



FIRST 5
ORANGE COUNTY
CHILDREN & FAMILIES COMMISSION

**REQUEST FOR
QUALIFICATIONS FOR
CONSULTANT SERVICES**

MARCH 18, 2019

<p>SUMMARY</p>	<p>First 5 Orange County, Children and Families Commission, is seeking qualified individuals and/or firms with demonstrated leadership and experience in various subject matters to provide specialized technical expertise for implementation of programs.</p>
<p>SUBJECT MATTER EXPERTISE</p>	<ul style="list-style-type: none"> • Comprehensive Health and Development • Quality Early Learning • Resilient Families • Early Childhood Systems Performance Assessment • Project Management • Community Engagement Support • Evaluation • Strategic Communication • Contract Compliance and Audit • Fund Development
<p>KEY DATES</p>	<ul style="list-style-type: none"> • Request for Qualifications (RFQ) and instructions for submittal will be available on First 5 Orange County’s website – March 18, 2019 • Final date to submit questions on the RFQ – March 29, 2019 by 3:00 pm • Responses to RFQ questions posted on First 5 Orange County’s website – April 8, 2019 • Due date for submission of applications – April 19, 2019 by 3:00 pm • Anticipated approval by First 5 Orange County of list of qualified consultants – June 5, 2019
<p>QUESTIONS</p>	<p>ALL QUESTIONS AND REQUESTS FOR ADDITIONAL INFORMATION REGARDING THIS RFQ MUST BE RECEIVED VIA EMAIL TO PROP10@OCGOV.COM NO LATER THAN FRIDAY, MARCH 29, 2019, 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 First 5 Orange County’s website on Monday, April 8, 2019.</p>
<p>INSTRUCTIONS</p>	<p>The Request for Qualifications and instructions for submittal will be available on the First 5 Orange County’s website www.occhildrenandfamilies.com</p>
<p>SUBMITTAL OF APPLICATIONS</p>	<p>All SUBMITTALS MUST BE RECEIVED BY <u>APRIL 19, 2019, AT 3:00 PM</u></p> <ul style="list-style-type: none"> • Submissions will only be accepted via email to: Prop10@ocgov.com • Submittals must include: 1) Checklist for Consultant Applications, 2) Cover Letter, 3) Qualifications, and 4) Expanded reference. • See Section III, page 5 for further information. • The First 5 Orange County reserves the right to reject any or all applications submitted.

FIRST 5 ORANGE COUNTY, CHILDREN AND FAMILIES COMMISSION
REQUEST FOR QUALIFICATIONS (RFQ)
FOR CONSULTANT SERVICES

I. GENERAL INFORMATION

A. Description of First 5 Orange County, Children and Families 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.

First 5 Orange County, Children and Families Commission (hereinafter referred to as “First 5 Orange County”), is a publicly-funded organization that is responsible for allocating public funds to support the advancement and sustainability of a countywide early childhood development system. First 5 Orange County’s core business is to invest in systems of care and innovation to improve outcomes for children in Orange County by ensuring the proper, effective, and efficient use of public funds in these areas and to utilize subject matter experts to identify and implement strategies in early childhood health, education, and development programs.

For more information regarding First 5 Orange County’s Strategic Plan, please refer to the following link on First 5 Orange County’s website:

- Strategic Plan

<http://occhildrenandfamilies.com/about-us/publications/>

B. Consultant Scope of Work

First 5 Orange County employs an organizational structure that uses resources efficiently and maximizes performance. It is led by a small staff of experienced and dedicated personnel. First 5 Orange County contracts with consultants who are subject-matter experts to provide technical expertise in the implementation of specific programs. First 5 Orange County strives to be flexible and responsive to issues and challenges as they arise and change overtime.

First 5 Orange County is seeking qualified individuals and/or firms (hereinafter referred to as “Applicants”) in the subject matter areas as defined herein. Applicants are encouraged to submit qualifications for each category of services that they are interested in providing. Applicants may submit qualifications for more than one category of service, but the application should clearly identify the subject matter areas for which the Applicant is submitting qualifications.

Applicants who are awarded a contract may be requested to provide planning, project review, and/or development recommendations regarding projects in a certain program area. The specific consultant scope of work will be determined at the time of the identified project need.

