Challenge Grants/
Social Enterprise Grants (CG/SE)
Program Administrator
Request for Qualifications (RFQ)
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I. TIMELINE FOR SELECTION PROCESS*

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<tr>
<th>ACTIVITY</th>
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<tr>
<td>RFQ Released</td>
<td>May 19, 2011</td>
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<tr>
<td>Teleconferences/Webinar Information Session</td>
<td>June 1, 2011</td>
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<td>Final date to submit questions regarding RFQ</td>
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<td>June 13, 2011</td>
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<td>- Online applications plus all forms</td>
<td>5:00pm, June 22, 2011</td>
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<td>and “Agency Involvement in Litigation and/or Contract Compliance Difficulties” forms</td>
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*Dates listed in timeline are subject to change at First 5 LA’s sole discretion.

All questions and requests for additional information regarding this RFQ must be received in writing by First 5 LA by 5:00 p.m. on June 8, 2011. First 5 LA reserves the sole right to determine the timing and content of the responses to all questions and requests for additional information.

Questions and information requests can be submitted to:

Jennifer Cowan, Program Officer
Community Investments Department
First 5 LA
750 N. Alameda Street, Suite 300
Los Angeles, CA 90012
Phone: 213.482.7558
Fax: 213.482.5903
E-mail: jcowan@first5la.org
II. BACKGROUND

A. First 5 LA – “Champions for Our Children”

In 1998, California voters passed Proposition 10, which levied a 50-cent per pack tax on all tobacco products. The resulting tax revenues were earmarked for the creation of a comprehensive system of information and services to advance early childhood development and school readiness within each county in California. In Los Angeles County, First 5 LA Commission was formed as a public entity to develop and oversee various early childhood initiatives and to manage the funding from Proposition 10. Since 1998, First 5 LA has invested over $800 million to support initiatives in all three of its goal areas. Additional information regarding First 5 LA can be found at http://www.first5la.org/.

In June 2009, the First 5 LA Board of Commissioners adopted a strategic plan to guide its investments through 2015: Strengthening Families and Communities in L.A. County. The plan was developed during a public process that engaged community stakeholders, grantees, commissioners and staff and in conjunction with research in the field of early child development. We believe, and research confirms, that children are strongest when they live in safe and thriving families and neighborhoods. Therefore, First 5 LA will focus on strengthening families, while also building the capacity of communities and organizations to create and sustain nurturing environments for children. This new "place-based approach" will allow First 5 LA to have a deeper impact in select areas, while also supporting countywide objectives, and to better measure the impact of its investments.

B. The First 5 LA FY 2009-2015 Strategic Plan

In June 2009, the First 5 LA Board of Commissioners adopted its FY 2009–2015 Strategic Plan entitled Strengthening Families and Communities in L.A. County. This Plan incorporates lessons learned from the first 10 years of First 5 LA’s grantmaking and research, which reveal not only the importance of supportive and informed parents and caregivers to a young child’s quality of life, but also the role of safe and supportive neighborhoods, or places, to that child’s development.

As a result, this new plan represents a major shift in First 5 LA’s grantmaking from an initiative-based to a place-based approach. This new approach will allow First 5 LA to focus on strengthening families while fostering the communities’ ability to create and sustain safe and nurturing places for children to grow and thrive. The Commission has selected 14 geographic communities to direct and focus their investments in. For more information about Best Start communities go to http://beststartla.org/.

In the Strategic Plan, the Commission established four specific outcomes that it seeks for young children in Los Angeles County. These priority outcomes are defined in the Plan as four long-term goals of ensuring that children:

- Are born healthy (decrease the percent of children born at a low birth weight)
- Are safe from abuse and neglect (decrease the number of substantiated cases of child abuse and neglect)
• Are ready for Kindergarten (increase the percent of children reading at grade level at 3rd grade)
• Maintain a healthy weight (decrease the percent of overweight children)

All of First 5 LA’s investments will be focused on changing outcomes in these areas.

