



Board of County Commissioners - Staff Report

Meeting Date: 02/19/19

Presenter: Alyssa Watkins

Submitting Dept: Administration

Subject: Consideration of Award of Bid for Human Service Planning

Statement / Purpose:

To consider an award of bid for Human Service Planning efforts.

Background / Description (Pros & Cons):

In a January 2017 Board retreat, the Board of County Commissioners selected Health and Human Services as an area of focus for their work in 2017-2018. As a part of that focus, subsequent discussions centered on the development of a Resource Allocation Model for use by the BCC in making funding decisions related to human services budget requests. There was recognition that such a Resource Allocation Model would require foundational information from a community Human Services Plan and corresponding System-Wide Evaluation Plan. A potential path forward was considered by the BCC and Town Council at the December 2017 Joint Information Meeting. However, due to concerns raised with the recommendation presented at that time, staff was directed to reengage with the human service sector to discuss alternate strategies.

Town and County staff and members of the Human Services Council worked together from January through September 2018 to discuss such alternate strategies. The group developed an outline of a planning process to guide the community in a shared vision for Human Services, resulting also in the development of system outcomes and a funding model to be used by Teton County and potentially the Town of Jackson. A part of that process called for the development of a "Core Committee". In October of 2018, the BCC agreed to the process proposed and subsequently appointed two members to the Core Committee (the Director of Health and the Board of County Commissioners' Administrator). A total of six members made up the Core Committee; 2 representatives from the non-profit human services sector, 2 from the Town of Jackson, and 2 from Teton County. The Core Committee wrote and, in January of 2019, released a Request for Proposals for a consultant to provide Human Services Planning services. Seven (7) responses were received, which the Core Committee independently scored and then met to review. The committee narrowed the field to three finalists and interviewed those three firms. Based on the results of those interviews, the committee unanimously recommends the award of bid to Program and Policy Insight (PPI).

Submitting Firm	Cost Proposal
Program and Policy Insight (PPI)	\$84,801
Spark Policy Institute	\$186,660
MGT Consulting Group	\$162,575

*Chart represents finalists only, remaining bids received were \$56,600, \$56,644.67, \$99,717.60, and \$149,945

The Town of Jackson has indicated a potential interest in partnering on this project, however, did not allocate any funds for the effort in FY19. While Teton County did allocate funds for FY19, PPI's proposal does not call for work to begin until FY20. Should the BCC elect to award the bid for the project and subsequently sign a contract for services, the County's fiscal commitment would be specific to FY20, and interim conversations could be had with the Town of Jackson to determine whether or not they would commit to being a fiscal partner.

Stakeholder Analysis & Involvement:

Representatives from the Human Services Council have worked with staff from the Town and County on this initiative.



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Fiscal Impact:

Although there is no actual fiscal impact to the award of bid, following contract approval (tentatively scheduled for consideration on March 5th, 2019), the County's fiscal obligation would be \$84,801; staff would budget for this amount in FY20. As mentioned previously, there is a chance that the Town will agree to be a partner on this initiative and subsequently share in some portion of the cost.

Staff Impact:

There is minimal staff impact to the award of bid. Staff impact will intensify following contract signing; the Board of County Commissioners' Administrator will be the primary point of contact and provide oversight to the consultant on this project.

Legal Review:

Gingery

Staff Input / Recommendation:

The Core Committee recommends award of bid to Program and Policy Insight.

Attachments:

Human Services Planning Process Outline

Human Services Planning RFP

Program and Policy Insight's Proposal to Conduct Human Service Planning

Suggested Motion:

I move to award the bid for Human Service Planning to Program and Policy Insight and direct staff to return with a contract for approval at the next regular Board of County Commissioners' meeting.

PROPOSAL TO CONDUCT
HUMAN SERVICE PLANNING FOR
TETON COUNTY AND THE TOWN OF JACKSON

Submitted to:

Alyssa Watkins
Teton County Government
P.O. Box 3594
200 S. Willow Street
Jackson, WY 83001

January 29, 2019

Submitted by:

Program and Policy Insight 

3935 NE Stanton St.
Portland, OR 97212

Kendra Lodewick
Program and Policy Insight, LLC
3935 NE Stanton St.
Portland, OR 97212

Program and Policy Insight, LLC



Alyssa Watkins
Teton County Government
P.O. Box 3594
200 S. Willow Street
Jackson, WY 83001

January 29, 2019

Dear Ms. Watkins:

Program and Policy Insight, LLC is pleased to respond to Teton County and the Town of Jackson's Request for Proposal to conduct Human Service Planning.

Program and Policy Insight is a small, women-owned business with substantial experience providing public facilitation, evaluation, performance measurement, and technical assistance to initiatives aimed at improving social and economic opportunities for individuals, families, and communities. The PPI team has deep expertise in stakeholder engagement and policy development and is uniquely suited to support Teton County and the Town of Jackson in their effort to develop a plan that will provide strategic direction for community planning and prioritization related to health and human services and inform future funding decisions.

Please feel free to contact me (541.514.2687 or klodewick@programandpolicy.com) with any questions about the enclosed proposal.

Sincerely,

Kendra Lodewick
Program and Policy Insight, Principal

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SUBMITTING ENTITY

The Submitting Entity of this Proposal to Conduct Human Service Planning for Teton County and the Town of Jackson is Program and Policy Insight, LLC. The required identifying details are provided below:

Program and Policy Insight, LLC
3935 NE Stanton St.
Portland, OR 97212
541.514.2687
klodewick@programandpolicy.com

Individual authorized to negotiate on behalf of the firm:
Kendra Lodewick
Principal

INTRODUCTION

Program and Policy Insight (PPI) is a small, women-owned partnership dedicated to providing high-quality program evaluation, applied research, and technical assistance services to a variety of government agencies, non-profit organizations, and public-private partnerships. PPI offers substantial experience to initiatives that aim to improve social and economic opportunities for individuals, families, and their communities. PPI's areas of expertise include workforce development, welfare reform and implementation, early care and education, disability policy, and education and training. Moreover, PPI staff bring years of experience conducting focus groups and community forums that ensure stakeholder engagement, input, and direction in a variety of human service policy and planning processes. The proposed PPI team provides essential expertise to support Teton County and the Town of Jackson in their effort to develop a plan that will provide strategic direction for community planning and prioritization related to health and human services and inform and direct future funding decisions.

WORK PLAN

Throughout the implementation of the work plan, PPI will participate in regular progress meetings with the client and provide any relevant documentation at least three (3) days before each progress meeting. The proposed budget assumes monthly progress meetings via video-conference, tele-conference or in-person, supplemented by ad hoc communication via email or phone as often as needed. Upon contract award, PPI will work with the client to set a timeline for a kick-off meeting and regular progress meetings. The format of the meetings, whether video-conference, tele-conference or in-person, are to be determined based on the schedule and budget considerations.

PHASE 1: RESEARCH/DEVELOPMENT

Phase 1 of the project will focus on gathering and synthesizing information about the community's human service needs. The PPI project team will begin the project by reviewing and synthesizing existing data for information about broad community human service needs, and when available, trends. As noted in the RFP, we expect to review local agencies' strategic plans, state statutes, Systems of Care White Papers, community health needs assessments, Mental Health reports, and statewide needs assessments, among others. We also expect to draw from extant data to further inform our understanding of human service needs and context in Teton County, Jackson, and smaller geographic areas if desired (e.g., Census Designated Places, Census tracts), such as:

- Basic demographic information from the U.S. Census Bureau (population, race/ethnic composition, age, and educational attainment) compared to Wyoming and the U.S. averages.
- Socioeconomic data from the U.S. Census Bureau (poverty rate, median income) and U.S. Bureau of Labor Statistics (unemployment rate)
- Child and family poverty estimates using children eligible for Free and Reduced-Price School Meals.
- Homeless estimates using Mc-Kinney Vento Homeless Assistance Act data on homeless and unstably housed children in grades K-1, and other available homeless estimates from local homeless initiatives/counts.

- Housing and rental affordability statistics using data available from the U.S. Census Bureau, the National Low Income Housing Coalition and other sources

We will produce a brief Needs Review memo based on the resulting information. Note that the Needs Review memo will be considered a working document (i.e., not for publication) for internal use to inform subsequent project steps and provide contextual information for broader analysis.

