



REQUEST FOR PROPOSALS (RFP)

Strategic Planning Consultant

RFP #2526-02

PROPOSALS DUE: January 13, 2025, 5:00pm PST

Our Vision

Children in Sonoma County from the prenatal stage to age five will develop to their fullest potential.

Our Mission

The mission of First 5 Sonoma County is to maximize the healthy development of all Sonoma County children from the prenatal stage through age five through support, education, and advocacy.

PROPOSAL SUBMISSION TIMELINE

RFP #2425-02

*All dates are subject to change at First 5 Sonoma County's discretion. Notice of any date changes will be posted on the [First 5 Sonoma County website](#).

Date/Time	Event	Virtual Location
Friday December 6, 2024	Request for Proposals (RFP) RELEASED	https://first5sonomacounty.org/funding-opportunities/
Monday December 16, 2024 3:00 pm	DEADLINE to submit questions regarding the RFP	Submit questions regarding RFP to funding@first5sonomacounty.org
Wednesday December 18, 2024 3:00 pm	Answers to Questions regarding the RFP Posted on the First 5 Sonoma website	https://first5sonomacounty.org/funding-opportunities/
Friday December 20, 2024 5:00 pm	DEADLINE to submit Letter of Intent (LOI) (electronic submission ONLY)	Proposer must create an account in FOUNDANT (grants management system) and submit LOI via FOUNDANT.
Monday January 13, 2025 5:00pm	DEADLINE to submit Proposals (electronic submission ONLY)	Upon receipt of LOI, applicants will be invited to apply through FOUNDANT
Thursday, January 23, 2025 5:00pm	Proposers notified of the Proposal Review Recommendations	Proposers will be notified via email
Monday January 27, 2025 3:30pm	Recommendation to the First 5 Sonoma County Commission to Approve Contract	N/A
Monday February 3, 2025	Consulting Services Begin	N/A

I. INTRODUCTION

NOTE: Proposers are strongly encouraged to review linked documents in this RFP for additional background information and context.

The First 5 Sonoma County Commission solicits proposals from qualified consultants interested in providing professional consulting services over a 10-month period to design, lead and facilitate key strategic planning activities, culminating in a 5-year strategic plan and community funding allocations that will begin July 1, 2026.

Strategic planning activities will include facilitation of two advisory committees:

- Measure I Community Advisory Council (newly formed 11-member committee, to be appointed by the Sonoma County Board of Supervisors by mid-February 2025);
- First 5 Strategic Planning Committee (composed of First 5 Commissioners, agency leadership and community partners).

The roles of these two committees will include reviewing quantitative and qualitative community data; participation in listening sessions with key stakeholders; and, prioritization of goals and strategies in alignment with [Measure I](#), [Prop. 10](#) and First 5 Sonoma’s [Working Framework to Advance Diversity, Equity, Belonging & Anti-Racism](#) (DEBAR). The comprehensive assessment of community needs through available data and community engagement to inform strategic goals and priorities is already underway, led by First 5 staff working with a consultant with expertise in community engagement.

The strategic planning consultant will also partner with First 5 Sonoma senior staff to craft, refine and finalize the following three deliverables:

1. 2026-2031 First 5 Sonoma County Strategic Plan
2. “At a glance” 1-2 page summary of the Plan
3. Funding allocations for each strategic goal area

The strategic plan and recommended allocations for funding will be presented by senior First 5 staff at a public hearing as part of the September 22, 2025 Commission meeting, and then approved by the First 5 Sonoma County Commission at the next monthly Commission meeting on October 27, 2025.

II. BACKGROUND

The First 5 Sonoma County Commission is an independent public entity created in 1998 by voter approval of [California Proposition 10](#), tobacco tax revenue dedicated to strengthening systems and funding programs and services that support the optimal early development of children, from birth to five years of age. Over the past 25 years, First 5 Sonoma County has stewarded over \$120 million in Prop. 10 tobacco tax funding in the community, investing in early childhood programs, services and systems countywide. Over time, as tobacco tax revenues have declined, other funding streams have been increasingly leveraged and braided to sustain investments.

In November 2024, Measure I (the [Sonoma County Child Care & Children’s Health Initiative](#)), a countywide sales tax, was approved by Sonoma County voters to establish a dedicated revenue source to increase access to child care and early learning opportunities through an array of system level and program investments, as well as a broad variety of supports for children’s health and mental health. Closely aligned with the goals and intent of Prop. 10, Measure I will be administered by First 5 Sonoma County and is estimated to raise \$30 million annually. As per voter intent, the Commission’s administration of both public funding streams will now be guided by a single, integrated community-informed strategic planning process on a 5-year cycle. The upcoming strategic planning cycle will be the first to incorporate both major funding streams.

