



## REQUEST FOR PROPOSALS

### Strategic Development Fund: 2013

Proposals must be submitted to:

FIRST 5 SAN MATEO COUNTY  
1700 S. El Camino Real, Suite 405  
San Mateo, California 94402-3050  
(650) 372-9500

By 5:00 p.m.,  
**Thursday, April 18, 2013**

[www.first5sanmateo.org](http://www.first5sanmateo.org)

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## I. PREFACE

### A. TIMELINE

<b>Event/Activity</b>	<b>Date</b>
RFP Release	February 28
Proposer's Conference (Mandatory)	March 12
Written Questions Due to F5SMC	March 15
Answers to Questions Proposed at the Proposer's Conference Posted by F5SMC	March 21
Letter of Intent (Mandatory, Non-Binding)	March 28
Proposal Due Date	April 18
Announcement of Recommendation	May 20
Send Notification Award & Non- Award Letter	May 22
Appeal Deadline	June 1
Executive Director Response to Appeal	June 10
Contract/Agreement Negotiations	May 21 – June 14
Agreement Approval	June 24
Anticipated Start Date	July 1

## B. GENERAL PROVISIONS AND RIGHTS

Proposals must be submitted to:

First 5 San Mateo County  
1700 S. El Camino Real, Suite 405  
San Mateo, California 94402-3050

**By 5:00 p.m.,  
Thursday, April 18, 2013**

This Request for Proposals (RFP) is not a commitment or contract of any kind. First 5 San Mateo County (F5SMC) reserves the right to pursue any and/or all ideas generated by this request. Costs for developing the proposals are entirely the responsibility of the Proposers and shall not be reimbursed. F5SMC reserves the right to reject any and all proposals. F5SMC reserves the right to waive any requirements of this RFP when it determines that waiving a requirement is in the best interest of F5SMC.

**General Provisions Regarding Public Nature of Proposals.** Government Code Sections 6550 et. seq., the "Public Records Act" defines public record as any writing containing information relating to the conduct of the public business. The Public Records Act provides that public records shall be disclosed upon written request, and that any citizen has a right to inspect any public record, unless the document is exempted from disclosure.

F5SMC cannot represent or guarantee that any information submitted in response to this RFP will be confidential.

All proposals submitted in response to this RFP shall become the exclusive property of F5SMC. At such time as F5SMC approves an Agreement, all proposals submitted in response to this RFP shall become a matter of public record and shall be regarded as public records.

**Proposer's Rights regarding Confidentiality of Proposals.** If F5SMC receives a request for any document submitted in response to this RFP, it will not assert any privileges that may exist on behalf of the person or business submitting the proposal. If a Proposer believes that a portion of its proposal is confidential and notifies F5SMC of such in writing, F5SMC may, as a courtesy, attempt to notify the Proposer of any request for the proposal. However, it would be the sole responsibility of that Proposer to assert any applicable privileges or reasons why the document should not be produced, and to obtain a court order prohibiting disclosure. The Proposer understands that F5SMC is not responsible, under any circumstances, for any harm caused by production of a confidential proposal.

**F5SMC's Rights Regarding Confidentiality of Proposals.** To the extent consistent with applicable provisions of the Public Records Act and applicable case law interpreting those provisions, F5SMC and/or its officers, agents, and employees retain the discretion to release or to withhold disclosure of any information submitted in response to this RFP.

## II. INTRODUCTION

**A. Invitation to Submit:**

F5SMC welcomes proposals from all qualified entities. The F5SMC Commission is interested in Proposers who exhibit expertise in providing services to children prenatally through age five and their families, as well as community-based programs and collaborative serving culturally diverse communities. F5SMC may, in its sole discretion, enter into contracts with multiple qualified agencies/entities.

**B. Purpose of the RFP:**

F5SMC requests proposals from local non-profit organizations, governmental entities, collaboratives, and/or public and private organizations that will achieve the outcomes identified in this RFP.

The overall intent of the F5SMC Commission is to issue an open RFP, soliciting proposals that address the current needs of the 0-5 population within San Mateo County. While areas of particular interest to the Commission are outlined below, applicants who can make a strong case for investments outside of these interest areas – by providing substantiating information, including recent data and detailed local needs assessments -- are also encouraged to apply.

Through the award of up to \$1.2 million via this RFP, the Commission will implement Prong 1 of its recently adopted Strategic Development Fund (SDF) (See Section II. F, for further detail) Grants funded through this RFP will be for a two-year period, with a likely maximum individual grant amount of \$370,000. Projects that are cross-sector, multi-disciplinary, collaborative, and/or address multiple Focus Areas of the Strategic Plan may be considered for higher levels of funding. The two-year time frame may include up to six months of planning activities if the project warrants it.

This RFP for \$1.2 million is the first of two RFPs to be issued as part of Prong 1 of the SDF, and will fund programs and services that support children 0-5 and their families, from July 1, 2013 - June 30, 2015.

**C. Authority:**

Proposition 10 (Prop10), the “California Children and Families Act of 1998”, imposed an excise tax on tobacco products and authorized counties to establish commissions to allocate these funds at the local level. Ordinance #03889 was adopted by the San Mateo County Board of Supervisors on March 9, 1999, creating the nine-member Children and Families First Commission (now referred to as First 5 San Mateo County Commission). The Commission was authorized to develop a Strategic Plan and allocate funds accordingly. The First 5 San Mateo County Commission adopted the initial Strategic Plan on March 15, 2000. The most recent update to the Strategic Plan, with an evaluation approach, was completed and approved in September 2008. The Strategic Plan is reviewed annually and was last approved in July of 2011.