Throughout the project PPI will seek input from the Core Committee, as well as the community, other stakeholders, and the Administrator of the Board of County Commissioners. PPI will work with the client to create the Core Committee, compiling a short list from which a final committee can be formed. With client input, PPI will identify criteria for inclusion, such as participants' roles within the human services system, the breadth of domains or agencies represented, and the desired size of the committee. Invitations to participate will be sent to the finalized list of identified members.

Expected Duration: August 2019

Representative Activities:

- Review and synthesize data related to community human service needs.
- Identify and form Core Committee.

Deliverables:

- Internal Needs Review memorandum.
- Formation of Core Committee.

PHASE 2: PUBLIC INPUT, CORE COMMITTEE/STAKEHOLDER INVOLVEMENT

We will use a multi-faceted approach for gathering public input, and core committee/stakeholder involvement. We expect key stakeholder data collection methods to include:

- **Stakeholder interviews** with key community stakeholders for input on the economic and policy climate and its impact on the development and delivery of human services. We will also seek input on stakeholders' perception of the primary human service priorities in the region. Stakeholders may include county administrators or elected officials, program administrators or managers, and/or program service providers, among others. *We expect to conduct 10 community stakeholder interviews.*
- **Focus groups** with diverse stakeholders will gather perception from service users and non-users on human service needs, availability, and efficacy. The more intimate setting of focus groups, compared to public community meetings, can increase participants' comfort in sharing sensitive feedback and experience. We expect focus group participants may include youth, seniors and persons with disabilities, families, single parents, homeless individuals, and members of priority ethnic or tribal groups. To increase participation and thank participants for their input, we will offer participants a \$25 Visa gift card. *We expect to conduct approximately four (4) focus groups of between 10 and 15 individuals each group.*
- **Public community meetings** will provide an opportunity for structured dialog and input from an open, diverse audience of community stakeholders. Depending on the number of attendees, we

may use live polling and/or distribute a brief survey card to optimize stakeholder input and aggregation. To increase participation, attendees will be entered in a drawing for a \$50 Visa gift card. *We expect to conduct two (2) public community meetings.*

- A **community survey** can collect analogous information across a broad spectrum of stakeholders and allows for compilation and comparison of responses. We propose a brief survey to avoid response burden and to focus respondents on key issues. The audience for the community survey will be determined in consultation with the Core Committee. The survey may be limited to elected officials, public agency staff, and service providers networks, or it may also be fielded to a broader audience including general community members and human service participants. The current budget does not include funding for a representative community-wide survey, but targeted survey implementation can reach a critical threshold of key project stakeholders to inform program goals. We look forward to discussing survey implementation options with the Core Committee.

We will synthesize public input across stakeholder groups and data collection processes to identify draft human service priorities for the region and gather initial feedback on resource priorities.

Expected Duration: September 2019

Representative Activities:

- Interviews with 10 community stakeholders.
- Up to four stakeholder focus groups.
- Up to two public community meetings.
- A community survey.

Deliverables:

- Implementation of stakeholder data collection methods.
- Draft human service priorities.

PHASE 3: VISION AND MISSION DEVELOPMENT

A mission statement defines the overall purpose of an organization, collaborative, or initiative by describing what you do, for whom you do it, and the benefit. A vision is a picture of the preferred future or what the community will look like if the stakeholders fulfill their mission. We will work with the client to define the desired focus for the mission, whether for the County of Teton human service agencies, the Town of Jackson human service agencies, a collaborative of the two, or all human service providers countywide.

The extensive input received during Phase 2 will prepare community stakeholders to readily develop a vision and mission for human services in Teton County and Jackson that represents broad community interests and priorities. We expect a wide range of stakeholders to participate in vision and mission development, including Core Committee members, low-income residents, service providers, and community citizens more broadly. We will work with the Core Committee to identify effective outreach methods that will facilitate diverse community participation.

We will use a citizen engagement and consensus-building methodology that draws on the most effective aspects of several facilitation models, including the Technology of Participation (ToP) Consensus Workshop model, developed by the Institute for Cultural Affairs, and the Drivers Model by Leadership Strategies, Inc. The workshop will include the following steps

- **Context:** Set the stage for the workshop by sharing preliminary summary results from Phase 2, reviewing the components of mission and vision statements, ensuring clarity on goals of the workshop and who we are creating a mission and vision for, and facilitating a short conversation to stimulate ideas.
- **Brainstorm Mission:** Generate ideas for the mission statement by identifying what the focus entity does, for whom they do it, and the benefit. Break into small groups to develop candidate statements.
- **Mission Consensus-building:** Discuss candidate statements, revise, and finalize using an efficient facilitated process that enables all participants a voice.
- **Brainstorm Vision:** Repeat brainstorm for vision.
- **Vision Consensus-building:** Repeat consensus-building for vision
- **Resolve:** Confirm the overall consensus and discuss significance and implications to next steps.

Expected Duration: October 2019

Representative Activities:

- Outreach to facilitate participation in the Consensus Workshop.
- Consensus Workshop to develop human service vision and mission for the region.

Deliverable:

- Draft human service vision and mission for the region.

PHASE 4: HUMAN SERVICE FORUM

We will conduct a Human Service Forum to introduce the draft human service priorities identified through the public input process in Phase 2, as well as the human service vision and mission statements developed in Phase 3 of the project. We will also describe initial community input on resource priorities. The Human Service Forum will provide opportunities for participant reflection and feedback on proposed priorities and will actively refine the draft human service priorities during the forum proceeding. The citizen engagement methodology employed will depend in part on the results of the earlier phases, the size of the forum, and the experiential aims of the forum. Options may include live polling, small group round robin rotations (e.g., World Café Method), structured voting, focus conversation, or mixed methods. We expect the forum to yield consensus on draft priority areas to inform the broader human service plan.

Expected Duration: November 2019

Representative Activities:

- Logistics planning for Human Service Forum.

- Implementation of Human Service Forum to review, reflect, and refine draft human service priorities.

Deliverables:

- Implementation of human service forum.
- Refined human service priorities.

PHASE 5: HUMAN SERVICE PLAN

We will aggregate and synthesize information collected through the extant data analysis, community data collection process, and Human Service Forum proceedings to develop a Human Service Plan for the region. The plan will describe the overall economic, human service, and policy context of Teton County and the Town of Jackson, including illustrative human service indicators and description of service infrastructure. The Human Service Plan will also introduce the human service vision and mission statements, as well as the human service priorities developed during the public input process. These priorities will be defined in action-oriented terms that can support policy development and implementation.

Expected Duration: December 2019 to January 2020

Representative Activities:

- Aggregate human service data collected through extant data and stakeholder data collection processes.
- Synthesize human service data.
- Describe context of human services in the region.
- Draft Human Service Plan based on Phase 1 through Phase 4 of project.

Deliverable:

- Draft Human Service Plan.

PHASE 6: RESOURCE ALLOCATION PLAN DEVELOPMENT

The final project phase will culminate in a Resource Allocation Plan that builds off the Human Service Plan to identify human service funding options in a variety of funding environments. We will review analogous resource allocation plans developed by other jurisdictions to identify practical and effective resource allocation methodology and funding models. We expect that the proposed resource allocation plan may include options for a variety of funding conditions, from fiscally constrained to fiscally endowed, to enable the plan to flexibly adapt to changing funding environments.

One example of relevant innovation in a PPI project was the development of Resource Allocation Scenarios for the Lane County (Oregon) Human Services Commission. The human services planning process culminated in a strategic framework for the allocation of new, flexible funds. This planning tool relied on two core principles:

1. The scenarios enabled the public, policymakers, and service providers to envision and assess service levels in incremental revenue environments, from reductions in current funding to full funding.
2. The resource allocation targets set were responsive to the community- and Lane County Human Services Commission-defined service priorities and goals set by other planning bodies.

In these ways, the scenarios not only enabled stakeholders to assess the impact of various funding levels, they aligned expenditures with community priorities.

The Resource Allocation Scenarios examined four potential funding environments:

- **Reduced:** Assumed *no new flexible funds* and an estimated loss of \$1 million in existing flexible funds, yielding lower service levels.
- **Modest Increase:** Assumed modest influx of *new flexible funds*, yielding a slight increase to service levels.
- **Action:** Assumed influx of *new flexible funds* (but lower than optimal), yielding somewhat higher service levels.
- **Vision:** Assumed influx of *new flexible funds*, yielding substantially higher service levels.