In 2022, the First 5 Sonoma County Commission adopted a [Working Framework to Advance Diversity, Equity, Belonging & Anti-Racism](#) (DEBAR), an effort that emerged out of the current [2020-2025 Strategic Plan](#). The DEBAR Framework was developed by staff, Commissioners and key stakeholders working closely with consultants based on an internal assessment and analysis of First 5 Sonoma’s internal operations and roles in the community and the degree to which racial equity was a central driver. The DEBAR Framework continues to serve as a toolkit and guide to evolving and establishing an anti-racist culture and implementing equity-focused strategies for grantmaking, internal operations, governance, as well as community engagement.

As a strategy to advance DEBAR, the Commission has adopted [targeted universalism](#) (TU), an approach that prioritizes goals and designs strategies around the needs of specific groups of children and families, while aiming for a universal goal with the overall assumption that children and families are part of the same social fabric. Targeted universalism emphasizes an awareness of how some people are differently situated and targets supports to those who are most marginalized. As the next step in [First 5 Sonoma County’s journey](#) as an anti-racist organization, it is the Commission’s intention that the

strategic planning process and prioritized strategies result in embedding and integrating the Working Framework to Advance DEBAR into the plan itself.

The needs assessment phase of strategic planning, already underway, will inform and deepen the contextual understanding of First 5 Commissioners, staff and community partners of the barriers, gaps, impact, relevance, responsiveness and value of Sonoma County services, programs and systems intended to serve children from birth through five years of age, their parents, caregivers and birthing people. The Commission’s intention is that prioritized strategies reflect the lived experience, ideas, needs and solutions of the families, children and providers that are most impacted by inequitable systems of care, including, but not limited to healthcare, safety net services, childcare, public education, public health, behavioral health and housing.

For additional background, please see the [First 5 Sonoma County Strategic Planning Roadmap](#), which provides a high-level summary of First 5 Sonoma County’s foundational principles, roles in the community, key planning deadlines and other relevant information.

III. TERM & FUNDING

Term: The term of this contract is ten months: February 1, 2025 – December 1, 2025.

Entire Contract Amount: Up to \$150,000, inclusive of personnel, materials, printing, travel, participant incentives and indirect costs, has been allocated for this project. Any amendments will be determined by available funds and the needs of this project at the sole discretion of First 5 Sonoma County Commission. Costs should be reasonable and well justified.

VI. SCOPE OF SERVICES

Strategic Planning Services and Deliverables:

A. Co-create the Strategic Planning process:

1. Act as a thought partner to First 5 Sonoma County senior staff around how to promote systems change, integration, and coordination of child- and community-focused systems of care;
2. Meet w/First 5 senior staff to review and refine
 - a) the planning timeline
 - b) plans to integrate community engagement into planning processes
 - c) key planning questions and decision points

d) reports and data on child well-being and disparities

B. Facilitate planning meetings/retreats with Measure I Community Advisory Council and First 5 Strategic Planning Committee:

1. Develop agendas that support genuine and meaningful participation, engagement, consensus-building and decision-making around funding priorities.
2. Develop planning documents, interactive activities, communications, PowerPoint presentations and other meeting materials that will help move through discussions and major decision points.
3. De-brief meetings and progress with staff to plan next steps.
4. Coordinate with staff and/or Community Engagement Consultants to integrate listening sessions into Measure I Community Advisory Council convenings.
5. Coordinate with First 5 leadership staff to integrate staff presentations into committee convenings.
6. Synthesize community engagement information from focus groups and listening sessions for group discussion and seek ongoing opportunities for incorporating and elevating community voice into the process to ensure it is centered in decision-making processes.
7. In collaboration with First 5 staff, incorporate review and discussion of community and population level data to help guide decision-making.
8. Ensure that a focus on promoting racial equity and eliminating disparities within social services, health and ECE systems is central to discussions.
9. Use facilitation techniques that support consensus building, open discussion, surfacing and managing real or perceived conflicts of interest, and conflict resolution.
10. Skillfully utilize hybrid and virtual technology for meetings and retreats to effectively balance in-person and virtual meetings to maximize engagement.
11. Document and summarize feedback and outcomes from meetings and retreats.