Under Proposition 10, each county is required to appoint a local Commission with a maximum of nine members, and to develop a Strategic Plan to determine how to allocate funding. Members of the First 5 San Mateo County Commission include a

Board of Supervisors representative; the County Manager or his designee, the Director of the Human Services Agency, the County Superintendent of Schools; and five public members. The current Commission members are:

- ◆ Michael Garb, Chair, Public Member
- ◆ Dave Pine, San Mateo County Board of Supervisors
- ◆ Jean S. Fraser, Chief, Health System
- ◆ Anne E. Campbell, San Mateo County Superintendent of Schools
- ◆ Beverly Beasley Johnson, J.D., Director, San Mateo County Human Services Agency
- ◆ Angel Barrios, Public Member
- ◆ Jorge Glascock, Public Member
- ◆ Harvey Kaplan, M.D., Public Member
- ◆ Lee Michelson, Public Member

**D. First 5 San Mateo County 2009-2015 Strategic Plan:**

The stated intent of Proposition 10 is to “facilitate the creation and implementation of an integrated, comprehensive, and collaborative system of information and services to enhance optimal early childhood development and ensure that children are ready to enter school.” (Prop 10, California Health and Safety Code, section 130100 (a)). First 5 San Mateo County recognizes that school readiness is one of the most important factors in ensuring “*Success for Every Child.*” In the past forty years, a compelling body of research has demonstrated that programs aimed at improving young children’s health and development have resulted in positive long-term childhood outcomes. In addition, numerous studies show that certain parental decisions and utilization of community programs result in substantial long-term cost savings. We also know that a healthy loving attachment to a primary caregiver contributes to healthy brain development. F5SMC respects parents as their child’s first and most important teacher. Honoring and supporting a healthy parent-child relationship is the foundation for F5SMC’s direct service investments.

Recently, Nobel Laureate Economist James Heckman quantified the return on investment of \$7 for every \$1 invested in early childhood development. Early investments reduce societal costs by reducing unemployment and crime. Early intervention reduces the long-term costs and improves outcomes for children with special needs. Other societal benefits of investing in young children include increased high school graduation rates, higher wages as adults, and better health outcomes. F5SMC seeks to help mitigate risk factors and promote protective factors for children 0-5 and their families.

In September 2008, the Commission adopted a new Strategic Plan for the years 2009-2015, based on the intent of Proposition 10, early brain development research, the value of prevention and early intervention, and the needs of our community. The Strategic Plan encompasses F5SMC’s Loving, Learning and Growing Comprehensive Evaluation Framework, which is intended to provide descriptive and outcome information about the children, families, and service providers supported by F5SMC funded programs.

The LTFP was reviewed and updated in September 2012 and calls for three funding cycles through June 2017. The latest iteration of the LTFP also includes a recently-

established Strategic Development Fund (SDF) that will reinvest \$6.5M of F5SMC funding into the community, made available through the overturn of AB99.

The Strategic Plan outlines a System of Care that incorporates four Focus Areas: Early Learning, Child Health and Development, Family Support and Engagement, and Communication and Systems Change. Each Focus Area includes overarching outcomes, specific strategies for achieving those outcomes, and indicators to help track progress towards desired outcomes. These outcomes, strategies, and indicators were selected based upon research, best practices, local learning, and community input.

Proposers should be familiar with the content of the Strategic Plan, which is available in Appendix F of this RFP, and on the F5SMC website, [www.first5sanmateo.org](http://www.first5sanmateo.org), under the **Publications** section of the home page.

- Focus Areas and Strategies from the F5SMC 2009-2015 Strategic Plan:  
The services requested in this RFP will address one or more of the four Focus Areas of the Strategic Plan: *Early Learning; Child Health and Development; Family Support and Engagement; and, Communications and Systems Change*. The information below directly references language from the F5SMC Strategic Plan. For a detailed list of the Strategies and Activities identified in each of these Focus Areas, please refer to the F5SMC 2009-2015 Strategic Plan.
- Relevant Outcomes from the F5SMC 2009-2015 Strategic Plan:  
The successful Proposer will demonstrate that proposed program activities will help San Mateo County achieve relevant Desired Outcomes listed in the Strategic Plan. For a complete list of the Desired Outcomes arranged by Focus Area, please refer to the F5SMC 2009-2015 Strategic Plan.

**E. First 5 San Mateo County Programs and Service Numbers:**

Since its inception, First 5 San Mateo County has invested over \$112 million in local programs and has served over 54,400 children prenatally through age five and 27,600 parents and primary caregivers. Currently, we fund 19 programs through 15 agencies, serving more than 13,000 children and their primary caregivers. Major investments have included: preschool and school readiness programs for children residing in low-API school attendance areas; workforce development for child care and preschool providers; home visiting programs for families experiencing low income, domestic violence, substance abuse, or mental health concerns; kindergarten transition programs; mental health consultation to preschools; health insurance for low-income and other high-need children; screening to identify children with special needs and linking them to assessments and services, and therapeutic childcare for children living in homeless shelters.

In fiscal year 2011-12, F5SMC programs served 15,166 individuals (unduplicated count), including 6,934 children, 6,288 parents/guardians, and 1,944 service providers. First 5 San Mateo County and partners distributed 5,132 Kits for New Parents in fiscal year 2011-12.

**F. Background & Purpose of the Strategic Development Fund:**

The resources to fund the successful proposal(s) will be drawn from the Commission's recently-established \$6.5 million Strategic Development Fund. The

SDF was created as a result of the overturn of AB99, and positions F5SMC to flexibly and nimbly respond to the needs of the 0-5 community, including supporting certain investment strategies that were eliminated due to the threat of AB99.

The purpose of the Strategic Development Fund is three-fold:

- 1) To provide F5SMC with an opportunity to maximize resources within a changing economic environment and to carefully assess all available options to improve services for young children and their families;
- 2) To provide F5SMC with the ability to target investments toward specific issues/s as identified by evaluation and research (e.g. F5SMC's Comprehensive Evaluation, Kindergarten Readiness Assessment, Family Survey, needs assessments/gap analysis, etc.).
- 3) To provide F5SMC with the ability to meet desired outcomes as defined in F5SMC's Strategic Plan, and to intensify strategies and implement Core Values and Guiding Principles.

The Strategic Development Fund will be deployed via four funding "prongs."

- Prong 1: \$2.4 Million to be released in two RFPs in an amount not to exceed \$1.2 million each. The first RFP will fund programs and services during FYs 13-14 and 14-15; the second will fund programs and services during FYs 15-16 and 16-17.
- Prong 2: Up to \$750,000 to be reinvested between the 8 ongoing programs that incurred budget reductions as a result of the threat posed by AB99.
- Prong 3: \$3M to support countywide partnerships and collaborations.
- Prong 4: \$400,000 to be allocated to the Communications & Systems Change focus area.

