



Request for Quotations

Evaluation Consultation and Support Services

Responses must be received via email by 4pm on Friday, June 10th, 2022

Send responses to Jenifer Clark, jdclark@smcgov.org and Myra Cruz, ecruz@smcgov.org

Note regarding the Public Records Act:

Government Code Sections 6250 et seq., the California Public Record Act, defines a public record as any writing containing information relating to the conduct of the public business. The Public Record Act provides that public records shall be disclosed upon written request and that any citizen has a right to inspect any public record unless the document is exempted from disclosure.

Be advised that any contract that eventually arises from this Request for Quotations is a public record in its entirety. Also, all information submitted in response to this Request for Quotations is itself a public record without exception. Submission of any materials in response to this Request for Quotations constitutes a waiver by the submitting party of any claim that the information is protected from disclosure. By submitting materials, (1) you are consenting to release of such materials by the County if requested under the Public Records Act without further notice to you and (2) you agree to indemnify and hold harmless the County for release of such information.

Background

In accordance with the 1998 California Children and Families Act and as required by First 5 California (F5CA), all First 5 County Commissions conduct evaluations of their investments supporting the well-being of young children, their parents and caregivers, and service providers who implement funded programs. At First 5 San Mateo County (F5SMC) <https://first5sanmateo.org>, these investments span sectors (including child care and early education, health, and human and social services), and can occur at multiple organizational levels (such as direct services to individuals, capacity building within organizations, systems building and/or integration within or across sectors, advocacy and public policy, and population level outreach and communications efforts). This wide variety of programs and systems-level interventions necessitates an equally wide variety of evaluation activities.

F5CA Evaluation Requirements:

- **Client Data Collection:** All County First 5 Commissions are required to submit aggregated client data to First 5 California on an annual basis. These data include the number of children, parents/guardians, and providers receiving specific types of services within a given fiscal year, broken down by the following categories: race/ethnicity, language, and child age. These data are tracked and reported by funded programs that provide direct services and are entered into our Persimmony Grants Management data system twice annually.
- **F5CA Narrative Evaluation Report:** All County First 5 Commissions are required to submit a narrative report to F5CA each year, outlined the research & evaluation activities undertaken, key findings of program evaluations, and any systems level and/or policy impacts resulting from these activities.

Local F5SMC Research & Evaluation Activities:

- **Individual-level Data Collection and Analysis:** Funded programs delivering more intensive services (i.e. home visiting, care-coordination/case management, or child-care/pre-school enhanced with wrap-around family supports) are required to collect client-level information regarding a number of indicators of interest to the F5SMC Commission and other stakeholders. These indicators include: socio-demographic information such as income and parental educational attainment, measures of parental self-efficacy, information about risk factors such as food or housing insecurity, and questions about activities such as reading to the child, the child's child care or preschool attendance, and access to and receipt of preventive health care.
- **Import/Export of Data from Systems Used by Partner Agencies and Secondary Data Analysis:** Our partner agencies frequently house the information they collect from clients within their own internal case management data systems. Securely and confidentially exporting data from those systems and importing them into systems used by F5SMC is necessary in order to analyze the data.
- **Social Network Analysis:** The goal of many systems-level interventions is to create and strengthen connections between programs and agencies serving the same client population. Evaluating the success of such endeavors can be challenging, especially when there is a desire for quantitative results and data visualizations. F5SMC has used the PARTNER social network

analysis tool to examine the relationships among collaborating agencies and to identify factors that either facilitate or hamper these relationships. For more information about this tool, you can visit <https://visiblenetworklabs.com/partner-cprm/>.

- **Qualitative Research:** Key Informant interviews, focus groups, and analysis of narratives submitted by grantees as part of their Program Reports provide F5SMC staff, Commissioners, and the public with personal stories that texture our understanding of many aspects of our work, including: program effectiveness, the existing service landscape, local needs within the Early Care and Education, Health, and Family Engagement sectors, and the experiences of San Mateo County’s families with young children. F5SMC staff develop and lead qualitative research projects, and also participate in projects led by other local and regional organizations.
- **Program-Specific Evaluations:** F5SMC staff and other stakeholders sometimes require a more in-depth evaluation of a particular funded program. In such cases, the partners work together to design a (typically) mixed-methods study that will provide a rich view of the work and its impact on participants. These types of studies generally focus on a single program funded by F5SMC and implemented by a single partner agency; however, there are times when such a project involves multiple funders and several implementing agencies. Current efforts include:
 - **Friday C.A.F.É. Evaluation:** This upcoming mixed-methods study will include key informant interviews, focus groups, survey development and analysis, and a social network analysis. Engaging stakeholders and participants in the evaluation design, culturally-responsive data collection, and making meaning of the results will be an important part of this project.
 - **Trauma- and Resilience-Informed Systems Initiative:** This ongoing project involves the administration and analysis of a locally developed Trauma-Informed Organizational Practices Assessment. F5SMC currently has consultants under contract who are involved in interpretation of any qualitative data, and who take the lead in communicating results back to participating agencies.
- **Needs Assessments and Landscape Scans:** F5SMC frequently partners on local research efforts aiming to better understand the situations and needs of San Mateo County’s young children, their families, and the programs and providers working to support them. These needs assessments and landscape scans may be focused on collecting population-level data from individual children, parents, or service providers, or on assessing the characteristics of agencies and programs within a particular sector (e.g. child care and preschool providers; home visiting programs; dental providers providing services in education settings). Although there are times when F5SMC staff and/or consultants perform the primary research functions for these efforts, in most cases our role is not technical, that is, we do not hold primary responsibility for survey development, data collection, or analysis.
- **Partnership with Other Local, Regional, or State-Level Efforts:** F5SMC is an active partner in research and evaluation activities headed by various agencies of the State of California, First 5 California, the First 5 Association of Counties, and other local and regional organizations, for example: Quality Counts California (<https://qualitycountscalifornia.org/>) and Quality Counts SMC (<https://smcqualitycounts.org/>), Help Me Grow SMC (<https://helpmegrowsmc.org/>), and Build

