



**HELP ME GROW SUSTAINABILITY PLANNING CONSULTANT  
REQUEST FOR QUALIFICATIONS**

**Application Deadline: 5:00 pm on MONDAY, SEPTEMBER 25, 2017**

**APPLICATION INFORMATION:**

1. All five sections of the application must be completed.
2. Completed applications should be emailed to:  
  
**Attn: Loren Farrar**  
**First 5 Alameda County**  
**1115 Atlantic Avenue**  
**Alameda, CA 94501**  
**[loren.farrar@first5alameda.org](mailto:loren.farrar@first5alameda.org)**
3. Applications must be received by 5:00 pm on MONDAY, SEPTEMBER 25, 2017. PLEASE SUBMIT PROPOSAL AND REQUIRED BUDGET ATTACHMENT. INCOMPLETE OR LATE SUBMISSIONS WILL NOT BE ACCEPTED.
4. All applicants will be notified MONDAY, OCTOBER 2, 2017 via email.
5. If you have any questions, please contact Loren Farrar at 510-227-6954 or via email at [loren.farrar@first5alameda.org](mailto:loren.farrar@first5alameda.org)

**SECTION 1: INTRODUCTION**

First 5 Alameda County (First 5) is an innovative public entity created by the passage of Proposition 10 in 1998. Proposition 10 is a tobacco tax that helps fund early childhood education and development related services for children aged 0-5. Since 2000, First 5's allocation of tobacco tax funding has decreased 40%. As we look to the future, we are faced with both the challenge of declining tobacco revenue and the opportunity of increasing awareness and support around early childhood.

A key component of the First 5 Alameda County Strategic Plan is the Early Identification strategy which seeks to plan for the sustainability of Help Me Grow (2017-21 Strategic Plan

page 23). The purpose of this consulting engagement is to support specific activities related to sustainability planning, leading to development of scenarios and recommendations for sustainable support of HMG components.

F5AC is seeking a qualified company, agency and/or individual to provide:

Expert guidance on structuring and sequencing the Help Me Grow (HMG) Sustainability Planning process; support in documenting HMG components and their relationships; interviews, focus groups or surveys with key stakeholders about their perceptions of HMG, its role in the system and potential partners for holding HMG or HMG components; and facilitation and development of criteria, capacities and scenarios for potential future organizational leads and structures.

**Please review the application materials for scope of work, application instructions and the criteria for selection.**

Interested individuals and organizations should submit their application to:

Loren Farrar  
First 5 Alameda County  
1115 Atlantic Avenue  
Alameda, CA 94501  
[loren.farrar@first5alameda.org](mailto:loren.farrar@first5alameda.org)  
510-227-6954

## SECTION 2: BACKGROUND

Based on a national model ([helpmegrownational.org](http://helpmegrownational.org)), Help Me Grow is a system that connects children birth to age 5 and their families with services and child development information. Help Me Grow also supports early identification efforts through developmental screening in primary care, early care and education and community settings. Families receive information and support in connecting with resources through a centralized telephone access point, as well as through the collection and dissemination of services and community resource information. Help Me Grow does not provide direct services. Rather, it is a system for improving access to existing resources and services for children birth through age five.

Help Me Grow was formally launched in 2011 with First 5 Alameda County serving as a lead agency for the initiative. First 5 both directly operates components of the system – such as the centralized telephone access point, community outreach, and data collection and analysis – and contracts out services, provides matching dollars for other system services and supports the cross-sector governance structure. While Help Me Grow has experienced tremendous growth over the years, it is primarily funded by First 5 dollars which are a declining revenue source. Further, Help Me Grow is planning for a reduction in First 5 investment and the end of a multi-year, multi-million dollar foundation grant in 2019. First 5 has initiated a sustainability planning process to explore strategies to sustain and grow the initiative.

## SECTION 3: SCOPE OF WORK AND REQUIREMENTS

### PROJECT OBJECTIVES

First 5 is seeking a consultant or a consulting agency (with multiple expertise) to assist with a sustainability planning process for the Help Me Grow Alameda County (HMG) initiative, currently operated and overseen by First 5 Alameda County. The purpose of the sustainability planning process is to identify new funding and/or re-alignment opportunities that would support the fiscal sustainability and growth of the initiative. As part of the exploration of sustainability, the process will explore the feasibility and costs / benefits of an alternative organizational lead or leads for Help Me Grow Alameda County that would support optimal impact and sustainability.

