



Request for Quotations Consultant: Strategic Plan 2025-2030

Responses must be received via email by 4 PM on Monday, April 8, 2024

Send responses to Michelle Blakely mblakely@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.

Purpose

First 5 San Mateo County (F5SMC) is seeking a consultant to design and facilitate our upcoming strategic planning process. Building upon what F5SMC has accomplished with our current Strategic Plan (2020-2025), this process will produce an updated plan for July 1, 2025, through June 30, 2030. Individual consultants or individuals/teams embedded within larger consultancies are eligible to apply. Proposed budgets are not to exceed \$75,000. Click the links for more information about [F5SMC](#) and our [2020-2025 Strategic Plan](#).

Background

In November 1998, California voters passed the California Children and Families First Act (Prop 10). This groundbreaking legislation added a 50-cent tax on all tobacco products with the purpose of creating “an integrated, comprehensive, and collaborative system of information and services to enhance optimal early child development.” The F5SMC Commission was established in 1999 and consists of nine Commissioners appointed by the SMC Board of Supervisors. Our Strategic Plan is updated every five years and guides our approach to funding, partnership, policy, and advocacy. The current plan has four Focus Areas: Quality Care & Education; Healthy Children; Resilient Families; and Policy, Advocacy & Communications, including Research & Evaluation.

F5SMC employs a team of nine staff with skills in community leadership, strategic partnership, evaluation, program development and implementation, and fiscal administration. As the County’s only organization legislated exclusively to achieving positive outcomes for expectant parents and children ages 0-5 and their families, we vigorously advocate for their needs and priorities.

In the last 5 years, F5SMC has invested over \$26 million in funding, directly serving 57,945 clients including children 0-5, parents/caregivers, and service providers. In FY 2022-23, those served by F5SMC identified as the following: American Indian/Alaskan Native 0.23%, Asian 17%, Black/ African American 2%, Latino/a 58%, Pacific Islander 1.1%, White 14%, and Multiracial/Other 8%. Additional data: [First 5 Annual Report FY 2022 - 2023](#)

Our Approach to Strategic Plan Implementation

F5SMC takes a whole child, whole family, whole community approach to understanding early childhood development and parent and family engagement. Our approach to supporting children’s success is aligned with Bronfenbrenner’s Ecological Systems Theory, emphasizing environmental factors as central context to development. In this blueprint, the child is at the center of what can be visualized as concentric circles including other systems and influences, such as family, community, and public policy. These factors influence the health, cognitive and social-emotional development, well-being, and long-term success of children and their caregivers.

We acknowledge that children develop in the context of their families and communities and in sectors and systems that might otherwise appear to be beyond the purview of early childhood. Many of these systems and influences are social determinants of health and impact families in a myriad of ways (i.e., mental health, immigration status, living standards, wages, housing, preferred modes of service delivery, family engagement practices and social connections.) Our investment trajectory overall is moving from focusing on funding for direct-service provision to funding more systems-level work, with several considerations guiding this trajectory. One consideration is understanding the contextual landscape at the local, state, and federal level as related to policy, partnership, and funding realities and resulting impacts. We advocate for and have a history of identifying

additional funding to leverage, blend and layer key initiatives for service delivery and systems work. Our targeted community investments and systems improvement efforts support populations of children and families that may experience challenges related to inequitable access to resources, systemic oppression, or situations within their families that can compromise child development (e.g. mental health issues, family violence, developmental delays). F5SMC is not alone in this work and there is more to do to address disparities and barriers. Partnership and mission focus have been key. See [2023 - 2025 Strategic Plan Implementation Plan](#).

F5SMC is fortunate to be part of a community with a history of collaboration and partnership within and across our public service sectors and community-based organizations. We strive to maximize positive impacts for young children, families, and our community by filling three primary roles: strategic financial investor, community partner in aligned efforts, and systems leader to advocate for the prioritization of young children and their families:

- **Strategic Financial Investor:** Our role as an investor is to make positive movement toward desired outcomes in critical areas of need for young children and their families. Specifically, these investments aim to make a unique contribution to family needs that are currently unable to be addressed by other entities.
- **Community Partner:** Our role as a community partner may be as a leader, initiating collaborative efforts aligned to its vision and mission; as a partner in existing efforts for which the leadership is provided or shared; or as a champion of community efforts, encouraging the efforts of others better resourced to make a positive impact. F5SMC prioritizes partnerships that are results-driven, action-oriented, and likely to achieve measurable results and impact.
- **Systems Leader:** Our role as systems leader utilizes appropriate and respectful channels, this leadership ensures that the unique health and developmental needs of young children are known, discussed, and integrated into community solutions.