**G. Basis of the Strategic Development Fund: 2013 Initiative:**

F5SMC is in the process of conducting a thorough needs assessment through the 2012 Kindergarten Readiness Assessment and the 2013 Family Story Survey Project. These data collection efforts are currently underway, the results of which will not be available to inform this RFP. However, the data will be released in June and September of 2013, respectively, in time to incorporate into second RFP related to Prong 1 of the SDF (scheduled to be released in January of 2015).

In preparation for the release of the Strategic Development Fund: 2013 RFP, F5SMC conducted a review of currently available data including F5SMC's Comprehensive Evaluation, the 2006 F5SMC Family Survey, and other countywide indicators. The needs identified have influenced the development of the investment interest areas within this RFP (see section II H-I). Some of the more compelling, preliminary findings indicate the following:

- Less than one third of all children currently served by F5SMC are under age 3. Economic research conclusively demonstrates that dollars invested in programs for children ages 0-3 provide a much higher return on investment than dollars invested at any other point in the lifespan.
- In 2011 in San Mateo County, 27% of all children in foster care were ages 5 and under; infants are more likely than any other age group to be removed from their parents.
- Chronic diseases result in a large social cost through increased health care expenditures, lost time at school and work, pain and suffering, and less

optimal development and functioning. Prevention is the most cost-effective way to address this issue.

- Several particularly high-risk populations within F5SMC's purview are not currently targeted by F5SMC funded programs.
- Due to the high cost of living in San Mateo County, it is a continued struggle for families to support their young children's well-being while achieving or maintaining self-sufficiency.
- Child care providers and preschool teachers with less than an AA degree report that F5SMC services have a much larger impact on their skills and knowledge than those with more advanced educational attainment.

The above findings are cursory and not intended to be an exhaustive representation of county indicators or conditions. Proposers are expected to provide additional, applicable research findings and data establishing the need for services to support their project proposals.

**H. Goals & Interest Areas of the Strategic Development Fund: 2013 Initiative:**

This RFP is open to any project addressing critical needs of the 0-5 population within San Mateo County.

The F5SMC Commission has identified particular areas of interest when directing their investments via this RFP process, which are enumerated below. However, if a proposer can make a compelling case for an emergent need outside of the interest areas (by providing data, research, asset maps, needs assessments, etc.), the proposed project will be considered in tandem with other proposals addressing the Commission's stated areas of interest.

A successful proposal – whether responding to an interest area noted below, or a need strongly substantiated by the applicant – will:

- 1) Rapidly increase F5SMC-funded investments in the community
- 2) Foster innovative service delivery, utilize best practices, and contribute to systems-building
- 3) Provide support for populations in need, targeting populations currently underserved by F5SMC where possible

**I. Populations, Risk Factors, and Issues of Particular Interest to the Commission:**

Proposals are encouraged for projects that aim to address the populations and risk factors identified below, within or across F5SMC's four Focus Areas, as well as the issues of interest noted below.

*Populations of particular interest to the F5SMC Commission:*

- Children ages 0-2 and their parents/caregivers
- Pregnant women/expectant parents
- Fathers who are marginalized or uninvolved with their children
- Service providers who work with these populations and/or address risk factors (see below)

*Risk factors of particular interest to the F5SMC Commission:*

- Involvement with the Child Welfare System
- Parents who are currently or were formerly incarcerated

- Children/parents with known or suspected mental health issues
- Increased likelihood of (a) poor health outcome(s)

*Issues of particular interest to the F5SMC Commission (organized by Focus Area):*

Child Health & Development

- Chronic disease prevention (including obesity-related disease, asthma, and other illnesses)
- Health disparities based on income, race or ethnicity, or geographic location
- Approaches that support mental health (including prevention and early intervention) for children and their parents/caregivers

Family Support & Engagement

- Helping families navigate support systems and overcome barriers to services
- Fostering healthy attachment and positive caregiver/child relationships for children experiencing a separation from their parent(s), and (when indicated) supporting successful reunification and reestablishment of the parent-child bond
- Maximizing the ability of Family Resource Centers and/ or other centralized resource hubs to serve families with children ages 0-2

Early Learning

- Incentivizing professional development among the ECE workforce in a way that supports our local priorities
- Enhancements to already existing early learning environments and child care facilities
- Increased access to inclusive environments and necessary support services for children with or at risk for physical, social-emotional, mental health, developmental, learning, or other special needs

Communications & Systems Change

- Leveraging technology to improve the efficiency of service delivery and information-sharing
- Integration of existing programs and services
- Investments that will help programs become self-sustaining over time
- Interventions targeted towards policy- or systemic-level change
- Incorporating current research and promising practices into systems and services
- Increasing public awareness of the critical importance to individuals and society of the first 5 years for optimal life-long development

**J. Expectations of Proposers:**

The Commission strongly encourages proposals from a wide variety of agencies and organizations. The commission is interested in applicants who exhibit expertise in providing services to children prenatally through age five and their families, as well as community-based programs that serve culturally diverse communities. The Commission is interested in applicants with projects that demonstrate strong

collaboration, that seek to achieve maximum service integration and continuity, and that maximize and leverage multiple funding sources. Proposals will be evaluated on their strength, relevance to F5SMC's goals, and the likelihood of their success. Proposed projects should be consistent with the Desired Outcomes detailed in the Commission's Strategic Plan and/or the areas of investment interest provided within this RFP.

Funds provided under Proposition 10 are intended to supplement, expand upon, and enhance activities funded from existing sources. Proposition 10 funds may not supplant existing resources and services.

All funded agencies and collaboratives will be expected to track process and outcome measures for their specific project. Additionally, funded projects will be expected to participate in a comprehensive evaluation of the effectiveness of efforts under Proposition 10.

**K. Scope of Work:**

The successful Proposer will be required to attain specific goals, with targeted objectives and measureable outcomes.

**L. Qualified Proposers:**

Non-profit agencies [501(c) (3)], government entities, collaboratives, public and private organizations are eligible.

**M. Communication with F5SMC:**

As of the release date of this RFP and continuing until the final date for submission of proposals, F5SMC personnel are specifically directed not to hold meetings, conferences, technical discussions, or communications of any kind with any Proposer for purposes of responding to this RFP. Any attempt by a Proposer, or agent thereof, to contact F5SMC personnel or a member of the Proposal Review Committee regarding the proposal process may be considered tampering and may result in the Proposer being disqualified from entering into any contract that may result from this RFP.

