



Notice of Request for Qualifications for Consultant Services

MARCH 8, 2018

SUMMARY	The Children and Families Commission of Orange County is seeking qualified individuals and/or firms with demonstrated leadership and experience for project management, evaluation, operational support, and on-call special project services (see Attachment 1). <i>Applicants who submitted a response to the prior Request for Qualifications (RFQ) on April 1, 2016 need NOT resubmit as those applicants are current and active on the list of qualified consultants.</i> [Note: Current qualified consultants may update their April 1, 2016 submission for consideration for the newly added expertise in HIPPA and FERPA expertise.]
TYPES OF CONSULTANTS	<p>Project Management</p> <ul style="list-style-type: none"> Consultants should propose hourly rate. In general, Commission practice is to pay hourly based on consultant expertise and experience within a range of \$65-\$125 per hour. <p>Operational & Professional Support</p> <ul style="list-style-type: none"> Consultants should propose hourly rate. In general, Commission practice is to pay hourly based on consultant expertise and experience within a range of \$75-\$125 per hour. <p>Evaluation</p> <ul style="list-style-type: none"> Consultants should propose hourly rate. In general, Commission practice is to pay hourly based on consultant expertise and experience within a range of \$75-\$125 per hour. <p>On-Call / Special Project Services</p> <ul style="list-style-type: none"> Experts in their field, to be engaged for specific limited term projects, contracts to be issued as projects are developed Compensation schedule to be determined by project
KEY DATES	<ul style="list-style-type: none"> Request for Qualifications (RFQ) and instructions for submittal will be available on the Commission website – March 8, 2018 Final date to submit questions on the RFQ – March 14, 2018 by 3:00 pm Responses to RFQ questions posted on the Commission website – March 19, 2018 Due date for submission of applications – March 22, 2018 by 3:00 pm Commission approval of updated list of qualified consultant – April 4, 2018
QUESTIONS	<p>ALL QUESTIONS AND REQUESTS FOR ADDITIONAL INFORMATION REGARDING THIS RFQ MUST BE RECEIVED VIA EMAIL TO PROP10@OCGOV.COM NO LATER THAN WEDNESDAY, March 14, 2018, BY 3:00PM.</p> <p>This will be the only opportunity to ask questions regarding the RFQ and submittal process. It is anticipated that responses to the questions will be posted to the Commission's website on Thursday, March 19, 2018.</p>
INSTRUCTIONS	The Request for Qualifications and instructions for submittal will be available on the Commission website www.occhildrenandfamilies.com
SUBMITTAL OF APPLICATIONS	<p>All SUBMITTALS MUST BE RECEIVED BY March 22, 2018, AT 3:00 PM</p> <ul style="list-style-type: none"> Submissions will only be accepted via email to: Prop10@ocgov.com Submittals must include: 1) the application checklist, 2) a cover letter, 3) resume, and 4) expanded reference list. See Section II, page 3 for further information. The Commission reserves the right to reject any or all applications submitted.

CHILDREN AND FAMILIES COMMISSION OF ORANGE COUNTY
REQUEST FOR QUALIFICATIONS (RFQ)
FOR CONSULTANT SERVICES

I. GENERAL INFORMATION

A. Description of the Commission

The California legislature adopted legislation set forth in the California Children and Families Act of 1998, Health and Safety Code Section 130100, et seq. implementing the Children and Families First Initiative passed by the California electorate in November 1998 and establishing the California Children and Families Commission and County Children and Families Commissions.

The Children and Families Commission of Orange County adopted its First Strategic Plan to guide the allocation of Proposition 10 tobacco tax revenue funds to programs that meet the intent of voter initiative and benefit Orange County's children from birth through age five on February 16, 2000. The Commission has held public hearings annually to reconfirm its strategic directions for the following year.

For more information regarding the Commission's Strategic Plan, Goal Areas, and Programs, please refer to the following documents on the Commission's website:

- Strategic Plan
http://occhildrenandfamilies.com/wp-content/uploads/2017/04/2017_18_Strategic_Plan.pdf

- Annual Report Summary
http://occhildrenandfamilies.com/wp-content/uploads/2014/12/CFCOC_AR16-7a_final.pdf

B. Consultant Scope of Work

The Commission is seeking qualified individuals and/or firms (Applicants) in four areas as defined. Applicants are encouraged to submit qualifications for each category of services that they are interested in providing. Applicants may submit for more than one category of service, but the application should clearly identify the subject matter area(s) for which the Applicant is submitting qualifications. For on-call consultants, the application should demonstrate subject matter expertise in one or more subject matter areas listed in Attachment 1.

1. Project Management

Project Management consultants must demonstrate skills and experience in management of funded programs including skills in service planning, coordination and collaboration, technical assistance, strategic communications, innovative practices, leveraging/sustainability strategies, evaluation, development of annual work plans and budgets, monitoring grantee performance, and reviewing/approving grantee invoices. See Attachment 2, Project Management Scope of Work, for further information.