Successful applicants will demonstrate qualifications to implement a recommended approach that includes the following activities:

1. Work with First 5 staff to revise and finalize a work plan for a sustainability planning process and a timeline that sequences tasks and activities. **(See Attachment A for the current draft of the Sustainability Planning Process).**
2. Work with First 5 staff to document HMG strategies, activities and infrastructure into clearly defined components and define relationships between each component.
3. Develop a process and approach to obtain feedback from First 5 leadership, staff, partners, HMG Steering Committee members and other stakeholders about Help Me Grow and its future, including but not limited to the perceived value of strategies and activities, the perceived function of strategies and activities and their relationships, and suggestions regarding potential organizational leads for the system as a whole and/or defined components.
4. Research the structures of other Help Me Grow systems in California and in other localities across the nation.
5. Facilitate a process to define the capacities and criteria that would be required of entities who are candidates to be leads for HMG or HMG components.
6. Work with staff to develop scenarios for the future structure that describes staffing patterns, costs, funding options, governance and pros and cons.

NOTE: It is not part of the scope of work to identify and vet potential organizational leads, but

to help define capacities and criteria of potential leads and help to develop visual scenarios once potential leads and partners are identified.

#### **CONTRACT REQUIREMENTS AND QUALIFICATIONS**

1. Contracted consultant or agency will assign an individual or team to carry out the contract activities identified above and will designate a project manager as lead contact to First 5.
2. Contractor will have demonstrated expertise and ability in the following (inclusion of subcontractors to create a team that would effectively lead this effort is allowable):
  - a. Nonprofit and governmental organizational structures and program design
  - b. Designing and managing complex, multifaceted planning processes
  - c. Qualitative research methodologies, including but not limited to interview and focus group administration
  - d. Ability to synthesize information
  - e. Excellent facilitation skills, including the ability to build consensus among diverse stakeholders
  - f. Strong communication and writing skills
  - g. Familiarity with Help Me Grow is preferred
  - h. Experience with government and/or nonprofit strategic restructuring is preferred
  - i. Experience working with public agencies is preferred
  - j. Experience working with collaboratives or coalitions is preferred
  - k. It is preferable if the applicant has knowledge of the early childhood field and Alameda county, but not required;
3. **Travel** – It is expected that the contractor will provide individual/agency automobile insurance coverage or will require individual automobile insurance coverage.
4. **Orientation and Introductions** – Contractor’s key staff assigned to the project will receive an overview and orientation to Help Me Grow Alameda County and background for the sustainability planning process. There will be an identified First 5 contact for questions and support throughout the duration of the project.
5. **Meeting Requirements** – Contractor’s key staff assigned to the project will meet with staff from First 5 and, if request, the Help Me Grow Steering Committee. Meeting location, dates and times will be scheduled after the award process has been

completed. Meetings will be through a combination of in-person (at various locations) and conference calls. Contractor may be expected to present to First 5 and/or Help Me Grow partners at various points throughout the award term.

6. **Oversight** – On-going contract oversight will be provided by F5AC based on agreed upon timelines and scheduled meetings.

## **SECTION 4: TIMELINE, FUNDING AND DELIVERABLES**

### **CONTRACT TIMELINE**

The term of the contract will be October 2017 – December 2018.

### **FUNDING**

Costs shall not exceed \$40,000 for this project. Proposals that exceed this amount will not be considered. Contractor payments will be made based on actual approved expenses and satisfactory work performance of identified deliverables.

### **DELIVERABLES**

1. Finalize a Work Plan for the Sustainability Planning Process, including recommended sequencing of tasks and activities.
2. Produce documentation and definitions of HMG components.
3. Produce a report that summarizes the feedback from First 5 leadership, staff, partners, Steering Committee members and other stakeholders, including names and affiliation where appropriate.
4. Produce documentation and definitions of capacities of and criteria for HMG organizational lead(s).
5. Produce visual models of the scenarios for the future structure and a report documenting staffing, costs, governance and pros and cons.

