Request for Proposals: Strategic Planning Consultant

First 5 Ventura County (F5VC) is soliciting proposals from qualified consultants or firms interested in providing professional consulting services to design, lead and facilitate key strategic planning activities, culminating in a strategic plan that will begin July 1, 2026.

To be considered, proposals must be received by **Thursday, February 20, 205 at 10:00 a.m.** Late responses will **not** be considered.

Proposals will only be accepted via email to: assistant@first5ventura.org

All proposals received will be provided a receipt for their submission by emailed confirmation. If you do not receive an email confirmation, or you wish to call and verify receipt, you may contact Jina Jue at (805) 648-9990.

Any questions concerning this request for proposal should be directed to:

Petra Puls, Executive Director
ppuls@first5ventura.org

All questions and answers will be posted on the F5VC website: www.first5ventura.org under About > Get Involved > Funding Opportunities.

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

Background

First 5 Ventura County (F5VC) envisions all Ventura County children being born healthy, thriving in nurturing environments, and entering school prepared and eager to learn. An independent public entity, governed by a nine-member Commission that is appointed by the Ventura County Board of Supervisors, F5VC is largely funded through the California Children and Families Act, a tobacco tax dedicated to developing locally managed resources and systems that improve health and education for children prenatal to age 5, passed by the voters of California in 1998. In addition to tobacco tax revenue, F5VC is funded through leveraged state and federal dollars, grants, and charitable donations.

First 5 Ventura County 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 Ventura County has stewarded over $223 million in tobacco tax funding in the community, investing in early childhood programs, services and systems countywide.

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During 2022, the Commission evaluated strategic priorities outlined in the F 2020-22 Strategic Plan to ensure investments are aligned with local, state, and federal opportunities and priorities. Due to the substantial shifts during FY 2020-22 and the unique needs accentuated by the COVID-19 pandemic, the Commission decided to adopt an extension of the Plan through FY 2026. This extension allowed the Commission to evaluate the impact of FY2020-22 investments and changing conditions impacting children prenatal to age 5 and their families before determining any program changes in future years. This extension of the FY2020-2022 Strategic Plan maintained strategic priorities, desired outcomes, evaluation measures, and key initiatives for FY2023-2026. The FY2020-2026 Strategic Plan's implementation timeline is slated to end in June 2026.

The comprehensive assessment of the conditions impacting prenatal to age 5 and their families in Ventura County through available data to inform strategic goals and priorities is already underway, led by F5VC staff. In November 2024, F5VC staff proposed a set of activities and a timeframe for developing a new Strategic Plan to be effective July 1, 2026.

Scope of Work

The Strategic Planning consultant will provide the guidance, coordination, and support needed to develop and implement a process that leads to the delivery of a Strategic Plan and Executive Summary by no later than March 2026. The Commission's next Strategic Plan will begin July 1, 2026 and run for an as-yet-undetermined length of time. The consultant will need to work closely with First 5 Ventura County senior staff, Commissioners, key stakeholders, and community members at various points in this iterative and collaborative process.
Below are the primary service components and general expectations for the Strategic Plan consultant.

Co-create the Strategic Planning process

1. Act as a thought partner to First 5 Ventura County senior staff on strategies for promoting systems change, leading to an integrated and coordinated child- and community-focused systems of care.
2. Meet with F5VC senior staff to review, discuss and refine
    - The proposed planning activities and timeline
    - Plans to integrate community engagement into planning processes
    - Key planning questions and decision points
    - Reports and data on child well-being and disparities
    - Report on current F5VC investments and outcomes

Community and Stakeholder engagement

1. Develop and implement a plan for engaging community voice in order to explore emerging issues, partnerships, and potential for collective impact.
    - The planning process will engage families at the grassroots level, F5VC staff, leaders of community organizations, and other stakeholder groups to accurately reflect the needs, opportunities, and strengths in communities.
    - Listening sessions, interviews, surveys, and/or focus groups may be conducted as part of the process.
2. Synthesize and, in coordination with staff, integrate community engagement information for group discussion and seek ongoing opportunities for incorporating and elevating community voice into the process.

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3. Examples of partners to involve may include:
    - Parent/Caregivers with a focus on parents from diverse/underserved communities.
    - Key Child and Family Service Providers with a special emphasis on those who serve vulnerable children and families.
    - F5VC frontline staff and managers.

Facilitate planning meetings/retreats with First 5 Ventura County Commission and staff

1. Convene and facilitate meetings with staff and Commission.
2. In collaboration with First 5 staff, incorporate the review and discussion of program participant, community and population level data to help guide decision-making.
3. Design agendas for productive meetings with the Commission that support genuine and meaningful participation, engagement, consensus-building, and decision-making around funding priorities.
4. Develop planning documents, interactive activities, communications, PowerPoint presentations and other meeting materials that will help move through discussions and major decision points.
5. Ensure that a focus on promoting racial equity within early childhood and social services systems is central to discussions.
6. Synthesize community engagement information and seek opportunities for incorporating community voice in the process to help guide decision-making.
7. Lead discussions at key Commission meetings using facilitation techniques that support consensus building and conflict resolution approaches.
8. Document and summarize feedback and outcomes from meetings and retreats.
9. De-brief meetings/progress with staff to plan next steps and prepare for subsequent Commission meetings/retreats.

