

CORE Investments Request for Proposals (RFP) 2022

**LESSONS LEARNED  
PROCESS EVALUATION:  
REPORT OF FINDINGS  
APRIL 2023**

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# Executive Summary

In 2015, the Santa Cruz County Board of Supervisors (BoS) and Santa Cruz City Council (Council) approved a results-based collective impact model named the Collective of Results and Evidence-based (CORE) Investments. The evolution of CORE has been community informed, Board and Council approved, and staff implemented. The 2022 CORE Request for Proposals (RFP) marked the beginning of the second CORE funding cycle and is the focus of this report. In June 2022, the BoS and Council awarded approximately \$5.9 million in contracts to 41 agencies representing 57 programs that address community needs across the CORE Conditions for Health and Wellbeing.

To ensure that the CORE initiative remains true to its principles of collective impact and continuous improvement, the Santa Cruz County Human Services Department (HSD) conducted an evaluation of the 2022 RFP process. The evaluation used data from the RFP process and conducted surveys, focus groups, and interviews with a broad range of stakeholders including elected officials, service providers, applicants, County and City staff and consultants, CORE Steering Committee members, and community members. High-level findings are summarized below. Details of methods and individual findings are presented in the full report.

## What Worked?

- ✓ The RFP and funding process **provided equitable opportunities for current and new programs to receive CORE funding.**
- ✓ The RFP **introduced equity dimensions** into the application and scoring process, which was widely supported by stakeholders.
- ✓ All elected officials said the **funding recommendations reflect the needs** of the communities of Santa Cruz County, while acknowledging there is not enough funding to address all unmet needs.
- ✓ Stakeholders appreciated the **community engagement process that informed the development of the RFP**, almost 2/3rds of survey respondents said they were satisfied with their opportunities to participate in the creation of the RFP.
- ✓ **Applicants appreciated technical assistance (TA)** provided to support the application process and had positive experiences using the online platform Reviewr to submit their applications.

### *Lessons Learned on What Worked*

- *Continue to engage community-based organizations and stakeholders in the creation of the next CORE RFP process*
- *Keep equity dimensions*
- *Use an online application portal*
- *Keep panel format and enhance support and training for panelists*
- *Continue to provide TA for applicants and look for ways to expand offerings*

- ✓ The **panel review process was well organized**. Panelists appreciated the support and training they received. Panelists, in particular, valued the structure of the scoring review process.

### Areas for Improvement

- ❖ Programs funded through CORE should be **celebrated and recognized** for their positive impacts.
- ❖ **Identification of CORE funding and allocation priorities, with direction from elected officials, must happen before the RFP is released.** Developing these priorities should be transparent, participatory and informed by a data- and equity-centered discussion among stakeholders.
- ❖ The RFP process **needs a longer timeline** to account for unexpected events (e.g., Omicron surge) and allow for deliberation between award recommendations and funding decisions.

#### *Lessons Learned for Improvement*

- *Celebrate successful applicants and services*
- *Have a values conversation to create alignment among stakeholders*
- *Identify funding priorities prior to the next RFP*
- *Start the RFP process earlier and provide more time between RFP release and funding awards*
- *Provide more detail on the RFP review and scoring process*
- *Recruit more panelists and increase panelist diversity*

- ❖ **Make the CORE application process easier.** The level of difficulty and amount of time needed to complete the application was a concern for the majority of applicants.
- ❖ The scoring process was detailed in the RFP; however, many applicants would prefer **more details around scoring** to be provided earlier in the application process.
- ❖ **Recruiting more panelists** and increasing the diversity of the panelist pool, both in experience and community representation, could reduce the amount of time needed for application review per panelist and further represent community voices of Santa Cruz County.

### Moving Forward

The County, City, and our partners are committed to advancing equitable health and well-being through CORE funding and its alignment with other investments. This process evaluation offers insights into aspects of the CORE RFP process that worked well and areas for improvement. We look forward to continuing this conversation with the community, and, together, fulfilling the CORE vision of an **equitable, thriving, resilient community** where everyone **shares responsibility** for ensuring the **health and well-being** of all people, at **every stage of life**.

**Thank you to all who participated in the lessons learned process evaluation.**

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## I. Evaluation Goals

In alignment with the values and principles of collective impact and continuous improvement, the Human Services Department (HSD) completed a lessons learned process evaluation of the 2022 Collective of Results and Evidence-Based Investments (CORE) Request for Proposals (RFP). Based on feedback that HSD received from stakeholders, including City and County elected officials, the lessons learned process was designed to evaluate the following questions:

1. How well did the RFP process reflect the values of the CORE framework and stakeholder engagement?
2. During the RFP process, to what extent did service providers demonstrate knowledge or capacity, especially in the use of data, collective impact and a focus on equity?
3. What worked well that should be continued in the next RFP process?
4. What unexpected outcomes resulted from the RFP process?
5. How can the RFP process improve next time?

The purpose of the findings in this report are to inform and contribute to the development of the next phase of CORE Investments.

## II. Report Structure

This report evaluates the RFP process from its development through the completion of the contracting process.

The report proceeds as follows: **Section III: Background & Implementation** provides an overview of the development, implementation and funding outcomes of the 2022 CORE RFP; **Section IV: Methodology** describes the methods and data sources used to complete the lessons learned report; **Section V: Results** provides all the findings from the lessons learned process evaluation. The findings are organized according to three overarching themes:

- Funding Process
- Technical Assistance (TA) and Communication Support
- Collective Impact

Sections provide a list of individual findings, considerations for stakeholders, quantitative data, and illustrative quotes.

### III. Background & Implementation

The 2022 CORE Investments RFP was informed by lessons learned from the previous RFP, community input, the CORE framework and related tools developed over the last five years, and direction from the Santa Cruz Board of Supervisors (BoS) and Santa Cruz City Council (Council). In 2017, the County of Santa Cruz and City of Santa Cruz issued the first CORE RFP, which was based on a results-based collective impact model. After the 2017 RFP, the County undertook a formal lessons learned process evaluation, which had several findings that contributed to the development of the 2022 CORE RFP:

1. Stakeholders suggest gathering feedback more broadly on the RFP and application form prior to release
2. Applicants would benefit from a simpler application
3. The length of time to complete the application was a concern for many applicants
4. Stakeholders suggested having more support for identifying evidence-based programs and practices (EBPs)

This CORE RFP was developed to reflect the evolution of CORE over the last five years. This includes integration of the updated CORE framework (vision, mission, values), inclusion of the CORE Conditions for Health & Well-being, and centering equity in the RFP. Multiple CORE tools that were developed to support results-based approaches to achieving collective impact were available as resources to the applicants. Tools included the CORE Results Menu which provides access to community level data, results and indicators that illustrate needs and strengths in each CORE condition. Another tool, the CORE Continuum of Results and Evidence, is designed to broaden the definition of what constitutes “evidence” and increase the capacity of agencies to implement EBPs and measure program outcomes.

The CORE RFP was informed by several study sessions with the BoS and Council. In February 2021, HSD went before the BoS and conducted a study session on the CORE RFP. At that meeting, the BoS asked HSD to engage with other funders and with the community on the development of the RFP. In September 2021, HSD presented to the BoS and Council and received approval for the RFP framework.

In response to the first RFP process evaluation, HSD and the City of Santa Cruz engaged community-based organizations and other funders as thought partners during the design of the RFP. Between June and October 2021, eight meetings were held to provide information on the CORE RFP process and solicit input and advice on how to operationalize equity and apply the CORE framework in the upcoming funding process. In total, 159 individuals from 77 organizations participated in these meetings. The input collected during and after the meetings were used to inform the CORE RFP process. To address the process evaluation finding regarding a simpler application, HSD introduced the tiered RFP approach, which

varied the complexity of questions based on the amount of funding requested, moved the RFP process online, and provided TA to applicants.

Based on the feedback from various stakeholder groups, the RFP framework was centered on advancing equitable health and well-being for all people, across their lifespan, using a results-based, collective impact approach. CORE Investments represents a shared commitment of the County and City to create equitable opportunities for all county residents to thrive, expressed by the eight interconnected CORE Conditions of Health and Well-being. Equity is central to this effort and compelled the County and City to require applicants to identify populations within the county who may face particular obstacles to their health and well-being, to create solutions tied to their needs, and to address the root causes of inequity.

Both funders approved distributing CORE funds using a hybrid model approach, in which most of the funds would support a broad base of direct services and a portion would focus on one collaborative, targeted impact investment. The funds were allocated across four tiers -small, medium, large, targeted impact, based on the amount of funding requested, with the intent to promote applications from agencies of different sizes. Importantly, in response to the first lessons learned report, the tier system was designed to help simplify the application process, by having application requirements increase with increased funding requests. Meaning that applying for funding in the small tier had the least requirements, and the targeted impact tier had the most requirements.

Proposals across all tiers would be driven by community needs as defined and articulated by the applicants. Applicants would describe how the needs they plan to address contribute to equitable health and well-being in one or more of the eight interconnected CORE Conditions and select a target result area and proposed program outcomes.

Additionally, the Board and Council approved HSD's proposed plan to provide Technical Assistance (TA) to applicants, which was done in one-on-one and group sessions. In total, 64 training and TA opportunities were provided to 298 participants.

In total, 128 proposals were submitted seeking over \$15 million in funding. The dollar amount of funding requested exceeded the \$5.9 million that was available for the CORE RFP by approximately \$9 million. Ultimately, the County and City awarded funding to 41 agencies representing 57 programs that address community needs throughout the county and across the CORE Conditions for Health and Well-being. Thirty-four of the 57 funded programs received CORE funding for the first time.

Twenty-two organizations had programs that were previously awarded CORE funding that were not awarded funding this CORE cycle. In order to help these organizations recalibrate their program needs and services, the BOS and Council made three and a half months of



transitional “bridge” funding available to them. Eighteen organizations received “bridge” funding, with four programs choosing to not accept the additional funds.

## **IV. Methodology**

The lessons learned process evaluation was completed by HSD staff with support from the CORE consultants.

The evaluation used a mixed methods approach to collect and analyze quantitative and qualitative data. Basic statistics were used to analyze survey data. A deductive content analysis was used to analyze interview and focus group transcripts. The results from the survey analysis and content analysis were synthesized in the findings presented in this report.

### *A. Sources*

Stakeholder input was collected through a combination of surveys, structured interviews, and focus groups. The process evaluation also reviewed BoS and Council memos, CORE Progress Reports, and RFP proposals.

### *B. CORE Lessons Learned Survey*

HSD developed a survey that asked a broad set of questions about the RFP process. A link to the survey was emailed to 333 unduplicated individuals from the following stakeholder groups: service providers, applicants, elected officials, CORE Steering Committee members, County and City staff, and panelists. A total of 112 survey responses were received, a response rate of 34%.

The broad range of stakeholders surveyed meant certain questions did not apply to many stakeholders. This resulted in an overrepresentation of Not Applicable/No Opinion responses for various questions. These responses were excluded from the final analysis of the survey data. When data are presented in the report, the number of respondents or “n” who answered the question is included.

### *Respondent characteristics*

Graph 1 shows that out of 92 survey respondents, 60 (65%) identified as woman/female, 20 (22%) man/male, and 3 (3%) non-binary.

**Graph 1: The majority of survey respondents identified as woman/female. (n=92)**

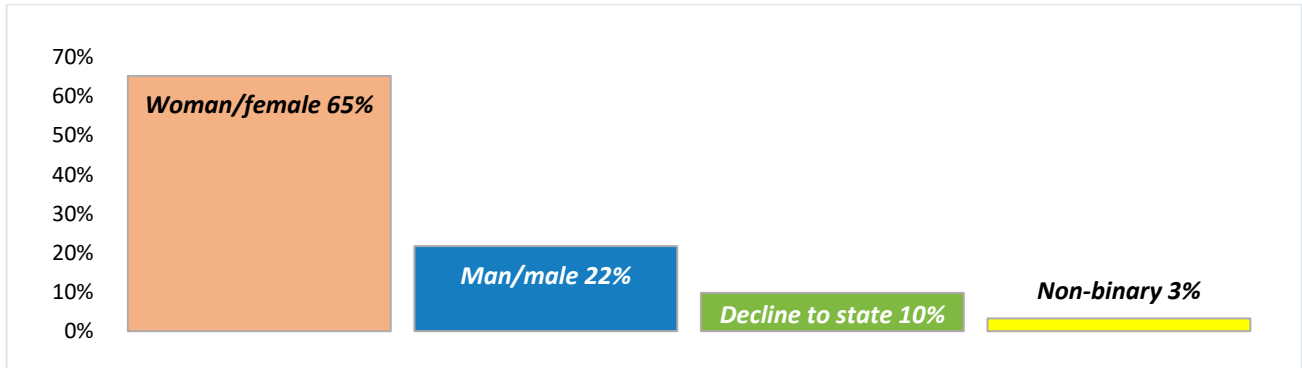


Table 1 shows the distribution of survey respondents according to their stakeholder group. Service providers made up the largest group of respondents and grant writers were the second largest group.

