INTENT TO NEGOTIATE

INTEGRATED SYSTEMS FOR CHILDREN WITH SPECIAL NEEDS
1. Opening & Welcome 2:30 – 2:40

2. Integrated Systems for CSN ITN Overview 2:40 – 3:45
   - Commission Background and Strategic Plan
   - ITN Process
   - Context and Background
   - Purpose, Service Strategies, Areas of Interest
   - Funding Term and Amount
3. Special Needs ITN Overview (continued)  2:40 – 3:45
   - Application Process
   - Attachments
   - Evaluation
   - Proposal Format and Submission
   - Proposal Selection Process and Review Criteria

4. Applicant Questions & Answers  3:45 – 4:15
Commission Background and Strategic Plan

(ITN pages 10-11)
F5SMC promotes positive outcomes for young children and their families through strategic investments, community leadership, and effective partnerships.
Strategic Plan 2020-2025

- Updated & Adopted October 22, 2018

- Three Focus Areas:
  - Quality Care and Education
  - Healthy Children
  - Resilient Families

- Continuation of Strategic Shift
Shifting the conditions that are holding the problem in place.
Long Term Financial Plan 2020-2025

- Linked to Strategic Plan
- 2 Phases of funding allocated:
  - July 1, 2020 - June 30, 2023
  - July 1, 2023 - June 30, 2025
- Decrease in Community Investments: 39% average reduction compared to prior strategic plan
- Community Investments remain flat 2020-2025
ITN PROCESS
Intent to Negotiate Process

- Coordinated effort involving F5SMC and multiple partners
- Used simultaneously with numerous partners or sole source
- Multiple working meetings
- Desired outcomes are usually clear
- Strategies may or not be defined
- Budget limit may or may not be defined
- Community input for program design and funded partners
- 12-16 weeks timeline
Three Phases of the ITN

**Phase 1**
- Engage Consultants
- Identify Lead Agency
- Conference Meetings
- Questions and Answers

**Phase 2**
- Lead Agency and Partners Collaboration
- Technical Assistance
- Conference Meeting
- Joint Proposal Submission

**Phase 3**
- Review Panel
- Recommendation and Approval
- Contract Negotiation
- Contract Execution
### INTENT TO NEGOTIATE

#### ROLES

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<thead>
<tr>
<th>F5MC</th>
<th>CONSULTANTS</th>
<th>LEAD AGENCY</th>
<th>PARTNERS</th>
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<td>ITN Process</td>
<td>Content Expertise</td>
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<td>Contribution to Joint Proposal Development</td>
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<td>Technical Assistance: Group and Individual</td>
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<td>Contact Negotiation</td>
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**INTENT TO NEGOTIATE**
Context and Background
“In California, there is no “single system” but rather a complex “series of systems” that exist independently of each other, occasionally overlapping and sometimes conflicting. These coexisting, overlapping, and contradictory systems and funding mechanisms result in an extraordinarily complex maze of services, dueling eligibility criteria, and financing approaches that can confuse even the savviest advocate and result in delayed or denied services for children and major financial outlays for families.”

- Edward Schor, MD, Lucile Packard Foundation for Children’s Health
<table>
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<tr>
<th>Period</th>
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<td>2007-2010</td>
<td>• Special Needs Project: Watch Me Grow</td>
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<td>• Demonstration Site</td>
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<td>• Systems Change</td>
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<td>2010-2015</td>
<td>• Integrated Systems for CSN: Watch Me Grow</td>
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<td>• San Mateo 5Cs &amp; Systems Change Group</td>
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<td>2015-2020</td>
<td>• Integrated Systems for CSN: Watch Me Grow</td>
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<td>• Help Me Grow Affiliate and Implementation</td>
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Relevant Research

EARLY IDENTIFICATION MATTERS

1/4 children aged 0-5 are at risk for delay

California ranks 30th for screening infants and toddlers

Only 28.5% of children receive timely developmental screenings

70% of children with delays go undetected until Kindergarten

California’s children are diagnosed later in life

Racial disparities exist

Every year, 12,000 three-year-olds are missing from CA’s special education system

