



REQUEST FOR QUALIFICATIONS

SUSTAINABILITY PROJECT FACILITATOR FIRST 5 FRESNO COUNTY

7/6/2009

First 5 Fresno County
550 E. Shaw Avenue, Suite 215
Fresno, CA 93710
(559) 241-6515
www.first5fresno.org

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REQUEST FOR QUALIFICATIONS

SUSTAINABILITY PROJECT FACILITATOR

FOR FIRST 5 FRESNO COUNTY

I. INTRODUCTION

A. PURPOSE OF REQUEST FOR QUALIFICATIONS

First 5 Fresno County is issuing this Request for Qualifications (RFQ) to qualified groups or individuals interested in working with the Commission to assist in the facilitation and implementation of the First 5 Fresno County Sustainability Project.

The consultant(s) must have expertise and experience in nonprofit strategic planning, organizational capacity building and sustainability planning; facilitation of training workshops; and delivery of nonprofit / school-based technical assistance. The successful applicant(s) should have strong knowledge of systems and programs serving children 0-5 and their families.

In response to this Request for Qualifications, applicants must submit a cover letter, a curriculum vitae or resume, narrative, budget and references to First 5 Fresno County no later than **5:00 pm on July 27, 2009**. Following a review of all submitted materials, qualified applicants will be invited for an in-person or phone interview during the week of August 3 - 7, 2009.

Please submit one (1) original and two (2) copies of your complete application to:

Michael Duarte, Capacity Building Officer

**First 5 Fresno County
550 E. Shaw, Suite 215
Fresno, CA 93710**

Attention: Sustainability Project Facilitator

ALL SUBMISSIONS MUST BE RECEIVED BY 5:00 PM, July 27, 2009. NO FAXED OR E-MAIL SUBMISSIONS WILL BE ACCEPTED.

For additional information or further questions, please contact Michael Duarte, Capacity Building Officer at (559) 241-6503 or mduarte@first5fresno.org.

Thank you for your dedication to children and families and for supporting the vision and mission of First 5 Fresno County.

B. PROPOSITION 10 AND FIRST 5 FRESNO COUNTY

First 5 Fresno County was established subsequent to California voters passing Proposition 10, the "California Children and Families First Act of 1998." The Act provides for a 50 cent per pack tax on cigarettes. The monies collected are to be used to fund anti-smoking and early childhood education programs, including parent education, health and childcare programs that promote early childhood development from prenatal through age five. County Commissions were established by each County's governing board. Commissions are responsible for adopting a strategic plan prior to the allocation of any funding. In Fresno County, the Strategic Plan, *Putting Children First*, was based on the law and was adopted by the Fresno County Children and Families Commission (dba First 5 Fresno County) on June 21, 2000, and has been revised each subsequent year. The 2008-2013 Strategic Plan can be found on the First 5 Fresno County website: www.first5fresno.org.

FIRST 5 COUNTY VISION

All children 0-5 years will achieve optimal social, emotional, physical, and cognitive development.

FIRST 5 FRESNO COUNTY MISSION

To be a catalyst for creating an accessible and effective network of quality services for young children (0-5 years) and their families.

FIRST 5 FRESNO COUNTY STRUCTURE

First 5 Fresno County is spearheaded by a nine-member Commission of individuals appointed by the Fresno County Board of Supervisors.

First 5 Fresno County maintains a staff of 19 persons, led by Kendra Rogers, Acting Executive Director. First 5 staff also includes an Administrative Team, Program Officers and Support Staff.

C. THE SUSTAINABILITY PROJECT BACKGROUND

The First 5 Fresno County Sustainability Project supports agencies (First 5 Fresno County current or former grantees) in developing and implementing plans to sustain high-quality outcomes for children ages 0-5 in Fresno County. Through a structured seven-month, team-based curriculum, agencies think and plan strategically about how to build their internal capacity to pursue and secure resources that will address their agency's long-term needs. Throughout the process teams identify not only critical financial needs, but also essential political, technical, collaborative, and administrative resources required to achieve long-term sustainability.