2. Evaluation (on-call)

Evaluation consultants must demonstrate skills and experience qualified to provide assistance with the ongoing design and implementation of the CFCOC's evaluation framework, which measures the quantity and quality of services provided by organizations funded by the CFCOC. See Attachment 3, Evaluation Scope of Work, for further information.

3. Operational Support

The scope of work for administrative support consultants will vary by project and shall be subject to negotiation between Commission and consultant prior to engagement of services. Applicants must demonstrate skills and experience in fiscal leveraging, fiscal management and other subject areas as set forth in Attachment 1.

4. On-Call / Special Project Services

The scope of work for on-call consultants will vary by project and shall be subject to negotiation between Commission and consultant prior to engagement of services. Selection of consultants for these projects will be based on demonstrated expertise and experience to meet project requirements. Selection in this area is no guarantee of future work; actual work will be determined based on identified projects based on Commission priorities.

C. Term of Project

The Commission anticipates establishing a current roster of qualified applicants for on-call consulting services related to special projects as needed. Once qualified, consultants may be selected for specific projects based on availability and expertise in the specific scope and nature of the proposed project and issued a contract for the specific project. The Commission expressly reserves the right to amend or add to the roster of qualified

individuals as needed to best meet the needs of the Commission. It is anticipated that the roster established through this RFQ process will be used until a subsequent RFQ is completed.

If selected for contract, Program Management consultants may receive a one (1) year contract. The contract will be subject to:

- Satisfactory negotiation of terms, including a price acceptable to both the Commission and the selected consultant(s);
- Annual availability of budgetary appropriations for the contracted consulting services;
- Annual review of the consultant's performance of services, and recommendation of the Commission's Program and Contracts staff.

Consultants selected for contract for non-Program Management services may receive agreement terms based upon project needs.

II. SUBMITTAL INSTRUCTIONS

A. Submittal Format / Acknowledgement of Receipt

- Page number limits for each component are listed below. Each page must be on 8.5 x 11 inch paper, single spaced, 12 point font size, with one inch margins on all sides.
- Submission of all pages of the application document as a single pdf document is strongly encouraged.
- The Commission is not responsible for late or non-delivery of submissions. Late or non-responsive submissions will be rejected without consideration.
- All submissions received will be provided a receipt by emailed confirmation. If you do not receive an emailed confirmation, or you wish to call and verify receipt, you may contact the Commission at: (714) 834-5310.

B. Contents of Submittal

All applicants should submit only one (1) response to this RFQ. If you are interested in applying for more than one type of consulting contract, i.e., project management and on-call special project services, your application must clearly identify the subject matter area(s) for project management, as well as the subject area(s) for on-call services.

Required documents to be submitted in response to this RFQ are:

- 1. Checklist for Consultant Applications (Attachment 7)** – provide applicant contact information and identify the type of consulting services and the subject matter areas being offered (refer to Attachment 1 for subject matter areas).
- 2. Cover Letter** – provide a cover letter, signed by the applicant, briefly summarizing applicant's qualifications and the consulting services being offered; include the requested hourly rate, or rate of compensation for deliverable based services, based on the proposed

services to be provided; and include any questions or concerns you may have regarding the Commission's general requirements as described in Section III below. For example, if your current insurance coverage does not meet the Commission's standard insurance requirements and you will seek a waiver for the difference, please specify what the difference is and what you will be requesting to be waived. Or, if you are aware of, or are concerned about, a possible conflict of interest, please disclose it in your application submittal

3. **Qualifications** – Applicants should provide a resume, curriculum vitae, or statement of firm qualifications outlining relevant work and/or consulting history, education, publications, prior projects, etc. Qualifications should demonstrate experience relevant to each of the type of consulting services submitted on Attachment 7.
4. **Expanded Reference** – provide an expanded reference narrative for one project in each subject matter area listed on your cover letter. Narratives should describe previous client engagements and be no more than four (4) pages total for all areas:
 - a. Project Title
 - b. Client/Agency Name
 - c. Description of the Project, including your role, and any deliverables and/or outcomes of the Project
 - d. Contact Person – This should be the person who serves or served as the lead project manager for your client. You are responsible for securing your client's permission to be contacted as a reference. Must include name, title, phone number and email.
 - e. Dates of Project (include state and end dates)
 - f. Compensation history, which will be used to justify the requested hourly rate/compensation rate.

C. The Commission reserves the right to retain all applications submitted; submission of applications indicates acceptance by the individual of the conditions contained in this RFQ and will be confirmed in contracts between the Commission and qualified individuals.

D. During the review process, the Commission reserves the right, where it may serve the Commission's best interest, to request additional information or clarification from individuals, or to allow correction of errors or omissions.

