First 5 Marin:
2022-2030 Strategic Plan Consultant
Request for Proposals (RFP)

Release Date: May 3, 2021
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I. TIMELINE FOR SELECTION PROCESS

<table>
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<tr>
<th>ACTIVITY</th>
<th>DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>RFP Released</td>
<td>May 3, 2021</td>
</tr>
<tr>
<td>Intent to Apply Due</td>
<td>May 10, 2021</td>
</tr>
<tr>
<td>Proposal Due</td>
<td>May 28, 2021</td>
</tr>
<tr>
<td>Interviews</td>
<td>Week of June 7, 2021</td>
</tr>
<tr>
<td>Contractor Selected</td>
<td>June 11, 2021</td>
</tr>
<tr>
<td>Board of Commissioners Approval</td>
<td>June 16, 2021</td>
</tr>
<tr>
<td>Anticipated Contract Start Date</td>
<td>July 15, 2021</td>
</tr>
</tbody>
</table>

In order to respond to this Request for Proposals (RFP), all applicants must submit an Intent to Apply email to pegah@first5marin.org by no later than 5 p.m. PT on May 10th, 2021. The email should include the following information:

- Name of Organization
- Name, email and phone number of Contact Person
- Note stating the Organization’s intention to apply for First 5 Marin’s Strategic Plan Consultant RFP

Submitting an intent to apply does not bind you to complete the application process but it is a required step in the application process. The proposer must submit all required documents via email no later than 5 p.m. PT on May 28th, 2021. It is the proposer’s responsibility to verify submission prior to the deadline. First 5 Marin will not be responsible for any technical problems or submission failure. Failure to submit ALL required documents by 5 p.m. PT may constitute an incomplete proposal and may be grounds for disqualification.

Questions and requests for additional information must be submitted in writing to:

Pegah Faed, DrPH, MPH  
Executive Director, First 5 Marin  
pegah@first5marin.org

All questions and requests for additional information regarding this RFP must be received in writing by First 5 Marin via email before May 7th, 2021. Responses will be posted on the First 5 Marin website the following week. First 5 Marin reserves the sole right to determine the timing and content of the responses to all questions and requests for additional information. First 5 Marin may respond to individual inquires and then post replies to all questions by the posting date.

II. BACKGROUND

First 5 Marin –

In 1998, California votes passed Proposition 10, which levied a 50-cent per pack tax on all tobacco products. The resulting tax revenues were earmarked for the creation of a comprehensive system of information and services to advance early childhood development and school readiness within each county in California. In Marin County, the First 5 Marin Commission was formed as a public entity to
develop and oversee various early childhood initiatives and to manage the funding from Proposition 10.

**First 5 Marin FY 2017-2022 Strategic Plan**

In 2016, the Commission adopted the 2017-2022 Strategic Plan which continues to build on years of work to build infrastructures to support systems and policy change. The current strategic plan also maintains a continued focus on achieving school readiness and health outcomes for children prenatal to age 5 and their families, while meeting the mounting need for policy leadership and county-wide partnerships that improve opportunities and reduce inequities for all young children in Marin. Our plan builds on lessons learned over the years, including the importance of strengthening community partnerships and increasing awareness that all Marin benefits with investments in all children.

The Commission has strategically focused its leadership and resources to build and support institutional and grassroots policy and advocacy infrastructures that will:

- Created a sustainable community culture that puts children at the center of our agenda
- Build public will to support and sustain health and school readiness outcomes.
- Promote shared responsibility for achieving outcomes across systems, institutions and individuals.
- Increase resource leveraging, coordination and integration among systems, organizations and institutions.
- Respond to change in the environment that impact equity for children and families.

### Priority Results and Outcomes

Through this focus, the Commission’s is committed to achieving the following Priority Results and Outcomes for all children in Marin:

<table>
<thead>
<tr>
<th>IMPACT</th>
<th>RESULTS</th>
<th>MARIN VALUES AND INVESTS IN ALL CHILDREN</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public policies support all children</td>
<td>Children have optimal health and wellbeing</td>
<td>Children have access to quality early education opportunities.</td>
</tr>
<tr>
<td>Public policies promote the optimal social/emotional development and school readiness of all children</td>
<td>Children are ready for school</td>
<td>Children with social/emotional issues and special needs are identified early and receive support.</td>
</tr>
<tr>
<td>Public policies support the development of quality early education and child-ready school environments that promote success in life.</td>
<td>Families and caregivers have access to information and support</td>
<td>Schools are prepared for children and linked with the community.</td>
</tr>
<tr>
<td>Public policies promote the optimal health, safety and wellbeing of all children</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Public policies and partnerships increase equity of opportunity for all children.</td>
<td></td>
<td></td>
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</tbody>
</table>
III. PROJECT OVERVIEW

First 5 Marin is currently in the 5th and final year of implementing the FY 2017-2022 Strategic Plan. First 5 Marin is seeking a consultant to work with and support staff in the review, reflection and refinement of the current strategic plan. The development of the next strategic plan is grounded in the learnings over the last 20 years, as well as input from key stakeholders and the community.