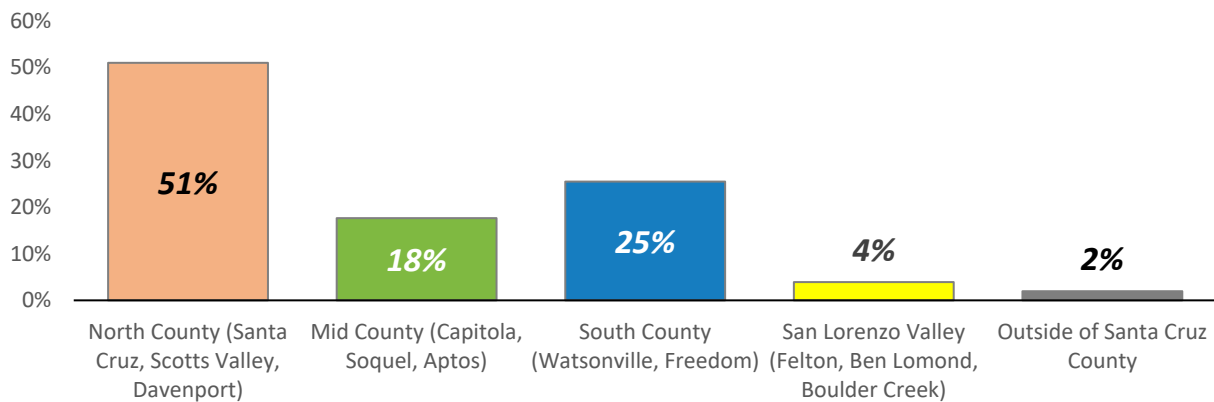
**Table 1: The majority of survey respondents were service providers and grant writers. (n=103)**

Stakeholder Group	Participants
Service Provider	52
Grant Writer	29
Panelist	21
County or City Staff	20
Community Member	13
CORE Steering Committee Member	10
Elected Official	6
<b>Total</b>	<b>157*</b>

**\* Some survey respondents belong to multiple groups, so this count has duplication and does not equal the total number of survey responses received.**

51 survey respondents provided the location of their main office, approximately half are located in North County and 1 in 4 have their main office located in South County.

**Graph 2: The main office location of survey respondents. (n=51)**



Forty-two of 57 applicants (72%) who responded to the survey question “What was the outcome of your agency’s CORE proposal(s)?” had some or all of their proposals funded.

**Table 3: Nearly 3/4 of applicant respondents had all or some of their proposals funded. (n =57)**

	All Proposals Funded	Some Proposals Funded	No Proposals Funded	Decline to Answer	Grand Total
Number of Applicants n=57	35%	37%	23%	5%	100%

*C. Focus Groups*

The stakeholder focus groups were conducted on the online meeting platform Zoom. The CORE consultants facilitated the focus groups and HSD staff were present to take notes and provide support as needed. See Appendix C. for details about the focus group sign-up process, and focus group procedures.

Eleven focus groups were conducted with four different stakeholder groups. The questions asked during focus groups were tailored to each stakeholder group. For example, the Panelist focus group questions solicited responses about their experience reviewing and scoring applications.

Table 4 shows that in total 53 stakeholders participated in focus groups, with the majority (31) being applicants.

**Table 4: The applicant/community member focus groups had the most participants.**

Focus Group Type	# of Focus Groups	# of Participants
Applicants/Community Member	6	32*
Panelists	2	8
Staff/Contractors	2	7
CORE Steering Committee	1	6

\* A community member who did not apply for CORE funding participated in an applicant focus group.

*D. Interviews*

HSD completed a total of 14 structured interviews with 4 members from the Santa Cruz County Board of Supervisors, 6 members of the Santa Cruz City Council, 3 individuals from County and City executive leadership, and one interview with the CORE Consultants.

*E. Limitations of the Research*

The low survey response rate (34%) means survey results are not generalizable and therefore may not be representative of the opinions of all stakeholders. With all focus groups there is the potential for a self-selection bias towards individuals that have stronger feelings about the process that may not be representative of all stakeholders. As well, the

presence of HSD staff and the CORE consultants may have influenced the opinions that stakeholders were willing to share.

The process evaluation primarily relied on information that was collected and analyzed after funding recommendations were announced, so the strong relationship between funding outcomes and applicant experiences with the RFP limit the overall explanatory power of the findings in this report.

To address these limitations, HSD used a mixed methods research design and triangulated survey responses with the feedback that participants provided during focus groups and interviews. In general, there was convergence between the opinions of survey respondents and the comments made by focus group participants. To avoid some of these limitations, future evaluations should collect and analyze data throughout the RFP process in order to minimize the influence of funding outcomes on applicant opinions.

Despite these limitations, the findings provided in this report offer valuable insight about the RFP process and should be taken as a starting point for community engagement and dialogue about the next steps for CORE Investments.

## **V. Results**

### *A. Funding Process*

**Finding 1: Timing for the development and release of the RFP was not ideal. The COVID-19 Omicron variant significantly impacted several aspects of the RFP process.**

When the RFP was developed and released, the City, County and Community-Based Organizations (CBOs) were experiencing high turnover, staffing shortages, and difficulties recruiting new staff.

Due to the Omicron surge, several CBOs requested that the application due date be extended. In order to accommodate the requests, HSD extended the RFP application due date from February 5, 2022 to March 5, 2022. The extended CORE RFP application due date coincided with the application due date for another local funder, Community Foundation of Santa Cruz County. Several elected officials described that the coinciding application due dates made it difficult for organizations who were applying for both sources of funding.

Additionally, City and County leaders reported that planned meetings with the BoS and Council to review the results of the RFP did not occur because the deadline for the RFP was extended.

The extended deadline also shortened the time that panelists had to review applications and delayed the announcement of CORE funding recommendations. This shortened the time that organizations had to prepare for not being funded or being funded.

**Considerations for stakeholders:** County and City staff recommend starting the RFP development process as early as possible. Several stakeholders suggested using a non-binding letter of intent to identify potential applicants and the types of panelists needed earlier in the process. A further recommendation included coordinating with other funders to avoid coinciding application due dates.

**City leadership:** *“COVID really impacted the timeline and I do not see how it could have been different this time around.”*

**County Staff:** *“But, you know, coming out of COVID, and then being instructed by the Board or the leadership at HSD, we need to do the RFP. It was quite challenging and a lot of pressure.”*

**Elected official:** *“The revised due date of the RFP application coincided with the due date for Community Foundation. This created a hardship for smaller organizations who were trying to complete applications for both CORE and Community Foundation at the same time.”*

**Finding 2: The tier system helped simplify the application process and increased access to CORE funding.**

The tier system was designed to distribute funding broadly to programs of varying sizes, and to make it easier for organizations to apply for CORE funding.

Table 5 shows that 41 (52%) out of 79 survey respondents who replied to the question “In your opinion, did using funding tiers (small, medium, large, targeted impact) make it easier for agencies and programs of different sizes to receive funding?” felt that the tier system made it easier.

Several stakeholders stated that the tier system simplified the application process by providing agencies a concrete frame for identifying their proposal funding needs. Additionally, some applicants expressed that the tier system provided clarity around where their proposed services fit in the broader scope of collective impact.

Although the majority of stakeholders, including elected officials, felt that using the tier system made it easier for agencies to apply for and receive CORE funding, several stakeholders expressed concerns that allowing organizations to apply across different tiers potentially favors larger organizations who have the resources to for multiple proposals.

**Table 5: The majority of stakeholders found the RFP tier system easy. (n=79)**

Tier system made it	Easy - Very Easy	Neither difficult nor hard	Difficult – Very Difficult	Total n=79
% of Respondents	52%	28%	20%	100%

**Considerations for stakeholders:** Stakeholders recommend maintaining a tier system and suggest exploring ways to make it easier for agencies with different capacities to apply for CORE funding.

**County staff:** *“I think that the tiers were a really good idea. In part because you didn't have like massive requests by, you know, lots and lots of programs and it just sort of channeled that a little bit better.”*

**Elected Official:** *“The tiers worked well. In particular the small tier made the application process less complicated for smaller organizations/programs.”*

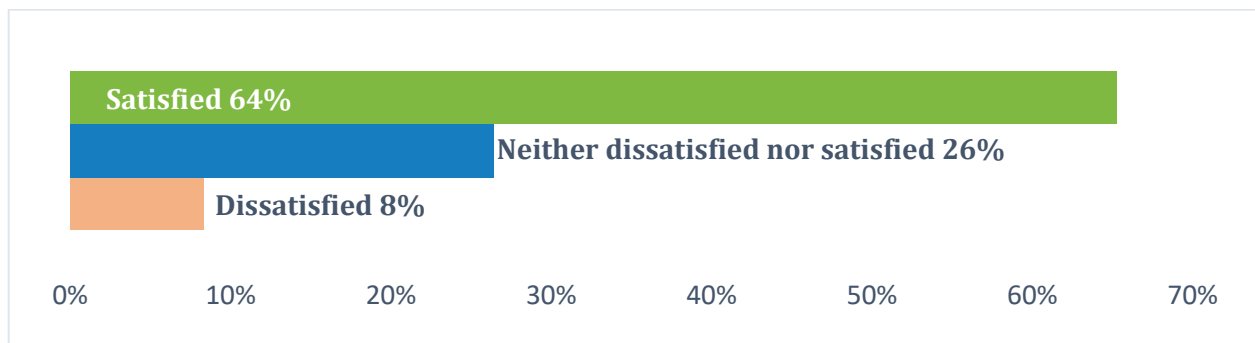
**Finding 3: Stakeholders were satisfied with the number of opportunities they had to participate in the creation of the RFP and felt the RFP process reflected the values of equity.**

A key finding from the first RFP process evaluation was that stakeholders wanted to be more frequently involved in the creation of the RFP.

This funding cycle, the majority of survey respondents (64%) were satisfied with their opportunities to participate in the creation of the RFP (n= 73). Additionally, Table 6 shows that 2/3 of survey respondents felt the RFP process did a good to excellent job incorporating the values of equity (n=83).

During focus groups, stakeholders expressed strong support for using CORE funding to address historical inequities in Santa Cruz County. The strong support stakeholders expressed about centering equity in the CORE RFP framework suggests that stakeholder input was incorporated in the resulting RFP. The majority of elected officials expressed support for including equity in the CORE framework and also expressed that the RFP process reflected the values of equity.

**Graph 3: The majority of stakeholders were satisfied with opportunities to participate. (n=72)**



**Table 6: The majority of survey respondents felt the RFP process reflected the values of equity. (n = 83)**

<b>How well was equity utilized throughout the RFP process?</b>	<b>Good – Excellent</b>	<b>Fair</b>	<b>Poor</b>	<b>Total n= 83</b>
% of respondents	67%	17%	16%	100%

**Considerations for stakeholders:** The high level of community engagement was appreciated by stakeholders and should be maintained. Consider the creation of a CORE public dashboard that provides information about the development of the CORE RFP and why certain decisions are made.

**County Staff:** *“Centering DEI (Diversity, Equity, Inclusion) was so important in this application. I want all applications to have a section that asks agencies how they operationalize equity within their agency.”*

**Applicant:** *“I was extremely impressed and inspired by the whole idea of focusing on those who are marginalized in our community and having an equity focus. That I think was really inspiring.”*

**CORE Steering Committee member:** *“Yeah, absolutely. I think there was plenty of opportunities to have discussions. And I think that there was a lot of input that kind of helped shape the RFP.”*

**Finding 4: Elected officials and other stakeholders support the RFP Process.**

The majority of elected officials acknowledged the progress that was made in this RFP in comparison to the first RFP. In general, elected officials expressed that this funding cycle helped solidify the RFP process as the preferred method that the County and City want to use to distribute general funds to address community needs.

Two elected officials expressed that more information about community needs and how funded programs are addressing those needs would improve the funding recommendation process. One of the two elected officials also expressed concerns about the costs associated with the CORE RFP process and suggested the County and City should reestablish the Community Programs funding model.