**N. RFP Modification:**

F5SMC may modify the RFP prior to the fixed date for submission of proposals by issuance of an addendum to all parties who have received the RFP.

### III. SCOPE OF WORK AND OTHER SPECIFICATIONS

A. Description of Scope of Work (SOW) components:

The SOW template provided by F5SMC is an Excel spreadsheet with tabbed pages delineating major objectives and activities. (See Appendix C for SOW Template.) The first set of tabbed pages will be individualized by the proposer outlining the goals, objectives, and activities that the project intends to accomplish. Additionally, SOWs submitted should contain the following six tabbed pages (see list below) and Proposers are also expected to meet these goals through their proposed project. The final three tabs of the SOW template (Systems Change, Evaluation, and Prop 10) are standard for all Proposers and F5SMC grantees and therefore require no adaptation.

1. Service Delivery: Provide culturally, linguistically, and developmentally appropriate services to children and families.
2. Collaboration: Describe the ways in which the proposed services will maximize collaborations with other systems and agencies within the County.
3. Sustainability: Promote sustainable practices and identify additional resources to ensure the continuation of service provision.
4. Systems Change: Communicate the importance of the first 5 years of life and collaborate to improve systems integration, decrease duplicative services, and create lasting beneficial systems improvement.
5. Evaluation: Participate in the design of the evaluation and in the implementation of data collection activities as required by the evaluation design.
6. Prop 10: Ensure the public is aware of the benefit of Prop 10 tax dollars by keeping the public informed of how and where Prop 10 funds are invested in San Mateo County.

B. Agreement to Terms:

The Proposer must be able to agree to all of the terms of the F5SMC general contract included in Appendix B. If the Proposer cannot agree to each term but still wishes to respond to the RFP, the Proposer must specifically identify in its proposal the terms with which it cannot comply.

C. Staffing:

A F5SMC Program Specialist will be the direct liaison between F5SMC and the funded partner(s). The Program Specialist will provide technical assistance, monitor for contract compliance, and quality oversight.

The funded partner(s) will be expected to participate in other regularly scheduled or ad hoc meetings as requested by F5SMC staff and is expected to maintain regular communication with F5SMC staff.

D. Survey Instruments:

Proposers must agree to administer/use any and all survey instruments as directed by F5SMC, and/or the F5SMC Evaluation Consultant, including outcomes and satisfaction measurement instruments.

E. Agreement Term and Renewal Language:

The Agreement Term will be for 24 months, from July 1, 2013 through June 30, 2015. Entering into a contract related to the Strategic Development Fund: 2013 RFP does not guarantee funding beyond June 30, 2015. Furthermore, all F5SMC contracts are subject to contract Agreement Term and Termination provisions as stated in Paragraph 3 of the F5SMC Agreement (See Appendix B).

F. Funding Allocation:

The approved total funding allocation is in an amount not to exceed \$1,200,000, for the Agreement Term (July 1, 2013 - June 30, 2015). The Commission hopes to achieve a balance of investment between Focus Areas in the overall F5SMC funding portfolio when making final funding decisions and therefore may fund more than one proposal. **The maximum likely grant award per proposal is \$370,000 over the two year grant period.** Larger grants will be considered for projects that provide intensive services to populations of interest, or that address issues that are cross-sector, collaborative, or affect policy-level changes.

## IV. PROPOSAL CONTENTS

**A. Content and Sequence of Proposal:**

To be eligible for contract agreement, Proposers shall adhere strictly to the format set forth below. Each of the required sections identified must be addressed and must be specifically labeled.

The content and sequence of the proposal will be as follows:

<i>Section</i>	<i>Title</i>
<b>1.</b>	<b>Cover Sheet</b>
<b>2.</b>	<b>Table of Contents</b>
<b>3.</b>	<b>Project Narrative</b>
<b>4.</b>	<b>Financial Summary</b>
<b>5.</b>	<b>Proof of Insurance</b>
<b>6.</b>	<b>References</b>
<b>7.</b>	<b>CEO or Board Authorization</b>
<b>8.</b>	<b>Attachments:</b>
	<b>Scope of Work</b>
	<b>Budget Request and Budget Narrative Forms</b>

Items 1 through 8 below contain brief descriptions of material that must be included in this proposal.

1. Cover Sheet:  
 Proposer shall identify the entity's/agency's name that will be providing the services offered in the proposal. The name, address, telephone number, facsimile number and e-mail address of a principal contact for information regarding the proposal shall be supplied. Under the **Publications** section on the home page of the F5SMC web site, [www.first5sanmateo.org](http://www.first5sanmateo.org), there is a specific form for the Proposer to use to complete the cover sheet. This form is also included with the RFP as Appendix A.
  
2. Table of Contents:  
 Immediately following the Cover Sheet, provide a comprehensive Table of Contents of the material included in the proposal. The Table of Contents must clearly identify the proposal sections and the applicable page numbers.
  
3. Project Narrative:  
 A narrative description of the proposed project is required and is limited to 25 pages. In addressing the requirements of the Scope of Work (see Section III.A) and the F5SMC Strategic Plan (see Section II.D&F); all of the following questions must be addressed in the narrative. Each response must be numbered and labeled in the order requested in the RFP. Additional content areas are permitted; however, they must remain within the 25-page limit for the narrative. Please refer to the criteria of this RFP to ensure that adequate and complete responses to the project narrative questions are provided.

The project narrative should include the following content areas 3A thru 3G:

### **3A. Background**

1. NEEDS ASSESSMENT:

- Describe the needs in the communities or settings to be served by the proposed project. Include findings from previously published needs assessments and other sources of information that are relevant to the proposed project.
- Explain why the proposed project is needed, and how it will ensure non-duplication of effort. Specifically address the existing landscape of services that are similar to or linked to the proposed project. What other similar services are being provided? What are the gaps in services and how are they being addressed? How will collaboration with existing service providers be coordinated in order to ensure non-duplication of effort?
- Identify and address risk factors in the population to be served.

