



## **Request for Qualifications**

### **First 5 San Luis Obispo County (First 5 SLO) Evaluation Services**

First 5 SLO is soliciting responses to the RFQ for a contractor to provide evaluation services as well as data review to support for First 5 SLO's Local Evaluation Report and Annual Report to First 5 California. To be considered, responses must be received in the First 5 SLO office via email no later than **12 p.m. on Friday, May 21, 2021.**

#### **RFQ TIMELINE**

April 26, 2021	<b>Release of Request for Qualifications (RFQ)</b>
May 10	<b>Deadline to Submit Questions Regarding the RFQ –</b> Interested parties are invited to submit questions via e-mail to <a href="mailto:jwells@first5slo.org">jwells@first5slo.org</a>
May 13	<b>Answers to Submitted Questions to be Posted on First 5 SLO County Website.</b> <a href="https://www.first5slo.org/">https://www.first5slo.org/</a>
May 21	<b><u>Responses to the RFQ Due by 12:00 p.m.</u></b> via e-mail to <a href="mailto:jwells@first5slo.org">jwells@first5slo.org</a>
On or before June 1, 2021	<b>Intent to Award Notification to all Applicants</b>
July 1, 2021	<b>Anticipated Contract Start Date</b>

### **About First 5 SLO County**

First 5 SLO originated as the Children and Families Commission of San Luis Obispo County (Commission) in 1998 as part of California's statewide voter Proposition 10. The intent of the Children and Families Act (Act) is to provide a comprehensive and integrated system of prevention and early intervention services for children prenatal to five years and their families in order to help young children grow and develop to their maximum potential. These services are paid for by a tobacco tax authorized by the Act. Eighty percent of the revenues collected goes to the 58 County Commissions to fund local programs. Annual tobacco tax revenues are distributed to County Commissions based upon county birth rates. The remaining twenty percent is used by the State Commission to implement statewide strategies.

First 5 SLO is an independent public agency and governed by a nine-person Commission. This Commission administers First 5 SLO's Proposition 10 revenue allocation, funding direct services for children ages 0-5 and their families. First 5's investments and daily work also aim to strengthen countywide systems and networks that support children and their families. First 5 SLO's mission is to allocate funds and advocate for quality programs and services, supporting children, prenatal to age 5, to ensure that every child is healthy, developing to optimal potential, and ready to learn in school.

## **Background**

First 5 SLO collects process and outcome data, including anecdotal narratives, to monitor contract compliance and to better understand the effectiveness of its investments. All funded partners collect data on program implementation, participant demographics, and program outcomes. These data are used to prepare an annual outcome report that covers implementation, progress toward program goals and objectives, and the measurement of specific outcomes. The information compiled in the report helps to inform Commission decision-making related to continued program investments and development of a multi-year strategic plan. Additionally, First 5 SLO collects and reviews demographic data from all funded partners, in aggregate, to develop its annual Local Evaluation Report, which is submitted to First 5 California. This information is aggregated with all other county First 5s' data to develop the First 5 CA Annual Report.

First 5 SLO's current evaluation activities are designed to examine program-level changes, ultimately measuring the extent to which clients served are "better off," using data collection instruments that are part of an evidence-based or best practice program, as well as those tailored for First 5 SLO. The Evaluation Plan includes the methods (including type of data collected), mode, and frequency of data collection. Evaluation tools are based on current best practices in the fields of evaluation and early childhood development.

First 5 SLO collects and analyzes data from funded partners on a quarterly basis. These data are reviewed by staff for accuracy and integrity, and guide conversations between First 5 and partner staff toward continuous quality improvement.

At this stage in its history as an investor in early childhood, First 5 SLO is increasingly engaged as a mobilizer of systems-level change. As such, First 5 SLO seeks an expanded evaluation focus beyond its funded programs to also include evaluation of its network building, collective impact, and advocacy work. First 5 SLO will need to better understand its impact on programs, systems and populations where it may be only one of several funders. This broadened role for First 5 SLO will require a "reenvisioning" of the agency's overall evaluation approach.

## **Communication with First 5 SLO County**

Questions regarding this RFQ may be submitted by e-mail through **4:00 p.m. on May 10, 2021**. Please use "Evaluation RFQ Question" as the subject heading and send all questions to [jwells@first5slo.org](mailto:jwells@first5slo.org).