**Countywide Approach**

In addition to the place based approach, FY 2009–2015 Strategic Plan outlines the critical role of strong, coordinated and responsive systems in supporting families and improving outcomes for children prenatal through five. These systems include the actual structures through which health and human services are provided in Los Angeles County, as well as to less formalized systems, such as the economic system, the policy environment, and overall public will for early childhood issues. By focusing on countywide systems improvement and change, strategic plan investments can have a widespread impact on children across Los Angeles County while improving the sustainability of the place-based approach and outcomes. Success in the Best Start communities requires that systems change occurs countywide in order to achieve sustained and long-term improved outcomes for children in those communities. First 5 LA understands that enduring systems changes are most successful when they are informed by, and grow out of, close-to-the ground, culturally competent, community-based and resident-driven models for strengthening families, such as those we will be supporting in Best Start communities.

The countywide approach represents a comprehensive effort to address systems improvement in Los Angeles County through the following seven strategies:

A. **Public Policy:** To define and pursue First 5 LA's priorities for policy change that support families within the four priority goal areas.
B. **Public Education:** To build public will and promote knowledge around issues facing children and families.
C. **Resource Mobilization:** To support and enhance the impact of the total portfolio of First 5 LA investments through effective, strategic partnerships; and by leveraging social and financial capital.
D. **Workforce Development:** To improve the knowledge and skills of the countywide prenatal to five workforce to strengthen families and support children’s healthy development.
E. **Data Systems Integration:** To support improvement of the quality and usefulness of data collected about children and families throughout Los Angeles County and the programs, projects and services that support them.
F. **Health Access:** To increase access to health insurance for children 0-5 by assisting families in obtaining coverage, and potentially subsidizing insurance for children not covered by other insurance.
G. **Information Resource and Referral:** To provide telephone lines or printed/online resource directories which community members can access in order to get information about resources available to them.

These strategies address countywide systems improvement from various points within these systems, yet work in a coordinated manner. Combined, they constitute a coordinated approach for First 5 LA to leverage opportunities, advocate for change, instill knowledge
and raise awareness about how best to strengthen families with young children. In addition, while these strategies were approved as “countywide,” some of the activities will be specifically targeted to support the place-based approach.

**Resource Mobilization Strategy**

At the June 10, 2010 Commissioner meeting, Commissioners approved First 5 LA’s FY 2009 – 2015 Strategic Plan Implementation Plan including an $11 million allocation for the resource mobilization strategy. The resource mobilization strategy will leverage both fiscal and non-fiscal resources to sustain the well-being of children and their families in Los Angeles County. The goal of resource mobilization is to maximize the amount of resources available to support and enhance First 5 LA’s four priority outcomes as outlined in the First 5 LA FY 2009-2015 Strategic Plan. At the October 14, 2010 Commission meeting information regarding the resource mobilization framework and potential activities was provided, identifying three approaches to leveraging fiscal and non-fiscal resources: (1) grantmaking; (2) building relationships; and (3) sharing information. As approved by the Board of Commissioners, First 5 LA will require that any leveraging opportunity must meet the following minimum eligibility requirements:

- Employs strategies that lead to change in one or more of First 5 LA’s priority outcomes and falls within the Theory of Change Full Pathway (*Appendix L*)
- Identifies fiscal or non-fiscal resources that will be leveraged
- Addresses the needs of First 5 LA’s target population

**C. Challenge Grants Program and Social Enterprise Grants Programs**

On March 10, 2011 the Commission approved a $1,500,000 allocation for the Challenge Grants Program and $500,000 for the Social Enterprise Grants Program for the purpose of leveraging resources to support and sustain First 5 LA’s investments.

The Challenge Grants Program is a competitive grant for those organizations seeking to enhance, expand or sustain existing programs that are represented within the First 5 LA Theory of Change. For selected grantees, First 5 LA will commit upfront to matching any new funds raised by the grantee at a 1:1 match rate, up to a specified amount during a two-year challenge timeframe (i.e., contract period). In addition to receiving the challenge grant, grantees may receive technical assistance to support their goals to raise new funds.

The Social Enterprise Grants program is designed to increase the number of organizations that are financially sustainable. To accomplish this goal, First 5 LA will provide Los Angeles County non-profits that are aligned with the First 5 LA Theory of Change the capital necessary to build, grow, and diversify their revenue stream by implementing strategies to increase their income and resources. Earned income strategies, including fee for service and establishing for-profit ventures, will facilitate long term sustainability for non-profits to meet their mission beyond First 5 LA’s investment.