ABUSE, NEGLECT, POVERTY, HOMELESSNESS: all contribute to a child’s risk of developmental delay

47% of California’s children are living in or near poverty

California’s Children **deserve to succeed**

THE FORMULA FOR SUCCESS

Timely Screening

THREE SCREENINGS BEFORE THIRD BIRTHDAY

Early Intervention

INFORMATION, LINKAGE, REFERRAL AND SUPPORT

Successful Outcomes

KINDERGARTEN READY TO INDEPENDENT ADULT
Barriers & Gaps

For children with special needs and families
- Access to inclusive environments and services
- Services for children with mild-to-moderate behavioral health concerns
- Culturally and linguistically-responsive services

For Providers
- Low reimbursement rates and inadequate funding for services
- Long wait lists for some services
- Lack of specialized service providers

For the System of Care
- Engagement with agencies and programs serving children with special needs
- Public awareness of the importance of early identification and intervention
- Legislative awareness of early identification and treatment as a looming public health crisis
PURPOSE, SERVICE STRATEGIES, AREAS OF INTEREST

- To enhance the continuum of care for children with special needs
- Provide a blend of targeted services to address service gaps and barriers and systems-improvement activities
- To implement a comprehensive, local Help Me Grow system
Service Strategies

1. Advocacy for policies and legislation
2. Centralized Access Point and care coordination services to support access to services
3. Multidisciplinary case conferencing
4. Systems-building, integration, and improvement
5. Strategic services to fill gaps and reduce barriers
6. Provider capacity building
7. Access to developmental screenings
8. Outreach to promote the HMG system
Areas of Interest

Targets:

- Information and resources for ALL children, their caregivers, and providers
- Children at risk for developmental delays due to adverse childhood experiences (ACEs) or trauma
- Black and Latinx children
- Children living in poverty
- Underinsured children in working families
- Infants and toddlers 0-3 years
- Providers
Targeted Improvements

FAMILIES
- Timely access
- Inclusive environments
- Mild-to-moderate concerns
- Culturally responsive

SYSTEMS
- Data sharing
- Education & advocacy
- Provider engagement
- Data sharing

PROVIDERS
- Data Sharing
- Knowledge of systems
- Valid screening tools
Lead Agency Characteristics

- History of successful administration of large-scale programs with multiple partners
- Ability to promote collaboration among partner agencies
- Ability to launch and maintain service components
- Capacity to provide fiscal oversight
- Ability to monitor and evaluate performance
- Ability to report regularly to F5SMC
Partner/Subcontractor Characteristics

- History of providing services similar to those in the ITN
- History of working collaboratively with other key agencies
- Demonstrating complementary strengths to the Lead Agency
- Record of completing tasks in the assigned time frame
Desired Outcomes

Population-Level Outcomes:
- Children have access to and are utilizing appropriate health care services to meet their health and developmental needs;
- Families feel connected to and supported by their community and able to nurture their children’s health and development;

Participant-Level Indicators:
- Decrease in percentage of parents reporting difficulty accessing services for mental health, developmental, or behavioral concerns
- Increase in percentage of parents reporting that they are able to access the services their family needs.
Funding Term & Amount

- Term: July 1, 2020 – June 30, 2023
- Up to $3,421,000 total over 3 years
- Average of $1,140,333 per fiscal year
- Funded in Partnership with:
  - Sequoia Health Care District
  - David and Lucile Packard Foundation
  - Peninsula Health Care District
## Integrated Systems for Children with Special Needs Initiative

