



## **Collective of Results and Evidence-based Results (CORE) Investments**

### **Request for Proposals (RFP)**

#### **Business Model and Sustainability Plan for the CORE Institute for Innovation and Impact (CORE Institute)**

**Proposals Due: Tuesday, March 31, 2020 by 5:00 p.m. PST**

#### **Summary of Request**

Optimal Solutions Consulting, a consulting firm based in Santa Cruz County, CA, seeks a qualified consultant or consulting firm **to research and recommend options for a sustainable business model** to support the start-up of the CORE Institute for Innovation and Impact (CORE Institute) for the next 2-5 years.

The CORE Institute is envisioned as a public-private partnership that supports shared knowledge, skills and practices across sectors. Drawing on both local and outside technical expertise, the CORE Institute could become a learning lab for testing, evaluating, scaling, and spreading innovative, outcomes-driven approaches to achieving equitable health and well-being. This, in turn, will build capacity for applying the key tenets and values of CORE Investments (a results-based collective impact initiative in Santa Cruz County) among both public and nonprofit agencies, as well as grassroots or community-led groups.

This consulting project will require conducting interviews with potential partners to explore their interest in participating in and supporting the CORE Institute, identifying options for a potential structure to coordinate the CORE Institute's offerings, and exploring similar models in other places to identify options for funding, structure, operations, and sustainability. The selected contractor will prepare a report and present findings to key project stakeholders by December 31, 2020.

#### **I. About CORE**

The Collective of Results and Evidence-based (CORE) Investments represents both a funding model and a movement to achieve equitable health and well-being in Santa Cruz County, California for all residents, across the lifespan. CORE Investments uses a collective impact, results-based approach that is responsive to community needs. The initiative was first launched in 2015 by the County's Human Services Department (HSD), working closely with the City of Santa Cruz, the County's Board of Supervisors, and other county agencies and partners. HSD and its partners planned a phased-in transition from separate funding processes for safety net services to a results-based, collective impact model. An initial phase led to a joint Request for Proposals for local service providers and 3-year contracts that have been extended for an additional year (through 2020). Subsequent phases of CORE Investments led to convening a Steering Committee, engaging partners and community members, developing a series of tools, and building local capacity to move towards a results-based approach, which includes the CORE Institute for Innovation and Impact (CORE Institute). HSD has contracted with Nicole Young of

Optimal Solutions Consulting since 2018 to lead the consulting team that facilitates the ongoing development of CORE Investment. In addition to Ms. Young, the team includes Nicole Lezin (Cole Communications, Inc.), Caitlin Brune, and other subcontractors responsible for specific tasks and deliverables.

As a funding model, CORE Investments provides a unifying framework to align local funders’ strategic priorities and investments, co-invest resources in more effective approaches, measure program-level outcomes and demonstrate their cumulative effect on long-term, community-level impacts, and attract additional resources. As a movement, CORE Investments helps align and amplify the efforts and impacts of multiple systems and existing initiatives that would benefit from a collective approach. CORE also creates a mechanism for examining and addressing organizational, systemic, and individual practices and structures that perpetuate inequities. CORE Investments brings new people and groups into discussions and decisions about addressing disparities in our County linked to race and other characteristics in order to make progress toward achieving equitable health and well-being for everyone.

A CORE Steering Committee with representatives from County and City government, an array of community-based service providers, and local funders has worked with a consulting team to reach consensus on a CORE Investments framework—including mission, vision, and values statements and a set of eight CORE Conditions for Health & Well-being to be addressed through a collective impact approach. The framework also reflects input from a broader group of community members and service providers, obtained through a series of CORE Conversations (each drawing about 100 participants).

The CORE Conditions for Health & Well-being are shown below.



Additional CORE tools, materials, and reports are available [here](#).

## II. Background on the CORE Institute

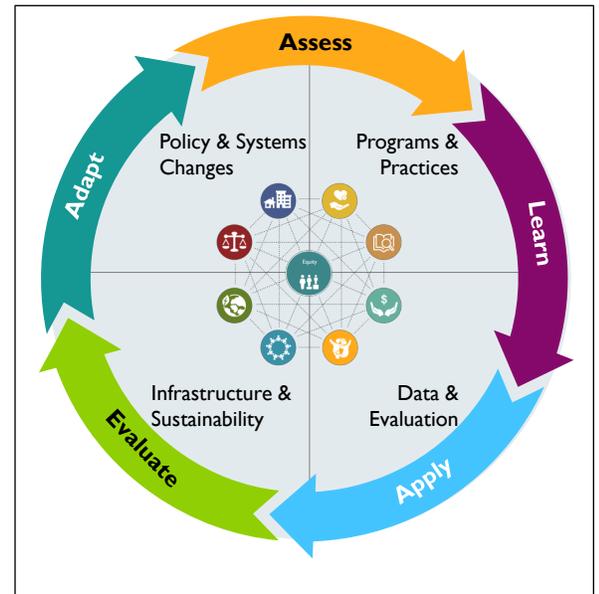
With guidance from the Steering Committee members and other partners, the CORE consulting team has developed several tools that are designed to help communicate and apply CORE concepts and apply them in practice. These include the **CORE Continuum of Results**

**and Evidence**, which is used in tandem with logic models and theories of change to help practitioners and funders focus on intended results and outcomes, and a **CORE Results Menu**, an interactive, customizable menu of impacts, outcomes, and indicators for each CORE Condition that was developed with [DataShare Santa Cruz County](#) (DataShare Santa Cruz) and will go live in June 2020.

