







2-Year External Evaluation RFP Pre-Proposal Meeting

November 28, 2023

Housekeeping

- **Virtual Sign-In** 
<https://forms.gle/6fu1MWbkkNsq1m716>
 - *For transparency purposes, City shall share attendees on today's RFP Pre-Proposal Meeting, please be sure confirm in the Google form.*
- **All attendees are muted upon entering** 
- **Session is recorded** 
 - Slides for this presentation will be available on the Oakland Children's Initiative webpage
- **Please hold questions until the end of the presentation** 
 - At the designated time, feel free to unmute and ask your question (please be mindful of others)
 - Alternatively, you can share questions via chat



WELCOME

- **Carmen Rotaru**, Administrative Analyst II Contracts Unit
Finance Department | Controller's Bureau
- **Jennifer Cabán**, Accountability Officer
Oakland Children's Initiative, City Administrator's Office
- **Laura Gonzalez-Woodward**, Contracts & Purchasing Manager
Finance Department | Controller's Bureau
- **Sophany Hang**, Contract Compliance Officer
Workplace & Employment Standards Department



CITY OF OAKLAND – STAFF

AGENDA



- **Oakland Children's Initiative - Overview**
- **Ordinance Requirements**
- **2 Year Evaluation RFP / Qualifications**
- **Funding Overview**
- **How to Apply**
- **Contract Compliance**
- **Important RFP Reminders**
- **Q & A**



The Oakland Children's Initiative ([Measure AA](#)), driven to the ballot by community advocacy, is a 2018 Charter Amendment passed by the citizens of Oakland to deepen the early investment in children and support them through college graduation, by dramatically **expanding and enhancing access to high quality early childhood education and providing college access supportive services** for students to obtain 4-year or 2-year college or technical degrees.

Oakland Children's Initiative Overview

Brief Oakland Children's Initiative Timeline



Oakland - Measure AA Parcel Tax Charter Amendment



Parcel tax is on the November 2018 ballot. Receives 62% approval and enters three years of challenges in court that delays implementation.¹

Winter 2022

City official launches the Oakland Children's Initiative

Begins parcel tax collection, Hires staff.

Fall/Winter 2022

Contracting & Implementation

Formal implementation (Jan 2023), contracts, program planning and budgets, and collaborative partnerships begin