The proposed Strategic Plan process is anticipated to encompass three major phases:

- Review how our strategies have been and are being implemented to achieve our targeted outcomes and the resulting learnings
- Reflect on how changes in the landscape and our own implementation experience can inform our approach to achieving our targeted outcomes
- Refine our strategies to incorporate learnings from our own experience in policy and systems change work and our assessment of strategic opportunities to achieve our targeted outcomes, as well as align with the strategic direction of other key organizations and entities in the County.

IV. SCOPE OF WORK

First 5 Marin is seeking technical assistance and consulting support to execute the 2022-2030 Strategic Planning process. The specific scope of work will be refined during the contract negotiation process, following the selection of the most qualified proposal team, and will include, but is not limited to, the following major work components consistent with the phases outlined below.

- Process Design and Project Management – The selected contractor should propose a Strategic Planning process and project management framework to ensure deliverables and timeline are met. An important component of the process design will be the Board engagement strategy, as well as the community engagement strategy. The selected consultant will be requested to provide recommendations on how best to engage the First 5 Marin Board of Commissioners, as well as the Community throughout the Strategic Plan Process.
- Drafting 2022-2030 Strategic Plan:
  - Review Phase- During the Review phase, the selected consultant will develop a framework to capture learnings from staff, partners, and community members. This phase will include the review of key documents identified by First 5 Marin, including other local and relevant strategic plans. Key questions to be answered during this phase of the process include:
    1. What progress have we made during the last strategic plan and what have we learned about how we do our work and the outcomes we are working to achieve?
    2. What has changed in the landscape in the last 5 years that impacts how we achieve our targeted outcomes?
3. What have we learned about First 5 Marin’s capacity to do this work?

- Reflect Phase – This phase of work is intended to provide a structured process for analyzing the information generated during the review phase. A key focus will be assessing to what degree the current strategies support achievement of our desired outcomes and what needs to be refined further or added to maximize our impact. Examples of questions to be answered during the reflect phase include:
  1. How do learnings from our progress inform how we approach our future work?
  2. How do changes in the landscape create new and/or unanticipated opportunities to advance our targeted outcomes?

- Refine Phase - The final phase will be to finalize a document that captures First 5 Marin’s strategic direction from 2022-2030. The plan document should be accessible to diverse set of stakeholders and clearly communicate our strategic approach. Examples of questions to be answered during the refine phase include:
  1. How should we prioritize our strategies based on the review and reflections?
  2. How do we need to approach our work differently based on this review and reflection?

- Drafting Complementary Implementation Plan: Once the 2022-2030 strategic plan has been approved by the Board of Commissioners in February 2022, the selected consultant will operationalize the strategies in a high level implementation plan. Applicants are encouraged to make recommendations in their applications about what should be included in this implementation plan.

- Drafting Complementary Evaluation Framework: The selected contractor will also be responsible for developing a complementary evaluation framework to support the learning cycle for First 5 Marin during the 8 year strategic plan.

V. ELIGIBILITY

Proposals will be considered from public and private entities and/or collaboratives consisting of a lead public or private entity and one or more subcontractors.

1. The proposer must have an established staff presence and office in California.
2. The proposer must have the capacity to work in Marin County.

VI. DESIRED QUALIFICATIONS

Proposers must have the experience, knowledge, skill and time necessary to execute a successful strategic plan development effort, which includes development of an evaluation framework and implementation plan.
These qualifications include:

**EXPERIENCE**

- Experience working with organizations similar in size and structure to First 5 Marin (e.g. other First 5 Commissions or similar public organizations with commissions or politically appoint boards) on strategic planning efforts;
- Strong history of working on large scale initiatives involving community and/or policy and systems change efforts;
- Demonstrated success in facilitating and building consensus among a leadership team and governance body;
- Experience with drafting, revising, implementing and monitoring strategic plans and effectively communicating the plans;
- Experience working with key informants such as funders, policy and decision makers and agency and community leaders;
- Experience working with marginalized communities;
- Experience analyzing and synthesizing complex information to inform leadership and policy maker decision-making.