## **SECTION 5: ELIGIBILITY & RESPONSE INSTRUCTIONS**

### **ELIGIBILITY**

To be eligible to apply, applicant must demonstrate:

- Knowledge and experience with nonprofit and government organizations;
- Ability to effectively design complex planning processes; and
- Expertise in program design and organizational structure development
- Familiarity with Help Me Grow is preferred

## RESPONSE INSTRUCTIONS

Responses to the Request for Qualifications are due September 25, 2017 by 5pm. Responses should be submitted by email to Loren Farrar at [loren.farrar@first5alameda.org](mailto:loren.farrar@first5alameda.org). No faxed copies will be accepted. Applicants are responsible for ensuring that applications are received by the deadline.

1. **Qualifications & Experience** – Describe the qualifications and experience of the agency and/or individuals who will successfully fulfill the obligations of the project. Specifically describe your experience supporting and/or developing organizational structures and models.
2. **Demonstration of understanding** – Describe the approach to completing the activities and deliverables of the project. Describe who will be involved in the planning process, in what capacity they will be involved, and what their skills and strengths are (Include resumes for all staff who will participate in the process).
3. **Timeline and Budget** – Complete the attached Timeline and Budget form based on the project activities and deliverables and explain your proposed budget in a brief narrative. (250 words or less)
4. **References and Work Samples** – Provide 3 current client references AND a sample of deliverable(s) from at least one relevant project.

## SECTION 7: SELECTION CRITERIA & SELECTION PROCESS

### SELECTION CRITERIA

The criteria by which each response will be judged are as follows:

1. **Applicable experience** – The extent to which the agency or individual demonstrates a depth of relevant experience in designing and implementing complex planning processes and in organizational structure design.
2. **Applicable approach and demonstration of understanding** – The extent to which the applicant describes an approach that is consistent with the needs outlined in this RFQ.
3. **Fit with First 5 Alameda County** – The degree to which the applicant's approach and values are consistent with that of First 5.
4. **Cost** – Should be reasonable and well justified.

### SELECTION PROCESS

All applications will be reviewed by internal staff. Applicants may be invited for an interview or asked to participate in a follow up conference call with staff. Candidates must be available for interview, if requested in the following time window: Thursday, September 28<sup>th</sup> from 1-5pm.

References may be consulted.

## **SECTION 8: OTHER INFORMATION**

1. No response will be considered for award unless submitted in full, delivered on or before the date specified in this RFQ.
2. Specifications are carefully prepared describing the services desired. An addendum will be issued to all applicants, if necessary, stating revisions, deletions, or additions to be made to the specifications.
3. Solicitation of qualifications in no way obligates First 5 to purchase any or all of the described goods or services prior to bid award by the First 5 Commission.
4. First 5 shall require indemnification on behalf of itself and Alameda County entities with any agencies or individuals into which it enters into agreements. In addition, First 5 requires all agencies to provide evidence of both workers compensation and general liability insurance, with First 5 listed as additional insured.