C. Selection Process

First 5 Orange County anticipates establishing a current roster of qualified applicants. 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. First 5 Orange County is not obligated to contract with any or all of the qualified applicants. First 5 Orange County expressly reserves the right to amend or add to the roster of qualified individuals to best meet the needs of First 5 Orange County. It is anticipated that the roster established through RFQ process will be used until a subsequent RFQ is completed.

II. SUBJECT MATTER EXPERTISE

First 5 Orange County partners with many influential organizations to improve the ability of the early childhood system to function well. This work to improve system functioning is often referred to as “systems change,” and it is a strategic priority for First 5 Orange County as a key means of maximizing the impact of our investments.

First 5 Orange County’s new strategic direction will focus on funding three main goal areas. They are 1) Comprehensive Health and Development, 2) Quality Early Learning and 3) Resilient Families. Subject matter experts who possess unique fields and skill sets will work on specific projects within each goal area. The relevant subject matter expertise needed for the specific projects are set forth herein.

A. Comprehensive Health and Development

First 5 Orange County’s goal is to promote the overall physical, social, emotional, and intellectual health of young children. Specific expertise needed includes:

- Innovative models for Medi-Cal reimbursement for maternal and child health services
- Ensuring compliance with Health Insurance Portability and Accountability Act and the Family Educational Rights and Privacy Act within interagency data-sharing relationships
- Promoting access to pediatric oral health care
- Developmental screening and early intervention
- Infant and early childhood mental health
- Prenatal to three (PN3) health strategies (e.g., home visitation, dyadic care)

B. Quality Early Learning

This goal is to ensure children in Orange County have access to quality early learning experiences and environments. Expertise needed in these areas include:

- Infant and Toddler Facility expansion
- Kindergarten Readiness Assessment (Early Development Index (EDI))
- Quality Rating Improvement System (QRIS)
- Landscape Analysis specific to Infant and Toddler system

C. Resilient Families

To create resilient families, it is important to cultivate parenting skills, promote economic stability, and enhance access to services. Expertise in this area includes:

- Maternal, infant and early childhood mental health
- Homeless Families, Shelter Services, and Homeless Management Information Systems
- Family resources centers
- Family Support Benefits systems such as (CalWORKs, Women Infant, and Children (WIC), Cal Fresh)

D. Early Childhood Systems Performance Assessment

First 5 Orange County's goal is to work with various sectors that are involved with early childhood (for example: health care, education, Family Resource Centers) to implement an assessment for the system. First 5 Orange County seeks expertise to accomplish this goal because it is vital to improving systems and making systems change. Specific expertise needed includes:

- Implementation of a systems assessment, which may include, but is not limited to, implementing an Early Childhood System Performance Assessment Toolkit which examines factors related availability and access, coordination of services, and responsiveness to parent needs and concerns
- Data gap analysis and identification of potential improvements systems
- Facilitating systems building collaborative among sector partners

E. Project Management

Project management services are needed in each of the subject matters described in this RFQ. Experience with managing complex, multi-party (e.g., state-funded initiatives) human services projects, and working with community-based organizations, is essential.

F. Community Engagement Support

A community engagement strategy can leverage First 5 Orange County's funded initiatives and position First 5 Orange County in a leadership role on critical issues related to young children in the County. Specific expertise in community outreach and engagement includes:

- Convening key stakeholders
- Facilitation of stakeholder collaboratives
- Non-profit and philanthropic strategies
- Parent Outreach

G. Evaluation

First 5 Orange County will be focused on improving early childhood systems throughout County. Expertise needed in building a new evaluation frameworks includes:

- Systems assessments
- Population trends
- Impact evaluations,
- Leverage existing data investments (e.g., Early Developmental Index)

H. Strategic Communications

The communications strategy is a combination of traditional public relations, legislative outreach, and graphic design. The team of strategic communications consultants will provide resources, expertise, and strategies to reach specific target audiences. The communications strategies will promote First 5 Orange County as a trusted source for data and expertise in early childhood development, a champion for children's issues, a convener of thought leaders, and a resource for local and state policy development.

Public Relations

Develop and implement an annual communications plan that includes, but is not limited to, managing the website and social media, developing the Annual Report Summary, writing success stories, policy/program briefs, and articles for publication in print media. Providing strategic counsel as it relates to public relations and communications.