The CORE consulting team has worked with DataShare and others to provide training and technical assistance (TA) on how to use the CORE tools and, more recently, for the Steering Committee members and their colleagues on operationalizing racial equity. Participants in CORE training events are asked to identify additional training and TA needs in their workshop evaluation surveys. In addition, a 2018 survey of CORE contractors, funders, and other stakeholders posed similar questions about potential areas and topics for training and TA. Areas of interest included data collection, outcome measurement and analysis, Evidence-based Program (EBP) implementation, and additional EBP training. Specific topics included integrating an EBP into an existing program, designing and using data collection tools, adapting EBPs with fidelity to the original design, and identifying program outcomes and quality measures.

To address these and other emerging needs, the consulting team, HSD, Community Foundation of Santa Cruz County, and other partners convened a Design Team to explore using CORE as a hub for learning and applying the results-based, collective impact tools and approaches customized for Santa Cruz County, through a proposed **CORE Institute for Innovation & Impact**.

The CORE Institute is envisioned as a public-private partnership that supports shared knowledge, skills and practices across sectors. Drawing on both local and outside technical expertise, the CORE Institute could become a learning lab for testing, evaluating, scaling, and spreading innovative, outcomes-driven approaches to achieving equitable health and well-being. This, in turn, will build capacity for applying key tenets of results-based, collective impact approaches among both public and nonprofit agencies, as well as grassroots or community-led groups. Through a variety of applied training, technical assistance, and capacity-building opportunities, the CORE Institute is intended to advance effective practices in areas such as community engagement, program planning, evidence-based programs, advocacy and policymaking, outcome evaluation, leadership, change management, leveraging resources, social impact investing, and organizational infrastructure.



Preliminary conversations with CORE Steering Committee members and other local funders, public agencies, and nonprofit service providers suggest there is both a need and enthusiasm for building greater capacity in each of these areas, as well as opportunities to leverage or co-invest funding and training resources to establish the CORE Institute. With additional resources, trainings offered through the CORE Institute could be produced in ways that allow for wider reach and distribution (e.g., via webinars, Livestreaming, online training series, etc.).

## **Requested Services**

Optimal Solutions Consulting seeks a qualified consultant or consulting firm **to research and recommend options for a sustainable business model** to support the start-up of the CORE Institute for the next 2-5 years. This would require interviews with potential partners to explore their interest in participating in and supporting the CORE Institute, identifying options for a potential structure to coordinate the CORE Institute's offerings, and exploring similar models in other places to identify options for funding, structure, operations, and sustainability.

The selected consultant will work closely with the CORE consulting team and CORE Institute Design Team, which includes community partners and members of the CORE Steering Committee.

The primary responsibilities and deliverables are:

1. Interviewing up to 10 CORE Design Team members and up to 15 potential partners, including community-based leaders (e.g. youth, parents), to present the concept of the CORE Institute and understand what would make the Institute useful and relevant from the perspective of various potential "users" (funders, government agencies, businesses, non-profit agencies, grassroots community leaders, etc.)
2. Researching potential models and associated costs for:
  - Funding (e.g., membership fees, fee-for-service, grants, donations, etc.)
  - Structure (e.g. brick-and-mortar location, virtual Institute, and/or hybrid structure),
  - Operations (e.g., staffing roles, communications, vetting and coordination of multiple trainers/TA providers, logistics, technology requirements, etc.).
3. Preparing a report for the CORE consulting team that presents one or more potential business models, along with their specific parameters and pros and cons.
4. Presenting findings to the CORE Institute Design Team for feedback and refinement, then presenting recommendations to the CORE Steering Committee.

The CORE consulting team will assist with providing additional background information about CORE Investments and the CORE Institute, as well as introductions to interviewees.

The consultant will lead an objective, transparent process aligned with CORE Investments values. Among these, *equity* in process and outcome stands prominently, as captured in this definition: *We uncover the root causes of inequities and disrupt individual, organizational, and systemic practices and structures that perpetuate inequities in opportunities and outcomes.*

### **III. Desired Qualifications**

- Experience with training and TA delivery (including design, delivery, and coordination)
- Prior experience working with organizations focusing on equity in their missions and operations
- Experience working with non-profit, government, and for-profit entities
- Experience with cross-sector and/or Collective Impact initiatives
- Experience with project management and business plan development

### **IV. Proposal Submission Details**

Proposals should not exceed 5 pages in length and include the following components:

- Scope of Work

- Overall approach to working collaboratively with the CORE consulting team, Design Team, and other stakeholders, including public and private funders and community leaders
- Key tasks/activities and milestones/deliverables associated with them, along with a timeline and estimated number of hours required to complete the project
- Additional information you would need to initiate and complete the project
- Anticipated challenges and how they will be addressed
- How your prior experience meets the Desired Qualifications described in Section III
- Contact information for three references from previous engagements
- Project budget (not to exceed \$30,000)

Please submit proposals electronically **Tuesday, March 31, 2020 at 5:00 p.m. PST** to: Nicole Young, [nicole@opti-solutions.com](mailto:nicole@opti-solutions.com). Awards will be announced in April 2020, with contracted work expected to begin in May 2020.

In evaluating proposals, the following will be taken into consideration:

- Match with the qualifications listed above
- Viability of activities and deliverables timeline
- Projected cost.