The Challenge: Reduced Resources for Community Investments

In recent years, F5SMC has been faced with the issue of declining Tobacco Tax revenue and is projecting a continued decrease in funds available for Community Investments during the period covered by Strategic Plan 2025-2030. While our dollars have never able to meet all of the needs for children prenatal to five and their families, it is increasingly important that we are able to identify the most impactful ways to deploy our funding.

Diversity, Equity, Inclusion, & Belonging and Elevating Parent Voices

Over the course of the past few years, F5SMC has taken a more intentional look at its role in examining and promoting diversity, equity, inclusion and belonging (DEIB) within its spheres of influence. As a part of this self-interrogation, one reflection is an acknowledgment that the families we serve are not adequately involved in informing the decisions and priorities for the agency. It is with the intention of correcting this that F5SMC staff and parents have embarked on a human-centered design project. The hope is that key learnings from this process will support F5SMC in our efforts to increase our understanding of the engagement with the families we aim to serve.

As a funder, F5SMC directs significant resources to multiple organizations, and both F5SMC and our funded partners have power over how those resources are eventually deployed and allocated. It is worth exploring how those with the power to direct these resources reflect the communities the resources are intended to support and honor the voices of those communities. In a recent survey of funded programs (FY 2020-2023), the top three DEIB Practices reported were Communication Efforts; Leadership & Advisory Roles (Staff) and Data & Evaluation. One recommendation for how F5SMC could support DEIB work included promoting community engagement through raising awareness and elevating parent voices.

Trauma- and Resiliency-Informed Systems Initiative

F5SMC engaged as a funder and participant in the Trauma- and Resiliency-Informed Systems Initiative (TRISI) an

active process to engage individuals at all levels within organizations to plan, execute, reflect on, and evaluate institutional practices to help move toward a more healing-centered approach. TRISI aims to sustain learning, which translates to actual implementation of policies and practices that support the child- and family-serving workforce. With the support of a coach, our team has co-created a Healing Centered Framework for the agency and we envision these principles incorporated into the strategic planning process.

Anti-Racism and Our Work

We have actively engaged in addressing anti-racism by asking ourselves: *How might we move into the work of anti-racism in our work at F5 San Mateo?* We explored how race shows up in the work that we do -- and how we might make an anti-racist pivot by reflecting on these tenets from the National Equity Project: Self-awareness around our biases; Disrupting inequitable practices in us + systems we're in; Honoring the distinct contributions that emerge from each person + community and Removing the predictability of success/failure that correlates with any social/cultural factor. Our anti-racism work is continuous and needs deepening and consistent action.

Statement of Intent

Please Note: 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.

F5SMC is accepting quotes for a qualified consultant to facilitate a strategic planning process resulting in a refreshed and updated five-year Strategic Plan dedicated to the success and well-being of children prenatal to five and their families residing within our county. Individual consultants or individuals/teams embedded in larger consultancies are eligible to apply. **The consultant will work with us to create (1) A refreshed final Strategic Plan for the period of July 1, 2025, through June 30, 2030, that will build upon what has been learned and accomplished locally with the current Strategic Plan and (2) a refreshed Strategic Plan Implementation Framework for the Commission and the community that outlines how F5SMC funds will be strategically invested over the next five years.** This process should be thorough and authentic, resulting in clear recommendations for the agency and its work for the upcoming Strategic Plan cycle set to begin in July of 2025.

The consultant should articulate in their bid submittal a clear process, timeline, structure, and budget for this work, which is targeted for completion by **October 30, 2024**.

The tasks and qualifications outlined below are suggested for the role of consultant for strategic planning but should not be limited by the list provided. The final scope of work and deliverables will be established with the successful bidder during contract negotiations with F5SMC prior to the start of the project.

Desired Tasks and Activities

Please Note: The tasks below are examples of the activities that the 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 between F5SMC and the successful proposer prior to the start of the project.

1. Project Planning and Management: The successful proposer will be responsible for all aspects of

managing and administering the Strategic Plan 2025-2030 Process, including (but not limited to):