Spring 2018

Courts rule in favor of Measure AA with simple majority vote for approval.¹

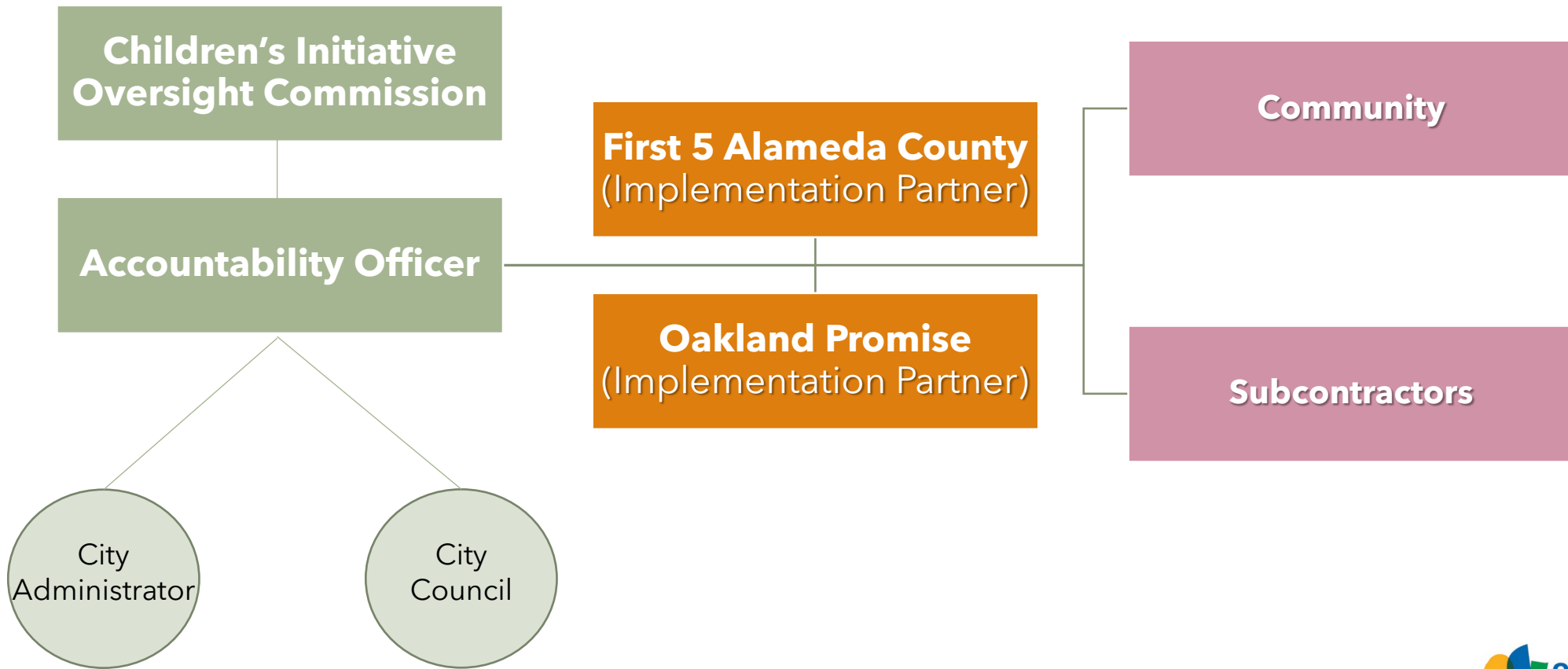
Summer 2022

Oakland Children's Initiative Implementation Partners Selected

- Early Education Fund – First 5 Alameda County
- College Access Supports – Oakland Promise



¹ - Sources include: Ballotpedia. [Oakland, California, Measure AA, Education Parcel Tax Charter Amendment \(November 2018\).](#)



Organizational Structure



Ordinance Requirements

EARLY EDUCATION FUND FIVE-YEAR GUIDELINES



- 1) **Increase overall attainment and reduce socioeconomic and/or other demographic disparities, in child educational outcomes, such as kinder-readiness, and provide family support services, to achieve the following outcomes prioritized** as follows, such that plans to fund a lower priority outcome may only be implemented if the Early Education Implementation Partner has determined that the next highest priority goal is reasonably achievable within the five-year period:
 - a) **Make available free or affordable and high-quality early education and/or preschool for four-year old children from low-income families, such as those who make less than eighty-five-percent (85%)** of the state median income, with a priority on serving the children of families with the lowest incomes and/or those who are in high need, while also supporting such families who need family, friend, and neighbor care.
 - b) **Increase the availability of free or affordable and high-quality early education and/or preschool for three-year-old children from low-income families,** with a priority on serving the children of families with the lowest incomes or those who are in high need, while also supporting such families who need family, friend, and neighbor care.
 - c) **Increase the affordability and/or quality of preschool for all four-year-old children,** with a priority on serving the children of families with the lowest incomes or those in highest need, while also supporting such families who need family, friend and neighbor care.
 - d) **Increase the affordability and/or quality of preschool for three-year-old children,** with a priority on serving the children of families with the lowest incomes or those in highest need, while also supporting such families who need family, friend and neighbor care.
 - e) **Increase the availability and/or quality of child development support services for children and families from low-income backgrounds** with children from birth through age three, while also supporting such families who need family, friend, and neighbor care.
- 2) **Provide for a rigorous external evaluation of the impact of the early education programs,** such as on child outcomes data including kindergarten-readiness, that will facilitate assessment of whether the early education programs are achieving the goals of the Act and provide information on how to mitigate disparities, such as those by wealth and income or for children in high-need.

Key Takeaways

- Implementation Partner must be a public agency
- 5-Yr Guidelines are in priority order
- Requires public systems *OUSD & OHS* as *Priority Partners* for funding (i.e. contracts)
- Targets high need families

EARLY EDUCATION FUND FIVE-YEAR GUIDELINES (CON'T)