2. TARGET POPULATIONS AND CULTURAL COMPETENCY:

Please describe the target population(s) that will be served in the proposed project, including:

- The geographic area(s) covered by the proposed project.
- The racial/ethnic make-up, age (if children), and economic resources of the target population(s).
- Explain how outreach to the population(s) will be conducted.
- Describe how the project will be culturally/linguistically appropriate for the population(s) served.

3. PROPOSER CAPABILITY AND ORGANIZATIONAL BACKGROUND:

Please describe the following for the Proposer agency:

- Date the agency was established and its primary mission. Explain the services and programs currently offered.
- Describe the agency's capability and resources to manage the proposed project, including timely start-up and implementation.
- Describe the agency's financial ability to conduct this project. Include: budget, staff size, and whether it has audited financial statements.

- Describe the agency's experience working with First 5 Commissions, county departments, or agencies serving children ages 0-5 and their families or care providers.
- Attach an organizational chart of the agency.
- Describe how this program fits into the proposer's organization or agency.

4. COMMUNICATION AND SYSTEMS CHANGE:

Proposers are encouraged to work collaboratively with community partners to increase the capacity and quality of services, as needed. Please provide the following:

- Background information on the nature of any collaborative relationships between entities involved.
- Describe the structure, communication, and governance system that will be used to ensure the ongoing involvement of collaborative members in the project.
- Describe efforts that are being made, or will be made, to promote systems integration and lasting systems improvements.
- Describe the agency's current efforts, future plans, and capacity to improve public awareness about the importance of the first five years of life.
- Include Memoranda of Understanding (MOUs) with all subcontractors and other major partners. These MOUs should indicate the specific responsibilities and services to be provided by subcontracting agencies and partners.

**3B. Project Description**

Please describe how the proposed project fulfills the requirements of this RFP. Include the following information:

1. ALIGNMENT WITH THE F5SMC STRATEGIC PLAN FOCUS AREAS: EARLY LEARNING; CHILD HEALTH AND DEVELOPMENT; FAMILY SUPPORT AND ENGAGEMENT, and COMMUNICATIONS AND SYSTEMS CHANGE:  
Describe how the proposed program aligns with the F5SMC Strategic Plan, Desired Outcomes, and how it relates to one or more of the Four Focus Areas.
2. ALIGNMENT WITH PARTICULAR AREAS OF INTEREST:  
Describe how the proposed project aligns with F5SMC's stated areas of particular interest in Section II.I. If the proposed project does not address one of the listed interest areas, explain the issue(s) the proposed project addresses.
3. PLANS FOR PERFORMING PROJECT ACTIVITIES:  
Identify plans for performing the required activities listed in Section III A of this RFP. Include concrete, specific information about the program-level strategies and measurable objectives

that will be used to implement and monitor each numbered activity. Include the following:

- Describe the specific strategies (methods/interventions) to be used to perform the Activities in Section IIIA: Scope of Work and Other Specifications.
- Explain why these strategies will be effective to meet the targeted outcomes.
- For each proposed strategy, provide a brief rationale for its selection. Where possible, cite applicable research that supports the effectiveness of the proposed strategy.
- Describe how the program design responds to changing needs, challenges, and emerging research. This would include regular assessment of the effectiveness of the service modality, service providers, staff supervision, service frequency, length of services, use of prepared materials, and service delivery settings.

### **3C. Staffing**

#### **1. PROJECT STAFF POSITIONS:**

Describe proposed project staff.

- Describe key project staff positions listed in the project budget under the Personnel line item. Attach job descriptions for all positions to be supported through F5SMC funds. These should include the minimum qualifications for each position.
- Indicate whether staff supported by these funds will be new hires or are in existing positions.
- Attach resumes for all staff currently in place. Explain how these positions have been previously funded. Prop 10 funds CANNOT be used to supplant state and local general funds (please see Supplantation Policy in Appendix E).
- Include names and resumes for consultants if they have already been identified.
- Indicate which staff person will have responsibility for program reporting.
- Describe how the on-going professional development of staff and monitoring of their work will be supported and evaluated.

### **3D. Evaluation**

First 5 San Mateo County is committed to funding services that will make strides towards achieving positive outcomes for children 0-5 and their families (for more information please refer to F5SMC's Strategic Plan under the **Publications** section of our website: [www.first5sanmateo.org](http://www.first5sanmateo.org)).

We measure program effectiveness and the impact on clients served through a variety of data collection activities.

Data collection requirements for projects funded through this RFP **WILL include:**

- Completing one Aggregate Data Collection form for each program component. Data elements include: Unduplicated clients served by race/ethnicity, language, and age of the child.
- Participating in the F5SMC Systems Change evaluation through focus groups, interviews, and/or surveys.

Depending on the types of clients that you propose to serve (e.g. children, parents, or service providers) and the services you propose to provide (e.g. group-based activities, home visiting, care coordination, or supports for service providers), data collection requirements for projects funded through this RFP **MAY include:**

- Administering Provider Surveys to a sample of service providers who participate in program services (requires informed consent).
- Administering the Family Survey to a sample of families who participate in program components involving group-based parent education or parent-child activities (does not require informed consent).
- Administering the Intake and Follow-Up Interviews to parents who participate in program components involving home visiting or care coordination (requires informed consent).

Explain how the requirements of the F5SMC comprehensive evaluation will be fulfilled. Identify the staff who will be assigned to work with the F5SMC Evaluation Specialist and Evaluation Consultants on data collection and analysis, and describe their experience with data collection, data management, and program evaluation. Based on the possible data collection activities identified below, please describe how much staff time is anticipated to be dedicated to data collection, and how program staff will engage clients and secure informed consent (if necessary). F5SMC Comprehensive Evaluation data collection tools are included in Appendices G1-G6 so that Proposers can accurately assess the resources that will be necessary to administer these tools to the clients who would be served through their proposed program.

Please note that the final evaluation requirements for funded projects will be determined by F5SMC during contract negotiations, depending on the service delivery strategies selected for funding.

### **3E. Alignment with the Strategic Plan Communication and Systems Change Focus Area**

Please describe how the proposed project works towards achieving the strategies, activities, and indicators listed in the Communication and Systems Change Focus Area of the Strategic Plan, and/or addresses Goal 2 of the SDF (see Section II. H).

### 3F. Supplantation

Please confirm that the proposed program would not violate the Commissions Supplantation Policy attached as Appendix E, and provide supporting documentation (if any exists).