For each revenue environment, the Resource Allocation Scenarios provided targets for allocation of new flexible funds among the Human Services Commission's four Priority Outcome Areas – Meet Basic Needs, Increase Self-Reliance, Build a Safer Community, and Improve Access to Services – which were determined during the priority-setting process.

During the Resource Allocation Development process in Teton County and the Town of Jackson, we would expect to conduct targeted stakeholder and Core Committee meetings on the resource allocation development to ensure ongoing stakeholder buy-in and engagement.

Expected Duration: December 2019 to January 2020

Representative Activities:

- Review resource allocation plans and/or funding models in other jurisdictions.
- Develop adaptable resource allocation model for Teton County and the Town of Jackson.
- Meet with Core Committee and/or stakeholders to review and reflect on proposed resource allocation model.
- Draft Resource Allocation Plan based on Phase 1 through Phase 5 of the project.

Deliverable:

- Draft Resource Allocation Plan.

EXPERIENCE

The PPI team has the experience necessary to successfully implement the project. For each of the key areas of experience cited in the proposal – human services, human service plan development, group facilitation, consensus-building, comprehensive planning and resource allocation – we provide detail on a relevant sample project completed by PPI team members. Additionally, to demonstrate PPI’s depth of experience in a more concise format, we provide a matrix below with selected additional relevant projects, organized by the key areas of desired experience.

Expertise in human service content domains: The proposed PPI team brings years of experience developing policy and evaluating delivery of a broad range of human services. Policy expertise includes education, family self-sufficiency, income and nutrition supports, talent development, child welfare, early childhood, people with disabilities, and housing insecurity and homelessness. The interconnected human service domains collectively aim to improve the ability of children, families, and the community to thrive socially, educationally, and economically. Moreover, PPI team staff members are familiar with the informal and formal support and service systems for children and their families that influence program implementation and outcomes. This diverse social policy experience provides important context for human service planning and resource allocation development. For example, for the Montana Temporary Assistance for Needy Families (TANF) Needs Assessment and Service Delivery Redesign and Evaluation, researchers analyzed extant data and collected primary data through key stakeholder interviews, client and provider/interested party surveys, and 12 focus groups statewide regarding client and contractor experiences. Findings and recommendations from the analysis focused on systemic, policy, and business practice issues that negatively impact client access and successful outcomes. The assessment informed Montana’s TANF advisory council’s strategic planning work, resulting in clarified program goals and improved policies and processes. PPI team members worked closely with the state in the redesign of the TANF service delivery model to provide person-centered, coordinated service delivery focused on removing barriers and increasing access to services and supports to promote family stability, employability, and financial security. The resultant social determinants of health framework established health and human services priorities for state-level and local community systems of care and support. PPI team members defined performance measures, developed an evaluation plan, and supported client advocate training.

Experience in human service plan development. The team consists of seasoned strategic planners and organizational development professionals, helping agencies achieve their goals through strategy development, implementation, and monitoring. For example, PPI team members conducted an update and evaluation of the State of Maine’s Olmstead plan, which facilitates broad cross-system coordination to provide services for people needing long term services and supports in the least restrictive setting. The project included cross-disability assessment of progress in implementing the state’s initial roadmap recommendations created in response to the 1999 Supreme Court decision. Key project tasks included stakeholder interviews, surveys, and analysis of administrative, secondary, and contextual data, and required deep knowledge of Maine’s Medicaid State Plan. Results of the assessment informed subsequent planning work, where PPI team members facilitated focus groups of policy makers,

Medicaid members, families, providers, advocates, and other interested parties statewide to define updates to the Olmstead roadmap. The project team then defined performance measures collaboratively with DHHS leadership and evaluated progress annually for two subsequent years.

Expertise in group facilitation. Project team members are trained and experienced facilitators. All members are trained in Technology of Participation (ToP) consensus-based facilitation methods and utilize this and other methodologies to provide engaging and productive meeting facilitation in a variety of different settings. For example, for the Oregon Talent Assessment for the Oregon Higher Education Coordinating Commission, the PPI team was responsible for stakeholder engagement and group facilitation to gather input on workforce development system strengths and opportunities, and identify key demand industry, skills, and training needs to inform comprehensive talent development strategy statewide. In addition to a stakeholder survey, the PPI team conducted multiple focus groups across industries, and facilitated large group workshops at the statewide Talent Summit to identify top collaboration challenges, articulate best practices and proven strategies, and define the role of business, education, and government in cultivating an effective talent development system.

Expertise in consensus building methods. PPI team members frequently facilitate consensus building workshops using ToP methodology and other established methods to articulate collective input across diverse project stakeholders. A recent relevant example includes the development of a system-wide strategy for workforce development in Westchester County, New York. PPI team members led a county-wide workshop of policy makers and program providers to define a vision for an effective workforce system for the region. The PPI team used consensus building facilitation methodology to help this cross-agency group of stakeholders define a common vision and articulate collective goals for workforce development services and outcomes in the region.

Experience providing comprehensive planning and resource allocation development. The proposed PPI team has unique experience providing comprehensive human service planning and resource allocation development. As noted earlier, PPI developed the Human Services Plan for the Lane County Human Services Commission. The planning process enabled the human service stakeholders and the broader community to prioritize core human service areas – such as basic needs, safety, and children and families, and health and wellbeing – as well as the clusters of services within these core services areas. This process allowed the county to plan resource allocation accordingly, developing allocation scenarios depending on the actual and potential level of flexible funding available. As with all of our planning work, rich community input informed the process.

Table 1: Selected Projects Demonstrating Relevant Experience

	Human Services	Human Services Plan Development	Group Facilitation	Consensus-building	Comprehensive Planning and Resource Allocation
Lane County Human Services Plan	✓	✓	✓	✓	✓
Statewide Assessment and Service Delivery Redesign of Montana’s TANF Program	✓	✓	✓	✓	✓
Strengthening Montana’s Early Childhood System Needs Assessment (in progress)	✓		✓	✓	✓
State of Maine Olmstead Roadmap Update and Evaluation	✓	✓	✓	✓	✓
EC-LINC Outcomes and Metrics Initiative	✓		✓	✓	
Westchester and Putnam County Labor Market Analysis and Workforce Development Strategy	✓		✓	✓	
Oregon Department of Human Services Vocational Rehabilitation Comprehensive Statewide Needs Assessment	✓	✓	✓		
First 5 Orange County Strategic Plan	✓		✓	✓	
Oregon Talent Assessment	✓		✓	✓	
Montana Department of Public Health and Human Services Strategic Plan	✓	✓	✓	✓	✓
Gallatin County Behavioral Health Symposium			✓	✓	
Montana Out of School Time Needs Assessment and Strategic Planning	✓		✓	✓	✓
Maryland Developmental Disabilities Council State Plan Update	✓	✓	✓	✓	
Montana Best Beginnings Advisory Council Statewide Needs Assessment and Strategic Planning	✓	✓	✓	✓	✓
Big Sky Community Needs Assessment	✓		✓	✓	

INNOVATION

Within the Work Plan, under Phase 6: Resource Allocation Plan Development, we have provided a detailed description of our innovative approach to human service funding for the Lane County (Oregon) Human Services Commission.

PERSONNEL AND STAFFING PLAN

STAFF AND TEAM ORGANIZATION

Proposed project staff include Kendra Lodewick, Kirsten Smith, and Kari Parsons. Kendra Lodewick will serve as Project Manager, including managing client communication, overall project design and implementation, and lead project analysis and reporting. Kirsten Smith will lead stakeholder engagement, and Kari Parsons will lead resource allocation development. In the table below, we have provided a detailed presentation of distribution of level of effort, based on the total estimated hours per task, each team member will commit to the six project phases and the project overall. All project management and communication tasks for the Project Manager and team members are reflected in the level of effort percentages.