- 3) **Ensure that professional development and coaching are generally available for educators**, and that participating center-based preschool programs generally are able to do the following within a reasonable timeframe:
 - a) Achieve a baseline rating of at least three (3) or higher on the regional Quality Rating and Improvement System (QRIS), or a successor system;
 - b) Utilize a developmentally-appropriate curriculum aligned with California Department of Education standards, and in addition that is also evidence-based and/or has demonstrated success in improving preparation for kindergarten;
 - c) Conduct formative assessments to shape instruction; and
 - d) Participate in valid, regular, and reliable assessments of early education quality in order to foster continuous improvement and to reduce disparities, such as those by income and wealth, in child outcomes.
- 4) **Ensure that funding streams** from federal, state and local sources, including Head Start, **are coordinated** to reduce the administrative burden of program beneficiaries in accessing services, and to ensure that existing high-quality early education programs are not made financially unviable.
- 5) **Give priority consideration to expanding higher quality programs and/or facilities for children who are in the highest need**, from the lowest-income backgrounds, live in areas of high unmet early education need, and/or who are traditionally underserved, as resources allow, which could include enhanced services, such as bilingual or dual-language instruction, supports to enhance cultural competency, or a higher rating on the QRIS or a successor system.



OAKLAND PROMISE FUND FIVE-YEAR GUIDELINES



Key Takeaways

- Implementation Partner must be a non-profit or public agency
- 5-Yr Guidelines are in **not** in priority order
- Requires funding support public school students (i.e. school district, charter)
- Targets high need families

- 1) **Reduce socioeconomic and/or demographic disparities**, such as those related to wealth and income, for children from an early age, **in College readiness, access, affordability, applications, enrollment, retention and completion**, particularly for students in high-need or who are traditionally underrepresented in post-secondary education.
- 2) **Increase early College savings and asset building for families with children ranging in age from zero to grade five**, such as through the creation and seeding of college savings accounts and the provision of financial coaching and supports to families.
- 3) **Increase the expectations and resources to attend College among children and families of all socioeconomic backgrounds in Oakland public schools**, with a priority for students from low-income backgrounds and/or traditionally underrepresented in College, through strategies, such as increasing school-based programming that builds the college-bound identity of students and a college-going culture in elementary, middle, and high schools.
- 4) **Increase College awareness, application, and eligibility, as measured by increases in completing courses required for College enrollment**, such as those required by the University of California, and in College acceptance rates of Oakland Public School students, through means such as providing College access services that are integrated into schools.
- 5) **Increase College affordability**, including by expanding access to public and private student financial aid, such as by increasing FAFSA or Dream Act Application completion rates, increasing the direct provision of College scholarships including multi-year last dollar scholarships, and partnering with educational institutions in order to provide institution-specific scholarships and to reduce tuition, room and board, and/or other college expenses.
- 6) **Increase College admission, matriculation, and enrollment rates**, such as increasing the percent of students who enroll in College in the fall directly following high school graduation through a focus on the above strategies.
- 7) **Increase full-time College persistence rates for students enrolled in College**, especially persistence between their first and second year of enrollment, through means such as mentoring, peer advising, and on-campus supports.
- 8) **Increase the number of Oakland students graduating from College within six (6) years of high school graduation.**

Oversight Commission Responsibilities

- **Approve subsequent 5-year guidelines** after the expiration of the initial 5-year guidelines established in the ordinance
- **Approve or reject recommendations on the selection, terms, extension, or termination** of the Implementation Partner from Accountability Officer; submit final approval to city council for adoption without amendment
- **Approve annual financial audits**
- **Review performance appraisals and external evaluation findings**

Accountability Officer Responsibilities

- **Oversee programs** and provide recommendations to the Citizens' Oversight Commission
- **Preparing subsequent 5-year guidelines** after the initial 5-year guidelines set forth in the ordinance
- **Leading the selection process and contracting for the Implementation Partners** for the Early Education Fund and Oakland Promise, making recommendations to the Citizens Oversight Commission.
- **Ensuring independent financial audits** and presenting the to the Citizens' Oversight Commission
- **Monitoring performance** of Implementation Partners
- **Oversee external evaluations, including selection of evaluator**
- Other duties as assigned by the City Administrator
- **Training** for members of the Citizens' Oversight Commission





2-Year Evaluation RFP / Qualifications

▪ Distribution of RFP/RFQ	9AM, November 17, 2023
▪ Pre-proposal Meeting	930AM, November 28, 2023
▪ Submission of RFP/RFQ	2PM, December 22, 2023
▪ Evaluation of Rankings	December 29, 2023
▪ Notification of Interviews	January 3, 2024
▪ Interviews	January 18 -26, 2024
▪ Contract Negotiations	February 2024
▪ Contract Documentation Distribution	February 2024
▪ Contract Award	March 2024

Important Dates
Tentative Timeline

The City of Oakland is seeking an external evaluator to:

- **Develop and implement the initial 2-year evaluation for the Oakland Children's Initiative** and its selected Implementation Partners. In accordance with the ordinance, proposals from evaluation firms shall focus on identifying how the Initiative can show collective impact, overall delivery of services in relation to each of the Implementation Partners; this includes strategies, sub-strategies, and activities to increase access and enhance quality early care and education and college access supports.
- Important that the evaluator **consider the impact of the initiative on broader community/ population well-being** as compared to how the evaluation will document program design and deployment.
- Based on performance in the initial evaluation phase, the City may consider a longer-term partnership to support the 2-year evaluation requirement set forth in the ordinance.