Up for SMC (<https://buildupsmc.com/>) . These efforts often require that F5SMC and/or our partner agencies collect and report on data elements determined by the lead organization.

- **Other Data Management and Evaluation Activities:**
 - F5SMC uses the Persimmony First5 Suite (www.persimmony.com) for grants management, collection of aggregated client data, and twice-yearly programmatic reporting on scopes of work and deliverables. **Familiarity with this system is required in order for a bid to be considered for funding.**
 - Each department in San Mateo County is developing indicators to track equitable access to local public resources. F5SMC is piloting indicators based on the residence of the children and families served (i.e. zip code or census tract), the race/ethnicity of children and caregivers served, and an examination of how equity is expressed within our funded agencies (e.g.: Are the racial/ethnic, linguistic, and cultural backgrounds of clients reflected within the staff at all levels of an organization? Does the organizations Board reflect the community it serves? Are the voices of staff and of families included in strategic planning, program development, and evaluation activities?) These equity indicators are reported to the County Manager’s Office.
 - F5SMC has its own social media presence as well as being involved in the websites, text campaigns, and social media efforts of funded programs and partner agencies. These platforms can be used to showcase personal stories of program participants, raise awareness of available services, and to share data via infographics, dashboards, issue briefs, and blog posts.

Statement of Intent

F5SMC is seeking quotes for evaluation consultation that will both support the ongoing work of the in-house Research & Evaluation Specialist and expand our capacity to conduct robust evaluation of our funded programs.

This RFQ is not a commitment or contract of any kind. F5SMC reserves the right to pursue any and/or all ideas generated by this RFQ. The responses will be used to determine the respondent’s ability to render the services to be provided. The failure of a respondent to comply fully with the instructions in the RFQ may eliminate its response from further evaluation as determined at the sole discretion of F5SMC.

PLEASE NOTE: The tasks below are examples of the activities that the Evaluation Consultant is likely to be asked to undertake. They are not intended to represent a final scope of work for this role. Final scopes of work and deliverables will be established during contract negotiations with F5SMC prior to the start of the project.

Desired Tasks and Activities

- Grantee Data Collection, Management, and Sharing: Consultant personnel will hold primary responsibility for working with grantees on data collection and management protocols. This will entail: a) holding conversations with grantee organizations to verify their current data collection and management practices with regards to participants in F5SMC-funded programs; b) work with F5SMC and grantees to refine existing data collection and management practices as needed; c) ensure that client level data collected on F5SMC-funded programs is collected and accurately captured within the agreed-upon data system; d) technical support for exporting client-level data to be shared with F5SMC from grantee data systems, and e) cleaning and formatting the data and securely transferring it to F5SMC. Please note any familiarity you may have with the systems used by grantees to house client data (e.g. Efforts to Outcomes [ETO], Noho, ChildPlus, Vertical Change, UniteUs, Salesforce).
- Persimmony Data System Technical Assistance and Data Entry: Consultant personnel will assist the F5SMC Research & Evaluation Specialist with responding to F5SMC staff and grantee requests for technical assistance with the Persimmony grants management system, including data entry into the system. Our F5SMC information was recently migrated to a new Persimmony server and interface. While Persimmony is handling the technical aspects of the transition and will be providing training for all users, F5SMC staff and the Evaluation Consultant will be conducting Quality Assurance checks and correcting errors, communicating with local users, fielding TA requests, and working closely with Persimmony to ensure that both the content and functionality of the system operates smoothly going forward. Evaluation Consultant personnel may also be asked to update the system with current grantee contractual and performance reporting information (e.g. budgets, scope of work deliverables for the new Fiscal Year). **Familiarity with the Persimmony First5 Suite is required for bids to be considered for this project.**
- Design and Implementation of Research & Evaluation projects: Consultant personnel will support the F5SMC Research & Evaluation Specialist in the design and implementation of research and evaluation projects. These activities may include:
 - Assisting with a review and qualitative analysis of Program Narratives submitted by grantee agencies as part of their Mid-Year and Year-End reports.
 - Assisting with development of interview and focus group protocols for the Friday C.A.F.É. Evaluation, the Equity Indicators Project, and other topics as needed.
 - Conducting focus groups as needed with participants including: program clients, service providers, management and administrative staff at funded programs, and/or parents of young children. Focus groups may be conducted in Spanish, English, Chinese, or other languages.
 - Assisting with the development and implementation of grantee surveys (typically administered via SurveyMonkey) on topics such as: indicators related to equity and representation within funded programs; the impact of the ongoing COVID-19 pandemic; facilitators of and barriers to collaboration; other topics as needed. May include tracking responses and providing TA to respondents.