**KNOWLEDGE**

- Understanding the issues facing First 5 Marin and First 5 Commissions across the State as they relate to First 5 Marin;
- General understanding of issues facing young children and families in California and Marin County
- Understanding of organizational development, organizational change management, including the ability to assess organizational challenges and develop strategies to strengthen organizational capacity, if necessary.

**SKILLS**

- Ability to produce high quality deliverables that are clear, concise and effectively communicate key messages;
- Ability to communicate complex issues, stimulate creative thinking and negotiate differences to resolve conflict;
- Strong written and oral communication skills; ability to synthesize information from multiple sources and form recommendations;
- Ability to galvanize individuals, groups and communities, with a variety of interests to build consensus around a shared vision;
- Ability to initiate and facilitate conversations with key informants, lead and facilitate public hearings and mediate public forums, if necessary;
- Ability to be accessible and flexible in accordance with product timelines and activities;
- Strong management and team building skills;
- Bilingual or multi-lingual staff
AVAILABILITY

In order to be considered, proposers must demonstrate that they have the capacity to dedicated the management resources and staff to support the project and the deadlines required, including completion of the planning process by June 2022.

VII. TERMS OF THE PROJECT

The Commission expects to enter into a 12 month contract with the selected consultant/organization. The contract may be eligible for renewal at the end of the contract period. This is expected to be a fixed-fee deliverables-based contract for a total not to exceed of $150,000. Once negotiated, payments will be based on a fixed price that is not subject to any adjustment by reason of costs experienced by the contractor in the performance of the contract.

The selected consultant will be paid upon on completion of each deliverable by First 5 Marin. The selected consultant may be asked to revise draft deliverables and payment will be linked to submission of final deliverables subject to First 5 Marin approval. Travel costs will be negotiated with First 5 Marin upon selection of the finalist.

The project period is expected to start on or about July 15, 2021 and is expected to last no more than 12 months, with the possibility of extension to support ongoing evaluation. Board approval of the proposed updated Strategic Plan is scheduled for February 2022, and the final months of the contract term have been reserved to prepare an implementation plan and finalize other related documents.

VIII. SELECTION PROCESS AND REVIEW CRITERIA

First 5 Marin will review the proposers based on a two phase approach and review process detailed below. Proposal must score satisfactorily in each level of review, as applicable.

PHASE 1

Level 1: Internal Review:

First 5 Marin will evaluate all proposals for completeness and minimum requirements. Basic requirements include: timely receipt of proposal, submission of all required attachments, and adherence to eligibility requirements. Proposal with omissions of any required documentation are subject to disqualification.

Level 2: Review of Qualifications:

Proposers that pass Level 1 review will proceed to Level 2 review. Reviewers made up of First 5 Marin staff will review and score proposals based on qualifications.

- Level 2 Review Criteria: The review of Qualifications will be based on the following criteria and maximum points assigned out of a total of 100 points:
  - Statement of Qualifications: maximum of 35 points

This review will consider the qualifications of the proposed to conduct strategic planning efforts and the degree to which the qualifications demonstrate the experience, knowledge, and skills of the proposer as defined in Section VI above.
Resumes of Key Staff: maximum of 35 points
This assessment will consider the qualifications of the proposed individuals to conduct strategic planning efforts and the degree to which the qualifications of the key personnel demonstrate the experience, knowledge and skills of the proposer as defined in Section VI above.

Availability of Key Staff: maximum of 15 points
The proposal should demonstrate the availability of key staff to support project requirements and to meet the timeline identified in this RFP. This includes availability of staff to manage the project and meet required deadlines.

Work Samples: maximum of 15 points
Proposers are requested to submit two samples of already completed work products that effectively demonstrate the quality of their work and applicability to proposed scope of services. The review will consider the written and visual quality of the work samples submitted.

PHASE 2
Level 3: Interview:
Proposers that score highly in Level 2 will be invited to interview. Only key personnel on the proposed RFP can participate in the interview. Tentative interview dates are included in Section I: Timeline for Selection Process and are subject to change at First 5 Marin’s sole discretion. Interviews will be held via Zoom.

The highest scoring proposer from the interview process will be awarded the contract and recommended to First 5 Marin’s Board of Commissioners for award of the contract.