**III. PROGRAM ADMINISTRATOR ROLES AND RESPONSIBILITIES**

The Community Investment Department is seeking applications from qualified organizations to serve as Program Administrator to oversee all aspects of the Challenge
Grants Program and Social Enterprise Grants Program, including developing, issuing and reviewing grant applications, selecting grantees, issuing grant awards, monitoring grantees, and providing technical assistance and support to grantees. First 5 LA will provide the Program Administrator with direction on the design of each grant program and participate in the application review and selection of grantees.

Each grant program has specific objectives and eligibility requirements and will require different types of support. For example:

- The Program Administrator will assess each Challenge Grants Program grantee’s capacity for fundraising and fund development, and provide grantees with the necessary training and technical assistance to support grantees in meeting their fundraising goals.
- The Program Administrator will assess the viability of each Social Enterprise Grants Program grantee’s proposal, and provide grantees with the necessary training and technical assistance to support the successful implementation and sustainability of their proposed strategies.

The Program Administrator will provide facilitation and logistical support for all meetings with First 5 LA, prospective and selected grantees; provide requested reports and documents to First 5 LA; and support First 5 LA’s evaluation of the grant programs. The Program Administrator will work in accordance with First 5 LA policies and procedures and in compliance with the policies and procedures of the Commission. In addition, all policies and procedures implemented for grantees of the Challenge Grants Program and Social Enterprise Grants Program must be consistent with First 5 LA policies and procedures.

IV. ELIGIBILITY

Applicants responding to this RFQ must have the qualifications, experience, competency and ability to successfully provide programmatic, fiscal and administrative oversight for both the Challenge Grants Program and Social Enterprise Grants Program. Applicants must have a physical presence in California, and the capacity to work throughout Los Angeles County.

V. SUMMARY OF DESIRED QUALIFICATIONS

In order to function as a competent Program Administrator, an ideal applicant will have all or some of the following qualifications:

**General Qualifications**

- Demonstrated success serving as a Program Administrator
- Prior experience developing, administering, and monitoring grant programs
- Capacity to effectively accept, manage and disburse First 5 LA funds on a timely basis
- Capacity to issue and manage multiple grants through a competitive bidding process
• Capacity to administer both the Challenge Grants Program and the Social Enterprise Grants Program
• Substantial expertise in working with non-profits, foundations, community-based organizations and social services agencies in L.A. County
• Knowledge of organizations in the field of early care, education, child development and family support needs and resources
• Knowledge of First 5 LA’s FY 2009–2015 Strategic Plan and Theory of Change

**Challenge Grants Qualifications**

• Expertise in developing and implementing matching and/or challenge grants
• Expertise in assessing organizations’ capacity for fundraising and fund development
• Ability to provide grantees with the necessary training and technical assistance to support their fundraising goals

**Social Enterprise Qualifications**

• Expertise in developing and implementing social enterprise funding opportunities
• Expertise in assessing the viability and sustainability of social enterprise strategies
• Ability to provide grantees with the necessary training and technical assistance to support the successful implementation of social enterprise strategies

Applicants that meet initial eligibility criteria (*See Appendix K- Review Tool*) may be invited for an in-person interview with First 5 LA staff.

**VI. TERMS OF PROJECT**

**Available Funding**

The selected Program Administrator will manage a budget of $1,500,000 for the Challenge Grants Program and $500,000 for the Social Enterprise Grants Program. The budget includes all grant funds and administrative costs incurred by the Program Administrator. It is expected that applicants’ budgets will be clearly justified in the budget narrative (*Appendix E*) and will be appropriate to the work proposed. Please refer to provided budget instructions (*Appendix D*) for guidelines on how to complete required budget forms.

The Program Administrator is responsible for all expenses related to any subcontracted services and for supplying all business equipment required to implement the tasks and scope of work (e.g., computer, printer, fax, internet access, telephone, etc.). The Program Administrator will be responsible for maintaining a method to capture and document time spent on project activities, as a means to support First 5 LA staff management of costs and to ensure accomplishment of all project objectives.