Produce a final Strategic Plan document

1. Create the Strategic Plan and Executive Summary documents and present a draft and a final version to the Commission. Please note that graphic design of those documents is not part of the consultant scope of work.
2. At a minimum, the resulting strategic plan will:
    - Provide a framework for making hard decisions and adapting to changing needs.
    - Chart a clear future pathway that defines First 5 Ventura County's priorities, investments, role, and core functions.
    - Adopt strategic priorities that will have an impact on reducing disparities in outcomes for children prenatal to age 5 and their families.
    - Propose a desired outcomes framework that ties investments and strategic priorities to intended results.

Qualifications and Experience

The ideal contractor must have the experience, knowledge, skill and time necessary to execute a strategic plan development effort, including:

- Proven ability to produce high quality deliverables that are clear, concise and effectively communicate key messages.
- Experience analyzing and synthesizing complex information to guide F5VC staff and Commissioner decision making.
- Strong expertise in planning and facilitating meetings that support genuine and meaningful participation, engagement, and decision-making.

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- Knowledge of facilitation techniques that stimulate creative thinking, support consensus building and negotiate differences to resolve potential conflict.
- Familiarity with First 5 programs or content areas (early learning, family strengthening, child health and systems of care) and understanding of issues facing F5VC.
- Experience engaging broader community stakeholders and incorporating community input into planning discussions.
- Ability to enter into a contract with First 5 Ventura County and complete the Scope of Work as defined in this Request for Proposals.
- Capacity to work in Ventura County.

Time Considerations and Requirements

1. To be considered, proposals must be received by First 5 Ventura County **Thursday, February 20, 205 at 10:00 a.m**. Late proposals cannot be accepted.
2. The contract is scheduled to be awarded in **March 2025**.
3. This project is expected to be completed by no later than **March 2026**.

Proposal Requirements

In 6 pages or less, provide a proposal that addresses the following:

1. Describe qualifications and past and current experience with similar work. Describe the size of the consulting firm/agency, areas of focus, general philosophy and experience conducting multi-year strategic planning for entities in the early childhood, youth and/or family support space.
2. Provide a detailed description of how the proposed project will be planned, designed and implemented, including:
    - How the consultant proposes to communicate, collaborate and engage with F5VC senior staff;
    - Proposed strategies for building trust with staff, Commissioners and community partners, achieving consensus around recommended goals and strategies, and addressing potential conflicts of interests; and
    - Proposed strategies for supporting Commission members in analyzing, synthesizing and incorporating a broad array of relevant data (quantitative and qualitative).
3. Provide a detailed workplan that includes a realistic project timeline for completing each significant segment of work with related timeline deliverables, tools, logistics, strategies, roles, and responsibilities for each phase leading up to a final Strategic Plan to be completed by no later than March 2026.
4. Provide costs for implementing the scope of work.
    - Costs for performing the above scope of work should be based on deliverables. Please list your proposed cost for each of the deliverables specified in the Scope of Work. Provide a breakdown for how you arrived at the cost for each deliverable.

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Additional Required Information:

- **Primary Contact Person** - include the email, mailing address and phone number of the primary contact person.
- **Resumes** – include the resumes of all staff expected to work on this project, delineating roles of each staff member in the proposed project.
- **List of References** – provide a listing of the names, addresses, telephone numbers, email addresses (if applicable), and agency contacts of three (3) former clients and the title of the project completed. F5VC may contact some or all of the bidder's references as part of its review process.
- **Examples of Previous Strategic Plan Work** - Provide at least two examples of previous strategic plan documents that represent the consultant's work, either as internet links to the examples or upload PDFs of strategic plan documents themselves.

Evaluation of Proposals

Proposals will be evaluated to ascertain which consultant or firm best meets the needs of First 5 Ventura County. Oral interviews may be necessary to assist in making the final selection.

Evaluation considerations will include the following:

- Qualifications, experience, and professional activities of the consultant; past performances of the consultant on work previously performed for governmental agencies or non-profits comparable to First 5 Ventura County.
- Proposal demonstrates a clear understanding of the work to be performed, includes strategies and approaches highly likely to produce intended outcomes, and the proposed timeline is reasonable.
- Cost, although a significant factor, may not be the dominant factor. Cost is particularly important when all the other evaluation criteria are relatively equal.

The award will be made to the consultant/contractor/firm, which, in the opinion of First 5 Ventura County, is best qualified.

F5VC may, at its sole discretion, reject any or all proposals submitted in response to this Request for Proposals (RFP). Failure to comply with the specifications of this solicitation shall be grounds for disqualification. F5VC also reserves the right to cancel this RFP at its sole discretion, at any time prior to execution of an agreement or contract. F5VC shall not be liable for any costs incurred in connection with the preparation of any proposal submitted in response to this solicitation.

After selection of contractor, F5VC reserves the right to enter negotiations with the contractor for additional work and/or to further define work requirements for the contract period.

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