Table 2: PPI Project Team and Level of Effort for Project Phases and Overall

	Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Phase 6	OVERALL
Kendra Lodewick*	30%	47%	33%	44%	38%	40%	40%
Kirsten Smith	5%	47%	68%	56%	23%	20%	37%
Kari Parsons	65%	6%	0%	0%	38%	40%	23%
TOTAL	100%	100%	100%	100%	100%	100%	100%

* Project Manager

Since 2008, members of the project team have successfully collaborated on many large and complex human service projects, as described above. We accomplish streamlined project management and timely completion through the clear delineation of tasks for each team member, use of shared cloud-based project management applications, regular internal team tele- or video-conference meetings, and frequent ad hoc communication as needed.

STAFF QUALIFICATIONS AND ABBREVIATED RESUMES

Kendra Lodewick

Principal and owner of Program and Policy Insight, LLC (PPI)

Key Qualifications

Ms. Lodewick specializes in research, evaluation, and technical assistance that improves opportunities for underserved populations and their communities. Ms. Lodewick has 20 years of experience conducting studies and facilitating policy related to education, social services, welfare implementation,

disability policy, and workforce development. She has worked with clients at the federal, state, and local levels to assess program implementation and performance and identify opportunities for service improvement and systems change.

Education and Training

1998	Master of Public Affairs and Policy Analysis	University of Wisconsin-Madison
1996	Bachelor of Science, Public Policy Analysis and Management	Cornell University
2014	ToP Facilitation Methods	Institute of Cultural Affairs

Professional Experience

Program and Policy Insight, LLC, Portland, OR, *Principal*, 2006 to present

Bloom Consulting, LLC, Bozeman, MT, *Associate*, 2014 to present

Parsons Consulting, Inc., Eugene, OR, *Associate*, 2008 to present

Abt Associates Inc., Cambridge, MA, *Associate*, 2001 to 2004

Berkeley Policy Associates, Oakland, CA, *Analyst*, 1998-2001

Wisconsin State League of Women Voters, Madison, WI, *Legislative Liaison*, 1997-1998

Wisconsin Department of Workforce Development, Division of Economic Support, Madison, WI, *Analyst*, 1996

Selected Career Consulting Projects

- **Bloom Project Associate.** Strengthening Montana’s Early Childhood System. (Montana Department of Public Health and Human Services, under subcontract to Bloom Consulting). 2019 to present.
- **Bloom Project Associate.** State of Montana Rape Prevention and Education Evaluation. (Montana Department of Public Health and Human Services, under subcontract to Bloom Consulting). 2018.
- **PPI Project Lead.** Westchester and Putnam County Labor Market Analysis and Workforce Development Strategy. (Westchester County Community Foundation) 2018.
- **PPI Project Lead.** Development of the Oregon Talent Assessment Plan (In partnership with ECONorthwest for the Oregon Higher Education Coordinating Committee) 2017-2018.
- **PPI Project Director.** Evaluation Plan and Implementation of the Bridging Oregon Initiative. (The Oregon Community Foundation). 2017-2018.
- **PPI Project Director.** Literature Review and Theory of Change Development for the Oregon Consortium of Family Networks. (Oregon Council on Developmental Disabilities) 2017-2018.
- **PPI Project Lead.** Business Champion for Talent Development Recognition Program. (The Indiana Chamber of Commerce Foundation) 2017-2018.
- **PPI Project Director.** Evaluation Plan for the “Counseling Counts” School Counseling Model in Indiana (The Indiana Chamber of Commerce Foundation) 2017.
- **PPI Project Director.** Oregon Department of Human Services Vocational Rehabilitation Comprehensive Statewide Needs Assessment. 2017.
- **PPI Project Director.** Yamhill County Needs and Opportunities Assessment (The Oregon Community Foundation). 2016-2017.
- **PPI Project Lead.** Effectiveness of Promising Strategies in Federal College Access Programs: Study of Student Messaging in GEAR UP (US Department of Education under subcontract to Abt Associates). 2014 to present.

- **Parsons Project Associate.** EC-LINC Research to Action: Measuring the Impact of Early Childhood Systems (under contract to Parsons Consulting). 2016-present.
- **Bloom Project Associate.** Redesign of the Maine State Olmstead Plan (Maine Department of Health and Human Services, under subcontract to Bloom Consulting). 2015 to present.
- **PPI Project Director.** Workforce Development Landscape Scan and Needs Gap Analysis (Indianapolis Private Industry Council, Inc.). 2014-2015.
- **PPI Project Lead.** Evaluation of Accelerated Training for Illinois Manufacturing/Illinois Workforce Innovation Funding. (State of Illinois. Under subcontract to Social Policy Research Associates). 2013-present.
- **PPI Project Director.** Evaluation of the National Fund for Workforce Solutions. (NFWS Funders' Group and Jobs for the Future). 2012-present.
- **PPI Project Director.** Evaluation Planning Services for Oregon Council on Developmental Disabilities Five-Year Plan. (Oregon Council on Developmental Disabilities). 2012-2016.
- **PPI Principal.** Technical Assistance to Health Professionals Opportunities Grants grantees. (U.S. Department of Health and Human Services, Administration for Children and Families. Under subcontract to JBS International). 2012-present.
- **PPI Principal.** Assessment of NFWS Social Innovation Fund Grantees' Data Reporting Capacity. (Jobs for the Future). 2011.
- **PPI Principal.** Evaluation of the National Fund for Workforce Solutions. (NFWS Funders' Group and Jobs for the Future. Under subcontract to Workforce Learning Strategies). 2007-2012.
- **PPI Principal.** Coordination, Facilitation and Quality Assurance Services for Northwest Regional Education Laboratory (U.S. Department of Education. Under subcontract to Education Northwest, formerly known as Northwest Regional Educational Laboratory). 2006-2012.
- **PPI Project Director.** Lane County Human Services Commission Human Services Plan. 2008-2009.
- **PPI Principal.** Coordination of Technical Working Group for Smaller Learning Communities Initiative (U.S. Department of Education. Under subcontract to Northwest Regional Educational Laboratory). 2008-2009.
- **PPI Principal.** Impact Evaluation of the Compassion Capital Fund Demonstration Project (U.S. Department of Health and Human Services. Under subcontract to Abt Associates). 2006-2008.
- **PPI Principal.** 2007 Comprehensive Needs Assessment for Oregon Vocational Rehabilitation Services. (State of Oregon Department of Human Services). 2007-2008
- **PPI Project Director.** Impact Evaluation of Upward Bound's Increased Focus on Higher-Risk Students. (U.S. Department of Education. Under subcontract to Berkeley Policy Associates). 2007-2008.
- **PPI Principal.** Evaluation and Technical Assistance Services for the Making-Connections Denver Family and Economic Success Cohort (The Piton Foundation; Denver, Colorado). 2007.
- **PK Project Associate,** TANF Program Evaluation (The City and County of Denver, Colorado, under subcontract to Public Knowledge, LLC) 2006-2007.
- **PK Project Associate,** Staffing and Process Improvement Study: Phase 2 (Oregon Department of Human Services, under subcontract to Public Knowledge, LLC) 2006.
- **Abt Project Director,** Development and Implementation of an Evaluation Design for the Building Essential Skills Through Training (BEST): Basic and Occupational Skill Development Initiative for Older Youth.
- **Abt Project Director,** Study of City Year's Partnerships.
- **Abt Project Director,** Evaluation of and Technical Assistance to the TechReach Initiative.
- **Abt Senior Analyst,** Serving TANF and Low-Income Populations Through One-Stop Centers.
- **Abt Senior Analyst,** State Use of TANF Administrative Data for Program Management and Performance Measurement.

- **Abt Senior Analyst**, Assessment of the State of Research Regarding TANF Recipients and Private Sector Employers.
- **Abt Senior Analyst**, Longitudinal Study of the Outcomes Associated with Participation in AmeriCorps.
- **Abt Senior Analyst**, Study of the TANF Application Process.
- **Abt Senior Analyst**, New Visions Self-Sufficiency and Lifelong Learning Project.
- **Abt Senior Analyst**, Community Based Abstinence Education Program Evaluation.
- **Abt Senior Analyst**, Provision of Experts, Program Implementation and Technical Assistance.
- **BPA Project Director**, Evaluation of the Contextual Learning Demonstration Grants
- **BPA Project Director**, Evaluation of Families in Transition of Santa Cruz County
- **BPA Analyst**, Evaluation of the Colorado Works Program.
- **BPA Analyst**, Evaluation of North Dakota's Welfare Reform Project, TEEM
- **BPA Analyst**, Evaluation of Arkansas' Temporary Employment Assistance (TEA) Program.
- **BPA Analyst**, JTPA Microenterprise Grants Program
- **BPA Analyst**, Evaluation of the Disability Employment Grant Services to Individuals with Disabilities
- **BPA Analyst**, Process and Outcome Evaluation of New Ways Workers (NWW)
- **BPA Analyst**, Evaluation of the Youth Grants for Youth Action Project

Kirsten Smith

PPI Associate and owner of Bloom Consulting, Inc.