The scope of work and budget will be finalized during the contract development and negotiation process. Funds will be granted through monthly invoices based on services rendered and actual expenses.
**Contract Period**

The total contract amount for the entirety of the project will not exceed $2,000,000 over three years. The term of this contract includes time for program development, implementation and closeout by the Program Administrator. It is estimated that the Challenge Grants Program will award grants over a two-year contract period, and Social Enterprise Grants Program will award grants over a period of one year. The final length of Program Administrator’s contract with First 5 LA will be determined by the contract execution date.

The Commission expects to enter into contract with the selected Program Administrator which will be eligible for renewal at the end of each contract year. Yearly contracts with First 5 LA will coincide with First 5 LA’s fiscal year, which ends on June 30th. Please note that First 5 LA contracts are executed annually, and at the end of each contract year the selected contractor will be required to submit a proposed scope of work and budget for the following year.

The Program Administrator shall not be authorized to deliver or commence performance of services as described in the application until written approval has been obtained from First 5 LA. Any performance of services commenced prior to the Program Administrator obtaining all written approvals by First 5 LA shall be considered voluntary.

**Contractual Obligation**

The selected Program Administrator is required by law to adhere to all contractual obligations as outlined in this document, including the First 5 LA Contract (*Appendix J*).

**VII. APPLICATION PROCESS**

In order to respond to this RFQ, applicants are required to submit the following materials to First 5 LA no later than **5:00 p.m. on Wednesday, June 22, 2011**.

Applications received after this deadline **will not** be considered.

First 5 LA requires submission of proposals using First 5 LA’s online system accessed from the CG/SE Program Administrator website at:


Applicants are strongly encouraged to participate in the teleconference/webinar before submitting a proposal where information about how to use this system and proposal requirements will be reviewed. Information about the teleconference/webinar is listed in the next section. Please carefully review the following requirements for proposal content.

1. **Online Application Form:** This online form accessible from the CG/SE Program Administrator website must be completed prior to submitting the Proposal
Narrative. Enter Executive Director’s name, address and other requested information.

2. **Proposal Narrative:** The Proposal Narrative must be uploaded in a Word or PDF document using the online proposal system on the CG/SE Program Administrator website. No hard copies of the Proposal Narrative will be accepted. *Narrative responses cannot exceed 6 pages double spaced.* The narrative must address the following:

**Program Administrator Background, Expertise and Experience (maximum 6 pages):**
- Number of years serving as a Program Administrator
- General and program specific qualifications, competency, experience, business integrity, and capacity to successfully execute a competitive grant program
- Established staff presence and office in California
- Examples of types of contracts applicant has previously entered into, including the name and type of contracting entity, location of the work, purpose of the work, and general types of services provided
- Estimate of what percentage of the overall organization’s work would be represented by this contract

The following materials are also required for application:

1. **Application Checklist (Appendix A)**
   Applicants must submit one original form signed in blue ink.

2. **Scope of Work:**
   Using the attached Scope of Work template (Appendix I), please describe the work processes (or methodology) your agency would utilize to address the following responsibilities described in this RFQ:
   - Program development
   - Application review and selection
   - Disbursement of grant awards
   - Program monitoring
   - Technical assistance and support to grantees
   - Programmatic and financial reporting to First 5 LA

   Before completing the template, please review the Scope of Work Instructions (Appendix H).

3. **Proposed Budget and Budget Narrative:**
   Using the attached budget worksheet (Appendix F), please provide an itemized budget that details expenses for the proposed services for the time period **September 1, 2011 - June 30, 2012.** Please include costs broken down by hourly rate for all staff and subcontractors, and include a budget narrative (Appendix E) justifying all costs included in the budget worksheet. In addition, please complete a projected budget summary (Appendix G) which covers the full three-year contract
period. Please reference the attached Budget Instructions *(Appendix D)* when completing the templates.

Applicant may also include other sample budgets and budget narratives that reflect the type of work they believe will be involved in the execution of their role as Program Administrator.

4. Résumé or Curriculum Vitae for Applicant(s): Provide a detailed professional résumé for each key staff person expected to work on the project, outlining all relevant work history, educational attainment, publications, prior research projects, etc. Include the résumés for subcontractors as well. All subcontractors must be clearly identified and approved by First 5 LA prior to commencing work.

5. Letter(s) of Intent or Memo(s) of Understanding *(if applicable)*: Required for all collaborative partners and/or subcontractors listed in Budget for Contracted Services. Document must specify proposed responsibilities of and between each of the partners and/or subcontractors.