2-YEAR EVALUATION RFP

The evaluation, at its core, should:

- **Align and account for the Results Based Accountability (RBA) Measures** required to be established, collected, and reported by the Implementation Partners. The RBA provides metrics that identify measures of how much, how well, and what will be better off as a result of investments of the Oakland Children's Initiative.
- **Be responsible for conducting a holistic impact evaluation** which accomplishes the following:
 - a. Aids the City of Oakland to identify the impact of its investments and overall implementation,
 - b. Offers insights and suggestions that will inform the next iteration of 5-year Guidelines to better meet real-time community needs and will uplift areas of improvement to align the work, and/or
 - c. Enhance existing practices and RBA metrics.
- **Inform its multiple stakeholders of the collective impact of OCI funded strategies and inform decision-makers about how to deepen collective impact in future years.**

2-YEAR EVALUATION RFP – SCOPE OF WORK

The evaluation design and execution should:

1. **Organize** around a whole child, whole family, and whole community framework
2. **Examine** how existing and new funding sources are being leveraged
3. **Employ** a mixed methods approach to data collection
4. **Analyze** system stability and sustainability
5. **Consider** the cost of care, affordability for family and meeting family need

The selected contractor is expected to conduct an evaluation that uses ***mixed methods approach*** to fully assess the impact of OCI. **Evaluation deliverables** should be usable and accessible by the public, government stakeholders, and funded program providers. Anticipated deliverables will include:

- **Regular, routine engagement** with the Accountability Officer and designated stakeholders, as agreed upon;
- **Regular progress evaluation reports** that demonstrate the advancement in development and implementation;
- **Summative, monthly feedback reports** from interviews and/or engaged partners in the prior month;
- **Impact evaluation report** for the Oakland Children's Initiative including one final report for the two-year period;
- **PDF report / PowerPoint presentation slides** that accompany each process and impact evaluation report to use in communicating findings to community and partner audiences; and
- **Presentation(s) of findings from each process and impact evaluation report** to community and partner audiences, as needed.



2-YEAR EVALUATION RFP – REQUIRED SERVICES

The selected contractor is expected to demonstrate:

- **Prior success in conducting evaluations** with similar features to that of the OCI and what is described in this request for proposals;
- **Demonstrated proficiency in one or more of the whole child, whole family, and whole community frameworks** including its application in an evaluation design;
- **Demonstrated capability to examine multiple funding sources across sectors** and how they are assessed relative to impact of an initiative;
- **Demonstrated capacity and capability to analyze system stability and sustainability** as described in the principles outlined in the RFP;
- **Understands and is familiar with the fundamentals of the local and/or statewide education landscape** (i.e. ECE, college access, etc.) and rudiments of meaningful family, community and partner engagement; and
- **Equity Centered** - demonstrated knowledge of the local community, holistic understanding of the forces impacting economically vulnerable groups, etc.

2-YEAR EVALUATION RFP – MINIMUM QUALIFICATIONS & EXPERIENCE



Funding Overview

- Funding for the **evaluation will be paid for through the** Oakland Children's Initiative **Oversight, Accountability, and Evaluation Fund**. This is a 7% subset of annual Initiative funding.
 - At least ***one-third of the monies deposited in the Oversight, Accountability and Evaluation Fund are appropriated for independent, third-party evaluations.***
 - Funds are re-allocated into Early Education & Oakland Promise Funds at the end of every two years.
- Bids are requested for estimated costs for services with a ***total not to exceed \$700,000.00 annually.***
- Allowable uses are specified in the voter-approved Charter amendment.
 - https://library.municode.com/ca/oakland/codes/code_of_ordinances?nodeId=THCHOA_ARTXVITHCHIN2018



Funding Overview



How to Apply



Required Proposal Elements

- 1. Transmittal letter**
- 2. Project team:** Describe the project team, including sub-contractors, and provide a business license for LBEs/SLBEs.
- 3. Project personnel:** Provide resumes or CVs for principal investigators, project managers, and any identified subcontractors.
- 4. Relevant experience:** Describe prior work on three similar projects and experience working with government, law enforcement, and community partners.
- 5. Billing rates:** Provide a budget that details the activities to be performed by each staff type and estimated hours. Hourly rates should be inclusive of base salary, fringe benefits, overhead, etc.)