**Proposed Year One Budget: Percentage Allocation: $1,140,333**

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<th>Description</th>
<th>Percentage</th>
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<td>1</td>
<td>Advocacy for Policies and Legislation</td>
<td>7%</td>
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<tr>
<td>2</td>
<td>Centralized Access Point and Care Coordination</td>
<td>30%</td>
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<td>3</td>
<td>Multidisciplinary Case Conferencing</td>
<td>10%</td>
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<td>4</td>
<td>Systems-Building, Integration, and Improvement</td>
<td>10%</td>
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<tr>
<td>5</td>
<td>Strategic Services to Fill Gaps and Reduce Barriers</td>
<td>15%</td>
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<td>6</td>
<td>Provider Capacity Building</td>
<td>10%</td>
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<td>Developmental Screenings</td>
<td>8%</td>
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<td>8</td>
<td>Outreach</td>
<td>10%</td>
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## RFP Timeline

<table>
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<tr>
<th>Event</th>
<th>Date</th>
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<tr>
<td><strong>ITN Conference #1</strong></td>
<td>March 9, 2020*</td>
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<tr>
<td><strong>Letter of Intent Due Date</strong></td>
<td>March 16, 2020</td>
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<tr>
<td><strong>Deadline to Ask Questions</strong></td>
<td>March 16, 2020</td>
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<tr>
<td><strong>Lead Applicant Interviews</strong></td>
<td>March 18, 2020, afternoon*</td>
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<tr>
<td><strong>Answers to Questions, Lead Rec Posted</strong></td>
<td>March 20, 2020</td>
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<tr>
<td><strong>Lead &amp; Partner Agencies develop proposal</strong></td>
<td>March 20 – April 15</td>
</tr>
<tr>
<td><strong>ITN Conference #2</strong></td>
<td>April 2, 2020*</td>
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<tr>
<td><strong>Proposal Due Date</strong></td>
<td>April 16, 2020*</td>
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<tr>
<td><strong>Review of Proposals And Proposer Interviews, if needed</strong></td>
<td>Week of April 20, 2020*</td>
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</table>
RFP Timeline (continued)

Announcement of Recommendation (F5SMC Commission Meeting) April 27, 2020

Appeals Deadline May 7, 2020

Agreement Negotiations May 11-15, 2020*

Agreements Approval (F5SMC Commission Meeting) June 22, 2020**

Agreement Execution By June 30, 2020*

Anticipated Start Date July 1, 2020
Letters of Intent (LOIs)

- **Mandatory** for all LEAD applicants, strongly encouraged for PARTNER applicants
- Two different templates
- Non-binding
- LEADS: Qualifications, key elements
- ALL: Indicate the service strategy(s) you hope to provide
Application Process
Proposal Contents

- Cover Sheet
- Table of Contents
- Project Narrative (including Financial Summary)
- Attachments
Project Narrative

- Executive Summary
- Lead Agency Capability
- Partnership Structure and Partner Agency Capability
- Project Description and Initiative Elements
- Financial Summary
F5SMC funds may NOT be used to supplant state or local general fund money for any purpose.

Our funds can ONLY be used to supplement or enhance existing levels of service.
Attachments

- Scope of Work Form
- Budget Request and Budget Narrative Forms
- Resumes of All Key Staff
- Job Descriptions
- Proof of Insurance
- CEO or Board Authorization
- References
- Letters of Commitment
- Miscellaneous
Scope of Work Form

▪ Program Components

▪ Activities for each Program Component
  ▪ Staff or agency responsible
  ▪ Documentation instrument(s)
  ▪ Timeframe

▪ Target service number for activities
  ▪ Report parents, children, and providers separately
  ▪ May be duplicated across activities listed on the tab
# Scope of Work Form

**Scope of Work Dates:**

**Lead Agency Name/Program Name:**

## Program Component #X:

<table>
<thead>
<tr>
<th>Activities</th>
<th>Timeframe</th>
<th>Responsible</th>
<th>Documentation</th>
<th>Yes/No/NA</th>
<th># Parents/ Caregivers served</th>
<th># Other Family Members Served</th>
<th># Children Served</th>
<th># Providers Served</th>
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*Note: If this activity does not serve clients directly, it is reported as a "Yes/No/NA" item. If you are directly serving clients, please report your target and actual numbers in the appropriate columns, and ignore the "Yes/No/NA" column.*
### Unduplicated Estimates and Actuals

