



# **Request for Qualifications (RFQ) – Consultant Pool for Grant Writing and Fund Development Services**

Release Date: Tuesday, March 26, 2024

Application Deadline: Applications will be reviewed on an ongoing basis, accepted anytime through June 30, 2024

\* Any date in this document may be changed at the discretion of First 5 Monterey County. All changes will be posted on the website at <https://www.first5monterey.org/contract-opportunities.htm>.

First 5 Monterey County  
1125 Baldwin Street  
Salinas, CA 93906  
Phone: (831) 444-8549  
[www.first5monterey.org](http://www.first5monterey.org)

**FIRST 5 MONTEREY COUNTY – REQUEST FOR QUALIFICATIONS (RFQ)**  
**CONSULTANT POOL FOR GRANT WRITING AND FUND DEVELOPMENT**

---

**TABLE OF CONTENTS**

1.	INTENT .....	1
2.	TIMELINE* .....	1
3.	BACKGROUND .....	1
	A. First 5 Monterey County .....	1
4.	AREAS OF SERVICES.....	2
	A. Grant Research and Writing Support.....	2
	B. General Fund Development Support.....	2
5.	SELECTION CRITERIA .....	2
6.	RFQ PROCESS.....	2
	A. Review Process and Award .....	2
	B. Award and Term of Contract .....	3
	C. Questions.....	3
	D. Deadline.....	3
7.	SUBMISSION REQUIEMENTS .....	3
8.	APPEAL PROCESS.....	3
9.	CAVEATS AND LEGAL NOTES .....	4
10.	APPENDICES LIST .....	4
	APPENDIX A – Insurance Requirements .....	4
	APPENDIX B – Coversheet .....	4

---

## 1. INTENT

First 5 Monterey County (F5MC) is developing a pool of qualified candidates to provide contractual support for grant writing and fund development.

The overall areas of support being sought are:

- A. Grant Writing and Research Support
- B. General Fund Development Support

Submissions will be accepted on an on-going basis through June 30, 2024. Once accepted, members of the Pool will be solicited for a specific contract as needed, based on areas of expertise of the Consultant and needs of F5MC. Acceptance into the Pool is not a guarantee of a contract. Selected Consultants may be required to participate in an interview and to submit additional information in order to complete the contracting process.

## 2. TIMELINE\*

RFQ Released	Tuesday March 26, 2024
Applications due	Accepted on a rolling basis through June 30, 2024
Notification of acceptance into Pool	Estimated 1-4 week after submission
Member(s) of Pool notified of a potential contract	On a rolling basis, as needs arise
Review of candidates for contract	Estimated 1-4 weeks after notification
Public notification of Intent to Award contract to selected consultant	Estimated 2-4 weeks after review
Contract negotiation and development of SOW and budget	Estimated 2-6 weeks after Intent to Award
For contracts over \$25k, F5MC Commission approval is required	Varies depending on review dates. The F5MC Commission Meetings schedule can be found here: <a href="https://www.first5monterey.org/commissioners-and-meetings.htm">https://www.first5monterey.org/commissioners-and-meetings.htm</a>

\* Any date in this document may be changed at the discretion of **First 5 Monterey County**. All changes will be posted on the website at <https://www.first5monterey.org/contract-opportunities.htm>.

## 3. BACKGROUND

### A. First 5 Monterey County

First 5 Monterey County (F5MC), also known as the Monterey County Children and Families Commission, was established in 1998 and is led by a Commission appointed by the Monterey County Board of Supervisors. The new F5MC Strategic Plan Framework July 2023 – June 2029 identifies the vision and mission as follows:

**Mission:** First 5 Monterey County enriches the lives of children, ages prenatal through 5, and their families by elevating early childhood as a priority, strengthening connections, and advancing quality within a whole system of care and support.

**Vision:** The wellbeing of all young children and families is nurtured by responsive services, just and equitable systems, and safe and welcoming environments.

In addition to the Vision and Mission above the importance of centering Race, Equity, Diversity and inclusion (REDIness) is an essential area of focus for F5MC. F5MC's 2023-2029 Strategic Plan

Framework can be found on our website at: <https://www.first5monterey.org/download/library/strategic-plan/strategic-plan-2023-2029-86.pdf>

#### **4. AREAS OF SERVICES**

Consultants in the Pool will be contracted for one or both areas of service listed in Sections A and B.