In order to gauge stakeholder support for the CORE RFP process, survey respondents were asked to suggest alternative public funding models that the County and City should explore.

Of the 28 responses received, the overwhelming majority 25 (89%) recommended improving the RFP process rather than shifting to alternative funding models. Stakeholders’

recommendations centered around including past performance and the impact of services in the scoring criteria, prioritizing certain services, and increasing the amount of CORE funding available.

Two stakeholders suggested that the City and County should explore participatory budgeting and participatory grantmaking. One stakeholder suggested that the County and City should discontinue the CORE RFP.

**Considerations for stakeholders:** Stakeholders, including elected officials, support continuing the RFP process and recommended that the BoS, Council and stakeholders should continue to engage in discussions to find ways to improve the RFP process.

***Elected Official:** "The RFP is the correct method. The issue is not with the method rather it is with improving the execution of the RFP process."*

***Elected Official:** "The current process has done well in shifting away from the previous process. And there is now starting to be recognition of the change in culture regarding how the County wants to fund certain social services."*

**Finding 5: We need to have a discussion about values that is equity and data- centered.**

The RFP process without directives about funding priorities, is a competitive process where the best proposals will get selected based on scoring criteria. HSD leadership and staff said the absence of CORE funding priorities made several aspects of the RFP more difficult, including the application, recruiting review panelists, and making funding decisions.

Additionally, the majority of elected officials, and several stakeholders expressed the need to prioritize certain CORE Conditions to ensure that they are funded. Several elected officials and stakeholders expressed concerns that certain "basic social safety net" services do not align with the competitive structure of an RFP process. The majority of elected officials and some stakeholders also suggested creating a carve out to ensure that certain services are funded.

Even with these concerns, the majority of survey respondents felt that the RFP process reflected the value of equity. In general, stakeholders expressed that HSD and the CORE consultants incorporated the feedback they provided during engagement sessions into the RFP process. Similarly, the majority of elected officials recognized that HSD and the CORE consultants followed the directives they were provided by the BoS and Council. As well, stakeholders and elected officials generally agreed that funding recommendations meet the needs of the community.

**Considerations for stakeholders:** The comments made by elected officials, stakeholders, and County leadership and staff reflect a need for more engagement and dialogue about the



services and priorities that the County, City, and partners want to target in the RFP. Stakeholders, the BoS and Council should engage in data driven, equity-based discussions with the public to identify the values that they want to operationalize in the RFP process. Identification of CORE funding and allocation priorities, with direction from elected officials, must happen before the RFP is released.

**CORE Steering Committee member:** *“I think I've struggled just like everybody else with figuring out the right balance between sort of predetermining the priorities and the allocation of funding prior to an actual release. And then how much of that happens through the submission and the scoring process”*

**Elected Official:** *“It is important to recognize that certain services do not fit within a competitive structure (RFP). It does not make sense to have some safety-net services be included in the competitive process. We need to identify which social services we want to be competitive vs non-competitive.”*

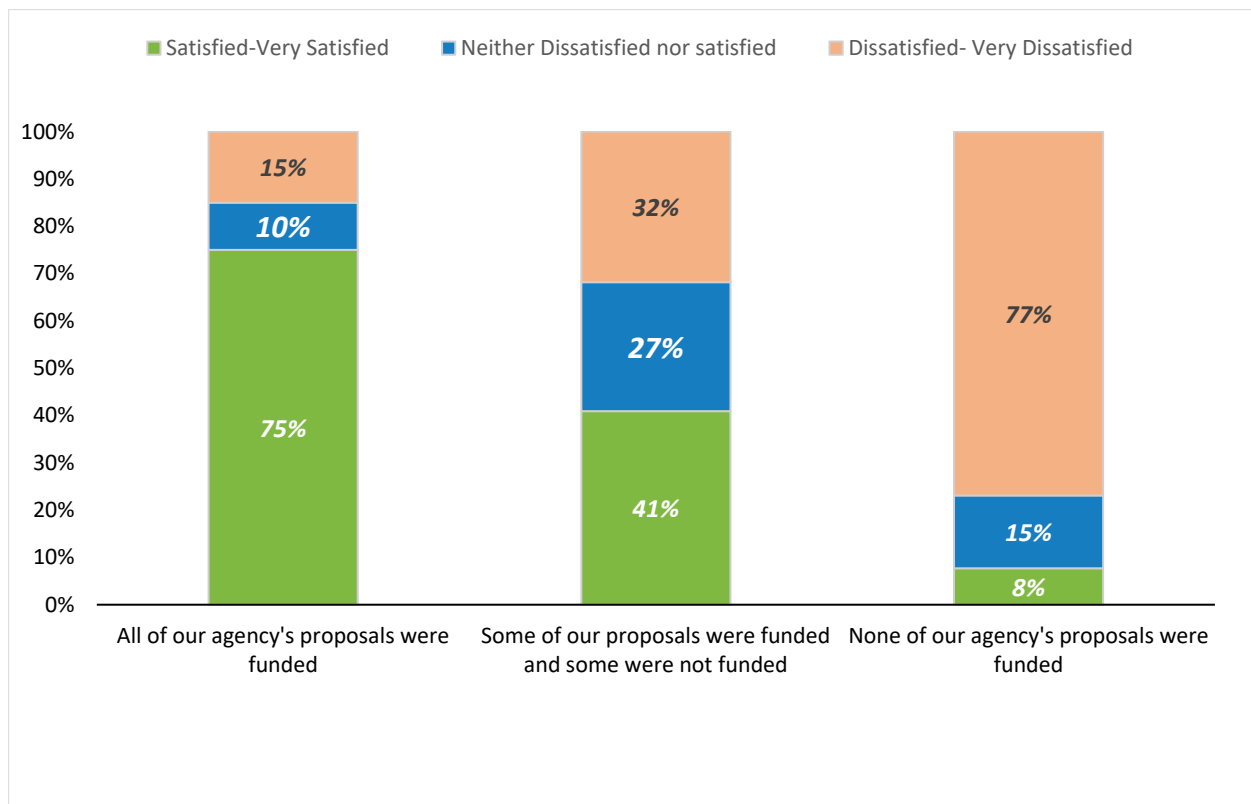
**Applicant:** *“this relates back to what I said earlier, I think the County, the supervisors need to work with, you know, with the staff and decide what they consider to be essential services for seniors in the community, there has to be a baseline established otherwise, we're going to continue to have these frustrating conversations and different expectations about the outcome of funding.”*

### **Finding 6: Applicant satisfaction with the RFP process was mixed.**

Similar to the findings from the first RFP process evaluation, this report finds that the experience of applicants was mixed. Approximately half of applicants (45%) who responded to the question, “How satisfied are you with the RFP process (regardless of the outcome of your agency’s proposal) were satisfied to very satisfied with the process, approximately 1 in 3 (37%) were dissatisfied to very dissatisfied, and 18% were neither dissatisfied nor satisfied (n=56).

Although, the majority of applicants felt included in the creation of the RFP and felt the RFP process reflected the values of equity, applicants also found the RFP application challenging to complete, and some applicants wanted more clarity about the scoring process. More significantly, applicant opinions about the RFP process were most influenced by the funding results of their proposals. Graph 4 shows that applicants who had all their proposals funded were the most satisfied, applicants who were not funded were the least satisfied, and applicants who had some proposals funded were generally split.

**Graph 4: Applicant satisfaction with the RFP process followed the funding of their proposals. (n=56)**



**Considerations for stakeholders:** Future evaluations should collect and analyze data throughout the RFP process in order to minimize the influence of funding outcomes on applicant opinions.

**Elected Official:** *“There seemed to be a lot of negative blow-back because some agencies assumed that they would receive funding but did not.”*

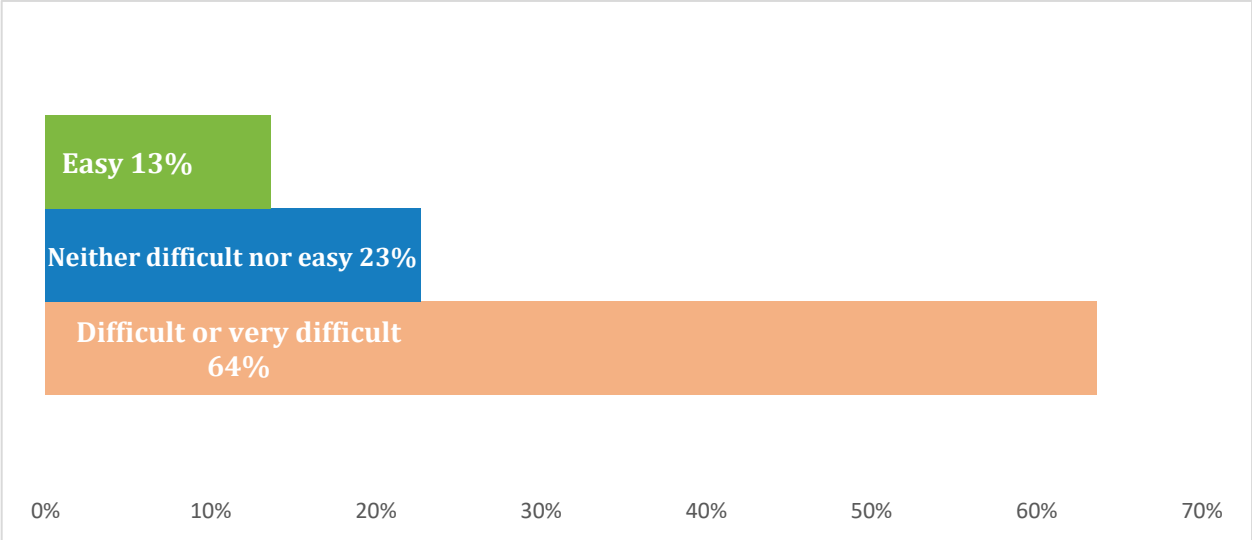
**County Leadership:** *“It would make sense to collect feedback throughout the process and not just after recommendations are made when individuals’ feedback about the process is influenced by whether or not their program was funded.”*

**Finding 7: The CORE application process should be simplified.**

After the first RFP, applicants expressed their desire for a simpler application. However, following the 2022 CORE RFP process, the difficulty of the CORE RFP application process continues to be a concern for the majority of applicants.

This funding cycle, approximately 2/3 of survey respondents who answered the question “In general, how easy was it to apply for the CORE RFP?” described the application process as difficult or very difficult (n= 65).

**Graph 5: The majority of survey respondents with an opinion felt the application was difficult. (n=65)**



In general, applicants expressed the structure of the application was confusing. Some of the suggestions that applicants provided for simplifying the application process are limiting the number of questions asked in the application, simplifying the structure of the questions, and only requesting information that is going to be scored. Several stakeholders recommended allowing applicants to select up to 3 CORE Conditions for their proposals.

Several applicants struggled finding local data to describe community strengths, needs, and inequities. Additionally, in their proposal, some agencies had difficulty identifying where their program fell on the CORE Continuum of Results and Evidence.

Applicants who did not find local data or examples of Promising Practices, including Evidence Based-Practices (EBPs), in DataShare seemed to struggle the most with developing their applications. In general, applicants who could not find relevant information in DataShare to help build their proposals expressed frustration about the amount of research and time the application required.

Although, trainings and group office hours were provided and recordings were made available online, the difficulty of the RFP application and the struggle that some applicants experienced in articulating where their programs fell on a spectrum of data and evidence suggest the need for additional support. Personalized TA was rated as the most helpful, however, it was limited to one session per application in order to ensure assistance was available to all applicants who requested it.

**Considerations for stakeholders:** Stakeholders recommend simplifying the structure of the application, limiting the number of questions asked, and prioritizing the information that is going to be scored. In addition, applicants would likely benefit from including links to multiple publicly available online data sources and EBP repositories in the RFP document. Increasing the availability of personalized TA beyond one session would likely benefit applicants.

**Applicant:** "I think that, you know, it was labor intensive, time consuming.... you know, we did participate in TA and made use of that, as well. But I'd say overall, it was a good process, fairly straightforward for us. But we definitely have experience, you know, writing grants of this size and nature, and took advantage of technical assistance and support as well. And I want to say that we added on a part time person who helped us with other efforts in the past, to help us with grant writing. And so that was also very important and critical for capacity for us as well."

**CORE Steering Committee Member:** " You know, just being mindful of what are we asking? And why are we asking that? Do we really need to know that? Is that something that we're going to weigh heavily on and if it's not, then take it out".

**Applicant:** "And sometimes there wasn't a distinct separation between the content of certain needs assessment related questions and outcomes related questions and other kinds."