- Assisting with the implementation of surveys related to the TRISI program and the Friday C.A.F.É. evaluation, including tracking responses and providing TA to respondents.
- Consultation to F5SMC staff on research and evaluation methods, data collection strategies, data analysis techniques, data interpretation and results sharing, and other evaluation topics as needed.
- In collaboration with F5SMC staff and communications consultants, develop data products to effectively communicate about our local needs, activities, programs, and impact. These products may include reports, dashboards, infographics, presentations, briefs, social media postings, etc. Audiences for data products may include: F5SMC Commissioners; policy makers; grantees; community partners; service recipients; the general public; and other stakeholders.

Budget

The proposed budget should not exceed \$100,000.

Timeframe

The anticipated timeframe for service delivery is from July 1, 2022 – October 31, 2023.

Response Submissions

Responses must address content areas 1 through 5 on the following pages. Submit an electronic copy of your response via email to Jenifer Clark, jdclark@smcgov.org and Myra Cruz, ecruz@smcgov.org . All responses must be received by **4pm on Friday June 10, 2022.**

1. Independent Consultant or Agency (no more than 1 page)

Please provide the name and address of the independent consultant or agency submitting this quote. Include the number of years the entity has been in business and its experience working with the public sector on evaluation projects. Provide brief descriptions of similar projects that your entity has successfully undertaken.

2. Personnel (no more than 2 pages)

Please provide the name and title of each individual who will be working on this project, the specific activities that they will be performing, and a brief description of their relevant qualifications and experience, including linguistic and cultural competencies. Include each person's hourly rate. You may attach résumés if you'd like; these will not count towards the two page limit for this section.

Indicate which individual is the contact person for this project and provide that person's phone number and email address.

3. Timeframe (no more than 1 paragraph)

Provide the date by which your entity will be available to start this work, and any lead-time or startup requirements that you may have. If your agency has an internal deadline for project completion (e.g. because a key staff member is going out on leave), include that information here as well.

4. Insurance (no more than 1 paragraph)

The County has certain insurance requirements that must be met. In most situations those requirements include the following: the contractor must carry \$1,000,000 or more in comprehensive general liability insurance; the contractor must carry motor vehicle liability insurance, and if travel by car is a part of the services being requested, the amount of such coverage must be at least \$1,000,000; if the contractor has two or more employees, the contractor must carry the statutory limit for workers’ compensation insurance; if the contractor or its employees maintain a license to perform professional services (e.g., architectural, legal, medical, psychological, etc.), the contractor must carry professional liability insurance; and generally the contractor must name the County and its officers, agents, employees, and servants as additional insured on any such policies (except workers compensation). Depending on the nature of the work being performed, additional requirements may exist. **Please indicate whether your agency is able to meet these insurance requirements and note any questions or concerns you may have.** Note that, in some circumstances, these requirements have been waived and inability to meet these requirements does not automatically disqualify proposers.

5. Activities and Budget (no more than 2 pages)

Complete the Proposed Budget table below. We strongly suggest that you draw from the “Desired Tasks and Activities” listed on **pages 5-6** of this RFQ as you fill in the table. You may add rows and columns if needed. If you have ideas for activities (other than those listed) that may enhance the project, please share those as well. *Please note that the final budget, scope of work, and project deliverables will be determined during contract negotiations with the successful applicant.*

Activity	Estimated Hours	Estimated Cost	Staff Responsible

Review Process

All submissions will be reviewed by staff at F5SMC. During this process, F5SMC may require a respondent's representative to answer additional questions orally (e.g. during a conference call or an online meeting) and/or in writing. Respondents will be notified via email if F5SMC has additional questions for them.

The criteria used as a guideline in the review will include, but not be limited to, the following:

- Consultant and/or agency qualifications and experience, including capability and experience of key personnel in:
 - Working with F5 County Commissions on evaluation and data management activities similar to those listed on pages 5-6 of this document
 - The Persimmony First 5 database system (<https://www.persimmony.com>)
- Language capacity and cultural responsiveness for populations relevant to the work of F5SMC
- History of successfully working with public agencies, organizational leaders, evaluation staff, and direct-service providers from multiple sectors
- Familiarity with the current issues confronting expectant parents and families with young children in San Mateo County and the service providers who support them
- Clarity of oral and written expression
- Cost

The decision made by F5SMC will be communicated via email and will be final.