### 3G. Project Sustainability

San Mateo County Proposition 10 funds are expected to decrease in future years. The Commission does not intend to fund projects that will become fully dependent on its funds for continuation in future years.

Please describe how the project will be sustained beyond the availability of this level of funding.

- Describe how the proposed project will complete its intended objectives and move towards becoming more self-sustaining.
- Explain how the proposed project activities may reduce costs elsewhere in the system.
- If there is a need and/or opportunity to raise or leverage funds from other sources, explain how this will be accomplished. Be specific about the funding sources (public and private) to be targeted and the fundraising or billing strategies to be utilized.

### 3H. Scope of Work Plan and Timelines

Describe the work plan and timeline for the implementation of services and the attainment of project objectives.

#### SCOPE OF WORK

Please complete the Scope of Work (SOW) Form. An electronic Scope of Work Form is available on our website under **Publications** at [www.first5sanmateo.org](http://www.first5sanmateo.org). A Scope of Work Form is also included in Appendix C.

Please be prepared to identify the measurable objectives and achievable outcomes that the proposed project will produce within the grant period. Provide **2 SOWs** that cover the total grant period (SOW #1: July 1, 2013- June 30, 2014; SOW #2: July 1, 2014- June 30, 2015), and please remember to include start- up and/or planning activities, if appropriate (a maximum of six months of planning activities is allowed). The Scope of Work should include the following:

#### **Measurable objective:**

- For each measurable objective listed in the project narrative, complete a separate page of the SOW Form. Several blank tabs are provided. Create additional tabs if needed.
- The final six tabs of the SOW template (Cultural Competence, Collaboration, Sustainability, Systems Change, Evaluation, and Prop 10) are standard for all Proposers and F5SMC grantees. Of the six final tabs, the last three are fixed and pre-populated, requiring no adaptation by Proposers.

**Total Unduplicated clients served under this objective:**

- Check one or more of the following categories that best describes the clients to be served, and estimate the unduplicated number for each category: Children 0-5; Families of 0-5; Providers of 0-5; Other.

**Major activities and timelines:**

- List the key activities that will be undertaken to accomplish each objective.
- Include all relevant details, i.e., hiring staff, recruitment activities, and the number and type of activities.
- For activities that do not span the entire contract period, please include the timeframe by quarter at the end of each activity. For example, Q1 indicates the activity will take place within the first quarter of the contract year. Q1-Q3 indicates the activity will take place from the first through third quarters. Please note that activities are considered ongoing unless otherwise indicated.

**Staff or agency responsible:**

- Indicate which staff person or contracted partner is responsible for carrying out each activity.

**Documentation instrument:**

- Indicate the tools proposed to document what is being implemented and who is being served. Examples include: contact logs, sign-in sheets, case notes, meeting minutes, F5SMC evaluation forms, etc.

**Target service number for activity:**

- Indicate the target service number as it relates to each specific activity. These service numbers may be duplicated given that service recipients may access multiple interventions.

4. Financial Summary:

Provide a synopsis of the anticipated budget for **each fiscal year of the project** including the process used to determine budgetary needs. F5SMC's Fiscal Year runs July 1 – June 30. Detailed financial information for each year of the project (FY 13-14, FY 14-15) will be included as attachments, using the Budget Request and Budget Narrative form in Appendix D.

5. Proof of Insurance:

Attach current insurance certificates indicating liability insurance of a minimum of \$1,000,000 for each of the following: comprehensive general, motor vehicle, professional, and worker's compensation.

6. References:

Include three reference letters of agencies or individuals recently familiar with the quality and reliability of the Proposer's work. Include the name;

mailing address, contact person, email address and phone number for each reference.

7. CEO or Board Authorization:  
Private organizations must submit an original, signed statement from your chief executive officer (CEO) verifying support for your proposal.

8. Attachments:

- Scope of Work: Using the template provided in Appendix C, prepare **2 Scopes of Work** including detailed deliverables that show how the proposed activities will be implemented for the agreement period. **Please submit a Scope of Work for (1) July 1, 2013 through June 30, 2014 (12 months); and (2) July 1, 2014 through June 30, 2015 (12 months).**

The Scope of Work template is also available in the **Publications** section on the home page of the F5SMC web site, [www.first5sanmateo.org](http://www.first5sanmateo.org).

- a. Budget Requests and Budget Narratives: Using the templates included in Appendix D, **provide 2 Budget Request and Budget Narrative Forms** detailing information about how this program will be staffed, financed and operated during the agreement period of July 1, 2013 through June 30, 2015. Budget Narratives must include calculations for each line item. **Please submit a Budget Request and Budget Narrative form for (1) July 1, 2013 through June 30, 2014 (12 months); and (2) July 1, 2014 through June 30, 2015.** Include personnel, operating, indirect costs, and other relevant expenditure categories.
- b. Include information on any other sources that will fund the proposed program; list them in the leveraged column.
- c. Identify and submit Budget Request and Budget Narrative Forms for any subcontractor(s) whose budgeted amount exceeds \$25,000.
- d. F5SMC allows a maximum amount for indirect costs of 12% of total direct costs (excluding subcontractor, consultant and capital costs).

The Budget Request and Budget Narrative Forms are also available in the **Publications** section on the home page of the F5SMC web site, [www.first5sanmateo.org](http://www.first5sanmateo.org).

## V. PROPOSAL FORMAT

- A. Format Guidelines:  
Proposals must be submitted both electronically and in paper format. Both electronic and paper copies must be received by the filing deadline. Paper copies must be typed in Microsoft Word, double-spaced in no smaller than 11-point Arial font, have margins no less than 1" on any side, and have consecutively numbered pages. Project narratives are limited to 25 pages. The Scope of Work Form, Budget and Budget Narrative Forms, and Reference Letters are considered attachments and do not count toward the project narrative page limit. Any materials in excess of the limit may not be considered.
- B. Submission Instructions:  
Electronic copies of the proposal must be submitted to [eroberts@co.sanmateo.ca.us](mailto:eroberts@co.sanmateo.ca.us).

The original paper copy of the proposal submitted should be unbound, along with eight copies securely bound by an industrial/heavy duty stapler in the upper left-hand corner. No facsimile or telephone proposals will be accepted.