### **Finding 8: The use of Reviewr helped streamline the application process.**

This funding cycle, applicants were allowed to submit their proposals via the online portal Reviewr.

Applicants appreciated the option to submit their applications online and generally reported Reviewr was straightforward and easy to use.

Some applicants reported the character limit for responses did not allow them to fully reply to questions. Some panelists struggled navigating multiple windows in Reviewr. One elected official reported that a constituent was unable to apply because the online portal did not accept their application.

**Considerations for stakeholders:** Applicants and panelists recommend the County and City continue using an online portal. Explore how Reviewr, or other software, can customize the structure of the RFP application to meet applicants and panelists' needs. Ensure that applicants are provided verification of their submissions.

***Applicant:*** "I actually really liked Reviewr. Entering everything in was actually really smooth for me."

**Finding 9: Applicants displayed a greater understanding about the CORE Continuum of Results and Evidence and Evidence Based-Practices.**

In the previous RFP funding cycle, applicants struggled to understand Evidence Based-Practices and levels of evidence as defined in the RFP. This funding cycle the CORE RFP incorporated the CORE Continuum of Results and Evidence (CORE Continuum) into the RFP application. In general, comments made by applicants during focus groups showed a good understanding of EBPs and the spectrum of evidence on the CORE Continuum. Some applicants particularly appreciated the flexibility the CORE Continuum allowed around the rigors of what is considered data, and data collection methods.

The amount of research that several applicants reported doing in developing their proposals suggests that they may not have fully understood how to use the CORE Continuum as a planning tool, rather than a prescriptive requirement to make their programs "fit" the traditional definition of an EBP.

**Considerations for stakeholders:** Stakeholders support continued trainings through the CORE Institute for Innovation and Impact. Applicants would be aided by a deeper understanding of evidence levels and more sources of EBPs to be included in the RFP document. In between funding periods, applicants would benefit from attending ongoing trainings. Specifically, trainings could focus on how to use the CORE Continuum as a planning tool when vetting, selecting, implementing, and evaluating programs, practices, and policies.

***Applicant:*** "I actually really liked the CORE Continuum of Results and Evidence. I thought that made a lot of sense. Now whether or not I could get my application to actually fit. That was quite a question, but that that in and of itself made a lot of sense to me."

**Finding 10: The review process was well organized.**

In total, 59 individuals served as panelists. Panelists were assigned to review applications in the CORE Conditions that best matched their personal and/or professional experience. In order to serve as a panelist, individuals were required to sign a Conflict of Interest Form and a Code of Conduct Form. Both forms are available in Appendix B.

To help prepare panelists, each was required to attend or watch a training on how to score the proposals and make comments on their scoring decisions. Each of the small, medium, and large proposals was reviewed by three panelists and the Targeted Impact proposals were reviewed by four panelists.

Panelists expressed appreciation for the training and support they received during the review process. The majority of panelists expressed appreciation for the reconvening process. In particular, panelists felt that reconvening to discuss the application scores helped them better understand the applications they personally reviewed. Panelists also expressed appreciation that they “never” felt pressured to change the scores they had given to an application.

Although applicants felt the review process was well organized, several panelists reported that the amount of time they needed to complete their reviews was more than the 10-20 hours the County communicated. Some applicants also said it would be helpful to have County or City staff available to answer their questions outside of traditional office hours.

Several panelists also said that the time frame to complete the review process was too short. The shortened timeframe is an example of how the Omicron variant impacted the RFP process. Initially, panelists were expected to review proposals in March. However, when the RFP application due date was extended, the panelists review was moved to April, which impacted the time available to review the proposals.

**Considerations for stakeholders:** Panelists reported the reconvening procedures worked well and should be maintained. Explore different options for responding to panelists’ questions outside of traditional work hours. Consider stakeholder suggestions for recruiting additional panelists such as using panelists’ networks to increase the number of panelists and reduce individual workload. Consider revising the time commitment hours listed on the panelist recruitment material.

**Panelist:** *“I had a positive experience. It was a pretty straightforward thing.”*

**Panelist:** *“The time commitment asked of the panelists (10-20 hours) was not realistic and was probably significantly exceeded by most panelists.”*

**Panelist:** *“And so I appreciated having the discussion. You know, knowing that we do have different opinions and different experiences, and honoring that. Yeah, so it’s important to make sure that is maintained.”*

**Finding 11: The pool of panelists should be grown and include more diversity.**

Review panels were comprised of individuals who were subject matter experts, researchers, professionals working in a particular CORE Condition, county and city staff,

members of the community, community leaders, and individuals with lived experience. To maximize panel diversity, panelists were randomly assigned a panel and then staff ensured that all panels had a mix of individuals with lived experience, race/ethnicity, and other characteristics.

The majority of stakeholders recognized the concerted effort the County and City made to recruit a diverse group of panelists that reflected the diversity of Santa Cruz County residents. However, they also recognized the need for more diversity on the review panels, in particular for individuals with lived experience.

County staff and contractors commonly felt that the Conflict of Interest policy limited the panelist recruitment process. Specifically, County staff identified that two years was too long of a time period for a panelist to not have any association with an applicant.

Several stakeholders recommended using panelists' networks to recruit potential panelists, recruiting more panelists with lived experience, recruiting more people of color, and narrowing the Conflict of Interest policy.

**Considerations for stakeholders:** Several stakeholders suggested that using a non-binding letter of intent could help the County and City identify the necessary number of reviewers with the background expertise needed earlier in the RFP process. The County and City should reconsider the conflict of interest rules and utilize existing panelist networks to recruit potential panelists and increase diversity.

**Contractor:** *"Do not make the conflict of interest policy so broad."*

**Finding 12: Stakeholders would benefit from additional clarity about the review and scoring process.**

Scoring was completed according to the criteria listed in the RFP document. Applications for the small, medium, and large tier were assigned for review according to the CORE Condition the applicant selected. To assist the panelists who were reviewing and scoring the proposals and promote consistency, HSD created a scoring matrix based on the scoring criteria published in the RFP document as well as the application questions. During the review and scoring process, panelists wrote comments on the strengths and areas that could be improved in each proposal. Applicants were provided the comments from their proposals upon request. In total 24 applicants requested and were provided the comments from their proposals.

Although the RFP document detailed the scoring criteria and 72% (n=90) of survey respondents found the scoring process clear, a substantial minority of survey respondents found the score process was not clear. Approximately 1 in 4 (28%) stakeholders who

responded to the question “Was the RFP application review and scoring process clear and easy to understand?” felt the scoring process was slightly or not at all clear.

In particular, some applicants did not seem to understand how their proposals were assigned for review. During a focus group, County staff reported that various applicants were unclear about how their proposals were going to be assigned for review. Specifically, some applicants did not seem to understand that their proposal would be assigned for review according to the CORE Condition they selected.

Additionally, some applicants also seemed to incorrectly believe that the level of evidence of their proposals was being scored, and this was also reiterated by a CORE Steering Committee member.

Although the scoring criteria was included in the RFP document, several applicants expressed that having access to the scoring matrix that was provided to panelists would result in a clearer understanding of the scoring process and better proposals.

**Considerations for stakeholders:** Stakeholders recommend releasing alongside the RFP document the methodology for assigning panelists to proposals as well as the panelist scoring matrix.

**County Staff:** *“I remember a lot of agencies were concerned about having to pick only one CORE Condition. There were a lot of questions about how the CORE Conditions factored into the review process. I don't believe that it was clear to applicants that they were going to be separated into panelist groups based on the CORE Condition they selected.”*

**CORE Steering Committee member:** *One of the comments that I heard a lot around the time when people were working on their proposals was a lot of fear around what was based on the previous CORE application process, not this current one, the one before where the different levels of evidence based practices were introduced for the first time, and there was a lot of fear around well, if I'm not at this level, I'll be scored lower....I know it was attempted to be made abundantly clear.... that's not going to impact the score.*

**Finding 13: Funded programs should be recognized for the important services they provide.**

In general, stakeholders felt that funding recommendations reflected the needs of the community. All elected officials stated that the funding recommendations reflected needs of the community.

Several stakeholders expressed that programs who received funding need to be recognized for the important services they provide for the communities of Santa Cruz County.



**Considerations for stakeholders:** Stakeholders recommend that the County and City explore ways to promote and increase public recognition about the important services that are funded through the CORE RFP.

***Elected Official:** “Yes, the funded proposals address the community’s needs. The programs that were funded provide a wide variety of services. Funding a wide variety of services is difficult to achieve and the RFP was able to achieve that.”*

***Applicant:** “We did our part. We did everything we were supposed to do. Everything, showed up at the TAs, learned, studied that application, we did everything, and we deserved it. We did everything. And there’s just some healing that definitely needs to take place in this community. Because that moment for us to celebrate, that was taken from us and it was taken from other awardees. And it wasn’t fair nor was it right. So I just really hope that this county can help the current awardees and learn the lessons so that nobody else has to experience this in the next round.”*

**Finding 14: The amount of time required to complete the contracting process was longer than anticipated.**

Programs that were approved for funding were provided a Scope of Work (SoW) template and budget form to complete and submit to the County. County staff followed up with applicants as needed in order to align their SoW and budget with the Results-Based Accountability framework and program reporting requirements. To support funded applicants during the contracting process, the CORE Consultants and County staff jointly provided two trainings on how to complete the SoW. County staff also provided a total of 8 drop-in office hours to answer questions that applicants had about their SoW and the contracting process.

The majority of funded applicants expressed frustration with the amount of time that it took to complete the contracting process. As well, some applicants felt that significant changes were made to their proposal outcomes in order to fit the RBA framework.

The lack of clarity about program data reporting requirements in the RFP document made the contracting process longer and more difficult than anticipated. Comments made by funded applicants suggest that they were not clear about program reporting requirements when the contracting process began.

County staff reported that the proposed outcomes and measures for some programs did not easily align with the RBA framework, and that various applicants struggled to simplify their proposed outcomes to align with the RBA framework.

**Considerations for stakeholders:** County contracting staff reported that revisions were better communicated and completed by phone or an online meeting. Therefore, the

contracting process would likely be shortened by scheduling appointments with applicants after funding recommendations are approved by the BoS and Council. Applicants would benefit from including the program reporting requirements in the RFP document and incorporating the RBA framework into the application process.

**Applicant:** *“I just want to echo that the scope of work contracting process took way more time than we thought it was. Because there was a lot of like, Wait, we propose this, you're asking for this.”*

**Applicant:** *But I think the scope of work should have just been included in the original application process.*

### *B. Technical Assistance and Communication Support*

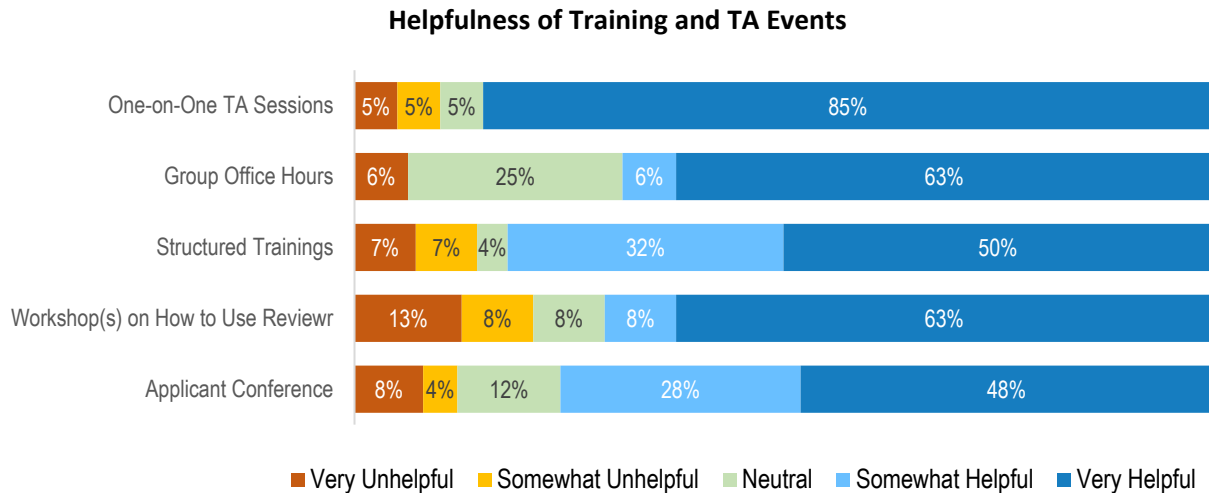
In addition to data from the Lessons Learned survey, this section of the report contains data from an evaluation survey that the CORE Consultants completed and submitted to HSD in May 2022.