III. GENERAL REQUIREMENTS

- A. **Contract** - The Commission will develop a contract based on its usual and customary terms and conditions incorporating the requirements outlined in the RFQ document and the responses of the qualified applicant(s).
- B. **Non-Resident Tax Withholding** – Please note that the Commission is required to comply with all State laws and regulations related to non-resident withholding pursuant to California Revenue and Taxation Code Section 18662 which requires 7% of all payments exceeding applicable amount in a calendar year to be withheld and sent to the California Franchise Tax

Board. Nonresident payees include corporations, limited liability companies, partnerships, and individuals that do not have a permanent place of business in California.

- C. **Personnel** - Project partners, managers, other supervisory staff and specialists may be changed if those personnel leave the firm, are promoted, or are assigned to another office. The personnel may also be changed for other reasons with the expressed prior written permission of the Commission. However, in either case, the Commission reserves the right to accept or reject any or all replacements.

Firm specialists identified in response to the RFQ can only be changed with the expressed prior written permission of the Commission, which reserves the right to approve or reject any or all replacements.

Other staff personnel may be changed at the discretion of firms provided that such replacements have substantially the same or better applications or experience.

- D. **RFQ Interpretations and Addenda** - Any change to or interpretation of the RFQ by the Commission will be posted on the Commission's website and any such changes or interpretations shall become a part of the RFQ for incorporation into any contract awarded pursuant to the RFQ.

- E. **Public Record** - All applications submitted in response to this RFQ will become the property of the Commission and a matter of public record.

- F. **Additional Services** - The general service requirements outlined above describe the minimum work to be accomplished. During initial contract negotiations and any subsequent negotiations for contract renewals, the scope of service may be modified and refined based on the needs of the Commission.

- G. **Undue Influence** – The firm declares and warrants that no undue influence or pressure is used against or in concert with any officer or employee of the Commission in connection with the award or terms of the Agreement that will be executed as a result of award of this RFQ, including any method of coercion, confidential financial arrangement, or financial inducement. No officer or employee of the Commission will receive compensation, directly or indirectly, from consultant, or from any officer, employee or agent of the firm, in connection with the award of the Agreement or any work to be conducted as a result of the Agreement. Violation of this Section shall be a material breach of the Agreement entitling the Commission to any and all remedies at law or in equity.

- H. **Submittal Preparation Expenses.** The Commission shall not be liable for any expenses incurred by the applicant in the preparation or submission of its applications and such expenses shall not be reimbursed under the resulting contract.

I. **Insurance Requirements**

The insurance requirements for standard Commission contracts are set forth below, including coverage amounts, types of coverage, and policy requirements. The insurance requirements for specific contracts may be adjusted at time of contract negotiations based on the scope of services to be provided.

- Comprehensive General Liability Insurance for bodily injury (including death) and property damage which provides not less than \$1,000,000 combined single limit per

occurrence and not less than \$2,000,000 annual aggregate.

- Comprehensive Automobile Liability Insurance for bodily injury (including death) and property damage which provides total limits of not less than \$1,000,000 combined single limit per occurrence applicable to all owned, non-owned and hired vehicles/watercraft, \$1,000,000 annual aggregate.
- Workers' Compensation Insurance for all employees engaged in project services with the California statutory amount of \$1,000,000 per accident (only if the applicant is a firm with employees).
- Employers' Liability Coverage of not less than \$1,000,000 per occurrence for all employees engaged in project services or operations (only if the applicant is a firm with employees).
- Professional Liability of not less than \$1,000,000 for professional licensed staff engaged in project services or operations (only if the applicant will provide a service which requires a professional license).

J. Conflict of Interest

A conflict of interest exists when a consultant has the opportunity to advance or protect his/her own interest, or the interests of others with whom he/she has a relationship, in a way that is detrimental or potentially harmful for the integrity or fundamental mission of the Commission. Consultants will be required to disclose potential conflicts of interest as soon as it becomes known to him/her, or prior to engaging in any services to a Commission funded organization, whichever comes first. Even the perception of a conflict of interest must be avoided and may require the restriction of the consultant's scope of work or may give rise to the disqualification of a consultant from providing further services on behalf of the Commission in a particular area of expertise. Commission staff shall consult with legal counsel regarding potential conflicts of interest at the earliest opportunity. Remedies may include, but not be limited to, removing the consultant from any decision making, limiting the consultant's exposure to the decision making process, and other means as available to avoid the conflict of interest.

SUBJECT MATTER EXPERTISE

The following summary will serve as a guide to the subject matter areas for which consulting services are being sought. Below are the current major programmatic areas and strategic priorities that the Commission funds. As a subject matter expert, consultants may be requested to provide planning, project review, and/or development recommendations regarding projects in a program area. The specific consultant scope will be determined at the time of the identified project need.

Please consult the Commission's website for additional information about the Commission's Strategic Plan, Goal Areas, and Programs.