Monthly full-day workshops walk sustainability teams through each step of the sustainability planning process with the ultimate goal of creating a comprehensive sustainability plan. Teams assess organizational and program strengths and weaknesses; identify resource needs and program goals; target potential funding sources and partnerships; and develop strategies to build community support, organizational capacity and sustaining collaboratives.

Agencies that successfully complete a written sustainability plan are eligible to receive a \$2,000 sustainability stipend to fund some of the staff time needed to implement their plans. The project culminates with a Resource Forum which brings programs together with representatives from local private and corporate foundations, corporations, county offices and nonprofit agencies. Participating grantees present their sustainability plans, receive feedback on these plans and work to build new relationships with the panelists.

First 5 Fresno County piloted the Sustainability Project in FY 2008-2009, with 10 agencies successfully completing the program and producing sustainability plans. First 5 Fresno County's goal in FY 2009-2010 is to serve another 10 agencies through the Sustainability Project. Sustainability teams from each agency consist of 2 to 4 people, which may include the executive director, finance officer, program director, development director and board members.

D. SCOPE OF SERVICES

First 5 Fresno County is seeking a consultant(s) to facilitate monthly Sustainability Project workshops; provide grantee technical assistance between workshops; review, assess and provide feedback on completed sustainability plans; coordinate and participate in the Resource Forum and assist First 5 Fresno County staff in general program implementation which may include logistics support. The consultant(s) will be required to achieve the following deliverables:

Desirable Sustainability Project Consultant Qualities:

- ☐ Engaging and effective facilitation and technical assistance skills.
- ☐ Ability to work effectively with individuals and teams with diverse strengths and varying backgrounds.
- ☐ Ability to initiate and facilitate conversations with multiple stakeholders.
- ☐ Ability to be accessible and flexible in accordance with product timelines and activities.
- ☐ Practical and culturally-appropriate perspectives on issues facing young children and families in Fresno County.

Deliverables

Under the direction of, and in coordination with First 5 Fresno County staff, facilitate the Sustainability Project and provide technical assistance to participating agencies. Specifically, selected consultant(s) will be responsible for the following components of the Sustainability Project:

1. Facilitation of 7 structured Sustainability Workshops. Note: consultants will have access to workshop materials piloted by First 5 Fresno County in FY 2008-2009. Minor adjustments, primarily to incorporate participant feedback from pilot year, will be required.
2. Facilitation of Board Member meeting to include soliciting priorities and needs of current participants.
3. Technical assistance to grantee teams (either onsite or by phone) in between workshops, as needed. Estimated 10 hours of technical assistance per team over the 7-month period, not including review of sustainability plan.
4. Review, assessment, and written feedback of completed sustainability plan.
5. Coordination of, and participation in, Resource Forum.
6. Ongoing feedback and communication to First 5 Fresno County; troubleshooting, best practices information and recommendations for additional technical assistance / capacity building support for grantees.
7. Supporting First 5 Fresno County staff with the overall implementation of the Sustainability Project which may include logistics management support.
8. The consultant may also be asked to provide additional training, consultation and support related to sustainability and capacity building support to grantees. First 5 Fresno County staff will identify and communicate the need for any related training, consultation and support to the consultant.
9. Facilitation of ongoing support structure to maintain collaborative relationships with participants.

E. CONTRACT PERIOD

The contract term is expected to be a 12-month period beginning September 1, 2009 and concluding June 30, 2010, with a renewable option for an additional three years based on performance.