Key Qualifications

Ms. Smith has 13 years of experience conducting primary research that evaluates the policy and practices of public and private entities in multiple states. Ms. Smith has facilitated community forums, focus groups, stakeholder interviews, advisory councils, and strategic planning workshops for diverse groups of people in a variety of domains, including the health care sector. Ms. Smith is in the process of completing focus groups focused on prevention services in communities throughout Montana and is leading a team of researchers analyzing Montana’s early childhood system through interviews, surveys, community forums, focus groups, and administrative/extant data. In addition to her research proficiency, Ms. Smith is a highly skilled project manager with extensive experience guiding large and small research projects to successful, timely conclusions.

Education and Training

2005	Master of Public Affairs	University of Texas at Austin
2005	Master of Arts, Russian, East European, and Eurasian Studies	University of Texas at Austin
2000	Bachelor of Arts, Political Science	University of Georgia
2006	ToP Facilitation Methods Certification	Institute for Cultural Affairs
2009	Project Management Professional Certification	Project Management Institute
2009	Strategic Planning Methods Certification	Institute for Cultural Affairs
2011	Implementation Methods Certification	Institute for Cultural Affairs

Professional Experience

Bloom Consulting, LLC, Bozeman, MT, *Principal*, 2012 to present
Program and Policy Insight, LLC, Portland, OR, *Associate*, 2014 – 2019
Parsons Consulting, Inc., Eugene, OR, *Associate*, 2016 to present
Public Knowledge, Bozeman, MT & Denver, CO, *Consultant*, 2005 – 2012
Fair Fund & International Research and Exchanges Board, Bosnia-Herzegovina, Croatia, and Serbia, *Research Associate*, 2004
Princeton University's Program on Science and Global Security, Princeton, NJ, *Research Assistant*, 2001-2002

Selected Career Consulting Projects

- **Bloom Project Director.** Conducting needs assessment, strategic planning, evaluation planning, and project management for Strengthening Montana's Early Childhood System Grant Project (Montana Department of Public Health and Human Services). 2019.
- **Bloom Project Director.** Conducting planning and facilitation for HealthCare Connections program (Bozeman Health Deaconess). 2019.
- **Bloom Project Director.** Wrote successful for Preschool Development Birth to Five application, Strengthening Montana's Early Childhood System (Montana DPHHS). 2018.
- **Bloom Principal.** Department strategic planning (Montana DPHHS). 2018.
- **Bloom Project Director.** Grant writer for Perinatal Behavioral Health grant application (Montana DPHHS). 2018.
- **Bloom Project Director.** Evaluation and needs assessment for Rape Prevention and Education Program (Montana DPHHS). 2018.
- **PPI Associate.** Stakeholder engagement, analysis and reporting for Oregon Talent Assessment (Oregon Office of Workforce Investments). 2018.
- **Parsons Associate.** Implementation of population-level indicators and system performance measures of early childhood and family wellbeing (Center for the Study of Social Policy, under subcontract to Parsons Consulting). 2016-2018.
- **Bloom Project Director.** Strategic planning for Montana Children's Trust Fund (Montana DPHHS). 2017.
- **Bloom Project Director/Facilitator.** Facilitated break out session for Gallatin County Behavioral Health Symposium (Bozeman Health Deaconess). 2017.
- **Bloom Project Director.** Statewide assessment of Montana's TANF program, implementation support for service delivery redesign, and evaluation planning (Montana DPHHS). 2016 to 2017.
- **Bloom Project Director.** Statewide assessment of out of school time programs and organizational strategic planning (Montana Afterschool Alliance). 2015 to 2017.
- **Bloom Project Director.** Assessment of progress since initial Olmstead roadmap, and redesign of the Maine State Olmstead Plan, and evaluation (Maine Department of Health and Human Services). 2015 to 2017.
- **Bloom Principal.** Assessment of brain injury-related services and supports (Colorado Brain Injury Program, under subcontract to Koné Consulting). 2017.
- **Bloom Project Director.** Strategic planning and training technical assistance for Montana Public Health Workforce Development Group (Montana DPHHS). 2017.
- **Bloom Project Director.** Strategic planning for Multicounty Public Health and Emergency Planning group (Montana DPHHS). 2017.

- **Bloom Project Director.** Evaluation of Girls for a Change project effectiveness (Thrive). 2017.
- **Bloom Project Director.** Assessment of Big Sky community needs related to expansion of programming (Thrive). 2016.
- **Bloom Project Director.** Strategic planning and logic modelling for Project LAUNCH (Linking Actions for Unmet Needs in Children’s Health) grant (Montana DPHHS). 2016.
- **PPI Associate.** Defining Developmental Disability Council State Plan goals, objectives, strategies, action plan, logic model, and evaluation approach (Maryland Development Disability Council, under subcontract to Program and Policy Insight). 2015.
- **PPI Associate.** Evaluation of the Oregon Consortium of Family Networks (Oregon Council on Developmental Disabilities, under subcontract to Program and Policy Insight). 2015.
- **Bloom Principal.** Analysis of Massachusetts’ child care subsidy system (Massachusetts Department of Early Education and Care, under subcontract to Koné Consulting and Urban Institute). 2014-2015.
- **Bloom Project Director.** Maternal and early childhood home visiting planning facilitation (Montana DPHHS). 2015.
- **Bloom Project Director.** Great Families conference facilitation to define family support provider goals and objectives (Montana DPHHS). 2014.
- **Bloom Project Director.** Evaluation of Gallatin Early Childhood Community Council (Greater Gallatin United Way). 2014.
- **Bloom Project Director.** Alternatives analysis for Healthy Montana Teen Parent Program (Montana DPHHS). 2014.
- **Bloom Project Director.** Statewide childhood and family needs assessment and strategic planning. (Montana DPHHS). 2013-2014.
- **Bloom Project Director.** Facilitated stakeholder advisory council and wrote operational protocol for Money Follows the Person grant project (Montana DPHHServices). 2012-2013.
- **Bloom Project Director.** Grant writing to implement evidence-based practices regarding mental and behavioral health needs of youth, caretakers, and biological families (Montana Child and Family Services Division, DPHHS). 2013.
- **Bloom Principal.** Child care subsidy program evaluation and business process reengineering (Washington Department of Early Learning, under subcontract to Koné Consulting). 2012.
- **PK Project Director.** Quality assurance for implementation of TANF and SNAP eligibility system replacement (Montana Department of Public Health and Human Services). 2008-2012.
- **PK Project Consultant.** Work Supports Strategies site analyst and evaluator (Ford Foundation, under subcontract to Center on Budget and Policy Priorities). 2009-2010.
- **PK Project Consultant.** Denver child care assistance program evaluation (Denver Department of Human Services). 2008.
- **PK Project Consultant.** Denver TANF contractor evaluation (Denver Department of Human Services). 2008.

Kari Parsons*PPI Associate and owner of Parsons Consulting, Inc.*

Ms. Parsons has over 18 years of experience in qualitative and quantitative data collection, analysis and reporting in diverse domains including public health, workforce development, early childhood, social welfare, education, and transportation. Ms. Parsons is a seasoned qualitative researcher, having conducted numerous interviews and focus groups over her career and synthesized the results into actionable findings. She is also an expert in community indicators and performance management, with extensive experience developing cross-domain community wellbeing indicators for several California counties. In addition, for the Orange County United Way, she developed a multi-variate index – the Family Financial Stability Index – which measures the financial wellbeing of families with children at the neighborhood level.