**Proposal Filing Deadline:  
5:00 p.m. on Thursday April 18, 2013.**

*Submit electronic proposals to:*  
[eroberts@smcgov.org](mailto:eroberts@smcgov.org)

*Submit paper proposals to:*  
First 5 San Mateo County  
1700 S. El Camino Real, Suite 405  
San Mateo, California 94402-3050  
(650) 372-9500

## VI. PROPOSAL PROCESS

A. Schedule of Events:

Event/Activity	Date
RFP Release	February 28
Proposer's Conference ( Mandatory)	March 12
Written Questions Due to F5SMC	March 15
Answers to Questions Proposed at the Proposer's Conference Posted by F5SMC	March 21
Letter of Intent (Mandatory, Non-Binding)	March 28
Proposal Due Date	April 18
Announcement of Recommendation	May 20
Send Notification Award & Non- Award Letter	May 22
Appeal Deadline	June 1
Executive Director Response to Appeal	June 10
Contract/Agreement Negotiations	May 21 – June 14
Agreement Approval	June 24
Anticipated Start Date	July 1

B. Proposer's Conference:

Agencies potentially interested in submitting proposals and requiring clarification of the intent or content of this RFP, or of the competitive proposal process, **will attend a mandatory Proposer's Conference.**

The intent of the Proposer's Conference is to only address those questions related to the information contained in this RFP.

F5SMC Strategic Plan: 2013 Proposer's Conference  
 First 5 San Mateo County  
 1700 S. El Camino Real, 1<sup>st</sup> Floor Miller Ream Room  
 San Mateo, CA  
**Tuesday, March 12, 2013**  
**9:00-11:00 a.m.**

**PLEASE RSVP for the Proposer's Conference no later than 5:00 p.m., March 7, 2013, to [eroberts@smcgov.org](mailto:eroberts@smcgov.org). Please indicate the number of people attending.**

C. Posting of Answers to Proposer's Conference & Written Questions:

F5SMC will accept Written Questions, from those who attended the Proposer's Conference, through March 15, 2013, sent via email to [eroberts@smcgov.org](mailto:eroberts@smcgov.org). All questions and answers – whether posed during the Proposer's Conference or afterward in writing -- will be posted to the F5SMC website on March 21, 2013. F5SMC may choose to provide additional information following receipt of the questions.

F5SMC is responsible only for what is expressly stated in this RFP and authorized written addenda thereto. F5SMC is not responsible for, and shall not be bound by, any non-authorized person acting or purporting to act on its behalf.

D. Submission of Letters of Intent:

Letters of Intent (LOI) are mandatory, but are non-binding. Any qualified entity wishing to present a project for funding consideration via F5SMC's Strategic Development Fund: 2013 RFP must submit an LOI by 5:00 p.m. by email on March 28, 2013 to: [eroberts@smcgov.org](mailto:eroberts@smcgov.org).

Please use the LOI template attached in Appendix H in preparing your Letter of Intent. The LOI template is also available in the **Publications** section of the F5SMC web site, [www.first5sanmateo.org](http://www.first5sanmateo.org).

E. Submission of Proposal:

1. All proposals submitted in response to this RFP shall become the exclusive property of F5SMC.
2. The proposal shall be used to determine the Proposer's ability to render the services to be provided. The failure of a Proposer to comply fully with the instructions in this RFP may eliminate its proposal from further evaluation as determined at the sole discretion of F5SMC. F5SMC reserves the sole right to evaluate the contents of proposals submitted in response to this RFP and to select a successful contractor, if any.
3. All proposals must remain valid for a period of not less than one hundred twenty (120) days from the closing date for submission.

## VII. PROPOSAL SELECTION PROCESS AND EVALUATION

- A. Final Filing Date:  
The final date and time to submit a proposal is Thursday April 18, 2013 at 5:00 p.m. Proposals, in hard copy (one unbound original, and eight stapled copies using industrial/heavy duty staples in upper left hand corner) and one email copy sent to [eroberts@smcgov.org](mailto:eroberts@smcgov.org) must be received at the F5SMC office by **5:00 p.m. on Thursday April 18, 2013**. The office of First 5 San Mateo County is located at:
- First 5 San Mateo County  
1700 S. El Camino Real, Suite 405  
San Mateo, CA 94402-3050  
(650) 372-9500
- B. Additional Information:  
If F5SMC determines, in its sole discretion, that additional information is required or desirable beyond that provided in the proposal(s) of any of the Proposer(s), F5SMC may call the Proposer(s) for additional information or invite the Proposer(s) to make oral and/or written presentations to the Proposal Review Panel.
- C. Late Proposals:  
Any proposals received after 5:00 p.m. on Thursday April 18, 2013 may be rejected by F5SMC as not meeting the requirements of this RFP. Faxed proposals will not be accepted.
- D. Rejection of Proposals:
1. F5SMC may reject any proposal not meeting the minimum requirements of this RFP.
  2. F5SMC reserves the right to reject any and all proposals.
  3. F5SMC reserves the right to waive any requirements of this RFP when it determines that waiving a requirement is in the best interest of F5SMC. F5SMC's waiver of an immaterial requirement shall not excuse the Proposer from full compliance with remaining requirements and the contents of its proposal in the event it is awarded the contract.
- E. Proposal Review Panel:  
The evaluation of proposals will be made by a Proposal Review Panel comprised of F5SMC staff and outside experts in Early Learning, Child Health and Development, and Family Support and Engagement. The review panel will be selected by the Executive Director of First 5 San Mateo County. The Proposal Review Panel will objectively and fairly assess each proposal and the qualifications of Proposers submitting proposals.

F. Proposal Review Criteria:

1. History, Background, and Structure of Proposer (including any collaborating entities):

- a. Personnel: How long have key personnel been conducting the types of services described in the proposal? Does key staff have experience providing the required services? Does staff have knowledge of early physical, cognitive, and social-emotional development, and of the issues facing San Mateo County's children aged 0-5 and their families?
- b. Needs Assessment: Has the Proposer taken into account needs assessments and/or other relevant sources of information in writing this proposal and in planning program design and services? Does the Proposer demonstrate sufficient understanding of: the nature and scope of the issue(s) being addressed; the existing gaps in services; the population(s) to be served; and other resources and/or collaborative opportunities to address the issue(s)?
- c. Experience: How long has the Proposer been involved in providing the types of services described in the RFP? What is the Proposer's track record in implementing programs? Does the Proposer have a history of successfully managing contracts with public or private agencies? Does the Proposer have experience working with other First 5 Commissions, county departments or agencies, or programs serving children aged 0-5 and their families? Has the Proposer demonstrated the capacity to successfully develop and implement services in partnership with others?
- d. What is the Proposer's track record in contract compliance, including reporting, accounting and record-keeping requirements?