- Strategic Plan

http://occhildrenandfamilies.com/wp-content/uploads/2017/04/2017_18_Strategic_Plan.pdf

- Annual Report Summary

http://occhildrenandfamilies.com/wp-content/uploads/2014/12/CFCOC_AR16-7a_final.pdf

A. Project Management (Program Areas / Strategic Priorities)

For further information regarding the scope of work of a Project Management consultant, please refer to Attachment 2.

Pediatric Health Services

Pediatric Health Services are designed to increase access to pediatric primary and specialty care, early developmental programs, physician sub-specialist programs, and vision services.

Oral Health

Over the past 10 years, the Commission has allocated more than \$15.5 million to support oral health programs in Orange County. In fiscal year 2012/13, the Commission made an additional \$20 million catalytic investment to sustain children's oral health over a 10-year period, including the continued pediatric dental residency program, expanded access to services in south Orange County, and promotion of the importance of early screening and prevention. In September 2016, the Commission submitted an application to the state Department of Health Care Services for a Dental Transformation Initiative, Local Dental Pilot Program (LDPP) grant; notification of application status is anticipated for January 2017. If an LDPP grant is received, the Commission will seek to engage project management and data analytics support for program implementation and monitoring.

Developmental Screening

The Commission, working with community partners, focuses on increasing the quantity and the quality of standardized developmental and behavioral screenings for young

children in order to increase early intervention and improve the health outcomes of children.

☐ **Children’s Mental Health**

In 2015, the Commission identified the prevention and treatment of children’s mental health disorders and behavioral problems as a funding priority, with the goal of making strategic one-time investments to help address service gaps and increase access to programs and services.

☐ **Bridges Maternal Child Health Network**

The Bridges Maternal Child Health Network is a countywide program aimed at ensuring all pregnant women and their babies have a medical home for comprehensive health services, receive information about health child development, and are assessed for health and other risk factors- with access to home visiting and early intervention services if needed. The Bridges network included high birth hospitals, community based service providers, and public health nursing.

☐ **Community Health Services**

The Commission funds community clinics and community health providers to ensure that families have access to health coverage and quality pediatric care. These services include but are not limited to enrollment in health coverage programs for low-income children and families, primary pediatric care, obesity treatment and prevention, and coordination of health services.

Additionally, the Commission also has a focus on health systems planning and maximizing third-party billing such as Medi-Cal and private insurance to assist in the sustainability efforts of Commission funded programs. Related services will also include research, analysis and technical assistance to interpret new and proposed healthcare policy and regulations with potential to impact Orange County’s children and their families; monitor national, state, and local trends in children’s healthcare coverage, utilization, costs, reimbursement and delivery systems; assess gaps in Orange County’s public healthcare system and identify opportunities for realignment of incentives to better support children’s health and development; and identify points of intersection between Orange County’s healthcare, education, and social welfare institutions, service providers, and revenue streams to assist the Commission in building or promoting effective and sustainable early childhood programs and systems of care for Orange County.

☐ **School Readiness Nursing**

School Readiness Nurses provide comprehensive health and developmental assessments for children ages 0-5 and link children to needed services. School Readiness Nurses are based at the 25 school districts that serve young children in Orange County.

Homeless Prevention

The Commission provides financial support for the development and operation of emergency and transitional shelter programs for pregnant women and families with children ages 0-5.

Early Learning

Early Learning programs include Early Learning Specialists at every Orange County School District with a kindergarten population to work within their communities to strengthen children's early learning skills; the Orange County Department of Education for early education training, professional development, and quality improvement rating programs; and various community and non-profit organizations to provide early learning opportunities, including but not limited to early literacy, early STEM (Science, Technology, Engineering, Math), speech and language, and early childhood development programs.

Health Insurance Portability and Accountability Act (HIPAA) and Family Educational Rights and Privacy Act (FERPA)

Leveraging and expanding data partnerships is a strategic priority for the Commission. Comprehensive knowledge of HIPAA and/or FERPA compliance, and extensive prior experience with developing and maintaining data partnerships, are essential to the establishment of successful interagency data-sharing relationships.

B. Evaluation (on-call)

For further information regarding the scope of work of an Evaluation consultant, please refer to Attachment 3.

Evaluation

All Commission programs are part of an integrated performance evaluation process that makes outcomes measurement part of the program operations. An expanded scope of work is included in Attachment 3.

C. Operational Support Services

Fiscal Leveraging

Fiscal leveraging is the process of using Proposition 10 funds to match other available funds including federal state or other grant funding sources. By leveraging its funding, the Commission can maximize the community's capacity to provide services most needed by young children and their families. Fiscal leveraging also improves organizations' overall fiscal stability, an important strategy for service provision during fluctuation economic conditions. Current fiscal leveraging strategies include Targeted Case Management and Medicaid Administrative Activities.

Contract Compliance & Audit

For further information regarding the scope of work of a Contract Compliance/Risk Management consultant, please refer to Attachment 4.

