



Champions For Our Children

**Organizational Assessment Consultant RFQ
Information Session Q & A
May 2010**

Is there a page limit for the narrative? Given the more extensive scope of work, could this be more than five pages?

The page limit of three to five pages for the narrative has been published in the RFQ. Applicants are encouraged to adhere to these parameters as much as feasible and advised to focus narrative content on project design, implementation and the capacity to manage the scope of work.

Is First 5 LA able to release the list of firms / consultants that submitted proposals in response to the first RFQ released in January 2010.

We are not able to release the list, because the process is not yet complete.

Please list the participants in the May 25, 2010 RFQ information conference call.

The following are the people who announced their presence during the teleconference call. Please accept apologies for any misspelling of any individual or company name.

*LaQuetta Shamblee, 4TheCause
Giselle Nicholson, Blue Garnet
Maura Harrington, Center for Nonprofit Management
Valerie Coachman-Moore, Coachman-Moore Associates
Chris Looney, Community Consulting Services (CCS)
Cynthia Freeman, Community Partners
Judy Spiegel, Consulting for a Change
Kristin O'Leary, Michelle Torgerson, Lee Draper, Draper Group
Elizabeth Harris, EMT Associates
Antonio Gallardo, FRAI Consulting
Paul Harder, Harder+Co Community Research
Brent Copen, Kristin Goddard, La Piana Consulting
Lisa Simon, National Pediatric Support Services
Michelle Nasser, NPO Solutions
Patty Oertel, Oertel Group
Kate Wilson, Taproot Foundation*

Are the organizations to be assessed based in countywide First 5 LA communities, Best Start LA communities, or both?

The organizations involved in this particular project are grantee organizations located in non-targeted communities under First 5 LA 2009-2015 Strategic Plan.

Does the project still involve any pilot implementation, such as in the initial RFQ?

No.

Does First 5 LA have a profile of the types or sizes of organizations or any way to describe a typical organization that may be involved in this project?

With apologies we are not able to provide any idea of the types or sizes of organizations that may be involved in this project until the target and non-targeted communities are approved by the Commission.

Does First 5 LA prefer a non-proprietary quantitative assessment tool of its own rather than a tool such as the CCAT? Or is First 5 LA interested in having a separate tool designed specifically for First 5 LA?

The intent of the RFQ is to offer respondents the opportunity to propose their approach to addressing the project objectives – to design a comprehensive, in-depth, multi-faceted organizational assessment approach and/or model that is adaptable to a range of organizations (budget, staffing, program, etc), to implement this approach, apply relevant adaptations and refinements and generate actionable organizational development/capacity building plans for the organizations involved. Respondents may incorporate existing assessment tools and/or design or develop customized resources.

First 5 LA has used the CCAT in a number of Technical Assistance Institute programs however we do not have a preference or requirement regarding use of this tool.

Contract Period: Page 8 of the RFQ states that the contract period will be for 12 months and that “the contract will be renewed based upon successful accomplishment of project objectives...” Does that mean that the project timeline might actually extend beyond 12 months?

The Commission would like the Transition plan projects completed within a 12 month period. A no cost contract extension may be considered as necessary to accommodate any changes in the project implementation timeframe.

Implementation Phase: Summary reports for each organizational assessment are listed as one of the deliverables. How will organizational results will be shared with participating organizations? Will they have assigned coaches to help them assess how to use the results to build capacity? Is that something that should be included in the scope of work for this contract?

Will the organizations receive funding to implement the organizational development plans resulting from the organizational assessment?

Summary reports of the organizational assessments are a key component of this project and will be presented to the organizations by the consultant(s) accomplishing the assessment. The summary reports are intended as a primary resource for the organizations as a realizable plan for organizational development and sustainability. Respondents may describe these presentations as providing coaching regarding implementation of the assessment recommendations.

First 5 LA will not assign coaches to the organizations; however, the organizations will be able to apply to First 5 LA for grants of up to \$75,000 to implement recommendations from the assessments. The intent is also that the organizational assessments/development plans will be of long term value to organizations in seeking other funding and to continue their organizational development and capacity building objectives.

In composing the budget, how might a respondent project the cost for the full project?

One option is to outline the cost of developing the organizational assessment model and an additional per organization cost to implement the assessment, i.e. \$10 per organization to do the assessment for 24 organizations would generate a total cost of \$240 for implementation, plus the cost of developing the assessment.

We are planning on assembling a team to respond to the RFQ, which will most likely include more than three principals with pertinent experience. How can we best reflect the depth of our team within the RFQ requirements of submitting no more than three resumes/C.V.s?

The RFQ as posted requests resumes or CVs for up to three principals who will be involved in the project design and implementation. Our objective was to limit the length of these materials to a reasonable volume. Respondents may choose how to present information representing additional expertise providers economically.