Required Proposal Elements

- 6. Project approach and organization:** Present your concept of the approach, organization, and structure that should be used for this evaluation. Describe how you intend to interface with City staff, community organizations and the larger community.
- 7. References:** Provide three professional references for prime consultants, two professional references for project managers, and at least one professional reference for subcontractors.
- 8. Required schedules:** Include signed copies of Schedules E, I, O and W with the proposal.



Proposal Submission

- Applicants should submit their proposal electronically via iSupplier by **Friday, December 22, 2023, at 2:00pm PST.**
- In addition, a copy of the proposal should be emailed to Jennifer Cabán, project manager, at **jcaban@oaklandca.gov.**



Review Process

- City of Oakland staff will review proposals for timeliness and completeness.
- A panel will review each proposal and determine the top proposals using the scoring rubric included in the RFP (pgs. 28 - 29)
- Interviews of at least the top 3 applicants will be held prior to final selection and contract award.
- Once an applicant is selected, the funding recommendation will be forwarded to Children's Initiative Oversight Commission & Oakland City Council for review and approval.



Questions

TECHNICAL ASSISTANCE

- E-mail questions regarding RFP to Jennifer Cabán, jcaban@oaklandca.gov
- ***Last day to submit questions is Friday, December 15, 2023 at 2 pm Pacific***
 - *No phone calls, please*

iSUPPLIER SUPPORT

- Email questions to isupplier@oaklandca.gov

CONTRACT ADMINISTRATION

- Email questions to contractadmin@oaklandca.gov

CONTRACT COMPLIANCE SUPPORT

- Email questions to Sophany Hang, SHang@oaklandca.gov

Department of Workplace and Employment Standards (DWES)

Pre-proposal Meeting – November 28, 2023



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DWES Creation and Responsibilities

Department was created July 1, 2020:

Labor Standards

- Educate workers and employers on Oakland's labor laws.
- Enforce laws promoting access to/participation in quality jobs.

Every Oakland worker, including BIPOC and women workers who are disproportionately represented in low-wage industries, has access to quality jobs that provide wages, benefits, and working conditions that allow workers to thrive and increase economic security.

Business Inclusion

- Ensure equitable access to the City's contracting opportunities.
- Maximize participation of local and small businesses.

Every small Oakland business, including BIPOC and women owned businesses that have been disproportionately unrepresented in City contracts, has equitable access to City contracts to increase economic security.



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DWES Divisions and Units

Divisions	Units
<div data-bbox="249 302 540 416">Labor Standards</div> <div data-bbox="249 462 563 725"></div>	<div data-bbox="637 297 1085 339"><u>Citywide Standards</u></div> <div data-bbox="637 348 2372 539">Enforces the City's Minimum Wage Ordinance, Worker Retention at Large-Scale Hospitality Business Ordinance, Hotel Minimum Wage and Working Conditions Ordinance, the Emergency Paid Sick Leave Ordinance, and the Workers Right to Recall Ordinance.</div> <div data-bbox="637 562 1230 605"><u>City Contractor Standards</u></div> <div data-bbox="637 614 2372 753">Enforces the Local Employment Program, the 15% Apprenticeship Program, the Living Wage Ordinance, the Prevailing Wage Resolution, and the Equal Benefits Ordinance.</div>
<div data-bbox="270 785 524 899">Business Inclusion</div> <div data-bbox="254 939 575 1205"></div>	<div data-bbox="637 782 1228 825"><u>Contract Compliance Unit</u></div> <div data-bbox="637 833 2359 973">Enforces the City's Local and Small Local Business Enterprise (L/SLBE) Program and the Disadvantaged Business Enterprise (DBE) Program for federally funded transportation related projects.</div> <div data-bbox="637 996 1646 1039"><u>Business Certification and Engagement Unit</u></div> <div data-bbox="637 1048 2354 1239">Engages in outreach and small business capacity building activities, including certifying businesses as local, small local, very small local, nonprofit local, non-profit small local, nonprofit very small local, Small Business Administration local business, and local business-locally produced goods enterprises.</div>