It is the policy of the Commission to ensure its organizational goals are achieved through a variety of Contract Management processes that provide programmatic oversight and support contractor organizational success. These activities may include but are not limited to financial review, reporting against scope of work, verification of invoicing and staffing, ensuring compliance with funding mandates, and compliance with industry regulations.

Strategic Communications

For further information regarding the scope of work of a Strategic Communications consultant, please refer to Attachment 5.

The consultant shall provide professional public and/or government outreach services to effectively communicate the Commission's mission, vision, goals and accomplishments.

Graphic Design

General graphic design services for the Commission including but not limited to design and production of the annual report summary, info-graphics, meeting notices, policy briefs, newsletters, and event invitations; graphic design and layout for reports and publications; and, design of educational materials and support.

Contract Development

Comprehensive knowledge and extensive prior experience in negotiating and developing human services contracts for public agencies. Comprehensive knowledge of applicable federal, state, county and Commission policies, laws and regulations related to program areas. Knowledge of human services programs or health care service delivery mechanisms, goals and community relationships. Knowledge of current issues regarding children and families of Orange County, including public health, childcare and early childhood development issues. Must have excellent written and oral communication skills.

Fund Development

Technical assistance will be aligned with pursuing national and federal funding opportunities for Commission priority service areas. Essential elements for this scope of work include identifying funding opportunities, working with local "networks" of service providers to develop collaborative case statements and grant proposals, and providing technical assistance to the Commission in structuring grant requests.

D. On-Call / Special Project Services

Individuals and/or firms with expertise in the same programmatic areas and strategic priorities listed above in Paragraph A for Project Management Consultants may be placed on a roster of On-Call Consultants for limited engagements to address specific project needs of the Commission. For further information regarding what may be included in the scope of work of an On-Call / Special Project Services consultant, please refer to Attachment 6.

PROJECT MANAGEMENT

SCOPE OF WORK

The following summary will serve as a guide to the skills sought in a Project Management consultant. The consultant's scope of work may include all or some of the following scope as related to the consultant's work plan included in their contract. Consultants submitting applications for project management should demonstrate their experience in each of the tasks below for which project management services are being offered.

1. Coordinate grantee development of contracts, work plans and budgets based on the priorities and conditions established by the Commission; communicate effectively with Project team and Commission staff.
2. Monitor grantee program performance and contract compliance in accordance with the policies and procedures established by the Commission to ensure effective program implementation and results.
3. Identify service gaps and barriers to Project success. Develop, and ensure implementation of, strategies to address identified barriers and gaps.
4. Assist in the design of responsive programs and initiatives including identification and design of screening/assessment tools, development of criteria for participation, and conducting review to identify applicable best and promising practices.
5. Assist in the documentation of best and promising practices; organize and conduct site tours as identified by Administrator.
6. Review and approve invoices submitted by grantees ensuring program performance and implementation.
7. Ensure that grantees are trained on the Commission's data collection approach and are utilizing the information technology to report as required by their contract.
8. Coordinate contract management activities with Commission staff and Audit and Monitoring Program consultant.
9. Assist the Commission's communications efforts by:
 - a. Providing resource services to develop key message content including attending, participating, and representing the Commission at meetings as determined by Administrator.
 - b. Providing presentations to Commission, Commission formal committees (such as Community Advisory Committee and Pediatric Health Services Committee), and community groups related to Project.
 - c. Assisting in the development of content and distribution of public communication materials.
 - d. Supporting the implementation of legislative advocacy, community partnership, and public awareness activities to protect local funding and decision making, create broad awareness of funded programs and services, and expand the base of financial support for critical programs.

10. Assist the Commission's efforts for leveraging/sustainability of Commission funded programs by:
 - a. Identifying funding sources to promote sustainability of Project.
 - b. Developing grant applications for funding in order to enhance Project and other Commission initiatives and services.
 - c. Conducting fund development activities such as convening meetings with potential partners in order to establish and strengthen linkages.
 - d. Providing training and technical assistance to improve business practices and grant applications.
 - e. Developing and/or managing fund development strategies that leverage public, private and non-profit funding sources.
 - f. When appropriate for project, facilitating and maximizing publically funded leveraging opportunities such as County-Based Medi-Cal Administrative Activities, Targeted Case Management, Early and Periodic Screening and Diagnosis and Treatment, Title IV-E, to improve accessibility, expansion and delivery of services for children 0-5.
11. Participate in Commission sponsored and/or approved planning activities to ensure integration of services, linkages among planning efforts, and referrals among Commission funded programs.
12. Facilitate meetings which may include community and public input and planning sessions. Meeting facilitation may include pre-meeting planning and agenda setting based on session goals, conducting the meeting, and post-meeting documentation.
13. Support the Commission's evaluation team by:
 - a. Coordinating efforts to assist in local, regional and State evaluation of Initiatives.
 - b. Researching best practices related to Project population and goals.
 - c. Investigating a variety of service models for the purpose of measuring project efficiency and effectiveness.