Fund development capacity is not specifically mentioned in the Organizational Assessment design, although it is essential for transitioning and for long-term vitality and sustainability, including for the organizations' ability to replace or leverage First 5 LA's support. This ties into other categories listed, but would like to know if this a purposeful omission.

Fund development is included in the Financial Analysis description in the RFQ. Assessment of fund development capacity is also implicit in several other aspects of the organizational assessment scope, including the qualitative internal review, external constituent (public image), etc.

Will you make the Transition Plan as approved by the First5 LA Commission available?

Copies of the Transition Plan are available upon request by sending an email to Heather Tunis, htunis@first5la.org or Erika Estrada, estrada@first5la.org

Would First 5 LA consider a proposal involving a collaboration of consultants or consulting groups, considering the increased scope of the project?

Yes

Are there any documents that previous respondents may not have to re-submit?

*The following documents submitted by previous respondents do not need to be resubmitted IF THERE HAVE BEEN NO CHANGES WHATSOEVER. In order to verify that these documents have not changed, please send an email to Heather Tunis, htunis@first5la.org, stating that there have been no changes and listing all of the documents referenced. Also, in the online application form, on page two, section 4 Experience with organizational assessment, effectiveness and/or development include the following phrase: **PREVIOUS MATERIALS WITHOUT CHANGES WERE SUBMITTED IN JANUARY 2010.***

Previously submitted documents acceptable for June 2010 due date, provided there are no changes:

*Signature Authorization Form
Agency Involvement in Litigation Form
Resumes
Client References
Board List (if relevant)
Articles of Incorporation (if relevant)
Audited Financial Statements (if relevant)
Bylaws (if relevant)*

Items that will need to be completed and submitted as instructed:

*Online application
Cover letter
Narrative
Budget
Budget narrative (optional)*

All new applicants will need to provide all materials indicated in the RFQ

Thank you for your interest!!

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PROJECT COMPONENTS

To what extent does First 5 LA expect the organizational assessment to borrow from The BEST model?

The BEST model has informed the initial concept for the scope and dimension of the organizational assessment that First 5 LA would like to develop and pilot. The description of the assessment scope and objectives in the RFQ are intended to inform respondents as to the caliber of model we hope to achieve through this project.

Does First 5 LA prefer to use the CCAT in particular, or is there interest in using/adapting other commonly used tools? If CCAT is preferred, would cost of us be included in consultant's budget?

First 5 LA has incorporated the CCAT (developed and administered by the TCC Group) into Technical Assistance Institute programs since 2006 and is therefore familiar with this tool. We are looking to respondents to address the multi-dimensional organizational assessment model outlined in the RFQ however they determine would constitute the most effective approach.

First 5 LA does have a current contract with TCC Group and will assume the cost of administering the CCAT to any organizations involved in this pilot project.

Is First 5 LA looking to develop an assessment tool for non-profit organizations that work in First 5 LA's target areas only, or for any non-profit organization?

First 5 LA seeks to develop a multi-dimensional, comprehensive organizational assessment model relevant to designing a realistic, achievable plan and pathway to the kind of organizational development and improvement that any non-profit organization would presumably wish to pursue.

Does First 5 LA want the analysis to include replicability issues?

We would like this project to advance us towards an organizational assessment model/process that is adaptable for a range of kinds of organizations (budget size, organizational life cycle, etc.). The intent is to incorporate this model into First 5 LA capacity building resources and there is potential for the program to be utilized in a number of contexts during the implementation of the new Strategic Plan 2009-2015.

Has First 5 LA utilized any particular tools to date with respect to organizational readiness?

Since 2006, First 5 LA has incorporated the Core Capacity Assessment Tool (CCAT) developed by TCC Group in the Community Opportunities Fund grant program, the Sustainability Project planning process program and the Social Enterprise Academy. The CCAT report provides insights into organizational needs in terms of core capacity concepts framed by TCC Group that include Adaptive, Leadership, Technical and Managerial Capacity in addition to providing an analysis of Organizational Culture and Lifecycle, also according to TCC concepts.

What is, according to First 5 LA, an effective and viable organization? How do you measure it?

Our purpose is not to per se define an effective and viable organization but to support organizations and communities in being effective and viable in pursuing and achieving positive outcomes for young children and their families. We subscribe to best practices and lessons learned from throughout the philanthropic community and nonprofit sector in terms of effectiveness and viability and currently focus our evaluation and research on the impact of specific strategies on outcomes for the 0 – 5 population. Our objectives and measures regarding capacity building for organizations and communities is very much in development, and our actual financial investments and work in capacity building are still relatively modest and in the very early stages.

Does First 5 LA have access to relevant search databases that will support the additional research on best practices?