Labor Standards Requirements for this Project

	Schedule	Provision	Applicability	Reference	Overview
Wages, Benefits, & Working Conditions	Schedule N (required)	Living Wage Ordinance	City Contracts	Chapter 2.28	<ul style="list-style-type: none"> Effective 7/1/2023: \$16.93 with benefits and \$19.44 without benefits 12 days off
	Schedule N-1 (required)	Equal Benefits Ordinance	City Contracts	Chapter 2.32	Benefits are offered equally to employees with domestic partners and employees with spouses



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Business Inclusion Requirements for this Project

	Schedule	Provision	Applicability	Reference	Overview
Local and Small Business Participation	Schedule E (required)	Local and Small Business Enterprise Program	City Contracts – Professional Services	Local and Small Business Enterprise Program , Resolution No. 69687 C.M.S., as amended and codified by Ordinance No. 12389 C.M.S., and as subsequently amended	50% local business participation requirement <ul style="list-style-type: none">• 25% for Local Business Enterprises (LBE)/Local Not for Profit Business Enterprise (L/NFPBE)• 25% for Small Local Business Enterprises (SLBE)/Small Local Not for Profit Business Enterprise (S/LNFPBE)• Very Small Local Business Enterprises (VSLBE) participation is double-counted towards meeting the requirement

Based on a revised Availability Analysis for this project, the local business participation requirement has been set to **0%**.



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Business Inclusion Requirements for this Project

Schedule	Purpose	Requirement	Consequences
Schedule E (required)	Submitted with Proposal to calculate the level of certified local business participation	<ul style="list-style-type: none">50% L/SLBE Participation requirement has been set at 0% based on availability analysis.	<ul style="list-style-type: none">L/SLBE participation requirement is set at 0%. Therefore, they are not penalties.

Based on a revised Availability Analysis for this project, the local business participation requirement has been set to **0%**.



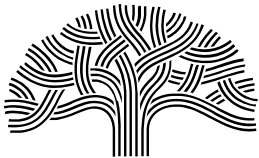
Preference Points

Schedule	Purpose	Possible Preference Points
Schedule E (required)	Submitted with Proposal.	<ul style="list-style-type: none">Requirement is set at 0%. Therefore, preference points are not applicable.



Additional Preference Points

Schedule	Purpose	Possible Preference Points
Schedule E-2 (optional)	Submitted with supporting documents no later than 4 days after Proposal due date to calculate preference points for business tenure in Oakland and Oakland resident workforce	<ul style="list-style-type: none">The L/SLBE participation requirement is set at 0%. Therefore, schedule E-2 is not applicable.



Additional Preference Points

Partnerships	Purpose	Possible Preference Points
Mentor-Protégé Agreement (optional)	Submitted with Proposal	<ul style="list-style-type: none">10% Preference Points--L/SLBE participation requirement is set at 0%, therefore, preference points
Joint Venture Agreement (optional)	Submitted with Proposal	<ul style="list-style-type: none">5% Preference Points (of proposal total) L/SLBE participation requirement is set at 0%, therefore, preference points