#### **Finding 1: The support that applicants are provided is unique to the CORE RFP, and applicants appreciated the quantity and quality of technical assistance.**

Between December 2021 and February 2022 the CORE consultants and County and City staff provided multiple trainings on the CORE framework, application tools and how to use Reviewr. Trainings offered by the CORE consultants included: Developing a Theory of Change and Logic Model with an Equity Lens; Using CORE Tools to Develop Your Proposal; Refining Program Outcomes and Evaluation Tools with an Equity Lens; and Using Data and Stories for Continuous Learning and Improvement. The CORE consultants also offered multiple group office hour sessions and individualized Technical Assistance (TA) to support applicants throughout the application process. In total, 64 trainings and TA sessions were provided. Trainings and office hours were recorded and made accessible to applicants. Trainings were interpreted into Spanish with bilingual materials available, and Spanish interpretation was also made available upon request for the individualized TA sessions.

In general, stakeholders expressed appreciation for the quantity, quality, and variety of TA that applicants are provided. The majority of applicants found all forms of TA helpful for developing their proposals. The individual one-on-one sessions were the highest rated and several applicants appreciated the flexibility that having access to recorded trainings provided.

**Graph 6: The majority of training participants found Trainings and TA helpful. (n varies by type of support)**



Some applicants recommended that TA should be aligned with the scoring criteria. Several stakeholders and elected officials recommended developing TA that is more geared towards meeting the needs of smaller organizations such as developing their grant writing skills and helping them to identify other sources (non-CORE) of funding.

**Considerations for stakeholders:** Stakeholders recommend the quantity and quality of technical assistance, including providing recordings of the trainings in English and Spanish, should continue. In order to build organizational capacity, the County and City should coordinate with the CORE Institute to provide agencies a series of trainings on grant writing and identifying other sources of funding that will further advance the collective impact services provided by CBOs outside of CORE funding. Consider conducting a community survey to identify the specific needs of small organizations and develop trainings accordingly.

**Applicant:** "I think the number of opportunities, the different types of opportunities, the consistency, the regular reminders that those opportunities were available. All of those things were fantastic. I think you guys did a great job."

**Applicant:** "I would say for me, from when the RFP came out, and all the training, which was thoughtful and excellent. That part went I'm going to say smoothly and predictable, like really predictable."

**Applicant:** "Yeah, so the group sessions, prior to the RFP were very helpful for us, me and the other person who wrote the grants for our organization found them helpful and both utilized that resource."

**Finding 2: Stakeholders were satisfied with the communication process.**

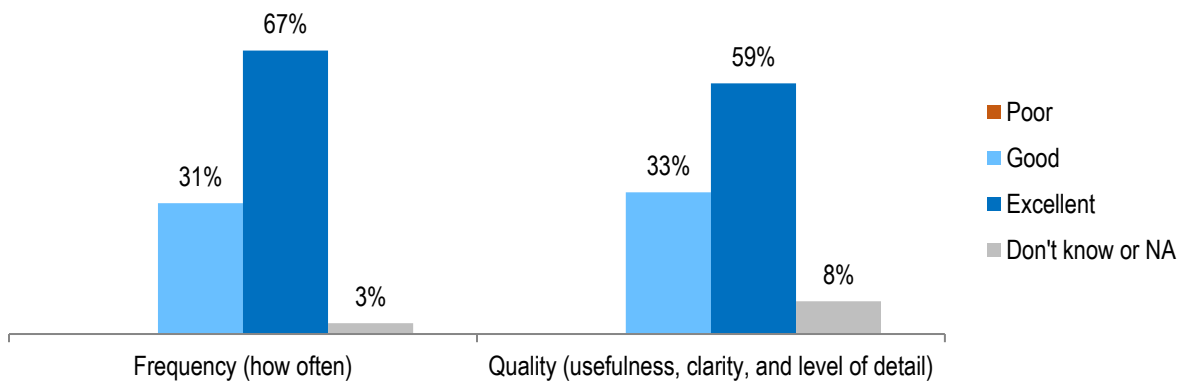
Table 7 shows that the majority of Lessons Learned survey respondents (67%) were satisfied to very satisfied with the amount of communication they received throughout the RFP process (n=79).

**Table 7: Satisfaction with the amount of communication. (n=79)**

<b>How satisfied are you with the amount of communication?</b>	<b>Satisfied - Very Satisfied</b>	<b>Neither dissatisfied nor satisfied</b>	<b>Dissatisfied - Very Dissatisfied</b>	<b>Total n= 79</b>
% of respondents	67%	18%	15%	100%

Additionally, the majority of respondents in the CORE Consultant’s survey summary rated the frequency and quality of communication about the trainings and TA as excellent.

**Graph 7: The majority of survey respondents rated both the frequency and quality of communication about the trainings and TA as Good or Excellent (n=39).**



Although stakeholders were satisfied with the communication process, during interviews all elected officials as well as City and County leaders expressed the need for an update after the RFP applications are received. This funding cycle, the meetings that were planned did not happen because the RFP application due date was extended due to the Omicron surge.

**Considerations for stakeholders:** Stakeholders recommend continuing the current frequency and high quality of the communication process. The County and City should ensure that there is enough time built into the CORE RFP timeline to update the BoS and Council about the results of the RFP process prior to announcing the funding recommendations.

**Elected Official:** "It would be helpful if the Board was provided a report between when the RFP applications are received, and the funding recommendations are made."

**Elected Official:** "There was a large gap in communication between when the RFP was released and when funding award recommendations were made. There needs to be more

*communication during this period. Perhaps this can be done through providing CORE RFP updates during the Community Programs Commission meetings."*

**Contractor:** *"the communication to announce that here's the RFP and any (ensuing) changes, I thought that was done very well. I thought it was widely communicated which was specifically focused on to be sure to reach a broad audience and that was done quite well."*

### *C. Collective Impact*

#### **Finding 1: More clarity about CORE as a funding model and a movement is needed.**

The relationship between using the CORE framework to design and implement a funding process (e.g., County and City's RFP) and using the CORE framework to advance results-based, collective impact efforts above and beyond the County and City's funding ("the movement") is unclear to many stakeholders. Several stakeholders commented on the lack of understanding the public has about the CORE Movement and CORE in general.

One way to understand the model and the movement is Collective Impact (CI), a type of collaboration that brings people together in a structured way to achieve social change. CI has been a helpful way to describe both CORE's vision for change and greater impact as well as how to organize, structure, and align current work towards that vision. This movement-building approach is reflected in the current description of CORE Investments as both a funding model and a broader movement to achieve equitable health and well-being in Santa Cruz County, using a results-based, collective impact approach.

Several elected officials and stakeholders also acknowledged the contribution CORE has made in raising awareness about equity in Santa Cruz County. Multiple stakeholders expressed support for the movement and recommended that the BoS and Council be more engaged with the movement in between funding cycles.

**Considerations for stakeholders:** Stakeholders report that more understanding is needed about the CORE Movement. Consider engaging multiple stakeholders in defining and understanding "the movement" - e.g., how CORE Investments can be a vehicle to advance equity and greater collective impact through and beyond the County's and City's General Fund investments. Explore ways to communicate the efforts of the CORE Investments Funding and Movement to the public, such as through the CORE website.

**County Leadership:** *"The current RFP engrained the CORE movement into the CORE framework. Also, I am now starting to hear more positive feedback about the CORE framework in meetings."*

**City Leadership:** *"The messaging and the language used by CORE needs to be simplified so that the average person can understand it".*

**Finding 2: Stakeholders want outcome data and the development of evaluation processes to better understand the collective impact of CORE funding.**

The process evaluation after the first RFP found that stakeholders wanted the development of processes to evaluate CORE as a collective impact model. Similarly, this report finds that in general stakeholders and elected officials want more data, and better evaluation of CORE and the impact that CORE funding is having in Santa Cruz County.

The majority of elected officials and several stakeholders expressed the need to better evaluate the impact CORE funding is having as a collective impact model. In particular, elected officials requested that more “objective,” “quantitative” data about community needs and CORE funding be included with the recommendations for funding.

Several elected officials expressed their appreciation for the community stories that were used to identify needs in this RFP and recommended that they be accompanied by more objective sources of data. Several stakeholders also expressed the need to complete a community impact assessment of CORE funding.

**Considerations for stakeholders:** Stakeholders recommend improving the available outcome data for CORE funded agencies. This CORE funding cycle (FY2022-FY2025), funded programs are required to collect unique participant counts, and participant demographics data. The data that is now starting to be collected should provide elected officials and stakeholders a better understanding about the communities that CORE funding is serving. Using this data as a starting point, elected officials and stakeholders should engage in a discussion about what data they want to collect from CORE funded programs.

Consider including the data reporting requirements that were implemented this funding cycle in the next RFP. Continue to develop organizations’ capacities to collect and report data.

***Elected official:*** “Including more metrics and data in the application process will provide a better sense of the people being served, and the quality of the services being provided.”

***County Leadership:*** “Moving forward, we need to make sure that we are tracking who is being served by CORE funding and that funded agencies are meeting their goals. I know that this time around we are having agencies report participant demographics data, that is a good development.”

**Finding 3: The early signs of collective impact are starting to develop.**

Collaboration and building organizational capacity are primary objectives of the CORE collective impact model.

During focus groups, statements made by funded and unfunded applicants reflected their growing knowledge of EBPs and the CORE Continuum. Several applicants commented that going through the RFP application process helped build organizational capacity. Several applicants plan on using their CORE application to apply for other grants.

Several applicants expressed a desire to improve their data collection methods and requested assistance, partnership and patience from the County and City as they do so. Multiple applicants also spoke about finding ways to collaborate with the County, City and other organizations. One applicant expressed an interest in finding ways to collaborate with other organizations to collect county-wide data.

**Considerations for stakeholders:** Stakeholders suggest the BoS and Council should consider the capacity building and collaborative spirit that has been developed when making decisions about changes to the CORE RFP and CORE more broadly. Continue to invest in collective impact efforts, including the CORE Institute and CORE Investments. Explore ways to increase the capacity of CBOs to engage in collective impact efforts.

***Applicant:** “we have a data team at our work, and we talk about it at the leadership team level every month, we’re focused on it, but we’re tracking the data just for our organization. So something that, you know, maybe that’s a thought for another county grant that would support us in working collaboratively as nonprofit organizations to track and collect county data.”*

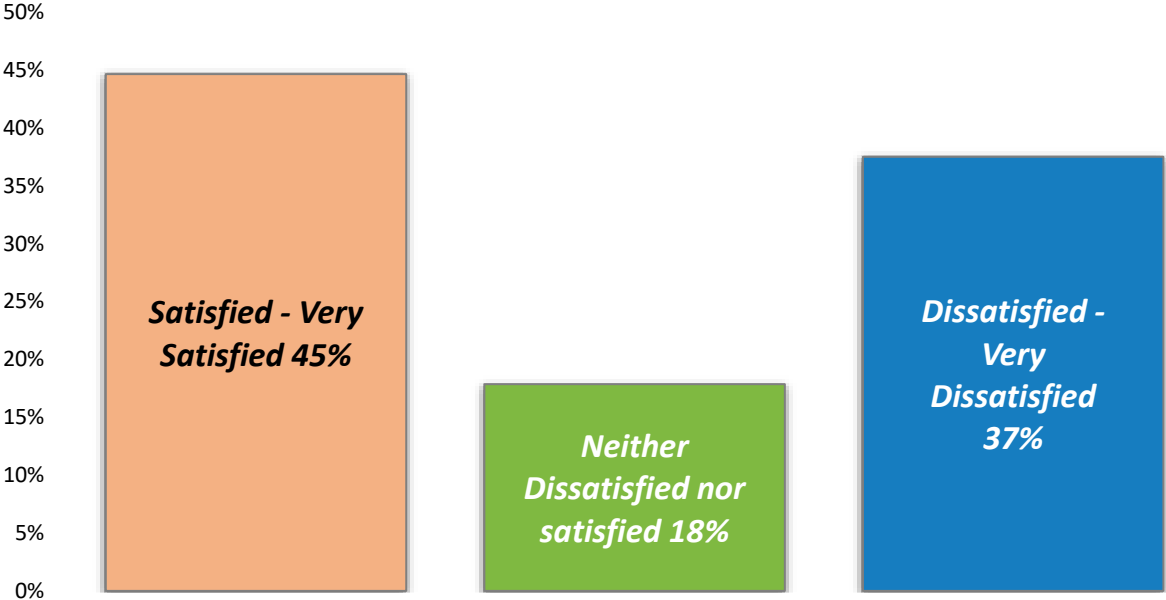
## Conclusion

This report is part of the continuous improvement process that is central to the collective impact model and CORE Investments. This process evaluation offers insights into aspects of the CORE RFP process that worked well and areas for improvement.

