



[www.first5sacramento.net](http://www.first5sacramento.net)

**Request for Applications: Strategic Plan Services  
RFA #: 18/19-01**

**Timeline**

DATE	ACTIVITY
May 24, 2019	Release of the Request for Applications (RFA)
June 21, 2019	Applications are due to the Commission office by 5:00 p.m.
July 8 - 12, 2019	Interviews with Selected Applicants
August 5, 2019	Present Recommendation to the Commission for Approval
August 12, 2019	Strategic Plan Services Contract Begins

**Invitation to Submit Applications**

First 5 Sacramento invites bids for a consultant and/or agency to conduct strategic planning activities including; 1) meeting preparation, 2) meeting facilitation, and 3) writing of First 5 Sacramento’s Fiscal Years 2021-2024 strategic plan. The Commission is seeking 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 **\$19,000** to this RFA.

**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 2020, the Commission enters the final year of its 2018-21 strategic plan, which is inclusive of three priority areas: Health, Early Care and Development, and Empowered Families. For a copy of the current Strategic Plan, please click [here](#). To review outcomes from 2017-18, 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 2021 and run through June 2024. 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 2021-24.

### **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 to be determined.

### **3. Writing of the 2021-24 Strategic Plan:**

- Meet with Commission staff to review Prop 10 statute requirements.
- Write the First 5 Sacramento 2021-24 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 or CD.

### **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 during the week of July 8, 2019. A recommendation for award will be voted on at the August 5, 2019 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 status following completion of the review and interview no later than July 15, 2019.

### **Application Submission**

Please submit an original, five (5) copies, and an electronic copy (on a flash drive or CD) 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, June 21, 2019.

**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 or CD of the application to:**

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

**First 5 Sacramento  
Strategic Plan Consultant Services  
Scope of Work Form**

**FY 19/20**

**Agency Name:** \_\_\_\_\_

<b>Major Category/Task</b>	<b>Activities</b>	<b>Deliverables</b>	<b>Due Date</b>

**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 relevant contracts completed in last five years.

<u>Year</u>	<u>Contracting Agency</u>	<u>Type of Service</u>	<u>Location</u>	<u>Amount</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

5. List relevant contracts, or other commitments (e.g. consulting arrangements), currently in force.

<u>Year</u>	<u>Contracting Agency</u>	<u>Type of Service</u>	<u>Location</u>	<u>Amount</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

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.

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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.

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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, June 21, 2019, to the Commission Office, located at 2750 Gateway Oaks Drive, Suite 330, Sacramento, CA 95833.**