EVALUATION SCOPE OF WORK

Requirement to Evaluate Proposition 10 Funded Services

The Proposition 10 statute (Section 130150 of the California Health and Safety Code) requires each county commission to “conduct an audit of, and issue a written report on the implementation and performance of, their...functions during the preceding fiscal year, including, at a minimum, the manner in which funds were expended, the progress toward, and the achievement of, program goals and objectives, and the measurement of specific outcomes through appropriate reliable indicators.”

CFCOC Evaluation Framework

The CFCOC has adopted a comprehensive evaluation plan that includes both process and outcome measures that are measured in the short, intermediate, and long term. The Evaluation Framework includes both Commission-wide and Program-specific evaluations. In addition, the CFCOC participates in the development of community-wide data. The goal of the Commission-wide evaluation is to provide an overall picture of the CFCOC’s accomplishments and progress toward achievement of the CFCOC’s goals and objectives. All grantees participate in the Commission-wide evaluation.

The CFCOC also evaluates specific programs or initiatives to learn more detailed information about the operations and outcomes of these initiatives and to guide program design. Typically, these evaluations involve several agencies participating in a single initiative, such as the Bridges Maternal Child Health Network (ten birthing hospitals, the County of Orange Health Care Agency, and four non-profit Home Visiting providers), or School Readiness Nursing (25 elementary school districts).

The CFCOC also participates in the development of community-wide indicators, both to provide comparisons with Commission-wide data and to see whether any effects of the CFCOC can be discerned at the community level. Two reports with which the CFCOC assists are the Annual Report on the Conditions of Children in Orange County (http://occhildrenandfamilies.com/wp-content/uploads/2014/12/OC_CoCReport_2017-Final_1for-web.pdf) and the Orange County Community Indicators Report (http://occhildrenandfamilies.com/wp-content/uploads/2014/12/OCCIR_2017_web.pdf).

Data Collection for Commission-Wide Evaluation

The CFCOC has several contract data system vendors that serve as the Commission’s data collection and reporting system which assist CFCOC grantees in reporting on the quantity of services provided and the outcomes of those services. Process measures may be collected through several mechanisms in the data systems, including:

- **Aggregate Data** – basic counts of how many children, families, and providers receive services funded by the CFCOC and how many services are provided to individuals by CFCOC-funded program

Grantee Milestones – more specific information about the accomplishments of individual grantees, which can be tabulated across grantees to provide more detail about the services provided by CFCOC-funded programs (e.g., how many children received assistance with health insurance enrollment).

Outcome measures are collected on individual clients through two mechanisms:

- Core Data Elements – a questionnaire covering the major goals and outcomes in the CFCOC’s Strategic Plan. All clients receiving CFCOC-funded services are asked to complete this questionnaire when they begin to receive services and at the end of services.
- Service Outcome Questions – a series of questions that are directly linked to the objectives in the CFCOC’s Strategic Plan. These questions are asked about a client when service to the client ends to assess whether the client’s condition changed as a result of the CFCOC-funded service.

Community-wide data may also be developed, managed and reported from other appropriate and reliable indicators such as the Early Development Index that are not directly reported into the Commission’s Data Collection and Reporting System.

Anticipated Scope of Work for On-Call Evaluators

Evaluators selected through this RFQ may be asked to perform one or more of the following types of services:

1. Assist with analyzing Commission data and assist in preparing reports for the Commission – there are almost 200,000 individual client records in the Commission’s Data Collection and Reporting System, collected since November 2001. Reports prepared for the Commission in the past include year-to-year comparisons of the Core Data Elements, a report on Service Outcomes, and comparisons of Commission data with county-wide data (Conditions of Children Report and Orange County Health Needs Assessment). Respondents should note that an archive of Commission client-level data from November 2001 is being prepared to facilitate future data analysis and may be used to assess the long-term effectiveness of Commission-funded programs.
2. Contribute to the ongoing review and design of Commission evaluation data collection requirements – the CFCOC is committed to collecting only necessary, usable and useful data while minimizing the amount of time and resources grantees must devote to data collection. Consequently, the Commission Evaluation Team conducts an annual review of the data collection requirements to determine whether the burden to grantees can be reduced.
3. Conduct and report on program evaluations – design, carry out, and report on evaluations of CFCOC initiatives and programs such as Capacity Building and Catalytic Grants. Program evaluations should utilize Commission data to the extent possible, while providing a more in-depth examination into the operations and outcomes of the program. Program evaluations may include both quantitative and qualitative evaluation