##### **A. Grant Writing and Research Support**

Activities anticipated to include, but are not limited to:

- a) Research grants
- b) Write grant applications
- c) Coordinate and project manage the grant application process
- d) Support grant report requirements

##### **B. General Fund Development Support**

Activities anticipated to include, but are not limited to:

- a) Write fund development pitches and help develop other fund development collateral
- b) Identify and cultivate individual and major gift donors
- c) Identify and cultivate institutional (foundation) donors
- d) Develop innovative fund development campaigns
- e) Collaborate with F5MC's communications team to ensure consistency

#### **5. SELECTION CRITERIA**

Responses will be reviewed in consideration of the following criteria and will be based upon will be based upon a combination of the written submission, references, and interview (if applicable). A submission of qualifications and acceptance into the Pool is not a guaranteed does not guarantee a match with a project and contract, and availability will be considered.

Submissions will be qualified based on the following:

- A. Knowledge and experience in the area of service (Section 4) for which the applicant is applying**
- B. Knowledge of early childhood programs and services**
- C. Established relationships with community and systems partners in Monterey County, as applicable**
- D. Excellent communications skills, both written and oral**
- E. Excellent organization and project management skills**
- F. Availability**
- G. Cost**

Furthermore, the area of expertise should be directly relevant to the work being undertaken by F5MC, and this relevance should be reflected in the applicant's response.

#### **6. RFQ PROCESS**

##### **A. Review Process and Award**

When an application is received it will be reviewed and rated by F5MC staff. F5MC may elect to include potential project staff and/or resource persons with relevant experience to participate in the review of applications. F5MC reserves the right to conduct interviews (which may be conducted

virtually), if deemed necessary. Additional information may be requested from the applicant. Being accepted into this Pool is not a guarantee of a contract.

**B. Award and Term of Contract**

The successful applicants will execute an agreement with F5MC which includes complying with F5MC insurance requirements as described in Appendix A before any costs are incurred. The Scope of Work and Budget will be finalized during contract negotiations.

If the resulting agreement is \$25,000 or more in the aggregate in any fiscal year, the award and execution of the contract is subject to F5MC's Commission approval.

Contracts entered into as a result of this RFQ maybe for a total term of no more than 5 years.

**C. Questions**

Any questions about this RFQ must be submitted via email to [Joanna@first5monterey.org](mailto:Joanna@first5monterey.org). Answers to questions will be posted periodically on the F5MC website.

**D. Deadline**

Complete applications must be submitted via e-mail to [Joanna@first5monterey.org](mailto:Joanna@first5monterey.org) and applications will be accepted, on an ongoing basis, through June 30, 2024. Applicants are responsible for ensuring that submissions are received on time.

The cost of developing the application is entirely the responsibility of the applicant and cannot be charged to F5MC nor included as a cost element of the proposed fee. All applications become the property of F5MC once they are submitted.

**7. SUBMISSION REQUIEMENTS**

Please include the items below to ensure a complete application package

**A. Coversheet** - Provided in Appendix B

**B. Statement of Qualifications - Experience, Skills, and Knowledge** - Applicants should submit a statement of qualifications outlining relevant work and/or consulting history, education, prior projects, etc. Include a history of relevant experience (such as paid or unpaid work, education and/or training) for each team member in the application.

The following areas should be clearly described:

- a. Knowledge and experience in **each** area of service (Section 4) for which the applicant is applying
- b. Knowledge of early childhood programs and services
- c. Established relationships with community and systems partners in Monterey County, as applicable
- d. Communications skills, both written and oral
- e. Organization and project management skills

**C. Fee Schedule** – Please indicate your all-inclusive hourly fees for consulting services. Travel and/or mileage will not be reimbursed. Different rates for remote and on-site work may be proposed.

**D. Availability** – Describe your availability to complete the relevant types of services described in this RFQ. Also, please include any known conflicts of availability. Work may fall outside of regular business hours.

**E. References** – Provide contact information for two (2) references for similar work completed in the last 3 years. Other individuals known by F5MC to be familiar with the applicant's work may also be contacted.

**8. APPEAL PROCESS**

Any applicant who wishes to file an appeal must file a written Letter of Appeal delivered by certified mail to

F5MC. Executive Director at the address on the cover of this RFQ within 4 business days of the announcement of the Notification of Intent to Award. Appeals are limited to violations of law, regulation, or procedure. Appeals will not be accepted on any other grounds. The Letter of Appeal must state the reason for the appeal, including all facts, citations of law, regulation or procedure that are the basis for the appeal. The F5MC Executive Director will review the Letter of Appeal and issue a written decision. The decision on appeal is final.