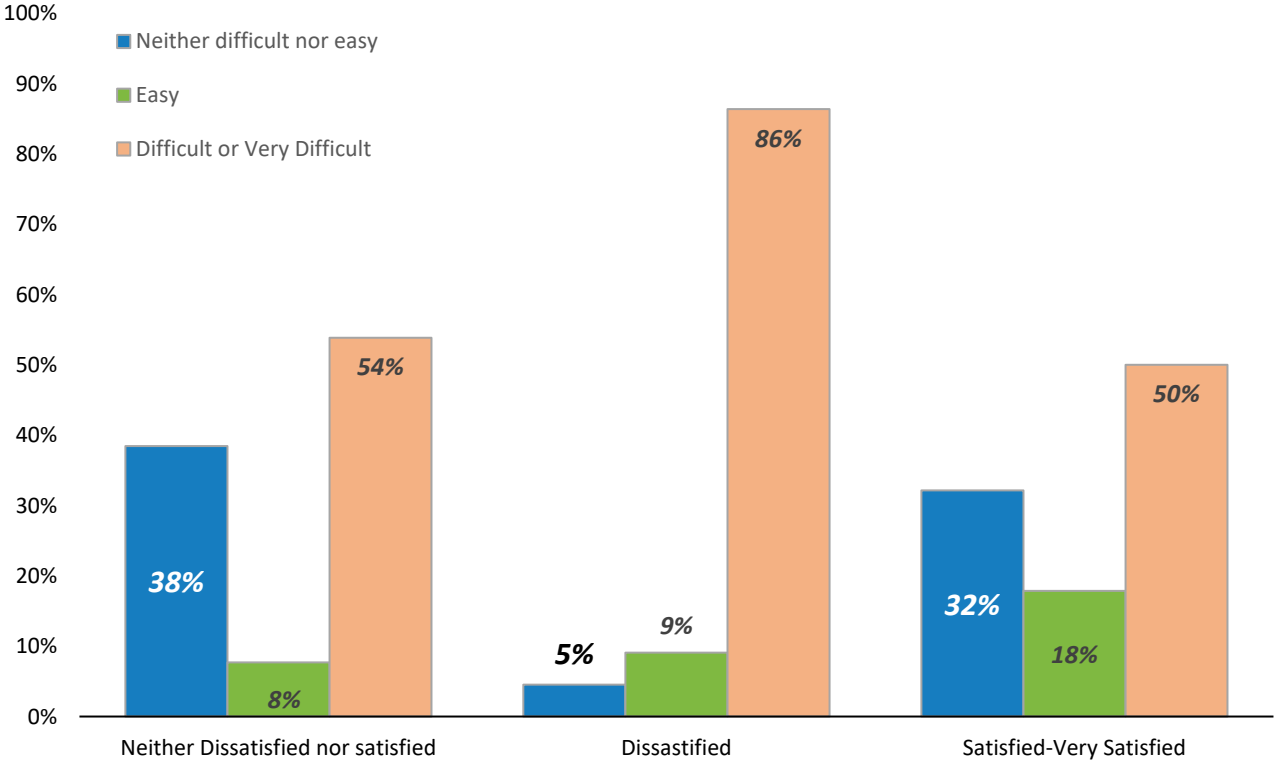
The findings and considerations in this report should be taken as a starting point for community engagement and dialogue about the evolution of CORE Investments. We look forward to continuing this conversation with the community, and, together, fulfilling the CORE vision of an **equitable, thriving, resilient community** where everyone **shares responsibility** for ensuring the **health and well-being** of all people, at **every stage of life**.

# Appendix A. Lessons Learned Survey Responses

## I. Applicant satisfaction with the RFP process. (n =56)

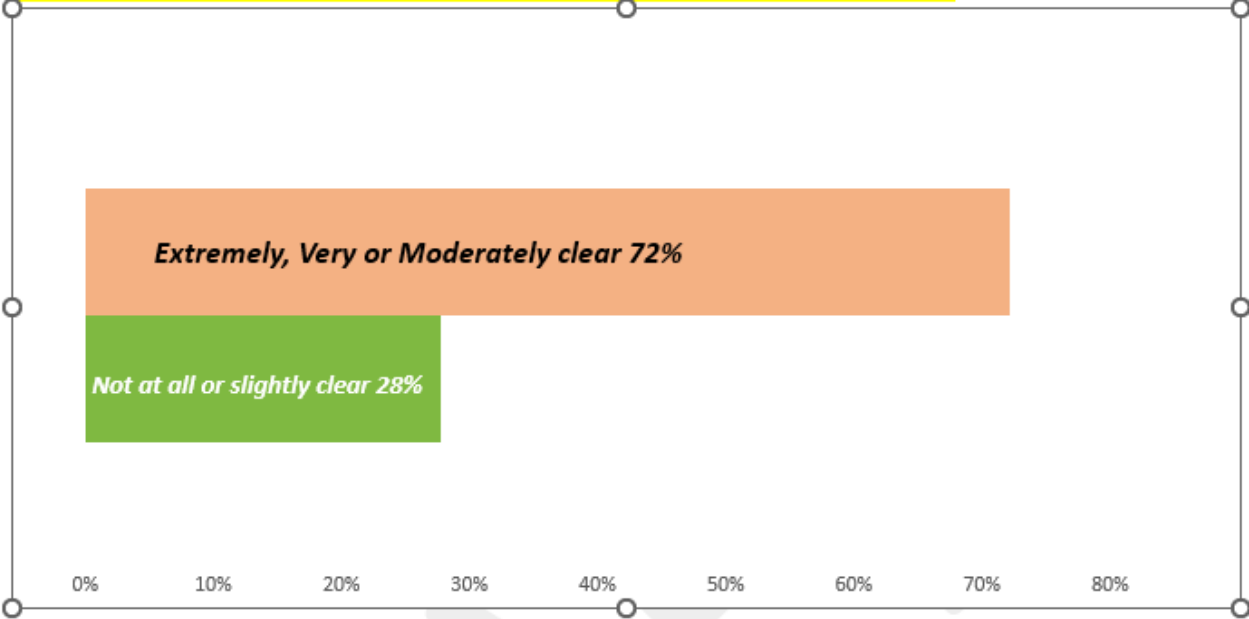


## II. Stakeholder satisfaction according to difficulty of the application (n=63).





**III. The review and scoring process lacked clarity for some stakeholders (n=90).**



Appendix B. Panelist Code of Conduct and Conflict of Interest Forms

I. Panelist Code of Conduct Form

**RFP Proposal Review Committee  
Code of Conduct  
RFP# HSD1-2021  
CORE Investments**

**The RFP Process**

These rules of conduct are designed to protect panelists as well as the funders and to avoid any unnecessary delays that may result from any appearance of impropriety.

- 1) Please refrain from discussing this RFP process with anyone outside this committee.
- 2) Refer all questions from a vendor or applicant to the CORE Investments team regarding this process. Do not speak directly to the RFP respondent.
- 3) If you or a close family member have volunteered, worked, or received services from an applicant, please disclose to the CORE Investments team before starting your review. The list of agencies who have applied is on pages 3 and 4 of this document. The CORE Investments team will decide if there is a conflict of interest.
- 4) The initial round of scoring will be complete by March 31, 2022, 5 PM PST.
- 5) After applications are selected for award, refer all inquiries regarding the selection process to the CORE Investments team at [COREReview@santacruzcounty.us](mailto:COREReview@santacruzcounty.us).

Thank you for your time and participation in this process. Please feel free to contact the CORE Investments team with any questions regarding this selection process at [COREReview@santacruzcounty.us](mailto:COREReview@santacruzcounty.us).

\_\_\_\_\_  
NAME

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
DATE

**COUNTY OF SANTA CRUZ**

II. Panelist Conflict of Interest Form

**COUNTY OF SANTA CRUZ  
GENERAL SERVICES DEPARTMENT - PURCHASING DIVISION  
CONFLICT OF INTEREST/NON-DISCLOSURE STATEMENT  
RFP HSD1-2021  
FY 21/22**

I acknowledge that I have been appointed to conduct a review of proposals submitted under the above titled Request for Proposals. I further acknowledge my responsibilities relating to conflict of interest and non-disclosure of information obtained during these reviews.

I do not have any conflict of interest, personal or organizational, real or apparent, in participating in the procurement process. If during the course of reviewing the proposals I become aware of an actual conflict of interest, I will notify the County of Santa Cruz CORE Review team at [COREReview@santacruzcounty.us](mailto:COREReview@santacruzcounty.us).

I understand conflict of interest to include any of the following situations:

- ◆ The panel member or immediate member of their family has volunteered or worked for an applicant (please see the list of applicants on page two of this document);
- ◆ The panel member or immediate member of his/her family has a financial interest in the procurement;
- ◆ A business organization in which the panel member or any member of his/her immediate family has a financial interest pertaining to the procurement; and
- ◆ Any other person, business or organization with whom the panel member or any immediate family member is negotiating, or has arrangements concerning prospective employment, is involved with the procurement.

Further, I will disclose no information obtained in reviewing proposals to anyone not also participating in the review. Specifically, I will not disclose the number of respondents to the solicitation; the names of the individuals and organizations that respond; nor will I disclose any information from technical or cost/pricing submissions of the offerors; except to other reviewers officially assigned to the review panel.

Finally, if anyone outside the official review chain seeks information about the procurement, I will not supply any information but will refer the person to contact the CORE Review Team at [COREReview@santacruzcounty.us](mailto:COREReview@santacruzcounty.us).

\_\_\_\_\_  
NAME (Please Print)

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_

\_\_\_\_\_  
DATE

Please mark an agency you believe you have a conflict of interest with

Participating Companies /Organizations

Acupuncturists Without Borders  
Advocacy Inc.  
Arts Council Santa Cruz County  
Association of Faith Communities of Santa Cruz County  
Big Brothers Big Sisters of Santa Cruz County  
Boys & Girls Clubs of Santa Cruz County  
California Rural Legal Assistance  
Catholic Charities of the Diocese of Monterey  
Center for Farmworker Families  
Central Coast YMCA  
Coastal Watershed Council  
Community Action Board of Santa Cruz County, Inc.  
Community Bridges  
Community Foundation Santa Cruz County  
Conflict Resolution Center  
Court Appointed Special Advocates of Santa Cruz County  
Dientes Community Dental Care  
Digital NEST, Inc.  
Eat for the Earth  
Encompass Community Services  
Families In Transition of Santa Cruz County, Inc  
Family Service Agency of the Central Coast (FSA-CC)  
First 5 Santa Cruz County  
FoodWhat, Inc  
FRIENDS OF SANTA CRUZ COUNTY PARKS DBA COUNTY PARK FRIENDS  
Girls Inc. of the Central Coast  
Grey Bears  
Harm Reduction Coalition of Santa Cruz County  
Homeless Garden Project  
Hospice of Santa Cruz County  
Housing Matters  
Jacob's Heart Children's Cancer Support Services  
Janus of Santa Cruz  
Just in Time for Foster Youth  
Latin Advocacy Network  
Live Earth Farm Discovery Program  
Mental Health Client Action Network  
MENtors Driving Change for Boys, Men and Dads  
Monarch Services - Servicios Monarca  
NAMI Santa Cruz County  
New Life Community Services, Inc  
Nourishing Generations Educational Project  
Pacific Elementary School District

Pajaro Valley Prevention and Student Assistance  
Pajaro Valley Shelter Services  
Pajaro Valley Unified School District  
Parents Center, Inc.  
Planned Parenthood Mar Monte  
Presbytery of San Jose  
PVUSD/Healthy Start Program  
Recovery Cafe Santa Cruz  
Rise Together  
Safe Families for Children Santa Cruz  
Salud Para La Gente  
Salud y Cariño  
Santa Cruz Barrio Unidos, Inc.  
Santa Cruz Children's Museum of Discovery  
Santa Cruz City Schools  
Santa Cruz Community Health Centers  
Santa Cruz Community Ventures  
Santa Cruz County Office of Education  
Santa Cruz County Office of Education (SCCOE)  
Santa Cruz Lesbian and Gay Community Center  
Santa Cruz Museum of Natural History  
Santa Cruz Toddler Care Center  
Second Harvest Food Bank Santa Cruz County  
Senderos  
Senior Citizens' Legal Service (SCLS)  
Senior Citizens Organization of the San Lorenzo Valley  
Senior Network Services, Inc.  
Seniors Council of Santa Cruz and San Benito Counties  
South County Triage Group  
Sweaty Sheep: Presbytery of San Jose  
Teen Kitchen Project  
The Free Guide  
UCSC - Sociology Department Dr. Rebecca London  
UCSC Blum Center  
United Way of Santa Cruz County  
United Way of Santa Cruz County - Cradle to Career (C2C)  
United Way of Santa Cruz County - Youth Action Network  
Vista Center for the Blind and Visually Impaired  
Volunteer Center of Santa Cruz County  
Walnut Avenue Family & Women's Center  
Watsonville Wetlands Watch  
Wings Homeless Advocacy  
Your Future Is Our Business  
YWCA of Watsonville

## Appendix C. Data Collection Tools

### I. CORE Lessons Learned Survey Email to Stakeholders

Hello,

The CORE RFP Lessons Learned process is kicking off! We are asking all who participated in the CORE process (applicants,

fundors, panelists, grant writers, elected officials, County/City staff) to complete a brief survey

<https://www.research.net/r/CORELessonsLearned> by October 21, 2022. We have attached a copy of the RFP for your

reference.