Education and Training

2014	Technology of Participation Facilitation Methods	Institute of Cultural Affairs
1999	Master of Urban & Regional Planning	University of California, Irvine
1993	Bachelor of Arts, Philosophy	Whitman College, Washington

Professional Experience**Parsons Consulting, Inc., Eugene, OR** *President, 2000-Present***Program and Policy Insight (PPI), LLC, Associate, 2008-Present****Bloom Consulting, LLC, Associate, 2016-Present****Burke Consulting, Associate, 2000-Present****Orange County Executive Office, Strategic and Intergovernmental Affairs, Staff Analyst III, 1998-2000****Selected Career Consulting Projects**

- **Bloom Project Associate.** Research and protocol development for Strengthening Montana’s Early Childhood System needs assessment (Montana Department of Public Health and Human Services, under sub-contract to Bloom Consulting). 2019.
- **Parsons Project Director.** Strategic planning and development services, including Local Control Accountability Plan alignment, stakeholder consensus workshops, and action planning technical assistance (Huntington Beach City School District). 2018-2019.
- **Parsons Project Director.** Strategic planning and development, including consensus facilitation of vision and mission, goals, strategies, and implementation; and content framing, presentation, and writing (First 5 Orange County). 2018-2019.
- **Parsons Project Director.** Development of the Family Financial Stability Index, an original multivariate composite index to assess family economic stability at the neighborhood level in Orange County, California (Orange County United Way). 2013-2019.
- **Parsons Project Administrator.** Research and development of indicators measuring countywide economic and social well-being for the *Orange County Community Indicators Report* (Orange County Business Council, 2019; First 5 Orange County, 2012-2018; County of Orange, 2000-2012). 2000-2019.
- **Parsons Project Director.** Facilitation of the EC-LINC Outcomes and Metrics Initiative, including the development and pilot implementation of cross-national indicators of early childhood wellbeing and the development of an early childhood system performance measure toolkit (Center for the Study of Social Policy, Washington, DC). 2016-2018.

- **Burke Project Administrator.** Research and development of indicators of countywide economic and social well-being for the *San Bernardino County Community Indicators Report* (County of San Bernardino, 2015-2018) and The Community Foundation of Riverside and San Bernardino Counties, 2010-2014, under subcontract to Burke Consulting). 2010-2018.
- **Bloom Project Associate.** Risk factor data analysis and index development for Rape Prevention and Education Program (Montana Department of Public Health and Human Services, under subcontract to Bloom Consulting). 2018.
- **PPI Project Associate.** Stakeholder engagement, analysis and reporting for Oregon Talent Assessment (Oregon Office of Workforce Investments, under subcontract to Program and Policy Insight). 2018.
- **Burke Project Associate.** Research and development of indicators of countywide transportation system functioning for the *Transportation Mobility Indicators Report* (Orange County Transportation Authority, under subcontract to Burke Consulting). 2014-15, 2017-18.
- **PPI Project Associate.** Study liaison for national evaluation “Effectiveness of Promising Strategies in Federal College Access Programs: Study Student Messaging in GEAR UP” at selected GEAR UP grantee sites (U.S. Department of Education, Institute of Education Sciences, under subcontract to Program and Policy Insight and Abt Associates). 2015-2018.
- **PPI Project Associate.** Facilitate focus groups and conduct interviews with key stakeholders, including staff, service providers, and adult and youth consumers in several regions for the Oregon Vocational Rehabilitation Comprehensive Statewide Needs Assessment (Oregon Department of Human Services, under subcontract to Program and Policy Insight). 2017.
- **PPI Project Associate.** Stakeholder interviews, extant data research, analysis and writing to assess needs and priorities for the Yamhill County (Oregon) Needs and Opportunities Assessment. (Oregon Community Foundation, under subcontract to Program and Policy Insight). 2016-2017.
- **Burke Project Associate.** Research and development of indicators of countywide economic and social well-being for *Riverside County Community Indicators Report* (The Community Foundation of Riverside and San Bernardino Counties, under subcontract to Burke Consulting). 2011-2015.
- **PPI Project Associate.** Evaluation implementation for pilot workforce development initiative for the Evaluation of “Accelerated Training for Illinois Manufacturing” (Illinois Department of Commerce and Economic Opportunity, under subcontract to Program and Policy Insight). 2013-2015.
- **Project Director.** Management of the First 5 Orange County evaluation framework revision and the creation of pilot performance measurement dashboards (First 5 Orange County). 2010.
- **Parsons Project Administrator.** Literature review, research, writing, and editorial oversight in collaboration with project partners for the social and geographic determinants of health initiative *Healthy Places, Healthy People* (Latino Health Access, 2011).
- **PPI Project Associate.** Research, interviews, focus groups, surveys, and presentations for the development of the Lane County (OR) Human Services Plan (Human Services Commission of Lane County, in partnership with Program and Policy Insight). 2009.
- **Parsons Project Director.** Research, facilitation, and presentation of options for the development of a low income needs assessment and human services master plan (Lane County Human Services Commission: Options for Implementation, in partnership with Program and Policy Insight). 2008.
- **PPI Project Associate.** Study liaison for the national, quasi-experimental “Impact Evaluation of Upward Bound’s Increased Focus on Higher Risk Students” at five university-based host institutions in Nevada, Utah, Colorado and South (U.S. Department of Education, Institute of Education Sciences, under subcontract to Program and Policy Insight, Abt Associates, and Berkeley Policy Associates). 2007-2009.

FIRM QUALIFICATIONS

PPI specializes in health and human services policy and service delivery at national, state, and local levels with government agencies and nonprofits, and is experienced in working with collaborative-based models for improving outcomes and driving systems change. As a small firm, PPI provides only highly qualified, experienced staff from start to finish of every engagement. The PPI team engaged for this project has years of professional experience managing complex projects, facilitating focus groups, engaging collaboratively with diverse project stakeholders, analyzing qualitative and quantitative data, synthesizing findings, and writing high-utility analytical reports. Moreover, the PPI team offers deep expertise in both the methodology and the substantive policy context required for the proposed project. In addition to the substantive PPI expertise described in the experience section above, PPI team competencies of particular relevance to the proposed project include:

Expertise in mission and vision development. The team has significant experience helping human service agencies and collaboratives efficiently craft their vision for the future and define their mission. Examples include mission and vision development with the Oregon Consortium of Family Networks (a collaborative supporting families of children with disabilities), First 5 Orange County (a state-funded agency providing services for families with children from birth through age five), Montana’s Children’s Trust Fund, and the EC-LINC Outcomes and Metrics Research to Action initiative (a cross-national network of early childhood agencies focused on improving the sector’s ability to measure the impact of early childhood systems), among others.

Expertise in stakeholder engagement. The PPI team’s expertise in consensus workshops, community forums, and focus group methodology enables us to develop responsive stakeholder engagement frameworks with overall resource efficiency. We have facilitated workshops, forums, and focus groups with diverse stakeholder representatives and have rigorous team training to ensure consistency in implementation across facilitators. We are adept at synthesizing diverse stakeholder feedback to glean consensus themes and convey stakeholder input. The proposed PPI team recently completed deep stakeholder engagement in the following projects, among others:

- Oregon Higher Education Coordinating Committee Statewide Talent Assessment
- Oregon Vocational Rehabilitation Comprehensive Statewide Needs Assessment
- Oregon Commission for the Blind Comprehensive Statewide Needs Assessment
- Montana TANF Assessment, Service Delivery Redesign, and Evaluation Planning
- Montana Out-of-School-Time Assessment
- Montana Early Childhood Needs Assessment and Planning
- Maine Olmstead Assessment and Evaluation
- Colorado Brain Injury Service System Assessment
- Montana Rape Prevention and Education Program Assessment
- Thrive-Big Sky Community Needs Assessment

Understanding of Wyoming’s human service context. Based in the Pacific Northwest with team members in the Mountain Region, PPI is familiar with the dynamics of mountain resort and/or commuter communities. Moreover, the proposed PPI team has current and extensive history of work in

Montana and Oregon, which include resort communities that experience a similar dynamic combination of robust tourism, resort presence, and otherwise rural characteristics. This context presents unique factors, including lower paid seasonal employment, disproportionately high cost of living, and equitable and efficient access to services, among others, that are critical consideration for a regional human service strategy. Ms. Smith supported early childhood system planning work in Sheridan, WY, including developing a consensus vision, mission, goals, and objectives through a facilitated workshop. Ms. Smith also has extensive prior experience working with the Wyoming Department of Health when working with Public Knowledge. In this position, she had the opportunity to work collaboratively on Department of Family Services projects and conduct data gathering focused on long term service and support needs throughout the state.