Questions and responses sent to applicants by email will be posted on the Commission's website: <https://www.first5slo.org/>. To be fair to all applicants, the Commission is not able to answer individual questions pertaining to this Request for Qualifications via telephone.

## **Scope of Work**

First 5 SLO County seeks one qualified contractor to:

1. Provide professional assessment/guidance on best practices related to evaluation obligations and communication of outcomes and investment impact.
2. Evaluate select funded program outcomes to answer the following: How much did we do? How well did we do it? Is anyone better off?
3. Work with staff in the development of measurable program objectives for funded activities.
4. Work with staff in the selection and development of appropriate data collection tools, data management, and activity reports.

5. Participate with staff in development and presentation of annual evaluation reports – Outcome and Local-State Evaluation Report.
6. Communicate impact data and information through presentations and recommendations to inform decision making, advocacy and strategic plan development.
7. Work with staff and funded partners to resolve any questions or data correction requests.

### **General Expectations**

- Establish and communicate to First 5 SLO a single point of contact for communications regarding activities under the Scope of Work.
- Provide support in data analysis across multiple data streams, and data across multiple strategic planning periods.
- Work closely with First 5 SLO staff to advise and support evaluation activities that will track a broad range of qualitative and quantitative data across First 5 SLO's funded programs.
- Advise in the selection, development, and/or improvement of evaluation tools and instruments that track service delivery and yield outcome/impact data.
- Maintain an understanding and awareness of evaluation and data trends among First 5 Commissions (regional and statewide), early childhood development, health, education and other fields related to children zero to five years old and their caregivers.
- Attend occasional meetings as requested by First 5 SLO staff.

### **Key Characteristics And Desired Qualifications Of Applicant(s)**

- Expertise in current methods and practices in evaluation and qualitative and quantitative analysis documented by a portfolio of written reports, analysis, presentations or similar materials.
- Professional and academic competence in psychology, public policy, statistics, organizational development, child development, public health, prevention science, or a related discipline.
- At least four years of experience evaluating public, private, non-profit, educational, or philanthropic organizations and service programs. Desired experience in multiple issue/policy areas, especially those related to the First 5 SLO FY20-24 Strategic Plan (available at <https://www.first5slo.org/> )
- Strong writing, speaking, and presentation skills.
- Proficiency in the use of technology in all areas of program evaluation, including Office Suite (Word, Excel, PowerPoint), database development (e.g. Access), statistical (e.g. SPSS) and qualitative analysis software.
- Proficiency in data visualization and outcome report writing.
- Ability to provide simple and comprehensible ways to clearly see and understand First 5 SLO investment impact.
- Commitment to ensuring that evaluation activities are carried out in a culturally sensitive manner.
- Familiarity with SLO County demographics and its child/family services landscape.
- Knowledge of the goals and objectives of First 5 SLO and its funded programs.
- Knowledge and experience with evaluation frameworks, including Results-Based Accountability (RBA), Network Evaluation, and evaluation of collective impact and/or advocacy efforts.

### **Available Funds/Funding Terms**

The total maximum annual funding available for providing all services outlined in this RFQ is **\$30,000** through June 30, 2022. Actual contract amount is to be determined with selected contractor.

The Commission will award a single year contract with the option to extend for an additional 2 years. Future funding is dependent on performance, decision by the Commission, and funding source availability for First 5 SLO.

All contracts are subject to the final approval of the Commission.

### **SUBMISSION OF A RESPONSE TO THIS RFQ**

#### **Coversheet**

All responses to the RFQ must include a 1-page coversheet that includes the name of the RFQ, the applying organization/individual, date of submission, and contact information for the person who will receive all communication regarding the response (name, title, phone, and email).

In **five pages** or less, respond to the following:

1. Describe your qualifications to implement, including past and current experience, the scope of work. Include past and current experience in working with governmental agencies, non-profit organizations, and/or community-based organizations to complete and/or support program/initiative evaluation, particularly those related to children prenatal to age five and their families.
2. Describe your proposed strategies and timeline for implementing the Scope of Work.
3. Describe your experience with evaluation frameworks including RBA, Network Evaluation, evaluation of collective impact projects, and evaluation of advocacy efforts.
4. Describe any barriers that you anticipate or foresee and how they may be addressed.

#### **CV and Supporting Documentation**

Attach current Curriculum Vitae and sample program evaluation materials. Provide contact information for three customer references including their organization's name and the dates of service for those contracts. If additional staff will provide support for this project, please provide CVs for each of those staff members.