C. In collaboration with First 5 staff, draft, refine and finalize the following three documents for presentation to the First 5 Sonoma County Commission:

1. 2026-2031 First 5 Sonoma County Strategic Plan

2. “At a glance” 1-2 page summary of the Plan
3. Funding allocations for each major strategic goal area

D. At a minimum, the resulting strategic plan will:

1. Chart a clear future pathway that defines First 5 Sonoma County’s goals, priorities, areas of investments, role, and core functions;
2. Articulate strategic priorities aligned with Prop. 10 and Measure I that are likely to have an impact on reducing disparities in outcomes for children 0-5 and their families.

VII. PROPOSAL REQUIREMENTS

A. Format

Proposers will submit a Letter of Intent, complete narrative sections, and required attachments through a web-based system, Foundant (see Timeline). Elements of the proposal are 1) a narrative responses entered directly into the Foundant system; and, 2) required uploads of PDF and Excel attachments.

B. Narrative

(To be submitted directly in Foundant. Character limits apply to each section.)

NOTE: Proposers should address each item below in the appropriate narrative sections. The narrative section responses may be developed in Word or another application and then cut and pasted into the Foundant system prior to submittal. However, character limits in Foundant may differ from document character counts in other applications, which may require the proposer to edit the narrative in Foundant to ensure submittal. It is strongly recommended that applicants enter the narrative into the Foundant system sufficiently in advance of the proposal deadline to allow time for editing directly in the system, or enter the information directly into the system. The system will save progress every 30 seconds, and allows the applicant to close and return at another time to complete the application.

1. Provide a brief summary of the proposal. *(5,000 character limit)*
2. Describe the size of the consulting firm/agency, areas of focus, general philosophy and experience conducting strategic planning for community funders in the early childhood, youth and/or family support space. *(5,000 character limit)*

3. Describe the consultant’s specific approach to multi-year strategic planning for community investments and applying equity-focused methodologies. *(5,000 character limit)*
4. Provide a detailed description of how the proposed project will be planned, designed and implemented. *(18,000 character limit)*
 - a) How consultant proposes to communicate, collaborate and engage with First 5 project lead(s);
 - b) Proposed strategies for building trust with planning committee members, developing community agreements, achieving consensus around recommended goals and strategies and addressing potential conflicts of interests;
 - c) Proposed strategies for supporting and facilitating committee members to review, analyze and synthesize a broad array of relevant data, both quantitative and qualitative, and findings from the community engagement process (currently underway), and direct engagement through listening sessions, including:
 - i. Identified geographic and other systemic gaps in community services for children, 0-5, and their parents and caregivers;
 - ii. dimensions of the current local landscape of systems, services and programs are meeting specific early childhood development and parental needs especially for underserved and/or hard to reach populations;
 - iii. contextual, socio-cultural and environmental factors impacting the well-being of children and families in Sonoma County.
 - d) Describe how the time and effort from non-professional committee members will be compensated and considered.
 - e) Proposed strategies for elevating the recommendations of First 5 Sonoma County staff;
 - f) Proposed strategies for leveraging the expertise and similar but separate roles of the two committees to ensure collective agreement and complementary alignment;

5. Provide at least two detailed examples of how the consultant/consulting firm has designed and facilitated inclusive planning processes that meaningfully engage stakeholders at various levels. *(8,000 character limit)*

C. Proposed Work Plan

(Upload as a PDF - 10 page maximum, 1" margins)

Provide a detailed plan in table format that includes a realistic ten-month project timeline for completion of all work. Describe the project in the following phases and include specific timeframe, deliverables, tools, logistics, strategies, timelines, roles, and responsibilities for each phase. Please note required elements for each phase;

Phase 1: Project Discovery & Finalization of Planning Process/Timeline

Required elements:

1. Review findings of needs assessment phase: focus group data, trend and indicator data about Sonoma County families, child development, child and maternal health and mental health, school readiness, family economic stability and mobility, availability and access to child care and early childhood services, social determinants of health and well-being, etc.
2. Review relevant mandates related to First 5 Sonoma County’s investments, stakeholder and advisory input, and other key guidance as per Measure I and Prop. 10.
3. Review information about First 5 Sonoma’s currently funded strategies, programs, initiatives and services, program outcomes and populations served, as well as key stakeholders and partnerships.
4. Work with staff to identify resources and establish communication flows for planning activities (meeting space, calendaring and timelining, etc.)
5. Creation of agendas, communication flowcharts, project tracking and other planning tools.
6. Determination of high-level meeting goals, sequence, timing and location of committee meetings.
7. Clear definition of all roles and responsibilities.