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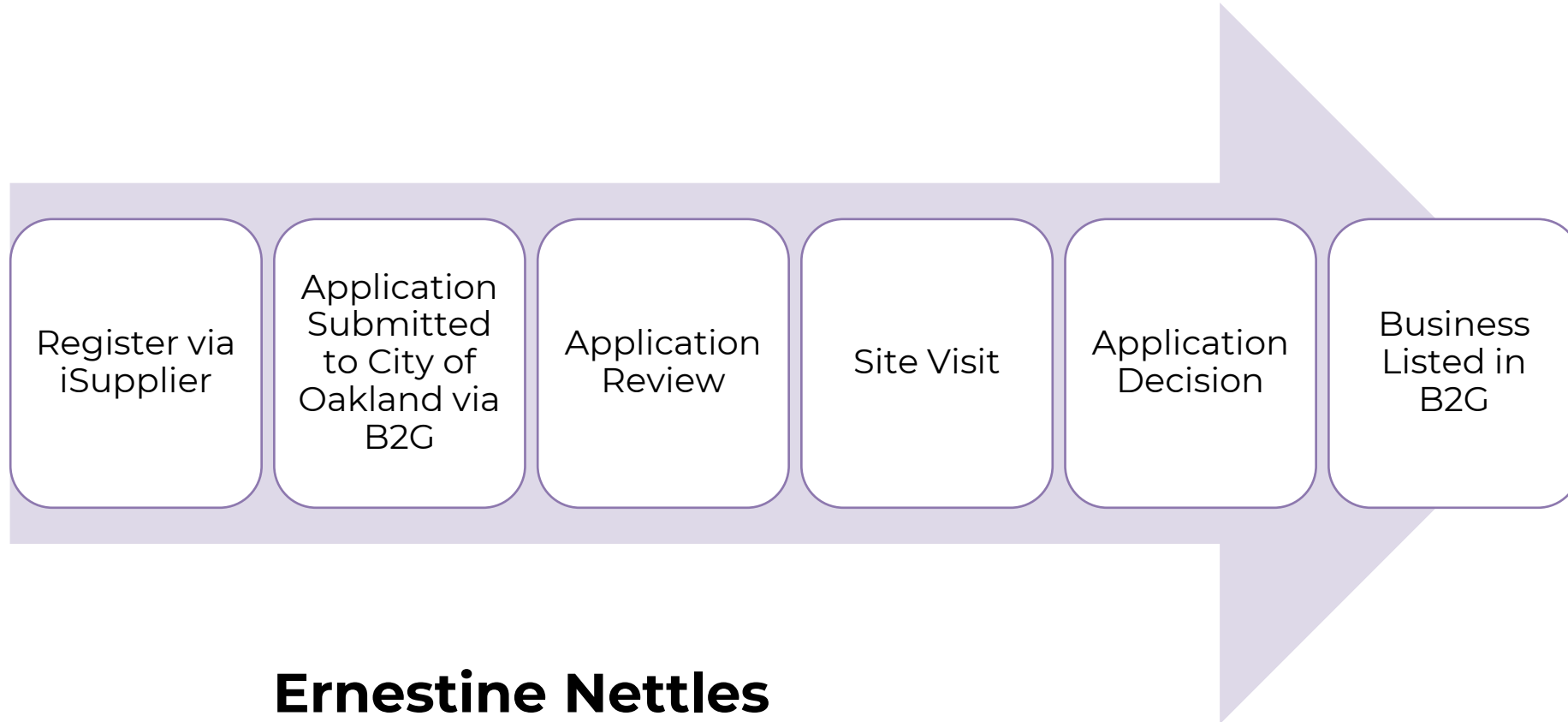
Certification Eligibility

- Oakland Headquarters
- Business in Operation for One Year (Six Months – VSLBE)
- Certified in Area of Expertise (i.e., Construction – Valid Licensure)
- Revenue Limits

Note: Current eligibility requirements are subject to change



What Are the Certification Steps?



Ernestine Nettles

Contract Compliance Officer
enettles@oaklandca.gov



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LEARN MORE

For more information on the City's policies that stimulate the fair and equitable involvement of Oakland Businesses, Workers, and Residents:

**[oaklandca.gov/departments/
workplace-employment-standards](https://oaklandca.gov/departments/workplace-employment-standards)**



Important RFP Reminders

- Reach out to any outlined staff early to secure technical support
- Review L/SLBE requirements and work with DWES for certification
- Contractors with the City of Oakland **must have a current business tax** license, information regarding business taxes may be found here:
<https://www.oaklandca.gov/services/business-tax-applications-1>
- Contract negotiations with successful applicant will determine funding and required deliverables

Important RFP Reminders

Tentative Evaluation Timeline

Dates and deliverables listed are subject to change in partnership with the Accountability Officer:

STEPS	DATES
Discovery Period	February - March 2024
Community & Stakeholder Engagement / Interviews	March - June 2024
Draft Recommended Evaluation	June 2024
Final & Approved Evaluation Framework / Template	June - July 2024
Evaluation Implementation	July - December 2024
Evaluation Report Due	December 2024 - January 2025
Presentation to Children's Initiative Oversight Commission	January 2025
Present to Other Stakeholders, as needed	January - February 2025

Evaluation Tentative Timeline

▪ Distribution of RFP/RFQ	9AM, November 17, 2023
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Important Dates
Tentative Timeline



Q & A



Contact Information:

TECHNICAL ASSISTANCE

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iSUPPLIER SUPPORT

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Thank You!