First 5 LA Capacity Building staff assembles and collects information about best practices in organizational development, capacity building, social enterprise, community capacity building, leadership development and other relevant topics. Some of these resources represent databases, others consist of qualitative studies. Most of this research is also available through online searches, professional associations and publications and other similar kinds of resources.

What will be the selection criteria for the two pilot organizations?

While criteria have not been established per se, the primary criteria will be interest in and capacity to participate, meaning a willingness to participate in a multi-dimensional investigation and assessment of internal and external operations and factors over an extended period of time and sufficient and appropriate staff and board time and engagement for this kind of process.

What information from potential pilot sites does First 5 LA have in its records?

First 5 LA has supported more than 200 organizations and programs to date and has formal documentation for each of the funded projects as well as substantive knowledge about these organizations and programs within the staff.

Is First 5 LA open to work with the consultant in deciding which organizations to pilot?

Yes.

The RFQ indicates piloting the model at “up to two organizations.” May the model be piloted at one organization rather than two?

Respondents have the opportunity to make the case for piloting the assessment model with one organization as opposed to two.

CONSULTANT ROLE AND CAPACITY

Is the consultant responsible for the report or recommendations to the agencies or to First 5 LA?

The consultant is responsible to provide First 5 LA with

- a full description of the model components and implementation plan and design
- a summary of successes and challenges in implementing the model in the pilot organization(s)
- the assessment report executive summary and table of contents

We anticipate that the consultant will provide the organization(s) involved in the pilot application of the assessment model with the full report.

What is the depth of the consultant's capacity required in specific areas of the assessment?

The description of the assessment scope and objectives in the RFQ are intended to inform respondents as to the caliber of model we hope to achieve through this project. Respondents have the opportunity in the RFQ to outline their perspective as to the degree of capacity required in any or all of the organizational assessment components in order to accomplish the objectives of assessment model design and pilot.

Is staff or consultants working for a First 5 LA-funded program eligible to be included in the RFQ as a sub-contractor (project consultant)?

Respondents have the opportunity in the proposal to make the case for the expertise they propose including in the implementation of the project objectives as well as to consider issues related to possible instances of conflict of interest.

Must the CVs of all potential subcontractors be included in the proposal?

Respondents should provide qualifications of sufficient participants in the project to communicate the caliber of their work and approach to the objectives of the project.

Could anyone apply as an independent consultant, and not as a part of a firm?

Yes. The selection criteria are based on accomplishing the design and piloting of the comprehensive organizational assessment process outlined in the RFQ. The applicant is responsible for demonstrating how they would address and implement the multiple components of the assessment.

TIMEFRAME

What is the timeframe for the project – the duration and ideal completion date? Is there an end date to the project?

Are there any more specifics or constraints around timing of activities?

The objective is to begin the project by mid May 2010 and while we would like to have a relatively quick implementation we understand that a comprehensive process such as outlined in the RFQ would most likely require a minimum of six months. The consulting contract may be for up to 12 months.

BUDGET & CONTRACT

What is the level of insurance required?

First 5 LA requires all contractors to name “Los Angeles County Children and Families First – Proposition 10 Commission (or abbreviated as LA Cty Prop 10 Commn.), its officers, agents, consultants and employees” as Additional Insured for Commercial General Liability and Professional Liability at a minimum of \$1 million per occurrence. Depending on the contractor’s business status, other insurance certificates requested during the contracting process may include Workers Compensation, Business Auto Liability, Crime and Property Coverage, if relevant.

Should the project budget include direct expenses such as printing and mileage?

The consultant budget form focuses on an hourly approach to providing consulting services. Respondents have the opportunity to determine whether to include direct expenses such as printing and mileage in their budgets or to focus costs on consulting fees.

On the budget form, how much specificity is required for the Task/Deliverables sections? May rows be added to the form if needed?

Respondents have the opportunity to present the budget in as much specificity as they wish. We recommend that the budget focus on key benchmarks involved in project implementation rather than highly specific details of each step within the stages of the project.

How many (interim update) reports will be required and at what frequency?

The project will involve a quarterly check-in meetings and a written report at the conclusion of the project and no later than within 30 days of the contract end date, as described in the response to the consultant role question above.

First 5 LA anticipates that the start up period of this project will involve a series of in-person meetings with the selected consultant(s) to review project plan and implementation design, collaborate on selection of and communications with participating organizations, and other facilitative roles and objectives.

Who retains ownership and/or exclusive licensing and usage agreements for intellectual and/or copyrighted tools/materials?

Any components of the organizational assessment model developed directly for the First 5 LA project are retained by First 5 LA, unless otherwise negotiated as part of the contract between the consultant and First 5 LA.

Any intellectual and/or copyrighted tools or materials provided by the consultant or a third party, such as TCC Group, remain the property of the original owner.

