www.first5sacramento.net

Request for Applications: Strategic Plan Services
RFA #: 16/17-01

Timeline

<table>
<thead>
<tr>
<th>DATE</th>
<th>ACTIVITY</th>
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<tr>
<td>June 23, 2016</td>
<td>Release of the Request for Applications (RFA)</td>
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<tr>
<td>July 15, 2016</td>
<td>Applications are due to the Commission office by 5:00 p.m.</td>
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<td>July 18 - 22, 2016</td>
<td>Interviews with Selected Applicants</td>
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<tr>
<td>August 1, 2016</td>
<td>Present Recommendation to the Commission for Approval</td>
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<tr>
<td>August 15, 2016</td>
<td>Strategic Plan Services Contract Begins</td>
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Invitation to Submit Applications
The First 5 Sacramento invites bids for a consultant and/or agency to enter into contract with the Commission to conduct strategic planning activities consisting of meeting preparation, meeting facilitation and writing of First 5 Sacramento’s Fiscal Years 2018-21 strategic plan. The Commission is looking for a short-term (6-12 month), mutually beneficial independent contract relationship with a qualified consultant to assist the Commission in its efforts to prioritize needs and allocate funding for a 3 year strategic plan. First 5 Sacramento has allocated $20,000 to this RFA for FY16/17.

Overview of First 5 Sacramento
First 5 Sacramento was formed following the passage of Proposition 10 in 1998. The Prop 10 initiative added a 50-cent-per-pack tax on cigarette sales to fund programs promoting early childhood development for children ages 0-5 and their families. The Commission is charged with the local implementation of the stated goals of Prop 10: to ensure children are learning and ready for school; families are strong and self sufficient; children are healthy; and systems and services are integrated and accessible. In July 2017, the Commission enters the final year of its 2015-18 strategic plan, which is inclusive of seven major funding areas: Health, Nutrition, Dental, Early Care, School Readiness, Community Connectedness and Effective Parenting. For a copy of the current Strategic Plan, please click here. To review outcomes from 2014-15, please click here for a copy of our Evaluation Findings.
**Scope of Strategic Planning Services and Deliverables**

Applications are being accepted to develop the Commission’s next 3-year strategic plan which will begin in July 2018 and run through June 2021. Below are 3 primary service components and general expectations the Commission has of the First 5 Sacramento Strategic Plan Consultant:

1. **Preparation for Strategic Plan Work Group Meetings:**
   - Meet with executive director and staff for background on planning process and to gain a thorough understanding of First 5 Sacramento’s statutory requirements to identify local needs and allocate funds to improve the lives of children ages 0-5.
   - Develop meeting materials that will help move the Strategic Plan Work Group members through major decision points in order to identify priorities and allocate funds for 2018-21.

2. **Facilitation of the Strategic Plan Work Group meetings:**
   - Facilitate Strategic Plan Work Group meetings where the members will reach consensus on the following:
     - priority areas for funding
     - funding levels for each identified priority area
     - organize and facilitate public and committee meetings, focus groups and interviews
     - provide a written report and presentation to the Commission

Work Group meeting dates are TBD.

3. **Writing of the 2018-21 Strategic Plan:**
   - Meet with Commission staff to review Prop 10 statute requirements.
   - Write the First 5 Sacramento 2018-21 Strategic Plan, ensuring that all requirements are included.
Application Instructions and Content Requirements
This section describes the required application format and content. Failure to follow the prescribed format may result in rejection of the application.

A. Proposal Format
The Narrative text sections of the application should be typewritten on standard 8½ X 11 paper, single spaced with one-inch margins on all sides of the paper using 12-point font and a maximum of five pages. Do not staple proposals; binder clip each proposal together.

B. Number of Copies
Applicants must provide one (1) original application with signatures in blue ink by an individual legally authorized to bind the agency/organization, five (5) complete copies of the entire application, and one electronic copy on a flash drive.