Phase 2: Implementation of Planning Processes

Required elements:

1. Define methodology and strategies (permissible to reference descriptions in the narrative).
2. Proposed committee logistics, scheduling and sequencing, strategy for Prop. 10 and Measure I alignment and feedback loop.

Phase 3: Document Development

Required elements:

1. Processes for how deliverable documents will be drafted, designed, reviewed and finalized:
 - a) 2026-2031 First 5 Sonoma County Strategic Plan
 - b) “At a glance” 1-2 page summary of the Plan
 - c) Committee recommendations for funding allocations

D. Budget: Fiscal Year Budget and Budget Narrative

*(Complete and upload Attachment A: SP Consultant Budget Template – *please upload the completed Excel spreadsheet, do not convert to PDF)*

The maximum funding available for the project is \$150,000.

Proposers are required to submit a detailed budget for the 10-month project and Budget Narrative. Budget information must be submitted through the web-based system on the provided Excel spreadsheet, Budget Workbook, Attachment A, to articulate all direct, indirect and sub-contractual costs to the project. Prior to submission, proposers should review and verify that the details included in individual worksheets in the Budget Workbook match and align exactly across worksheets. Each item in the budget and budget narrative must correlate to specific activities described in the proposal. No costs should be included in the Budget and Budget Narrative that are not described in the proposal, and vice versa.

Proposers may include costs to incentivize/compensate community members on committees that are not otherwise compensated for their time, as well as food, child care, translation, interpretation and other costs related to engaging the community in a culturally responsive and linguistically accessible manner.

Indirect Costs

Indirect costs are shared costs across an organization whose benefit is not readily identifiable with a specific program or programs, but necessary to the general operation of

the organization. The methodology for calculating indirect costs should be explained in the Budget Narrative. If indirect costs are calculated through an overall percentage of direct costs, then individual indirect costs cannot be also listed as line items, and vice versa.

Costs to be considered “direct” for purposes of calculating indirect include: salaries, benefits, materials and supplies directly related to implementation of the project, travel and sub-contractual costs. Indirect costs cannot exceed 15% of direct costs.

Budget Narrative

In the Budget Narrative tab in the Budget Workbook, explain how costs in the budget were estimated and justify the need for each cost. Use the template to break down each major cost category (i.e., salaries, fringe benefits, equipment, travel, supplies, other direct costs and indirect costs). Provide a brief description of each budget line item in the budget and show the calculations used to derive the costs.

For Personnel, list each job title/role separately and include name(s) (or TBD if position is vacant), gross annual salary, hourly wage, any anticipated salary increases (i.e. COLA, merit, etc.) that may occur during the funding period and role in the project. Describe how fringe benefits are calculated in the budget.

Describe and justify equipment, including quantity, cost per unit, and identify the purpose and the individuals who will be using the equipment. For Postage, Supplies, Printing and Travel, provide a general description, quantity and the number of months. For employee mileage associated with the project, describe the rate of reimbursement. The mileage rate should not exceed the GSA mileage reimbursement rate. Describe the method chosen for budgeting indirect costs and how they are calculated.

E. References

Provide references, listing a minimum of three (3) previous clients, preferably community funders, for whom the consultant/consultant firm has provided strategic planning consulting services. References should be relevant to both the firm and the primary/lead consultant being proposed for this engagement. Please include the following information:

1. Organization Name
2. Contact Information
3. Brief description, timeline, and budget of similar work performed.

F. Bios or Resumes/CVs of Consultants

(Upload as a PDF – 10 page maximum, 1” margins)

Include biographies, resumes or CVs for all consultants and subcontractors. Upload all documents to Foundant as a single PDF.

G. Examples of Previous Strategic Plan Work

(Upload as a PDF – 10 page limit, OR links to online accessible files)

Provide at least two examples of previous strategic plan documents that represent the consultant’s work. Upload a PDF with internet links to the examples or upload PDFs of strategic plan documents themselves.

VIII. SUBMISSION

A. Questions about the RFP

Questions from prospective proposers regarding this RFP are to be directed to funding@first5sonomacounty.org by 3:00 pm, Monday, December 16th, 2024. The email subject line must read: “RFP Questions – Strategic Planning Consultant”. Questions received via email will be posted with the corresponding answers on the First 5 Sonoma County website by 3:00pm, Wednesday, December 18th, 2024.

B. Mandatory Letter of Intent Submission

All proposers must submit a Letter of Intent by 5:00 pm, Friday, December 20th, 2024, in [Foundant](#), First 5 Sonoma County’s grants management system. If an applicant is new to the system, an agency profile must first be created, and then an individual applicant profile will need to be created under that agency. Instructions are available on the sign in page of the system.