### **Budget and Financial Summary (2-page limit, not included in the 5-page limit)**

Prepare a narrative of how resources will be allocated to implement the Scope of Work (staffing, fee schedule, etc.)

Include a proposed budget for implementing the scope of work as described above. All proposed line items must include a summary description. Budget pages do not count for the page limit.

All line items of the proposed budget are subject to review and negotiation prior to final contract approval.

### **Response to RFQ Format Requirements**

Responses must be typed, using 11-point font on 8 ½" x 11" paper, 1-inch margins. The name of the applicant agency should appear at the top of each page. Pages must be consecutively numbered, including all attachments. All required response documents must be included at time of submission. Incomplete responses will not be accepted.

### **EVALUATION PROCESS & SELECTION CRITERIA**

A review panel will be responsible for reviewing all responses to the RFQ and evaluating them against the established criteria. The review panel will use the following selection criteria to evaluate the responses received. A minimum score of 70 points will be required for a response to be eligible for funding. A score of 70 points or higher, however, does not guarantee that an organization/ individual will be selected for funding. First 5 SLO's Executive Director will make a recommendation to the Commission. Final funding decisions will be made by the Commission.

#### **Scoring Criteria and Points:**

1. Describe your qualifications to implement, including past and current experience, the scope of work. Include past and current experience in working with governmental agencies, non-profit organizations, and/or community-based organizations to complete and/or support program/initiative evaluation, particularly those related to children zero to five years old and their families. **(30 points)**
2. Describe your proposed strategies for implementing the Scope of Work, taking into consideration the timelines outlined in the Scope of Work **(20 points)**
3. Describe your experience with evaluation frameworks including Results-Based Accountability, Network Evaluation, evaluation of collective impact projects, and evaluation of advocacy efforts **(20 points)**
4. Describe any barriers that you anticipate or foresee and how they may be addressed **(10 points)**
5. Professional references and submitted sample materials **(20 points)**

## **ANTICIPATED AWARD/CONTRACT START DATE**

July 1, 2021

## **AWARDS/NOTIFICATION OF INTENT TO AWARD**

Written notification of the Commission's intent to award will be sent to all applicants on or before June 1 2021.

## **Selection of Contractor**

The entity will be selected primarily on the responsiveness of the response to implement the requested scope of work and expertise and experience of the organization. Cost, although a significant factor, may not be the dominant factor, but cost will be particularly important when all the other evaluation criteria are relatively equal.

The Commission may, at its sole discretion, reject any or all responses to this RFQ. The Commission also reserves the right to cancel this RFQ at its sole discretion, at any time prior to execution of an agreement or contract. The Commission shall not be liable for any costs incurred in connection with the preparation of any response to this RFQ.

## **General Terms and Conditions**

1. Proposers wishing to submit a response to this RFQ do so entirely at their own expense, and submission of a response indicates the individual/ organization's willingness to conform to the conditions contained in this RFQ unless clearly and specifically noted otherwise.
2. First 5 SLO, in its sole discretion, reserves the right to determine whether any response meets the minimum eligibility standards, to determine whether a response is responsive, and to select an individual/ organization that best serves its objectives. First 5 SLO reserves the right to make an award in part or in full to the individual/ organization of its choice, based on the evaluation of the separate project components. First 5 SLO reserves the right to modify the information required for each phase of the selection process.
3. Notwithstanding any other provision of this RFQ, individuals/ organizations are hereby advised that this RFQ is a solicitation of qualifications only and is not to be construed as an offer to enter into any contract or agreement. First 5 SLO shall have the unconditional and unqualified right to withdraw, cancel, or amend this RFQ at any time.
4. Responses to this RFQ should be made according to the instructions contained herein. Failure to adhere to the RFQ instructions may be cause for rejection of the response. A response which contains conditions or limitations set up by the individual/ organization may be deemed irregular and subsequently rejected by First 5 SLO.
5. First 5 SLO reserve the right, at its sole discretion, to waive variances in responses provided such action is in the best interest of First 5 SLO. Where First 5 SLO waives minor variances in responses, such waiver does not modify the RFQ requirements or excuse the individual/ organization from full compliance with the RFQ. Notwithstanding any minor variance, First 5 SLO may hold any response to strict compliance with the RFQ.

**6.** False, incomplete, or unresponsive statements in the response may be cause for its rejection. The evaluation and determination of the fulfillment of the RFQ requirements will be First 5' SLOs responsibility and its judgment shall be final.