C. Outline of Application Content
The content and sequence of the Application is as follows:

1. Application Cover Sheet (Attachment 1)
2. Detailed summary of your qualifications and applicable experience
3. Narrative overview of how you would complete these services
4. Scope of Work (Attachment 2)
5. Proposed Deliverable Budget and Budget Justification
6. Conflict of Interest Statement (Attachment 3)

D. Application Instructions

1. Application Cover Sheet and Certification Form: Complete the Application Cover Sheet (Attachment 1). Original signatures must be in blue ink by an individual legally authorized to bind the agency/organization.

2. Detailed summary of qualifications and applicable experience: Provide a brief history of the individual/agency, including number of years in operation, and demonstrate the Applicant has the qualifications, capability and experience to perform the requirements included in this RFA. Provide a description of the experience and qualifications of the proposed key staff members who will be assigned to this project, including function, level of education, degree and/or license, if appropriate, and a detailed resume for each person.

3. Narrative overview of how the Applicant would complete these services: Describe in detail how the Applicant will meet the desired services in this RFA. Include activities and deliverables the Applicant believes may be accomplished with the resources available. Identify all major tasks, activities and outputs and describe how they will be reached, including the timeframe required.
4. **Scope of Work, including timeline and tasks:** Complete the attached Scope of Work form (Attachment 2).

5. **Proposed Budget and Budget Justification:** Include and clearly detail all costs, payment schedules, line items categories and/or other related costs associated with the application. Please include a budget justification providing clear explanation of costs.

6. **Conflict of Interest Statement:** Complete and submit the Conflict of Interest Statement (Attachment 3).

**Selection Process**

A selection team consisting of Strategic Plan Work Group members and staff will review the applications prior to interviews with the Applicants on July 21 or 22, 2016; a recommendation for award will be voted on at the August 1, 2016 Commission meeting. The recommendation will be based on the best interest of First 5 Sacramento, rather than the lowest cost application. All funding decisions are final; there is no appeal process to the Commission. Applicants who meet the minimum qualifications set out in this RFA will be asked to interview with the selection team. The interview will enable First 5 Sacramento to gather further information on any aspect of the application, to seek additional information and/or references and to review work samples and other relevant materials.

Applicants will be notified in writing of their application following completion of the review and interview no later than July 26, 2016.

**Application Submission**

Please submit an original, five (5) copies, and an electronic copy (on a flash drive) of your application in an envelope marked: “Application – First 5 Sacramento Strategic Plan Consultant Services” addressed to:

Julie Gallelo  
First 5 Sacramento  
2750 Gateway Oaks Drive  
Suite 330  
Sacramento, CA 95833

Applications are due at First 5 Sacramento offices by 5:00 p.m. on Friday, July 15, 2016.
First 5 Sacramento
Strategic Plan Consultant Services Application Coversheet

Individual/Agency Name________________________________________

Contact Person _______________________________Title______________

Address______________________________________________________

Phone: ____________________ E-mail: ____________________________

RFA Check List:

_____ Detailed summary of your qualifications and applicable experience

_____ Narrative overview of how you would complete these services

_____ Scope of Work (Attachment 2)

_____ Proposed Budget and Budget Justification

Authorized Representative:

THE APPLICANT CERTIFIES THAT: To the best of my knowledge and belief, data in this application are true and correct. The document has been duly authorized by the governing board of the applying agency.