- a) Planning, scheduling, and facilitating meetings, taking notes, and identifying “next steps.”
 - b) Monitoring project activities and providing regular progress updates to F5SMC staff, including via regular (weekly or twice-monthly) project management meetings for the duration of the project
 - c) Invoicing for the project on a quarterly basis, using the F5SMC online grants management system
2. Work with F5 staff, Strategic Planning Ad-hoc Committee of Commissioners and key staff members and the full Commission in the process
- a) Under the direction of the F5SMC Executive Director and/or Deputy Director, plan, schedule, and facilitate regular meetings with F5SMC staff and the Strategic Planning Ad-hoc Committee.
 - b) Engage F5SMC Commissioners during Commission meetings including:
 - Regularly scheduled meetings on May 20, June 24, July 22, and Sept 23.
 - Additional Special Sessions may be calendared as needed.
3. Community Engagement
- a) In partnership with F5SMC staff and Commissioners, design and implement a Community Engagement process to gather feedback from local stakeholders.
 - Stakeholders may include (but are not limited to): Leaders and service providers at F5SMC-funded organizations, unfunded partner organizations, and/or public agencies serving populations relevant to the work of F5SMC; Expectant parents and families with children ages 0-5; Local policymakers.
 - Engagement activities may include (but are not limited to): Key Informant Interviews; community meetings; focus groups; surveys; or public participation activities during Commission meetings.
4. Document and Data Review
- a) Review, analyze & synthesize foundational documents, local evaluation results and impact as well as relevant data from regional, statewide, or national evaluations or mapping projects of programs or strategies that we currently support or are considering supporting.
5. Produce a final Strategic Plan document and Strategic Plan Implementation Framework
- a) Create the Strategic Plan document and present both a draft and a final version to the Commission. At a minimum,
 - Provide a framework and recommendations for making decisions about resource allocation and adapting to changing service and funding landscapes.
 - Adopt strategic priorities that will have an impact on reducing disparities in outcomes for children 0-5 and their families.
6. 25-Year Timeline Context: Create a timeline of the initial 25 years of F5SMC. This would include

the understanding always that the funding source would be reduced (less smoking) and the template of community engagement would change. This framework could help F5SMC Staff, Commission, and public understand context, history, lessons learned, landscape and successes.

7. Preparation and Dissemination of Reports, Presentations, and/or other Data Products:

In collaboration with F5SMC staff and the Strategic Plan Ad Hoc Committee, as needed, develop and disseminate reports and presentations to share the results and products from the process:

Data products may include reports, dashboards, infographics, presentations.

Desired Qualifications for Consultant: Strategic Plan 2025-2030

- Significant and nuanced experience and expertise with supporting agencies through strategic planning processes utilizing best practices.
- Ability to expertly deliver Desired Tasks & Activities (page 4-6).
- Strong facilitation skills
- Experience utilizing innovative decision-making tools or processes.
- Skill at facilitation of inclusive, participatory, and transparent processes.
- Experience successfully developing consensus-based strategic plans.
- Knowledgeable of collective impact or collaborative strategic initiatives
- Ease and clarity presenting to various stakeholder groups and groups facilitation.
- A deep and evolving commitment to exploring principles of diversity, equity, inclusion, and belonging; beginning with self-examination, and an understanding of the role that systems play in perpetuating white supremacy culture and power dynamics.
- Strong ability to establish trust and build rapport with internal and external stakeholders, including diverse families, multi-sector professionals, residents, and executives in public- and private-sectors.
- Commitment to working with F5SMC staff to achieve the collective goals of the project.
- Knowledge of San Mateo County and of child- and family-serving organizations and professionals.
- Experience in San Mateo County and or experience with other F5 County Commissions.
- Proactive and responsive communicator with effective time-management skills.
- Compliance with requirements of submission as outlined in this RFQ document.
- Cost

Budget

The proposed budget should not exceed **\$75,000**.

Timeframe

The anticipated timeframe for service delivery is from **May 1, 2024–October 31, 2024**

Response Submissions

Responses must address content areas 1 through 5 on the following pages and should be single spaced with 12-pt font. Submit an electronic copy of your response via email to Michelle Blakely, mblakely@smcgov.org and Myra Cruz, ecruz@smcgov.org. All responses must be received by **4pm on Monday, April 8, 2024**.

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 or similar organization in strategic plan design & facilitation.

Describe the level of knowledge and experience with the field of early childhood development, generally, including other sectors supporting children and families through age 5. Brief descriptions of strategic planning projects similar to those described in this RFQ 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 to deliver Desired Tasks & Activities (page 4-6). Describe their level of knowledge and experience with the Desired Qualifications (page 6). Include any knowledge and experience with organizations in the Early Childhood sector in San Mateo County or relevant experience with other F5 County Commissions. 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 rare 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 4-6** of this RFQ as you fill in the table. You may add rows and columns if needed. *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 date for answering of additional questions is scheduled for **Monday April 15**.

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 knowledge, capability, and experience of key personnel in:
 - Working with F5 County Commissions on activities similar to those listed on pages 4-6 of this document.
 - Working with public agencies, and community-based organizations, on activities similar to those listed on pages 4-6 of this document.
 - Organizations and services offerings within the Early Childhood sector in San Mateo County
- Cultural responsiveness for populations relevant to the work of F5SMC
- History of successfully working with public agencies, community-based organizations, organizational leaders, program, fiscal, administration and evaluation staff, and various stakeholder groups from multiple sectors
- Quality of oral and written expression
- Compliance with requirements of submission as outlined in this RFB document.
- Cost

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