In addition, we are setting up virtual focus groups to gather more detailed information about your experience. You can

sign up for the focus groups through the link in the survey or here

[https://www.research.net/r/CORE\\_Focus\\_Groups](https://www.research.net/r/CORE_Focus_Groups) .

HSD will reach out to firm up the details of your focus group participation.

Our goal is to encourage thoughtful, respectful, and candid dialogue. No matter what role you played during the CORE

RFP process, we hope you will share your perspective and continue to be part of the broader CORE community.

The feedback collected from the survey and focus groups will be used to inform and improve future CORE funding process efforts. We look forward to learning from your experience as part of our commitment to continuous

improvement.

Thank you for helping CORE with the lessons learned process. If you have any questions, please contact

[corelessonslearned@santacruzcounty.us](mailto:corelessonslearned@santacruzcounty.us).

Sincerely,

The CORE Team

II. CORE Lessons Learned Survey

**The County of Santa Cruz Human Services Department (HSD) is conducting a comprehensive evaluation of the CORE Request For Proposal (RFP) process and welcomes your feedback on all aspects of the RFP.**

**County and City staff were asked to create a competitive procurement process that was consistent with the values and intent of CORE Investments, namely achieving equitable health and well-being in Santa Cruz using a collective impact, results-based approach. To do this staff met multiple times with elected bodies and community stakeholders to gather input on how best to develop the RFP. In response to this input, the RFP incorporated equity requirements and a tiered approach that included small, medium, and large awards, with an additional, larger Targeted Impact award. Once the RFP was released, technical assistance opportunities were made available to applicants and a total of 64 tech assistance sessions were provided. Additionally, HSD, in partnership with the City of Santa Cruz, created robust scoring criteria and trainings for a diverse and representative set of panelists to review and score proposals. Based on the panelist scoring, funding recommendations were made to the City and County of Santa Cruz for adoption.**

1. Please describe your relationship to CORE (select all that apply)

Service Provider

CORE Steering Committee Member

Elected Official

County or City Staff

Panelist

Community Member

Grant Writer

2. Did you or an agency you are associated with apply for CORE Funding?

- Yes
- No

3. What was the outcome of your agency's CORE proposal(s)?

- All of our agency's proposals were funded
- Some of our proposals were funded and some were not funded
- None of our agency's proposals were funded
- Decline to state

4. In which tier(s) did you apply for CORE funding (select all that apply)?

Small

Medium

Large

Targeted Impact

5. Was your agency previously funded by CORE

- Yes
- No
- Decline to state
- I don't know

6. Primarily, where do the residents your agency provides services to live in Santa Cruz County?

North County (Santa Cruz, Scotts Valley, Davenport)

Mid County (Capitola, Soquel, Aptos)

South County (Watsonville, Freedom)

San Lorenzo Valley (Felton, Ben Lomond, Boulder Creek)

The entire county



7. Where is your agency's main office located?

- North County (Santa Cruz, Scotts Valley, Davenport)
- Mid County (Capitola, Soquel, Aptos)
- South County (Watsonville, Freedom)
- San Lorenzo Valley (Felton, Ben Lomond, Boulder Creek)
- Outside of Santa Cruz County
- No main office

8. Please describe your race/ethnicity (please select all that apply)

White or Caucasian

Black or African American

Hispanic or Latino

Asian or Asian American

American Indian or Alaska Native

Native Hawaiian or other Pacific Islander

Another race

Multiracial

Decline to State

9. Please describe your gender.

Woman/female

Man/male

Non-binary

Trans-Male

Trans-Female

Other

Decline to state

10. Please select your age group

Under 18                      45-54

18-24                         55-64

25-34                         65+

35-44                         Decline to state

11. How satisfied are you with the number of opportunities CORE provided for community stakeholders to participate in the creation of the CORE RFP?

Very dissatisfied

Dissatisfied

Neither dissatisfied nor satisfied

Satisfied

Very satisfied

Not Applicable/No Opinion

12. How satisfied are you with the amount of communication CORE provided to community stakeholders about the creation of the RFP and the application process?

- Very dissatisfied
- Dissatisfied
- Neither dissatisfied nor satisfied
- Satisfied
- Very satisfied
- Not Applicable/No Opinion

13. In general, how easy was it to apply for the CORE RFP?

- Very difficult
- Difficult
- Neither difficult nor easy
- Easy
- Very easy
- Not Applicable/No Opinion

14. For the RFP process CORE Investments defined equity as, "fairness or justice in the way people are treated, specifically: freedom from bias or favoritism. A program built on equity will address the needs of specific populations most likely to be affected by inequities by providing resources and opportunities such that they may thrive alongside other residents in the county." How well was this definition of equity utilized throughout the RFP process?

- Poor
- Fair
- Good
- Very good
- Excellent
- Not Applicable/No Opinion

15. In your opinion, did using funding tiers (small, medium, large, and targeted impact) make it easier for agencies and programs of different sizes to receive funding?

- Made the process very difficult

- Made the process difficult
- Made the process neither difficult nor easy
- Made the process easy
- Made the process very easy
- Not Applicable/No Opinion

16. Was the RFP application review and scoring process clear and easy to understand?

- Not at all clear
- Slightly clear
- Moderately clear
- Very clear
- Extremely clear
- Not Applicable/No Opinion

17. To the best of your knowledge, do you feel each scoring category was weighted correctly?

- |  |   |
|--|---|
| <input type="radio"/> Completely Incorrect | <input type="radio"/> Completely correct        |
| <input type="radio"/> Slightly incorrect   | <input type="radio"/> Not Applicable/No Opinion |
| <input type="radio"/> Slightly correct     |   |

18. The RFP application review panels were designed to reflect the county/city in terms of equity dimensions, such as race/ethnicity, geography, age and/or experience with specific CORE conditions.

Do you feel the design of the panels led to an equitable scoring process?

- |  |   |
|--|---|
| <input type="radio"/> Not at all equitable | <input type="radio"/> Extremely Equitable       |
| <input type="radio"/> Slightly equitable   | <input type="radio"/> Not Applicable/No Opinion |
| <input type="radio"/> Very equitable       |   |

19. CORE is a competitive public process (RFP) open to everyone, do you have suggestions for other public processes or approaches that could be used to fund programs?

- No
- I do not know/No opinion
- Yes, please write your suggestion(s) below

20. How satisfied are you with the CORE RFP process (regardless of the outcome of your agency's application)?

- Very dissatisfied
- Dissatisfied
- Neither Dissatisfied nor satisfied
- Satisfied
- Very satisfied
- Not Applicable/No Opinion

21. Do you have any additional feedback that you would like to provide about the RFP process?

Thank you for taking the time to fill out this survey. If you are interested in participating in a CORE RFP Focus group please click on the link below to fill out an interest form. Thank you.

[https://www.research.net/r/CORE\\_Focus\\_Groups](https://www.research.net/r/CORE_Focus_Groups)

### III. CORE Focus Group participant sign up process

Three methods were used to recruit focus group participants 1) HSD emailed service provider associations to inquire about scheduling focus groups for their members during regularly scheduled meetings. Two associations requested focus groups be provided to their members: The Human Care Alliance and the Aging & Disability Services Providers.

2) 314 unduplicated stakeholders including service providers, panelists, grant writers, CORE Steering Committee members, County and City staff, and community members were emailed a link to an online Focus Group Interest Form. 3) The link to the Focus Group Interest Form was also provided in the CORE Lessons Learned Survey.

The focus group interest form asked stakeholders to provide their contact information, their relationship to CORE, and their availability too attend a focus group. Stakeholders were assigned to focus groups according to the stakeholder group they identified in their relationship to CORE.

Prior to participating in a focus group, all participants were emailed the CORE RFP document, the focus group question and a link to a Focus Group Participation Agreement form. All potential focus group participants were required to review, sign and submit the agreement prior to attending their scheduled focus group.

The participation agreement form provided participants the purpose and procedures of the focus groups, and in order to encourage open, honest dialogue the agreement asked that the confidentiality of all focus group participants be respected.

All focus group participants submitted a signed form. One stakeholder opted to not sign the form and did not participate in their scheduled focus group. To ensure that this stakeholder's feedback was included as part of the process evaluation, HSD provided the stakeholder the option to submit their feedback via email. The stakeholder submitted their written response to the CORE Lessons Learned email account and their feedback was included in the process evaluation.

#### IV. CORE Focus Group Interest Form

**As part of the CORE Lessons Learned process, we are asking individuals to participate in a focus group to provide their opinions on the CORE RFP process. Our goal is to encourage thoughtful, respectful, and candid dialogue. No matter what role you have, we hope you will share your perspective and will continue to be part of the broader CORE community regardless of funding status.**

**We will be scheduling these focus groups to be an hour in length and will reach out to you when we have days and times confirmed. Thank you.**

1. What is your name?

2. What is the best e-mail address to contact you?

3. What is the best phone number to contact you?

4. Is this a cell phone that can receive texts?

Yes

No

5. Please list any organization(s) you are associated with.

6. Are you able to attend an online meeting (e.g. Zoom, Teams, WebEx)?

Yes

No

7. What is your relationship to CORE (select all that apply)?

Service Provider

CORE Steering Committee Member

County or City Sta

Panelist

Community Member

Grant Writer

Other (please specify)

8. Please describe your race/ethnicity (please select all that apply)

White or Caucasian

Black or African American

Hispanic or Latino



Asian or Asian American

American Indian or Alaska Native

Native Hawaiian or other Pacific Islander

Another race

Multiracial

Decline to state

9. Please describe your gender.

Woman/female

Man/male

Non-binary

Trans-male

Trans-female

Other

Decline to state

## V. Focus Group Participation Agreement Form

### **CORE Lessons Learned Focus Group Participation Agreement**

#### **Purpose**

The purpose of this focus group is to explore stakeholders' experiences with the CORE Request For Proposal (RFP) process in order to improve future CORE RFP process efforts.

The focus group will cover the following topics:

- Framework of the RFP
- RFP application
- Proposal review process
- Communication and Technical Assistance

#### **Focus Group Procedures**

The focus group will be facilitated by Optimal Solutions Consulting with Human Services Department (HSD) staff in attendance. As the facilitators of the focus group, Optimal Solutions will ask questions for discussion and moderate the conversation to ensure that every participant has an equal opportunity to share their experience.

The information collected from all focus groups will be combined with other data collected to develop a CORE lessons learned report to improve and inform future CORE RFP efforts. The focus group discussions will be recorded and transcribed. All data collected, including recordings, will be stored on secure computers, remain accessible only to the HSD lessons learned team, and will be deleted upon completion of the lessons learned report. The report will be shared with the Santa Cruz County Board of Supervisors, Santa Cruz City Council and will be made available to all CORE stakeholders in Spring 2023.

Your participation today is voluntary. You can choose whether or not to provide feedback on any or all of the focus group discussion topics. You are not required to provide responses to any of the discussion questions, and you may choose to stop participating and leave the focus group at any time.

#### **Confidentiality**

Participant and agency names or other individually identifying information will not be used in any report that is produced as part of the CORE Lessons Learned Process. While quotes may be used to illustrate findings, no quotes will be used that contain information that is identifying information. We also ask that participants respect the confidentiality of others in this group and not repeat what has been shared during this focus group.