Legislative Outreach

Provide legislative expertise and support on legislative issues. Coordinate and prepare for briefings with federal, state and local elected officials, and plan and support the annual First 5 Advocacy day in Sacramento. Write regular updates to be presented to the First 5 Orange County Board members. Provide strategic counsel as it relates to legislation and legislative issues. **The duties do not require lobbying, and the selected firm will not be a registered lobbyist for First 5 Orange County.**

Graphic Design

Provide graphic design services for the Annual Report Summary and other projects as needed. Projects may include but will not be limited to flyers, meeting notices, event invitations, reports, brochures, newsletters, presentation materials, photography. The selected firm will also provide printing and production as needed.

I. Contract Compliance & Audit

It is the policy of First 5 Orange County to ensure its organizational goals are achieved through a variety of contract compliance and programmatic reviews to support contractor organizational success. Specific expertise needed includes:

- Contract performance and compliance audit
- Fiscal audits
- Assessing internal controls
- Conduct fee-for-service and service payback reviews

J. Fund Development

Fund development includes pursuing foundation, state and federal funding opportunities for First 5 Orange County priority service areas. Elements for this scope of work include identifying funding opportunities, working with local “networks” of service providers to develop responsive proposals, and providing technical assistance to First 5 Orange County in structuring and writing successful grant requests.

III. SUBMISSION INSTRUCTIONS

A. Submission 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.
- First 5 Orange County 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 First 5 Orange County at: (714) 834-5310.

B. Contents of Submission

All Applicants should submit only one (1) response to this RFQ. If you are interested in applying for more than one subject matter expertise, your application must clearly identify the subject matter areas.

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

- 1. Checklist for Consultant Applications (Attachment 1)** – provide Applicant contact information and identify the subject matter areas being offered.

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 First 5 Orange County’s general requirements as described in Section IV below. For example, if your current insurance coverage does not meet First 5 Orange County’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 submission.
 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 1.
 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 start and end dates)
 - f. Compensation history, which will be used to justify the requested hourly rate/compensation rate.
- C. First 5 Orange County 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 First 5 Orange County and qualified individuals.
- D. During the review process, First 5 Orange County reserves the right, where it may serve First 5 Orange County’s best interest, to request additional information or clarification from individuals, or to allow correction of errors or omissions.

IV. GENERAL REQUIREMENTS

- A. **Contract** - First 5 Orange County 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 First 5 Orange County 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 First 5 Orange County. However, in either case, First 5 Orange County 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 express prior written permission of First 5 Orange County, 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 First 5 Orange County will be posted on First 5 Orange County'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 First 5 Orange County 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 First 5 Orange County.

- 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 First 5 Orange County in connection with the award or terms of any contract 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 First 5 Orange County will receive compensation, directly or indirectly, from Applicant, or from any officer, employee or agent of the firm, in connection with the award of any contract or any work to be conducted as a result of an ensuing contract. A violation of this provision shall be a material breach of any contract entered into, entitling First 5 Orange County to any and all remedies at law or in equity.

- H. **Submittal Preparation Expenses** –First 5 Orange County 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 a resulting contract.

- I. **Insurance Requirements** –The insurance requirements for standard First 5 Orange County 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 First 5 Orange County. 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 First 5 Orange County-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 First 5 Orange County in a particular area of expertise. First 5 Orange County 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.

K. Cancellation of RFQ – First 5 Orange County may cancel this RFQ at any time.

L. Compliance with Laws - All Applications submitted in response to this RFQ shall comply with current federal, state, and other applicable laws related thereto.

M. Severability - If any provisions or portion of any provision of this RFQ are held invalid, illegal or unenforceable, they shall be severed from the RFQ and the remaining provisions shall be valid and enforceable.

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 Email:		
<u>Applicants</u>			
<p>Indicate the type of consulting services being offered by checking subject matter area(s) below. Applicants must demonstrate experience relevant to each subject matter area.</p> <p>A. __ Comprehensive Health and Development</p> <p>B. __ Quality Early Learning</p> <p>C. __ Resilient Families</p> <p>D. __ Early Childhood Systems Performance Assessment</p> <p>E. __ Project Management</p> <p>F. __ Community Engagement Support</p> <p>G. __ Evaluation</p> <p>H. __ Strategic Communications</p> <p>I. __ Contract Compliance and Audit</p> <p>J. __ Fund Development</p>			