**Help Me Grow Sustainability Planning Consultant**  
**Timeline and Budget**  
**October 2017 – December 2018**

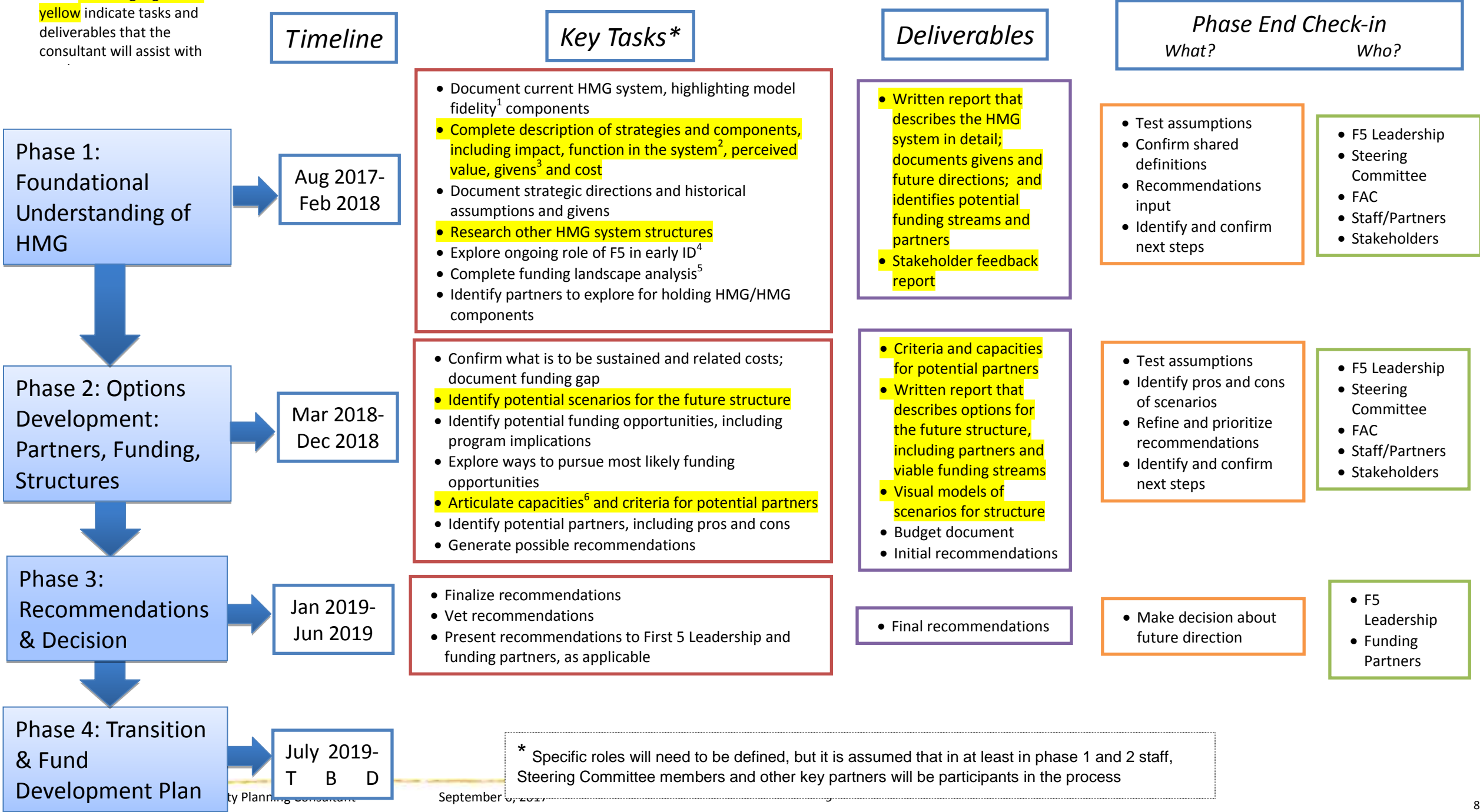
Project Activity / Deliverable	Timeline	Budget
<b>Total Project Budget</b>		



**Attachment A**

Note: items highlighted in yellow indicate tasks and deliverables that the consultant will assist with

# 2017-2019 Sustainability Planning



\* Specific roles will need to be defined, but it is assumed that in at least in phase 1 and 2 staff, Steering Committee members and other key partners will be participants in the process

## 2017-2019 Sustainability Planning Glossary of Terms

1.	Fidelity	Fidelity is the extent to which the delivery of a model adheres to the components and design as intended by the developers of the model. Help Me Grow is a national model.
2.	Function in the system	A function in the system means the purpose that it serves. For example, <ul style="list-style-type: none"> <li>• the function of the Help Me Grow phone line is to provide a central access point in the county for referrals, information and care coordination related to child development for children ages birth to 5</li> <li>• the function of the Help Me Grow pediatric outreach, training and technical assistance is to increase early identification practices, including developmental screening, among child health care providers and support them to ensure children are getting appropriate follow-up support</li> </ul>
3.	Givens	Givens are established facts or conditions. For example, it is a given that to continue as a Help Me Grow system, we have to implement the model to fidelity.
4.	Early ID	Early ID is short-hand for the concept of early identification, which is defined broadly here to include a broad array of strategies that can be used to ensure concerns in young children’s development are identified, to equip families and providers with information about child development, and to promote appropriate follow-up and support.
5.	Funding landscape analysis	Funding landscape analysis is being used to describe a process of documenting all of the potential funding streams (dollars that are allocated through government sources, policies and programs, sometimes as a result of a bill that passed) that should be evaluated as a potential financial support for Help Me Grow.
6.	Capacities	Capacities refers to what another organization must be able to do or already have in place to be considered an option for running HMG or HMG components.