Strong written and communication skills. The PPI team is skilled at developing documents that are user-friendly, provide clear and concise recommendations, use accessible tables/graphics to convey information visually when possible, and avoid technical language. We will include a description of project methodology, processes, and tools as separate appendices or as a separate Technical Report, to improve report accessibility for interested readers. Reports include a brief Executive Summary that summarizes key findings and recommendations, followed by more detailed analysis in the body of the report. We will work with the Core Committee to identify the report audience and format characteristics to ensure a high-utility product.

Skilled project managers. Since 2005, PPI has successfully brought large and complex projects to completion with high levels of satisfaction from clients. We follow proven project management frameworks that include online project tracking tools, cloud-based document repositories, and regular project progress reports that identify tasks completed, forthcoming tasks, and any possible risks to timely project completion.

REFERENCES

Contact, Title, and Agency	Contact Information	Work Performed
Steve Manela, Division Manager Lane County Human Services Commission	541-682-3798 Steve.Manela@co.lane.or.us	Human Services Plan for Lane County, including resource allocation scenarios
Nicole Rooney, Manager Long Term Services and Supports Office of Aging and Disability Services	207-287-4265 nicole.rooney@maine.gov	State of Maine Olmstead Roadmap Update and Evaluation (Services performed under Bloom Consulting contract with team members K. Smith and K. Lodewick)
Leah Becknell Former Operations and Policy Analyst, Oregon Commission for the Blind	513-518-2176 leahmbecknell@gmail.com	Oregon Department of Human Services Commission for the Blind Comprehensive Statewide Needs Assessment
Kim Goll, Executive Director First 5 Orange County	714-834-5310 Kim.Goll@cfoc.ocgov.com	First 5 Orange County Strategic Plan
Chris Coburn System Manager Community Health Improvement and Partnerships	406-414-5548 ccoburn@bozemanhealth.org	Group facilitation and stakeholder engagement regarding the Health Care Connections program at Bozeman Health (Services performed by Kirsten Smith under Bloom Consulting)

**TETON COUNTY, WYOMING
TOWN OF JACKSON, WYOMING
HUMAN SERVICE PLANNING
REQUEST FOR PROPOSALS**

January 2, 2019



OVERVIEW

1. Project Purpose

Teton County, Wyoming and the Town of Jackson, Wyoming intend to enter into a contract with a consultant to develop and create a Human Service and Resource Allocation Plan for Teton County.

Teton County and the Town of Jackson are seeking a qualified professional for the provision of the following services.

A consultant needs to have knowledge and experience in:

- Meeting facilitation (including large community workshops and forums)
- Vision and mission development
- Strong written and communication skills
- Plan Development

2. Project Background

Teton County and the Town of Jackson have long demonstrated a commitment to funding Health and Human Services organizations. Many organizations have received funding annually, while funding to others has been less consistent. Over the last ten years, total contributions to Health and Human Services organizations by the County and Town have increased nearly 25%. During the last few years the Human Services agencies in Teton County have experienced deep budget cuts from the State of Wyoming. Despite making up some of the cuts through private fundraising and additional funding from the County and Town, Human Services organizations still face budget cuts. A number of initiatives have been implemented in response to the issue, including increases in private fundraising, development of a White Paper to describe the problem, and a commitment from the elected officials to elevate the problem. The elected officials are now seeking the development of a plan that will provide strategic direction for community planning and prioritization related to health and human services, and help inform and direct future funding decisions.

3. Project Scope, Timeline and Deliverables

The consultant will report to the Board of County Commissioner's Administrator during all phases of the project (see Section 4. Progress Reporting). Throughout the project the consultant is expected to gain core committee, community, and stakeholder input. The project scope is to include, but is not limited to:

1. Phase 1: Research/Development

Timeline – April 2019.

Deliverables:

- Review community documents including, but not limited to: local agencies' strategic plans, state statutes, Systems of Care White Papers, community health needs assessments, Mental Health report and statewide needs assessments.
- Recommend/Invite organizations to participate in a Core Committee for the duration of the project.

2. Phase 2: Public Input, Core Committee/Stakeholder Involvement

Timeline – May/June 2019

During this phase the consultant will gain input from the public, identified Core Committee members and stakeholders for the direction of the Human Service and Resource Allocation Plan.

Deliverables:

- Identify, describe and implement a comprehensive strategy and methodology for citizen involvement in the Human Service Plan development process.
- Assure the residents and core committee members are provided an opportunity to participate in the development of this plan.

- Conduct at least (2) two public community meetings and a minimum of (2) two focus groups (participants to be determined) and individual core committee member interviews.
- Act as facilitator to gather specific information about services, use, preferences and any agency strengths, weaknesses, opportunities and threats.
- Provide well organized and directed activities, techniques and formats to ensure a positive, open and proactive public participation process is achieved.
- Provide written records and summaries of the results of all public processes and communications strategies.
- Help to build consensus and agreement on the plan and if consensus is not possible, provide information for informed decision making by the Core Committee.
- Provide methods to hear from as many people as possible, including users and non-users of the services.

3. Phase 3: Vision and Mission Development

Timeline: May/June 2019

Conduct a community workshop in order to develop a shared vision for Human services in the Town of Jackson and Teton County.

Deliverables:

- Identify, describe and implement a comprehensive strategy and methodology for citizen involvement in the vision and mission development process.
- Assure the residents and Core Committee members are provided an opportunity to participate in the development of this plan.
- Conduct at least (1) one public community meeting to gain input for the development of the vision and mission statements.
- Act as facilitator to gather specific information about development of vision and mission statements for the plan.
- Provide well organized and directed activities, techniques and formats to ensure a positive, open and proactive participation process is achieved.
- Provide written records and summaries of the results of all public processes and communications strategies.
- Help to build consensus and agreement on the vision and mission statements and, if consensus is not possible, provide information for informed decision making by the Core Committee.
- Provide methods to hear from as many people as possible, including users and non-users of the services.

4. Phase 4: Human Service Forum

Timeline: July 2019

Human Services Forum – To help guide the decision-making process for the Human Services Plan.

Deliverables:

- Hold a Human Service Forum to inform the development of the Human Service Plan.
- Present stakeholders and core committee with vision and mission statements, and community concerns for human services and resource allocation plan.
- Provide well organized and directed activities, techniques and formats to ensure a positive, open and proactive participation process is achieved.
- Provide written records and summaries of the results of process and communications strategies.
- Help to build consensus and agreement to direct Policy decisions of the Human Service and Resource Allocation Plan.

5. Phase 5: Human Service Plan

Timeline: September 2019

Human Service Plan – A comprehensive, community human service plan for the Town of Jackson and Teton County that incorporates all the above activities and information and other studies and plans conducted (i.e. Mental Health Assessment). The focus of this plan will relate to policy level decisions.

Deliverables:

- Development of a Human Service Plan to inform the County and Town on identified policy related issues.

6. Phase 6: Resource Allocation Plan Development

Timeline: November 2019

Develop a resource allocation plan that will support the shared Vision/Mission and address community human service needs.

Deliverables:

- Research funding models and funding options.
- Conduct stakeholder and Core Committee meetings to assist in development of a resource allocation plan.
- Act as facilitator to gather specific information about development of resource allocation plan for human service organizations.
- Provide well organized and directed activities, techniques and formats to ensure a positive, open and proactive participation process is achieved.
- Provide written records and summaries of the results of process and communications strategies.
- Help to build consensus and agreement on the resource allocation plan and, if consensus is not possible, provide information for informed decision making by the Core Committee.

4. Progress Reporting

The consultant and the Board of County Commissioner’s Administrator shall hold progress meetings as often as necessary, but no less than once per month until the final plan is approved by the elected officials. The consultant shall supply the Administrator with at least (1) one copy of all completed or partially completed reports, studies, forecasts, maps, notes or plans as deemed necessary by the Administrator at least (3) three working days before each progress meeting. The Administrator shall schedule the meetings, as necessary, at key times during the development of the Human Service and Resource Allocation Plan.