4. components. Examples of past program evaluations include: Evaluation of the Capacity Building program, Evaluation of the Bridges Maternal Child Health Network, Evaluation of the School Readiness Nurse Expansion Initiative.
5. Serve in an advisory capacity to the Commission on its overall evaluation design and on individual program evaluations. Review and advise on program evaluation proposals.
6. Serve as a project manager to implement evaluation requirements of grant funded (external or Commission) collaborative community projects or projects implemented across California counties.
7. Collect and compile Commission-wide data that are not currently collected in the Commission's Data Collection and Reporting System. For example, the CFCOC may seek to compile data on client knowledge and opinions about the services funded by the CFCOC. This may be carried out through a survey of clients or by other means to be determined.
8. Develop, compile, and/or utilize county-wide data (e.g., Early Development Index, Bridges Maternal Child Network) or prepare countywide assessments (i.e., Community Indicators Report) to provide an overview of the present and emerging needs of children and their families. Additional baseline information could assist in further setting the Commission's data and other evaluation data in perspective in terms of understanding the impact of CFCOC investments.
9. Provide technical assistance on performance measurement and evaluation requirements to Commission collaborative grant-funded programs.

Statement of Qualifications and Experience

- a) Provide a description of the Evaluator (individual or company) that includes your primary purpose and function, philosophy, size (number of employees), location of office(s), number of years in business, and general description of your experience as an Evaluator. Provide a brief statement of your/your organization's philosophy about evaluation as it relates to the CFCOC vision, mission, and funded services.
- b) For at least one Anticipated Scope of Work area, describe an approach that could be used to carry out the scope of work. The approach should demonstrate the Evaluator's philosophy and abilities to evaluate CFCOC-funded services. Describe the Evaluator's experience in performing work of a nature similar to that solicited in this RFQ. The respondent is encouraged to directly relate their experience with the items in the Anticipated Scope of Work for which they would expect to provide services. Describe at key projects for which sample reports can be provided in each of the areas selected. Include a description of the purpose of the evaluation, how the project was developed and implemented, challenges, experience with obtaining Institutional Review Board approval (if needed), and how the report was used, if known.

CONTRACT COMPLIANCE & AUDIT

SCOPE OF WORK

The following summary will serve as a guide to the skills sought in Contract Compliance consultants. The consultants will provide performance audit, risk assessment reports and financial review and audits to the Commission on select Commission funded programs. This may require review of agencies' financial documents, data on program participants, agencies' policies and procedures, and familiarity and adherence to industry standards (e.g., requirements for licensing, program administration and operations, child abuse reporting, funding restrictions, etc.)

These scopes of work requires the ability to travel throughout the county to conduct on-site visits to programs and document review. Difference consultants may perform each respective scopes of work. Scopes of work activities may include:

1. Performance Audit

- Verification of contractor data reported in Commission's on-line reporting systems, specific to the scope of work and milestone reporting required by contractor's Commission funded agreement
- Verification of compliance with funding mandates of the Children and Families Act of 1998, Health and Safety Code Section 130100, et seq. (i.e., no supplanting, serving the age 0-5 population, and to serve Orange County residents)
- Verification of submissions of required authorizations and/or consent forms for data collection or services
- Verification of services provided under service payback agreements

2 Risk Management

- Verification of submissions of required authorizations and/or consent forms for data collection and/or services
- Verification of compliance with all federal, state, county and local laws, regulations and ordinances including, but are not limited to, personnel background checks, licensing requirements, mandated trainings and certifications

3. Financial Review and Audits

- Verification of invoicing compliance
- Review of prior agency audits & 990 reports
- Verifying fund leveraging and budgeting amounts

- Conduct fee-for-service reviews
- Verification of credit earned for service payback agreements
- Assessing internal financial controls

STRATEGIC COMMUNICATIONS

SCOPE OF WORK

The following summary will serve as a guide to the skills sought in a Strategic Communications consultant. The consultant shall provide professional public and/or government outreach services to effectively communicate the Commission's mission, vision, goals and accomplishments. The scope of work may include:

1. Develop annual outreach and briefing plans for elected officials at the state and county level.
2. Develop responses to Assembly and Senate bills or other legislative actions that may have a potential impact to Proposition 10.
3. Schedule site visits to Commission funded programs.
4. Develop and/or implement strategies to support community partnerships that create a broad awareness among Orange County's leaders for the programs and services funded with local Proposition 10 revenues.
5. Pursue corporate sponsorships to support strategic communications strategies.
6. Develop an annual public awareness plan to succinctly communicate the Commission's activities, obligations, and achievements.
7. Assist in the development of key messaging to describe the Commission and its purpose, as well as specific program messages.
8. Identify appropriate methodologies for the distribution of key messages to the public.
9. Develop strategies to broaden the base of support for critical programs through additional direct funding support, individual donations and in-kind corporate support.
10. Assist in the organization of Commission events, giving particular attention to events where community leaders and elected officials will be present.
11. Attend Commission meetings, provide strategic advice on communication issues, and provide overall strategic communications support and management.
12. Develop community education campaigns on critical issues to improve outcomes for young children.
13. Expand communications tools to reach grantees, key stakeholders and Orange County residents through a variety of outlets.
14. Provide strategic communications support to grantees to sustain and expand funding sources.
15. Manage the Commission website and social media sites.
16. Develop press releases, editorial letters, public briefings, and op-eds on specific policy areas for submission to media outlets and posting to the website.