*By signing this form, you are agreeing to participate under the conditions stated above*

## VI. Applicant Focus Group Questions

Overall Experience with CORE RFP	<ul style="list-style-type: none"> <li>• How would you describe your overall experience with the CORE RFP process?</li> </ul>
Use of CORE Tools, Training & TA	<ul style="list-style-type: none"> <li>• Let's talk about your experience with the CORE tools, training and technical assistance that were available during the RFP process. The CORE tools are:             <ul style="list-style-type: none"> <li>○ CORE Results Menu on DataShare</li> <li>○ CORE Continuum of Results &amp; Evidence</li> <li>○ CORE Strategies &amp; Program Outcomes Menu</li> <li>○ Promising Practices database on DataShare</li> </ul> </li> <li>• What worked well, or what was useful, about the CORE tools? What was challenging about using the CORE tools?</li> <li>• What could be improved about the CORE tools?</li> <li>• What worked well, or was useful, about the training and TA opportunities? What was challenging about participating in the training/TA?</li> <li>• What could be improved about the training and TA in the future?</li> </ul>
Application Process	<p>We'd like to hear about your experiences with the entire application process, which could include the RFP document, the application questions, the online application portal (Reviewr), and the communication with the County throughout the application process (Q&amp;A, feedback on proposals, appeals).</p> <ul style="list-style-type: none"> <li>• Please share your experience during the application process. What things did you find helpful, useful, or easy to understand? What was most challenging about the application process?</li> <li>• What could be improved in future application processes?</li> <li>• How clear/understandable were the instructions provided in the RFP?</li> </ul>
RFP Framework (Funding Approach)/Scoring	<p>The CORE RFP asked applicants to use data and community stories to illustrate both community strengths and needs and to articulate proposed services and outcomes for whichever CORE Condition or Conditions they selected rather than prioritizing certain CORE conditions. Additionally, equity was a key value of CORE. Applicants for small, medium, and large tiers were allowed to select any dimension of equity they wished to address – such as inequities by race/ethnicity, age, socio-economic status, sex, gender identity and so on. Targeted impact proposals were required to address issues of racial equity and could include additional dimensions of equity if they desired.</p> <ul style="list-style-type: none"> <li>• What was your experience using this approach?</li> </ul>

	<ul style="list-style-type: none"><li>• What scoring criteria should be kept for future procurements and what, if any, additional criteria should be considered?</li></ul>
Additional Feedback	<ul style="list-style-type: none"><li>• What is the most important piece of advice you'd like to give the County and the City of Santa Cruz about the next CORE funding process?</li><li>• What is the most important piece of advice you'd like to give people in nonprofit agencies about how to prepare for the next CORE funding process?</li><li>• Do you have any final thoughts or recommendations, on any topic, that we have not discussed?</li></ul>

## VII. CORE Steering Committee Focus Group Questions

<p>Stakeholder Engagement</p>	<p>We'd like to start by hearing your thoughts about the stakeholder engagement opportunities. The meetings and survey for funders and community partners were designed to gather input from multiple perspectives on two "Big, Hairy Questions": 1) How can we center equity in the CORE funding process in concrete, actionable ways for both funders and service providers? and 2) How can the CORE Conditions be used as a framework for making decisions about funding allocations? Participants were asked and encouraged to share suggestions about how the County and City should handle dilemmas about flexibility and simplicity in a public procurement process (simple is not always easy for applicants or funders), whether to establish broad or targeted funding priorities, and how to center equity in the RFP, knowing that there's a wide spectrum of organizational readiness, skills, and capacity in public and nonprofit agencies.</p> <ol style="list-style-type: none"> <li>1. In your opinion, were there sufficient opportunities to participate in the development of the RFP?</li> <li>2. What suggestions do you have to improve the stakeholder engagement sessions when RFPs are being developed, without creating conflicts of interest or unfair advantages?</li> </ol>
<p>RFP Framework (Funding Approach)</p>	<p>The City and County agreed to distribute CORE funds using a hybrid approach, in which most of the funds would support a broad base of direct services and a smaller portion would focus on one collaborative, or collective, impact. The funds were allocated across four <b>tiers</b> — small, medium, large, and targeted impact – based on the amount of funding requested.</p> <p>The CORE RFP asked applicants to use data and community stories to illustrate both community strengths and needs and to articulate proposed services and outcomes for whichever <b>CORE Condition</b> or Conditions they selected rather than prioritizing certain CORE Conditions.</p> <p>Additionally, <b>equity</b> is a key value of CORE. Applicants for small, medium, and large tiers were allowed to select and describe any dimension of equity they wished to address – such as inequities by race/ethnicity, age, socio-economic status, sex, gender identity and so on. Targeted impact proposals were required to address issues of racial equity and could include additional dimensions of equity if they desired.</p>

	<p>3. From your perspective as a Steering Committee member, what are your thoughts about this approach – meaning, the use of funding tiers and allowing applicants to select their CORE Conditions and equity dimensions?</p> <p>4. What suggestions do you have for ensuring future RFPs reflect the values and intent of CORE, particularly equity?</p>
Review & Scoring Process	<p>We want to hear your perspectives as Steering Committee members about the panel review and scoring process that informed the funding decisions.</p> <p>5. What are your thoughts about the scoring criteria and matrix provided in the RFP and the scoring rubric provided to panelists?</p> <p>6. What scoring criteria should be kept for future funding cycles and what other criteria, if any, should be considered?</p> <p>7. What recommendations do you have for recruiting a diverse set of non-conflicted panelists?</p>
Communication & Support for Applicants	<p>Our last topic is the communication and support that was available to applicants during the RFP process. Individual and group training and technical assistance (TA) sessions were offered to help applicants understand the RFP, the application questions, the CORE framework, and the CORE tools. The County also published a Questions and Answers document three times during the application period and maintained all the critical information and links on HSD’s website.</p> <p>8. Based on your observations or direct experiences, what are your thoughts about quality, frequency, and/or relevancy of the communication and support offered to applications during the RFP process?</p> <p>What worked well? What could have been improved?</p>
Additional Feedback	<p>9. What is the most important piece of advice you’d like to give the County and the City of Santa Cruz about the next CORE funding process?</p> <p>10. What is the most important piece of advice you’d like to give people in nonprofit agencies about how to prepare for the next CORE funding process?</p> <p>11. Do you have any final thoughts or recommendations, on any topic, that we have not discussed?</p>

**VIII. Contractor/Staff Focus Group Questions**

RFP Framework (Funding Approach)	The RFP framework used a hybrid approach, in which most of the funds would support a broad base of direct services and a smaller portion would focus on one collaborative, or collective, impact.
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	<p>The funds were allocated across four tiers — small, medium, large, and targeted impact – based on the amount of funding requested.</p> <p>The CORE RFP asked applicants to use data and community stories to illustrate both community strengths and needs, and to articulate proposed services and outcomes for whichever CORE Condition or Conditions they selected rather than prioritizing certain CORE Conditions.</p> <p>Additionally, equity is a key value of CORE. Applicants for small, medium, and large tiers were allowed to select and describe any dimension of equity they wished to address – such as inequities by race/ethnicity, age, socio-economic status, sex, gender identity and so on. Targeted impact proposals were required to address issues of racial equity and could include additional dimensions of equity if they desired.</p> <ul style="list-style-type: none"> <li>• Please share your thoughts on this approach. What worked well and should be kept as part of future RFP’s? What could be improved, and how?</li> <li>• What suggestions do you have for the development of the next RFP framework?</li> </ul>
<p>Application Process</p>	<p>We’d like to hear about your experiences with the entire application process, which could include the RFP document, the application questions, the online application portal (Reviewr), and the communication throughout the application process (Q&amp;A, feedback on proposals, appeals).</p> <ul style="list-style-type: none"> <li>• Please share your thoughts on the application process. What worked well? What could be improved? <ul style="list-style-type: none"> <li>○ How was your experience with Reviewr?</li> <li>○ How could we align the RFP process to include scopes of works that could be used in contracts?</li> </ul> </li> <li>• How clear was the Q&amp;A process? What suggestions, if any, do you have to improve the process?</li> <li>• How clear was the appeals process? What suggestions do you have for the next RFP appeals process?</li> </ul>
<p>Review, Scoring, and Application Selection Process</p>	<p>We want to hear your perspectives about the panel review and scoring process that informed the funding decisions. This includes all the steps to develop the scoring rubric, analyze scores, resolve variances between panelists, and select final awards.</p> <ul style="list-style-type: none"> <li>• What are your thoughts about the scoring criteria and matrix provided in the RFP and the scoring rubric provided to panelists?</li> <li>• What scoring criteria should be kept for future funding cycles and what other criteria, if any, should be considered?</li> </ul>

	<ul style="list-style-type: none"> <li>• What did you think about the process to resolve variances between panelists? Should this approach be retained? What adjustments, if any, should be made?</li> <li>• How well did it work to make decisions based exclusively on panelist scores? Are there other criteria or approaches to be considered? If so, why?</li> </ul>
Panelist recruitment and selection	<p>We'd like to hear about your thoughts about panelist recruitment and selection. This includes all the steps to identify reviewers, screen them for eligibility, including conflict of interest, and select panelists to review applications.</p> <ul style="list-style-type: none"> <li>• What worked well in this process?</li> <li>• What could be improved?</li> <li>• What suggestions do you have for recruiting a diverse pool of non-conflicted panelists for future funding cycles?</li> </ul>
Internal Communications, Coordination, Staffing	<p>Let's discuss the internal communications, coordination and staffing within and across the teams managing and implementing the RFP process.</p> <ul style="list-style-type: none"> <li>• What worked well?</li> <li>• What could be improved?</li> <li>• What are your thoughts on the CORE Leadership Committee (referred to as CORE Steering during the RFP process) and its decision-making process?</li> <li>• What impact did the CORE RFP have on your workload? What are your recommendations for staffing the process in the future?</li> </ul>
Additional Feedback	<ul style="list-style-type: none"> <li>• What is the most important piece of advice you'd like to give the County and City of Santa Cruz about the next CORE funding process? To nonprofit agencies?</li> <li>• Do you have any final thoughts or recommendations, on any topic, that we have not yet discussed?</li> </ul>



## IX. Panelist Focus Group Questions

<p>Question 1: Review and scoring process</p>	<p>First, we want to talk about the process to review and score applications. In particular, we’re interested in your views on the <i>RFP document and application questions, the web-based scoring platform (Reviewr), the scoring matrix, and the small-group panel reconvening meetings to discuss scores</i>, if you attended one of those. We’ve posted these items in the chat. Please tell us:</p> <ul style="list-style-type: none"> <li>• What worked well in the review and scoring process?</li> <li>• What was challenging? What could be improved, and how?</li> </ul>
<p>Question 2: Communications and panel support</p>	<p>We’re particularly interested in hearing your views on the <i>panelist training, general communication about the process, and HSD response to any answers to specific questions you asked</i>. As before, those topics are posted in the chat. Also as before, please tell us</p> <ul style="list-style-type: none"> <li>• What worked well about the communications and panel support?</li> <li>• What was challenging? What could be improved, and how?</li> </ul>
<p>Question 3: Time commitment</p>	<p>As you might guess from the questions in the poll, we’d like to hear about your experiences with the amount of time you spent on this process and the time allotted to review applications.</p> <ul style="list-style-type: none"> <li>• How well did it align with your expectations?</li> <li>• What could be improved, and how?</li> </ul>
<p>Question 4: Applicant-driven process, including equity</p>	<p>For our final discussion question, we want to explore some of the unique aspects of the CORE RFP. As you recall, unlike some RFPs that have a narrow set of priorities defined by the funders, the CORE RFP asked applicants to articulate community needs, strengths, proposed services and outcomes for whichever CORE Condition or Conditions they selected. Additionally, equity is a key value of CORE. Applicants for small, medium, and large tiers were allowed to select and describe any dimension of equity they wished to address – such as inequities by race/ethnicity, age, socio-economic status, sex, gender identity and so on. Targeted impact proposals were required to address issues of racial equity and could include additional dimensions of equity if they desired.</p> <p>Focusing on your experience as a reviewer, [Facilitator ask first question, get/invite responses before moving to next question, repeat]</p> <ul style="list-style-type: none"> <li>• What do you feel worked well about this approach?</li> <li>• What was challenging? What could be improved, and how?</li> </ul>
<p>Final thoughts and closing</p>	<p>Do you have any final thoughts or recommendations, on any topic, that we have not yet discussed?</p>

	Answer any final questions. Restate process next steps, timeline, confidentiality agreement, and offer to accept additional comments by email. Thank and dismiss participants.
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