**7.** First 5 SLO reserves the right to interpret or change any provision of this RFQ at any time prior to the response submission date. Such interpretation or change shall be in the form of a written addendum to this RFQ. Such addendum will become part of this RFQ and any resultant contract. Such addendum shall be made available to each individual/ organization which has received the RFQ and on First 5 SLO's website. Should such addendum require additional information not previously requested, a response's failure to address the requirements of such addendum in the final response may result in the response not being considered.

**8.** First 5 SL) has, at its sole discretion, the unconditional and unqualified right to determine whether a time extension is required for submission of responses, in which case, a written RFQ addendum issued by First 5 SLO shall indicate the new submission date for responses. Prior to the final submission date, proposers may retrieve their responses to make additions or alterations. Such retrieval, however, shall not extend the final submission date.

**9.** Individuals/ organizations should carefully review this RFQ and all attachments for comments, questions, defects, objections or any other matter requiring clarification or correction (collectively "Comments.") All Comments concerning the RFQ must be sent to Jason Wells by the deadline included in the timeline above.

**10.** This RFQ does not represent an offer or commitment by First 5 SLO to enter into an agreement with an individual/ organization or to pay any costs incurred in the preparation of a response to this request. The responses and any information made as part of the responses will not be returned to the individual/ organization. This RFQ and the selected response to this RFQ, may, by reference, become a part of any formal agreement between the individual/ organization and First 5 SLO resulting from this solicitation.

**11.** The individual/ organization shall not collude in any manner or engage in any practices with any other potential responders that may restrict or eliminate competition or otherwise restrain trade. Violation of this instruction will cause the response to be rejected by First 5 SLO. The prohibition is not intended to preclude joint ventures or subcontracts that are identified in the response. All responses submitted must be the original work product of the individual/ organization. The copying, paraphrasing, or otherwise using of substantial portions of the work product of another individual/ organization is not permitted. Failure to adhere to this instruction will cause the response to be rejected.

**12.** No person will offer, give or agree to give any First 5 SLO employee or its representatives any gratuity or offer of employment in connection with this RFQ or the award of a subsequent contract by First 5 SLO. No First 5 SLO employee or its representatives will solicit, demand, accept or agree to accept from any other person a gratuity or offer of employment in connection with this RFQ or a subsequent First 5 SLO contract.

**13.** To withdraw a response, the individual must submit a written request, signed by an authorized representative, to Jason Wells. After withdrawing a previously submitted response, the individual/ organization may submit another response at any time up to the deadline for submitting responses. Individuals/ organizations are liable for all errors or omissions contained in their response. Individuals/ organizations will not be allowed to alter response documents after the deadline for submitting responses. First 5 SLO will not accept any amendments, revisions or

alterations to responses after the deadline for submittal unless such is formally requested, in writing, by First 5 SLO.

**14.** All responses and other materials submitted become the property of First 5 SLO. Selection or rejection of a response does not affect this right. All response information, including detailed price and cost information, will be held in confidence during the evaluation process. Upon the completion of the evaluation, the responses and associated materials will be open for review by the public to the extent allowed by the California Public Records Act, (Government Code Section 6250-6270 and 6275-6276.48). By submitting a response, the individual/ organization acknowledges and accepts that the contents of the response and associated documents will become open to public inspection.

**15.** The California Public Records Act limits First 5's ability to withhold trade secrets or related records, the disclosure of which may be exempt or prohibited pursuant to federal or state law. If a response contains any trade secrets that an individual/ organization does not want disclosed to the public or used by First 5 SLO for any purpose other than evaluation of eligibility, each sheet of such information must be marked with the designation "Confidential." First 5 SLO will notify the submitter of data so classified of any request to inspect such data so that the submitter will have an opportunity to establish that such information is exempt from inspection in any proceeding to compel inspection.

**16.** After review of the responses, First 5 SLO intends to enter into contract negotiations with the selected individual/ organization. These negotiations could include all aspects of services and fees, or only a select few. If a contract is not finalized in a reasonable period of time, First 5 SLO will open negotiations with other individuals/ organizations.

**17.** If any provision of this RFQ is declared by a court to be illegal or in conflict with any law, the validity of the remaining terms and provisions will not be affected; and, the rights and obligations of First 5 SLO and individuals/ organizations will be construed and enforced as if the RFQ did not contain the particular provision held to be invalid.

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