Name: ______________________________     Title:  __________________
(please print)

Signature: ___________________________    Date: __________________

This page must be attached to your application. Submit an original, five (5) copies and an electronic version on a flash drive of the application to:

First 5 Sacramento
2750 Gateway Oaks Dr. #330
Sacramento, CA 95833

RFA # 16/17-01
First 5 Sacramento  
Strategic Plan Consultant Services  
Scope of Work Form  

FY 16/17  

Agency Name: ________________________________  

<table>
<thead>
<tr>
<th>Major Category/Task</th>
<th>Activities</th>
<th>Deliverables</th>
<th>Due Date</th>
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Conflict of Interest Statement

TO: FIRST 5 SACRAMENTO COMMISSION
2750 Gateway Oaks Drive, Suite 330
Sacramento, CA 95833

SUBJECT: Application in Response to RFA # 16/17-01

TYPE OF BUSINESS/AGENCY: (CHECK ONE)

__ Public __ Corporation __ Private Nonprofit __ Private for Profit __ Individual Owner
__ Partnership
__ Other – specify: ____________________________

Name of Applicant (Legal Entity)

Name, Parent Corporation (if applicable)

Address of Applicant (Street, City, State, Zip Code)

Applicant's Federal Tax Identification Number/Individual’s SSN

Contact Person (Please Print) (Name, Title, Phone Number)

Name and title of person(s) authorized to sign for agency
APPLICANT’S STATEMENTS

1. Number of years prospective contractor has been in business under present business name, as well as prior or related business names: ________________________________

2. Number of years prospective contractor has been licensed: _________________________

3. Number of years of experience prospective contractor has had in providing required, equivalent, or related services: ________________________________

4. List contracts completed in last five years.

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<tr>
<th>Year</th>
<th>Contracting Agency</th>
<th>Type of Service</th>
<th>Location</th>
<th>Amount</th>
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5. List contracts, or other commitments (e.g. consulting arrangements), currently in force.

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<tr>
<th>Year</th>
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6. Provide details of any failure or refusal to complete a contract.

______________________________________________________________________________

______________________________________________________________________________
7. If not a governmental agency, complete the following:

   a. Does the agency hold a controlling interest in any other organization?
      __Yes          __No

      If yes, list organizations________________________________________________
      ____________________________________________________________

   b. Is the agency owned or controlled by any other person or organization?
      __Yes          __No

      If yes, list person(s) or organization(s):________________________________
      ____________________________________________________________
      ____________________________________________________________

   c. Financial interest in any other business:________________________________

   d. Name of persons with whom the prospective contractor has been associated in business as partners or business associates in the last five years:

      Name of Business Associate  Name of Business
      ____________________________  ____________________________
      ____________________________  ____________________________
      ____________________________  ____________________________
      ____________________________  ____________________________

8. Briefly describe any litigation involving the agency, or principal officers thereof, in connection with any contract.

      _______________________________________________________________________
      _______________________________________________________________________
      _______________________________________________________________________
      _______________________________________________________________________
9. Is all major equipment necessary to complete this project currently on hand?

__Yes  __No

If no, list all major equipment that needs to be purchased.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

10. List any commitments or potential commitments, which may impact assets, lines of credit, or guarantor letters, or otherwise affect the applicant's ability to perform the contract services.

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
Certification

I certify that all statements in this document, Applicant’s Statements, are true. This certification constitutes a warranty, the falsity of which shall entitle the Commission to pursue any remedy authorized by law, which shall include the right, at the option of the Commission, of declaring any contract made as a result hereof to be void. I agree to provide the Commission with any other information the Commission determines is necessary for the accurate determination of the agency's qualification to provide services.

I certify that the _____________________________ (agency’s name) will comply with all requirements specified in the RFA and any contract resulting from this RFA process which are applicable to the services which we wish to provide. I agree to the right of the First 5 Sacramento Commission, County, State, and Federal government(s) to audit the financial and other records of the agency named above.

______________________________
Print Name of Applicant or Authorized Agent

______________________________
Signature of Applicant or Authorized Agent

______________________________
Title of Applicant or Authorized Agent

______________________________
Date

Application packages in response to RFA # 17/16 - 01 ARE DUE NO LATER THAN 5:00 P.M on Friday, July 15, 2016, to the Commission Office, located at 2750 Gateway Oaks Drive, Suite 330, Sacramento, CA 95833.