## **9. CAVEATS AND LEGAL NOTES**

- A. F5MC reserves the right to cancel the RFQ 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. The costs of developing an application cannot be charged to F5MC or included in the proposed budget.
- B. No Supplanting – F5MC is prohibited from providing funds to maintain existing levels of service and from replacing State or Local general fund money (supplanting). F5MC funds may only be used to enhance existing services or create new programs or services.
- C. The Application is not a contract for employment or hire and the final terms of the proposed contract are subject to review and approval of the Commission.
- D. The RFQ is not a contract for employment or hire and the final terms of the proposed contract are subject to negotiation and review and approval of the F5MC Commission.
- E. The estimate given in the Submission must include all design, planning, and implementation costs.
- F. All Applications and associated materials become the property of F5MC upon submission and will not be returned to applicants. F5MC reserves the right to accept or reject all or a portion of any application and reserves the right to waive any minor irregularities in any application.
- G. F5MC reserves the right to reject an application based on errors made in computing costs or due to noncompliance with the requirements of this application as determined by F5MC at its sole discretion. F5MC is not responsible for any errors in the application, including mathematical errors.
- H. Upon award, the successful applicants will be expected to execute an Agreement with F5MC. F5MC is under no obligation to select the applicant who presents the application with the lowest cost structure. An application award is based upon quality of the application within a reasonable proximity to the other proposed costs. Selection will be made based on overall evaluation of the applicant submissions and the best interests of F5MC as determined by F5MC.
- I. In the event that F5MC is not satisfied with the submitted proposals and corresponding scopes of work from a service, budget, and/or geographic perspective, it may choose to negotiate the scope of work with the existing applicant Pool, other vendors, or institute Article VI, Section 11 Selection Process Exceptions of the F5MC Policies and may select another Consultant.
- J. F5MC reserves the right to negotiate project-related conditions, scopes of work, budgets and costs with any successful applicant. If negotiations fail to culminate in a contract, F5MC may institute Article VI, Section 11 Selection Process Exceptions of the F5MC *Policies* and may select another Consultant.

## **10. APPENDICES LIST**

**APPENDIX A – Insurance Requirements**

**APPENDIX B – Coversheet**

## **APPENDIX A – Insurance Requirements**

As a condition of this Agreement CONTRACTOR must provide proof of insurance for the following and maintain in full force and effect, during the term of this Agreement, the following types of insurance:

- [X] General Liability** [“occurrence” coverage]  
CONTRACTOR shall maintain general liability insurance with limits of not less than \$1,000,000 per occurrence for bodily injury and property damage liability combined.

Additional Insured Endorsement: The policy must include Monterey County Children and Families Commission, the individual members thereof, and all F5MC officers, agents, employees, and its Board of Directors as Additional Insureds with respect to services being provided, including ongoing and completed operations. Additional insured endorsement shall be equivalent to ISO form CG 20 26 07 04.

- [X] Automobile insurance**  
CONTRACTOR shall maintain motor vehicle liability with limits of not less than \$250,000 per person, \$500,000 aggregate, and \$100,000 property damage for each vehicle to be operated in association with this Agreement. Such insurance shall cover liability arising out of a motor vehicle including owned, hired, and non-owned motor vehicles.

- [X] Workers’ Compensation** - Required for all CONTRACTOR *with* employees  
Statutory Limits or \$1,000,000, Employers Liability minimum \$100,000

***Please have Insurance Certificates with any Additional Insured Endorsements sent to First 5 Monterey County, 1125 Baldwin Street, Salinas, CA 93906.***

- A. All Insurance Certificates showing proof of insurance must include a 30-day Notice of Cancellation endorsement.
- B. F5MC’s legal name, Monterey County Children and Families Commission, must be used on all insurance certificates and endorsements.
- C. All insurance provided required under this Agreement shall be primary coverage with respect to F5MC, and any insurance or self-insurance maintained by F5MC shall be in excess of CONTRACTOR’S insurance coverage and shall not contribute to CONTRACTOR’S coverage. F5MC is to be notified immediately if any aggregate insurance limit is exceeded.
- D. Failure to provide these documents shall be grounds for termination or suspension of this Agreement.
- E. It is the responsibility of CONTRACTOR to confirm that any and all subcontractors that CONTRACTOR may use for the completion of this Agreement comply with all terms and conditions of the insurance provisions.
- F. Policies shall not be canceled, non-renewed or reduced in scope of coverage until after sixty (60) days written notice has been given to F5MC.
- G. Evidence of Self-Insurance: For CONTRACTORS who are self-insured, legally adequate evidence of self-insurance meeting the approval of F5MC’s Legal Counsel may be submitted for any coverage required above. For Workers’ Compensation, CONTRACTOR must submit a copy of the Self-Insured Certificate issued by the State of California.

Prior to any obligations of F5MC, CONTRACTOR shall file certificates of insurance with F5MC, showing that CONTRACTOR has in effect the insurance required by this contract. CONTRACTOR shall file a new or amended certificate including applicable endorsements promptly after any change is made in any insurance policy, which would alter the information on the certificate then on file.