2. Philosophy and Service Model:

- a. If the proposal responds to the F5SMC Commission's areas of investment interest, is there a clearly articulated understanding of the populations, risk factors, and/or issues of interest as described in the RFP? Does the proposal demonstrate an understanding of and address F5SMC's Strategic Plan?
- b. If the proposal responds to a need outside of the areas of investment interest, is the need well-established and substantiated?
- c. Will the proposed narrative/plan satisfactorily support the objectives delineated in the F5SMC strategic plan?

- d. Does the Proposer demonstrate that it has a track record of positive community collaboration? Does it currently have good relationships in San Mateo County? Do all other collaborating entities included in the proposed project have a good track record of collaboration and developing relationships?
  - e. Does the proposed service model make effective use of the community partners it involves without duplicating services in the designated community(s)?
3. Scope of Work/Staffing and Operations/Cultural Competency:
- a. Are the activities described in the Scope of Work sufficient to accomplish the goals outlined in the RFP and the F5SMC Strategic Plan?
  - b. Are the objectives listed in the SOW measurable and achievable?
  - c. Is there sufficient staffing proposed to perform the services and activities?
  - d. Is the level of expertise and experience of the staff sufficient to provide the proposed services?
  - e. Does the proposal convincingly describe the plan for ongoing communication with staff and monitoring of staff performance?
  - f. Is the agency's plan for providing culturally competent services consistent with the principles described in the RFP? Does the agency offer multi-lingual capability?
4. Planning/Implementation Plan/Timeline:
- a. Will the proposed activities allow for the development of a comprehensive, integrated, and cohesive program as outlined in the Scope of Work?
  - b. If the project involves a planning phase, are the objectives of the planning phase appropriate and warranted by the project?
  - c. Does the proposal provide enough specificity to support detailed implementation of the required services?
  - d. Can the proposed activities reasonably be accomplished within the proposed timeline?
5. Project Budget and Budget Narrative:
- a. Is the Budget Narrative clear, realistic and specific? Does the Budget Narrative demonstrate a thoroughly planned project?
  - b. Are budget justifications, including administrative costs, reasonable? Are staffing patterns adequate?

- c. Does the proposal ensure that the project does not supplant state or local general fund money? See Supplantation Policy (Appendix E).
- d. Are all Budgets and Budget Narratives for subcontracts included?
- e. Does the Proposer effectively describe their ability to utilize all opportunities to leverage additional resources and indicate all resources available in-kind?

6. Sustainability/Supplantation/Evaluation:

- a. Are the strategies for the project sustainable beyond the funding term explained in detail?
- b. Is there any potential for conflict with the F5SMC Supplantation Policy?
- c. Does the proposer explain a plan for addressing mandatory F5SMC evaluation requirements?

7. References:

Has the Proposer provided three reference letters, including agency/individual name, mailing address, contact person, email address and phone number for each reference?

G. Errors or Changes in the Proposal:

If errors are found in a proposal, F5SMC may reject the proposal; however, F5SMC may, in its sole discretion, correct arithmetic and/or transposition errors. The Proposer will be informed of the errors and corrections.

If an item is described in the narrative and omitted from the cost data, the proposal will be interpreted to mean that the Proposer will provide the item at no cost. If this is a significant item, the Proposer will be notified.

Clarification of and changes to proposals prior to contract award are permissible provided that each Proposer is treated fairly and equally.

H. Lowest-cost Proposals:

F5SMC reserves the right to accept other than the lowest price when the best interests of F5SMC are served by doing so.

I. Local Preference:

F5SMC reserves the right to give preference to a San Mateo County based vendor if deemed in the best interest of F5SMC.

J. Notification:

Notification of the announcement of recommendation will be done by certified or registered mail. Notification may also be conducted via email and/or phone.

K. Inability to Negotiate an Agreement:

After a Proposer has been recommended for funding by the Proposal Review Panel and selected for funding by F5SMC, negotiations will commence to institute a contract. If a satisfactory contract cannot be negotiated, F5SMC may, in its sole discretion, defer the amount of funding to another date or award the funds to another Proposer.

L. Appeal Process:

An email followed by a certified or registered letter informing unsuccessful Proposers that their proposal has not been selected for funding will be sent on May 22, 2013. A Proposer must submit a written appeal to be received by the Executive Director of F5SMC by June 1, 2013. Appeals shall be in writing (emails and faxes will not be accepted) and shall be limited to the following grounds:

1. Any failure of F5SMC to follow RFP procedures as articulated in the RFP; and/or
2. The RFP review criteria were not appropriately applied to the proposal.

The Proposer must include a statement of explanation in the appeal letter describing the specific reasons that form the basis of the appeal.

The Executive Director of F5SMC will respond in writing to the appeal within 10 calendar days of the receipt of the written appeal. F5SMC staff may establish a meeting with the Proposer in order to discuss the concerns. The decision of the Executive Director of F5SMC is final.

**If the instructions of this RFP were not followed in full by the Proposer, there are no grounds for appeal to the Commission.**

## VIII. APPENDICES

Appendix A: Cover Sheet

Appendix B: F5SMC Sample Contractor Agreement

Appendix C: Scope of Work

Appendix D: Budget Request and Budget Narrative  
Forms

Appendix E: F5SMC Supplantation Policy

Appendix F: F5SMC 2009-2015 Strategic Plan

Appendix G: Evaluation/Data Collection Tools

G1: F5SMC Aggregate Data Tool

G2: F5SMC Intake Interview Form

G3: F5SMC Follow-Up Interview Form

G4: F5SMC Parent Survey Form

G5: F5SMC General Provider Survey

G6: F5SMC ECE Provider Survey

Appendix H: Letter of Intent Template