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<th>Captured in Persimmon as:</th>
<th>Yes/No/NA</th>
<th># Parents/Caregivers</th>
<th># Other Family Members</th>
<th># Children 0-2</th>
<th># Children 3-5</th>
<th># Children Age Unk</th>
<th># Providers</th>
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Scope of Work – F5 Standard Tabs

- F5 Standard Activities
- F5 Standard Communications
- F5 Standard Evaluation

(one set for the Lead, one for subcontractors/partners)
Budget Request & Budget Narrative Forms

- Consider carefully the FTE's necessary to provide your programs and services

- Complete a separate Budget Request & Budget Narrative Form for each subcontractor of $25,000 or more

- Show leveraged funds & in-kind support

- Indirect Costs

NOTE: THIS FORM HAS MULTIPLE TABS!
**Budget Request & Narrative Form**

(Appendix D)

**First 5 San Mateo County**

### BUDGET REQUEST FORM

Complete this form to show the budget for the entire project for the fiscal year. If there are subcontractors or collaborative agency budgets involved, please complete an additional budget request form for each and identify the subcontractor.

<table>
<thead>
<tr>
<th>Agency Name</th>
<th>Program/Project Name</th>
<th>Amount of Request</th>
<th>Budget Period</th>
<th>Submission Date</th>
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</thead>
</table>

**List Leveraged Amount Available** - Non F5SMC funds available to support the project, excluding the amount being requested from the Commission. At the bottom of the form under section VII, please list the funding source for all funds included in this column and any amounts from this column that are not yet secured.

**PERSONNEL**

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<th>Position Title</th>
<th>Salary Range</th>
<th># FTEs</th>
<th>A. Amount Requested</th>
<th>B. Leveraged Amount Available</th>
<th>C. Total Program Budget (A+B)</th>
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**OPERATING EXPENSES**

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<th>Description/Explanation</th>
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**BUDGET NARRATIVE FORM**

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<tr>
<td>Subtotal - Operating Expenses</td>
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Evaluation

Protocol & Potential Results
Evaluation

- Individual-Level Data Collection
  - Entering and/or providing an export of individual-level data specified by F5SMC
  - Administration of specific survey instruments
  - Service type and dosage
  - Self-reported parenting behaviors, skills, and confidence

- Other Types of Data Collection
  - Agency-level information
  - Systems-level information
  - HMG-specific mandates
Proposal Format & Submission
Proposal Format

- Typed, double-spaced, one-sided, no smaller than 12-point Arial font, margins no less than 1” on any side, consecutively numbered pages.

- Narratives may be no longer than 30 double-spaced pages (not including attachments).

- One unbound original copy, seven additional copies securely bound with a staple, and an electronic copy provided on a flash drive labeled with the Lead Agency’s name.
Proposal Selection Process & Review Criteria
Proposal Selection Process & Review Criteria

- ITN Conference #1  March 9, 2020
- **Letter of Intent**  March 16, 2020
- Lead Agency Applicant Interviews  March 18, 2020
- Lead Agency Recommendation  March 20, 2020
- ITN Conference #2  April 2, 2020
- **Proposals Due**  April 16, 2020
  4:00 p.m.

- Completed proposals must be received at the F5SMC office
Proposal Selection Process & Review Criteria

- This process has two phases of review and recommendation: Lead: After LOI submittal, Overall: After full proposals received
- Staff review proposals for completeness; meets the general ITN criteria
- Proposals reviewed by a panel of outside experts and staff to assess based on the Review Criteria
- Possible interviews
- Recommendations made to the Commission, who makes the final decision
Proposal Review

Level 1
First 5 SMC Staff - Application Screening

Level 2
First 5 SMC Staff and External Subject Matter Experts

Level 3
Commission approval
What if I have Questions?

- We will accept any additional written questions by email through March 16, 2020 at 12:00 am - email eroberts@smcgov.org and mle@smcgov.org

- Questions and answers from this ITN Conference and any additional written questions will be posted on our website by: March 20, 2020

- Visit our website www.first5sanmateo.org
Questions & Answers