Reference Checks (Optional)
Reference checks may be completed. Information obtained through reference checks will complement the results from the interviews and may affect the selection of the proposer. First 5 Marin must be able to contact 2 references provided by the proposer. If 2 references cannot be reached, First 5 Marin may deem the proposer ineligible for this opportunity.

Award and declination notifications are anticipated to be sent out to proposers in Late June 2021.

IX. REQUIRED DOCUMENTS
The documents listed in this section are required to respond to this RFP.

Omission of any document/form may constitute an incomplete proposal and may be grounds for disqualification.

1. Proposal Cover Page: In order to respond to this RFP, proposers must include a proposal cover page and submit all required documents specified below through email. The cover page must include the following information:
   o Name of Organization
   o Name, email and phone number of Contact Person
2. **Statement of Qualifications**: Please provide the requested information in one separate document and submit via email. There is an eight page maximum for this portion of your application. The narrative must be 12 point font, double spaced. Applicants are asked to submit a narrative describing their experience conducted strategic planning for an organization similar to First 5 Marin. The narrative should demonstrate the experience, knowledge, and skills the proposer will bring to the project, specifically identifying the experience, knowledge and skills requested in Section VI above. A successful application will provide a general description of the approach the consultant and their team will use to complete the work outlined in Section III of this RFP. This description should explain how the proposer will leverage their experience in working on strategic planning projects and their knowledge and/or experience working with First 5 Marin and/or similar organizations. Qualifications should directly related and support successful completion of the Scope of Work as outlined in Section IV.

3. **Project Organization & Resume(s)**: Please provide the following requested information as one document and attached it in your email:
   a. Organization Chart for the project team (1 page max)
   b. Description of the roles of the project team members and the availability of key staff to support project requirements and to meet the timeline identified in this RFP (1 page max)
   c. Resume(s) for the key staff leading, managing, or participating on the project (3-4 page max per resume). Resumes should only be provided for staff that are anticipated to have a significant role of the project.

4. **Work Samples**: Two samples of proposer’s completed work products that are most applicable to the work the consultant will be undertaking in this project and that best demonstrates the proposer’s competency in their declared area of expertise or knowledge domain.

5. **Scope of Work**: Describe the objectives, activities and related deliverables. The final Scope of Work will be negotiated with First 5 Marin upon selection of the finalist. Proposers must use the template provided in Appendix A.

6. **Fixed-Fee Budget**: Using Appendix B: Provide the proposed fee for each proposed deliverable outlined in your scope of work.

7. **Budget Narrative**: In the Budget Narrative, explain the included costs over the 12 month period for this proposed project. This includes the estimated hours by staff, including rate of pay, associated with the completion of proposed deliverables. First 5 Marin intends to enter into a fixed-free deliverables based contract for a not to exceed amount of $150,000.

8. **References**: Provide name, title, address, and telephone number of two references for clients for whom similar services have been provided.
### Appendix A: Scope of Work Template

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Activities and Subtasks</th>
<th>Staff Assignment</th>
<th>Timeline</th>
<th>Deliverables</th>
</tr>
</thead>
<tbody>
<tr>
<td>Include who, what, when, where, how and how much for each objective.</td>
<td>Indicate the activities and subtasks leading to the fulfillment of the objective. Include benchmarks or milestones in chronological order. Include the appropriate quantity or frequency of the associated activities or subtasks.</td>
<td>Indicate staff, consultants, or subcontractors responsible for the respective activity or subtask.</td>
<td>Indicate start and end period.</td>
<td>Indicate Date Due</td>
</tr>
</tbody>
</table>


Appendix B: Budget Template

Agency Name: _____________  
Project Name: _____________

<table>
<thead>
<tr>
<th>Month/Period</th>
<th>Task #</th>
<th>Task Description</th>
<th>Deliverable</th>
<th>Payment Amount</th>
<th>Task total</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>MAJOR TASK FROM SCOPE OF WORK</td>
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</tr>
<tr>
<td></td>
<td></td>
<td>ADD SUB-TASK DESCRIPTION</td>
<td>ADD ROWS AS NEEDED</td>
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<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>CURRENT YEAR TOTAL</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

OTHER DIRECT COSTS  
(if applicable)

| E.g. Travel | $ | - |
| E.g. Parking | $ | - |
| E.g. Printing | $ | - |
| TOTAL | $ | - |

| TOTAL TASKS/DELIVERABLES | $ | - |
| TOTAL OTHER DIRECT COSTS | $ | - |
| TOTAL COST (All Tasks) | $ | - |

*Note: Proposers may choose to recreate these templates in EXCEL.