17. Develop marketing and media materials such as brochures, annual and quarterly reports, e-newsletters, magazine articles, public service announcements and content for the website and social media venues.
18. Project development support including program research and concept development; copy writing and editing of educational materials; program content review; coordination of peer reviews; development of distribution and marketing plans.
19. Project oversight, writing, reviewing and quality control of public information materials.
20. Prepare written status reports on strategic communications activities.

ON-CALL / SPECIAL PROJECT SERVICES
SCOPE OF WORK

The scope of work for on-call consultants will vary by project and shall be subject to negotiation between Commission and consultant prior to engagement of services. In the past, the Commission has employed consultants to do one or more of the following:

1. Develop feasibility reports
2. Facilitation of meetings and planning processes
3. Assist in new program development, including research about specific program areas and how such programs may be implemented in Orange County
4. Design fund development strategies
5. Grant writing support
6. Other as needed planning services, analyses, and/or specific program reviews
7. Health systems planning and maximizing third-party billing such as Medi-Cal and private insurance
8. Training on evidence based practices and curricula

Checklist for Consultant Applications

Applicant Name:					
Type of Entity (check one):	<input type="checkbox"/> Individual	<input type="checkbox"/> Corporation	<input type="checkbox"/> LLC <input type="checkbox"/> Partnership		
Address:	Contact Name:				
	Contact Phone:				
	Contact Fax:				
	Contact Email:				
<u>New Applicants</u>					
<ul style="list-style-type: none"> • Indicate the type of consulting services being offered by checking Project Management, Evaluation, Operational Support Services, or On-Call / Special Project Services (may select more than one). • For each type of consulting services, check the box for the subject matter areas for which such services are being offered (may select more than one). Qualifications submitted must demonstrate experience relevant to each subject matter areas selected below. • See Attachment 1 for descriptions of the subject matter area listed below. 					
<input type="checkbox"/> A. Project Management <ul style="list-style-type: none"> <input type="checkbox"/> Pediatric Health Services <input type="checkbox"/> Oral Health <input type="checkbox"/> Developmental Screening <input type="checkbox"/> Children's Mental Health <input type="checkbox"/> Bridges Maternal Child Health Network <input type="checkbox"/> Community Health Services <input type="checkbox"/> School Readiness Nursing <input type="checkbox"/> Homeless Prevention <input type="checkbox"/> Early Learning <input type="checkbox"/> HIPPA <input type="checkbox"/> FERPA 					
<input type="checkbox"/> B. Evaluation (on-call) <table border="0" style="width: 100%;"> <tr> <td style="vertical-align: top;"> <ul style="list-style-type: none"> <input type="checkbox"/> Assist with analyzing Commission data and preparing reports <input type="checkbox"/> Contribute to the ongoing review and design of Commission evaluation data collection <input type="checkbox"/> Conduct and report on program evaluations <input type="checkbox"/> Serve in an evaluation advisory capacity <input type="checkbox"/> Serve as a project manager to implement evaluation requirements </td> <td style="vertical-align: top;"> <ul style="list-style-type: none"> <input type="checkbox"/> Collect and compile Commission-wide data <input type="checkbox"/> Develop, compile, and/or utilize county-wide data <input type="checkbox"/> Provide technical assistance on performance measurement and evaluation requirements </td> </tr> </table>				<ul style="list-style-type: none"> <input type="checkbox"/> Assist with analyzing Commission data and preparing reports <input type="checkbox"/> Contribute to the ongoing review and design of Commission evaluation data collection <input type="checkbox"/> Conduct and report on program evaluations <input type="checkbox"/> Serve in an evaluation advisory capacity <input type="checkbox"/> Serve as a project manager to implement evaluation requirements 	<ul style="list-style-type: none"> <input type="checkbox"/> Collect and compile Commission-wide data <input type="checkbox"/> Develop, compile, and/or utilize county-wide data <input type="checkbox"/> Provide technical assistance on performance measurement and evaluation requirements
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- C. Operational Support Services**
 - Fiscal Leveraging
 - Contract Compliance & Audit
 - Performance Audit
 - Risk Management
 - Financial Review/Audits
 - Strategic Communications
 - Graphic Design
 - Contract Development
 - Fund Development

- D. On-Call / Special Project Services**
 - Pediatric Health Services
 - Oral Health
 - Developmental Screening
 - Children's Mental Health
 - Bridges Maternal Child Health Network
 - Community Health Services
 - School Readiness Nursing
 - Homeless Prevention
 - Early Learning
 - HIPPA
 - FERPA

Returning Applicants

- I have reviewed this updated RFQ and wish to update my prior submission. The following update(s) are attached to this Checklist:
 - Checklist (subject matter expertise)
 - Qualifications
 - Expanded references
 - Hourly rate