C. Proposal Submission

Proposals, including all uploaded attachments, must be submitted electronically via Foundant, First 5 Sonoma County’s web-based grants management system by 5:00pm, Monday, January 13th, 2025. No hard copies will be required or accepted. Proposers that submit a Letter of Intent by the deadline specified in this RFP will receive a code to access the application in Foundant.

IX. PROPOSAL REVIEW AND AWARD PROCESS

Step 1: Proposal Elements Requirements Screening

Each proposal will be reviewed for the complete and accurate submission of required elements, format and forms as specified in the RFP.

Step 2: Scoring and Review by Proposal Review Team

Proposals that meet the criteria in Step 1 will be reviewed and scored by an ad hoc review committee that will be comprised of Commissioners, staff, and individuals with expertise

and experience in strategic planning. Members of the review team will be carefully selected to mitigate and minimize any real or perceived conflict of interest.

Reviewers will score each item and provide written comments regarding strengths and weaknesses of the proposal. It is critical for proposers to provide complete, clear and specific information in the narrative text of each question of the proposal that is consistent with other information contained in the proposal, such as the budget, budget narrative and staffing competencies. Each section should be answered completely and will be scored individually. Scores may be reduced if sections include “see below” or refer to another section for complete information.

The review team will discuss their individual scores for each proposal in a facilitated meeting where reviewers will have the opportunity to compare their perceptions and impressions. Individual reviewer scores alone will not determine whether a proposal is funded; reviewers will be encouraged to discuss proposals in the context of First 5 Sonoma County’s overarching strategic vision and community context in a facilitated consensus-building process. Weighted scoring for each component of the proposal is illustrated in the table below:

Proposal Component	Max Points
Proposal Narrative	40
Work Plan	25
Qualifications	20
Budget	15
TOTAL POSSIBLE	100

X. PROPOSER INTERVIEWS

Reviewers will have the option to recommend that proposers be contacted for an interview to explore specific issues related to the proposed approach, strategies, budget, staffing, or other elements of implementation and potentially negotiate refinements to proposed scope of work within the parameters described in this Request for Proposals.

XI. INITIAL AWARD RECOMMENDATION LETTER

An initial award recommendation letter will be sent to all applicants notifying them of the review team’s recommendation.

XII. APPEAL PROCESS

Applicants wishing to appeal the review committee’s recommendation have three (3) working days from the date of the initial award recommendation letter to file an appeal in writing. Letters of appeal must be addressed to Angie Dillon-Shore, Executive Director and sent electronically to: funding@first5sonomacounty.org.

Grounds for appeal are limited to a violation of a First 5 procedure, law, rule, or regulation regarding this RFP process. Appeals will not be accepted on any other grounds. Mere disagreement with the recommendation or decision is not grounds for an appeal.

Appeals will only be considered if received electronically by 5:00 PM on the third working day from the date of the initial award recommendation notification. The appeal letter will be reviewed by the Executive Director and a decision on the appeal will be electronically sent to the applicant. The decision on appeal is final.

XIII. AWARDING OF CONTRACT

The First 5 Sonoma County Commission will award the contract, upon which First 5 staff will enter into negotiations with the selected applicant to execute a formal agreement. The contract resulting from this RFP will include, but will not be limited to, the following terms and conditions:

- Insurance requirements
- Payment structure & invoicing requirements

XIV. RESERVATIONS

- First 5 Sonoma County reserves the right to cancel the RFP process at any time for any reason, even after review of all the applications, and is not responsible for any expenses incurred by an applicant in developing an application.
- First 5 Sonoma County reserves the right to reduce, amend, and/or rescind this RFP at any time prior to final execution of the contract.
- First 5 Sonoma County reserves the right to negotiate scope of work, budget, and costs with any successful applicant. If negotiations fail to culminate in a contract, First 5 Sonoma County may select another applicant.
- First 5 Sonoma County is under no obligation to award a contract to the applicant that presents the lowest cost. Selection will be made based on overall evaluation of the application and the best interest of First 5 Sonoma County as

recommended by the review team and the Executive Director and approved by the Commission.

- First 5 Sonoma County reserves the right to request clarification from any applicant on their application.
- First 5 Sonoma County reserves the right to accept all or a portion of any application, to waive any minor irregularities in an application.
- First 5 Sonoma County reserves the right to contract with more than one firm. All applications become the property of First 5 Sonoma County.
- All applications will remain confidential until a contract is negotiated, however, because First 5 Sonoma County is a public entity, all applications can become public after all successful contract negotiations.