5. Submittal Content/Qualifications

Submittal Qualifications:

Consortiums, joint ventures, or teams submitting offers will not be considered responsive unless it is established that contractual responsibility rests solely with one individual, firm, or corporation. Teton County will contract with one Entity only in conjunction with the services solicited in this Request for Proposals (RFP).

Submittal Content:

Consultants shall adhere to the following format and content in their submittal:

1. Identification of the Submitting Entity. State the name of the firm, mailing address, telephone number, email address, and individual authorized to negotiate on behalf of the firm. (1-page maximum)
2. Work Plan. Describe in detail the proposed work process that will be developed to provide the required services in Section 3. Describe how required services will be complete within the timeline established in Section 3. (10 pages maximum)
3. Experience. Provide specific and detailed examples of direct experience with Human Services, human service plan development, group facilitation, consensus building, comprehensive planning and resource allocation. Please highlight work performed in Wyoming and in resort and/or commuter communities. (5 pages maximum)

4. Innovation. Identify and describe in detail experience with a variety of approaches to Human Service funding and requirements that may be useful to the community (must be included in the proposed Work Plan).
5. Personnel and Staffing Plan. Identify and provide resumes for all personnel who will have responsibility for service provision. Indicate the level of effort each staff person shall have in providing each service. Indicate the organization of the proposed team, specifically identifying the proposed Project Manager. Explain how the team will be organized to ensure adequate communication and performance among the personnel/firms in the team arrangement. Provide a brief overview of the firm's qualifications to undertake this assignment. The County and Town are expressly interested in the firm's experience and qualifications of providing professional services for this specific project. Lengthy explanations of completed, yet unrelated, projects will not be considered. (10 pages maximum)
6. References. Provide a list of current and past clients for which your firm has performed work of a similar nature. For each reference, include a contact name, phone number and email address. Briefly describe the work performed for each reference. Include a minimum of three references and no more than five.
7. Cost Proposal. Please provide a cost proposal (e.g., task hours and staff billing rates with inclusion of expected travel costs, project-related expenses, contingency, and not-to-exceed) for each task. This section should be submitted in a separate sealed envelope.

6. Proposal Response

Each consultant shall submit one (1) printed copy of the complete submittal and one (1) electronic copy in a PDF-format. All submittals must be received by Teton County Administration by 4:00 P.M. MST, Wednesday, January 30, 2019, 200 S. Willow Street, Jackson, Wyoming, 83001. Submittals shall be valid for a period of ninety (90) days from receipt by the County. Submittals received after the date and time specified above shall be disqualified from consideration. Late submittals shall be returned unopened. Qualifying submittals shall be opened on Thursday, January 31st, at 9:00 A.M. MST in the Teton County Administration offices, 200 S. Willow Street, Jackson, Wyoming, 83001. The public is invited to attend.

Responses to this RFP should be submitted via Federal Express, United Parcel Service, or hand delivered to:

Alyssa Watkins
Teton County Government
P.O. Box 3594
200 S. Willow Street
Jackson, WY 83001
Phone Number: (307) 733-8094

All questions and requests for additional information shall be directed to Alyssa Watkins, BCC Administrator via e-mail only at awatkins@tetoncountywy.gov

7. Additional Information

The solicitation does not commit Teton County to award a contract, to pay any costs incurred with the preparation of a proposal, or to procure or contract for services or supplies. Teton County/Jackson reserves the right to accept or reject any or all proposals received in response to the request, to negotiate with any qualified source, or cancel in whole or part this proposal process if it is in the best interest of the County or Town to do so. Subsequent to contract negotiations, prospective consultants may be required to submit revisions to their proposals.

Postponement or Amendment:

The County and Town reserve the right to amend any portion of the RFP. Copies of such amendments shall be made available to all prospective, interested consultants via e-mail. Where such amendments require changes in the submittal requirements, the final date for submission may be extended.

Cost of Submittal Preparation:

Any costs incurred by the consultant in responding to this RFP in anticipation of receiving a contract award shall be the responsibility of the Entity submitting the response. The County and Town shall not reimburse the Entity for any such expenses.

Schedule of Submission and Review:

The Selection Committee, after its initial review and scoring, may elect to select a successful submittal. Conversely, the Selection Committee may elect to contact short-listed applicants to ask for final and best offers, pursuant to the Teton County procurement policy. After scoring all submittals (and all final and best offers, if applicable), the Selection Committee shall make a recommendation to the Board of County Commissioners and Town Council regarding the successful submittal. The Board of County Commissioners and Town Council will formally award the project and Teton County will enter into a contract with the consultant.

Acceptance:

This RFP provides interested professionals with the necessary information to enable them to prepare and submit information for consideration by the County and Town.

The County and Town reserve the right to enter into further discussions with any consultant based solely on the initial response to this RFP along with the right to negotiate the cost with the selected consultant if it is deemed to be in the best interest of the County and Town.

If the County and Town is unable to negotiate a final scope of services and professional fee with their first choice, they reserve the right to negotiate with other consultants that submitted a response to this RFP.

Items to be provided by the Department:

- A project representative
- Copies of all existing studies, plans, programs and other data including the Teton County/Jackson Comprehensive Plan and access to all applicable records
- Assistance with on-going community meetings

8. Project Schedule

The County and Town intend to follow the schedule outlined below. However, the County and Town reserve the right to revise the review schedule at their sole discretion.

January 2, 2019	Request for Proposal distribution
January 30, 2019	Request for Proposal due date, 4:30 PM MST
February 1, 2019	Completion of RFP evaluation by the committee
Week of February 4th, 2019	Interviews with short-listed firms (if necessary)
March 5, 2019	Award of Contract with Teton County
March 8, 2019	Notice to Proceed
December 30, 2019	Project Completion

9. Submittal Evaluation Criteria

A selection committee, consisting of two representatives from each of the following: Human Services Sector; The Town of Jackson; and Teton County shall evaluate the submittals based upon the following criteria:

	Rating	Weight	Score
1. Criteria One - Submittal Format			
Appearance, followed			
Instructions, Professional	_____	5	_____
2. Criteria Two - Work Plan and Schedule			
Methods employed, understanding			
What is wanted, methodology,			
Scheduling, time control	_____	10	_____
3. Criteria Three - Experience and Innovation			
Responses of Past Clients	_____	5	_____
4. Criteria Four - Personnel and Staffing			
And (Corporate Qualifications)			
Experience and qualifications of			
Key personnel assigned to this			
Project, Recent experience,			
Company structure	_____	5	_____
5. Criteria Five – Estimated Project Costs			
In line with work proposed	_____	5	_____
		Total Score	_____

Rating Points: 10 – Excellent; 7.5 – Good; 5 – Satisfactory; 2.5 – Marginal; 0 – Unsatisfactory

Teton County Human Services

Planning for a Healthy Future

An outline of a planning process to guide the community in a shared vision for Human Services, resulting also in the development of system outcomes and a funding model to be used by the Town of Jackson and Teton County.

This project is a collaborative partnership between the non-profit Human Services sector, the Town of Jackson and Teton County.

The “Core Committee” will consist of 2 representatives from the non-profit human services sector, appointed by the Human Service Council. At a minimum one representative will be a current Human Service Council member. Two employees from the Town of Jackson and two employees from Teton County will be appointed by the Town of Jackson and the Board of County Commissioners. A total of six members will make up the Core Committee.

The task of the Core Committee will be to write a Request for Proposals for a consultant to provide services outlined in Phases 1-3. Members of the Core Committee will evaluate proposals and make a recommendation to the Town and County for a consultant to perform the three phases of this project.

The Core Committee will strive for consensus in recommendations to the Town Council and the Board of County Commissioners. However, if this is not possible, the majority position will be presented along with justification for any minority position(s).

PHASE I – Human Services System Plan

Definition: A comprehensive, community human services plan for the Town of Jackson and Teton County to develop a shared vision, mission, values and guiding principles to inform system wide goals

Outcome – A Human Service Plan

PHASE II– System Evaluation to Support Shared Outcomes

Definition: A system wide evaluation plan to measure outcomes and define success through a shared measurement system and platform.

Outcome – A System Wide Evaluation Plan

PHASE III – Resource Allocation Model for the System

Definition: A resource allocation model to be used by elected officials for making evidence-based funding decisions in a variety of funding climates.

Outcome – A Resource Allocation Model