F. TENTATIVE TIMELINE AND SCHEDULE OF EVENTS

RFQ Issued:	July 6, 2009.
Due Date for Qualifications:	July 27, 2009 at 3:00 PM
Interviews for Qualified Applicants:	Week of August 3 - 7, 2009 (<i>if necessary</i>)
Qualified Consultant Notified:	Week of August 10-14, 2009
Work Commences:	September 1, 2009

G. QUESTIONS ON REQUEST FOR APPLICATIONS

Any questions or requests for clarification about this RFQ must be submitted in writing to Michael Duarte, Capacity Building Officer, by fax to (559) 241-6510, or email to mduarte@first5fresno.org

For the benefit of all applicants, no questions will be accepted after 5:00 p.m. on 7/27/2009. A summary of any questions received and their responses will be placed on the First 5 Fresno County website within 48 hours (www.first5fresno.org).

II. APPLICATION REQUIREMENTS

A. APPLICATION CONTENT REQUIREMENTS

1. **Application Cover Sheet** — Complete (**Attachment A**) Identify the contact person for the application, and their address, telephone, fax, and e-mail information. Include a statement to the effect that the application will remain valid for a period of not less than 120 days from the date of submittal. An official authorized to bind the firm to the terms of the application must sign the Application Cover Sheet.
2. **Application Narrative** — Narrative: A 3- to 5-page narrative outlining the consultant(s) demonstrated ability, based on qualifications and experience.

The Narrative shall include:

- a. **Firm Description:** Provide a corporate overview of your firm and its commitment to the Fresno community through support of its local Community Based Organizations (501c3). Highlight any that would address our target population. Include a general description of the organization's financial condition and identify any conditions (impending merger, office closures, bankruptcy, etc.) that may impede your ability to complete the scope of services.
 - c. **Experience:** Describe the firm's experience in providing services to the public sector or government agency. Include a brief description of the services provided, how long such services have been provided, and a contact person (telephone number included) for each client described. Résumé or Curriculum Vitae: Outlining all relevant work history, educational attainment, publications, prior research projects, etc.
3. **Fee Schedules** – Describe the fee structure of your firm and provide any schedules to support the structure. The consultant(s) will be compensated on a time and expense basis. The consultant is responsible for supplying all business equipment needed to implement the tasks above (e.g., computer, printer, fax, internet access, etc.). Successful consultant(s) will function as part of a larger staff/consultant team. The consultant(s) will be responsible for maintaining a daily log to capture time spent on activities. This will support First 5 Fresno County staff management of costs to ensure execution of all tasks related to the scope of work.

Provide proposed fees and cost information for all services to include the following:

- a. Proposers should review the requirements of this RFQ and address all services needed to meet the deliverables in the fee schedule. Indicate how First 5 Fresno County will be invoiced for services. This information should be detailed and broken down by type of service and units of work or other

applicable measure. Proposers should provide a comprehensive fee schedule as First 5 Fresno County will not include compensation in the contract for items not addressed.

- b. Include the methodology for any future increases in costs of service. Include the method in which pricing adjustments will be calculated.
- c. The fee proposal submitted along with the proposed approach will be used as a basis for any contract negotiations. The actual scope of services and fees included in the contract may be negotiated and may vary to satisfy First 5 Fresno County's actual needs.

- 4. Conflict of Interest** – Include a statement describing any potential or known conflict of interest regarding this RFQ and/or the First 5 Fresno County, or affirm that you do not have a conflict of interest.

B. APPLICATION SUBMISSION INSTRUCTIONS

- 1. Use a simple clasp or staple in the upper left-hand corner to secure each copy of the application.
- 2. Applications can be mailed or hand delivered but regardless of the postmark date, must be received by Commission staff by July 27, 2009. Electronic transmission either by fax or email will NOT be accepted.
- 3. Mail or hand-deliver one (1) original and two (2) copies of the application package to:

Sustainability Project Facilitator RFQ

Attention: Michael Duarte

First 5 Fresno County

550 E. Shaw Avenue, Suite 215

Fresno, CA 93710

III. APPLICATION EVALUATION CRITERIA AND PROCESS

Qualifications will be evaluated by First 5 Fresno County staff. Consultant(s) must have the qualifications, experience and competency, and ability to successfully carry out the Sustainability Project facilitation and related technical assistance. Consultant(s) will be considered from not-for-profit and for-profit agencies, public and private organizations and collaborative groups. Applicants should have a presence in California, the capacity to work in Fresno County and have familiarity with conducting similar trainings. The ideal consultant(s) will be familiar with the fields of strategic planning, nonprofit management, fundraising and capacity building. Knowledge of systems and services for children 0-5 and their families is also important. Additionally, the ideal consultant(s) will have extensive experience providing technical assistance and training to school-based and / or community-based organizations.

Selected consultant(s) may be invited for an interview with First 5 Fresno County staff. The following represents the selection criteria that will be considered during the evaluation process:

- o The consultant's past experience in performing comparable work;
- o The consultant's knowledge and experience of non-profit organizational capacity building, strategic planning and sustainability; and
- o The consultant's knowledge and understanding of the issues facing young children and families in Fresno County (especially specific to the building capacity of child serving organizations).

After approval by the Commission, the contract will be negotiated with the selected firm.

IV. CONFIDENTIALITY OF RESPONSES

While First 5 Fresno County cannot guarantee the confidentiality of information submitted by the agency, it will endeavor to protect the information to the extent possible, as permitted by law.

In order for trade secrets submitted by an agency to be protected from disclosure by First 5 Fresno County, the agency shall identify each page and paragraph or item it regards as "confidential" and wants First 5 Fresno County to protect from disclosure. Additionally, the agency shall provide an index listing all pages and paragraphs or items marked "confidential," which includes, for each index entry, a complete justification which cites the statutory basis for each of the agency's "confidential" classifications.

In the event First 5 Fresno County receives a request for release of information marked "confidential" by the agency, First 5 Fresno County will, before disclosure, notify the agency in writing regarding the information requested

V. MISCELLANEOUS INFORMATION

- A.** Issuance of this RFQ does not constitute a commitment by the Commission to award a contract. The Commission reserves the right to reject any or all applications received in response to this RFQ, or to cancel this RFQ if it is in the best interest of the Commission to do so.
- B.** First 5 Fresno County anticipates selecting only one contractor to carry out the work described in this RFQ. However, if the Commission believes its goals can be best met by contracting with more than one applicant to this RFQ, it may elect to contract with multiple applicants.
- C.** The firm submitting an application agrees that by submitting an application it authorizes First 5 Fresno County staff to verify any or all information and/or references given in the application.

- D.** First 5 Fresno County staff reserves the right to approve all subcontractors proposed by the primary contractor.
- E.** First 5 Fresno County staff reserves the right, after contract award, to amend the resulting contract as needed throughout the term of the contract to best meet the needs of all parties.
- F.** Appeals will only be accepted based on a violation of a law, rule, regulation, or terms of this RFQ. Mere disagreement with the decision of First 5 Fresno County Staff is not grounds for an appeal. In addition, all appeals must state the law, rule, and/or regulation on which the appeal is based. First 5 Fresno County is the sole and final authority regarding the approval or disapproval of applications and the conditions under which they are funded. All appeals will be presented to First 5 Fresno County Commission for review.

Note: Appeals will not be heard for late applications or applications that do not pass the initial review.

Additional information about First 5 Fresno County, including its Strategic Plan, is available on our website: www.first5fresno.org.

COVER PAGE

Name of Firm: _____

Address: _____

Telephone no. (_____) _____ Toll Free Telephone no. (_____) _____

Primary representative/manager/partner-in-charge

Name: _____

Title: _____

Telephone no. (_____) _____

E-mail: _____

Primary Contact for this RFQ if different from above

Name: _____

Title: _____

Telephone no. (_____) _____

E-mail: _____

The representations made herein are made under penalty of perjury.

ATTESTED ON THIS THE _____ DAY OF _____ 2009

Signature of Authorized Bidder

Title of Bidder