6. References *(minimum of 3, maximum of 5. No more than 6 pages total)*: References may be from colleagues, current or former clients, or peers. Each reference should include name, company, address, phone number, email, length of time known, and a short statement about your relationship. In addition, written statements from each reference may be included. First 5 LA must be able to contact at least two (2) of the references provided by the applicant. If two (2) references cannot be reached within a timely manner (no more than three attempts, no longer than one week), First 5 LA may deem the applicant ineligible for this opportunity.

7. Agency Involvement in Litigation and/or Contract Compliance Difficulties *(Appendix C)*: Please read the information on the required Agency Involvement in Litigation and/or Contract Compliance Difficulties form thoroughly. An unsigned form or its omission will constitute an incomplete application and will be grounds for disqualification. Applicants must submit one original form signed in blue ink.

8. Signature Authorization Form *(Appendix B)*: This form is required in order to verify signature authority to enter into contractual agreement with First 5 LA. If not outlined in the Bylaws, a Board Resolution or Partnership Agreement must be submitted, as applicable, that indicates signature authority. Applicants must submit one original form signed in blue ink.

9. IRS Letter of Determination *(if applicable)*

10. Business License *(if applicable)*

11. Articles of Incorporation *(if applicable)*

12. Bylaws *(if applicable)*
13. **Board of Directors or List of Partners (as applicable)**

14. **Annual Independent Audit:** The applicant must include the most recent independent financial audit including the following:
   - Management Letter
   - Auditor’s Report
   - Statement of Financial Position (Balance Sheet)
   - Statement of Activities (P/L, Income and Expenses Report)
   - Statement of Cash Flow
   - Functional Expense Report
   - Notes to Financial Statements
   - Federal “Single Audit” (if applicable)

**Submission Process**

Applicants are required to submit one application in the following manner:

- All documents listed on the Application Checklist (*Appendix A*) should be uploaded with the online application.
- All forms that require signatures must be signed in **blue** ink. Signature stamps are **not** acceptable. Please submit one (1) original and signed copy of First 5 LA’s “Application Checklist”, “Signature Authorization” and “Agency Involvement in Litigation and/or Contract Compliance Difficulties” forms sent or delivered to First 5 LA.
- All supporting materials must include the name of the applicant.

**VIII. SELECTION PROCESS AND REVIEW CRITERIA**

**Selection Process**

1. First 5 LA staff will evaluate all applications for completeness and minimum qualifications. Basic requirements include: timely receipt of application, inclusion of all appropriate attachments, etc. Applications with omissions of any required documentation are subject to disqualification. Applicants may use the Application Checklist as an aid in preparing the application. Please note that the Application Checklist is merely an aid.

2. After initial review, applicant’s qualifications will be evaluated and scored by a panel of three (3) external reviewers. (*Appendix K- Review Tool*)

3. As a public entity, the Commission has a responsibility to the public to ensure that the organizations selected are financially stable to provide services. Further written materials regarding the financial stability of the agency may be requested by our finance department prior to the interview.

4. Some or all of the applicants who have submitted complete and responsive applications may be interviewed. Interviews are scheduled to be held on dates shown
in Section I (Timeline for Selection Process). These dates are subject to change at First 5 LA’s sole discretion. Interviews will be held either at First 5 LA or via phone. Further written materials regarding qualifications may be requested prior to the interview.

5. As part of this review process, the panel may contact an applicant’s references.

First 5 LA reserves the right, without prejudice, to reject any or all submitted qualifications. An appeals process is not available — all decisions of First 5 LA are final.

IX. CONTRACTUAL CONSIDERATIONS

Specific contractual considerations, including but not limited to the following, apply to RFQ submission process and project implementation and to any contracts that result from the submission and implementation of the project/proposal. The contractor will need to comply with all of the provisions in the attached sample contract (Appendix J).

A. Conflict of Interest

The selected Contractor will be required to comply with the COMMISSION’s Conflict of Interest provisions, as outlined in the contract, and as applicable under California Law. Contractor acknowledges that he/she/it is acting as public official pursuant to the Contract and shall therefore avoid undertaking any activity or accepting any payment, employment or gift from any third party that could create a legal conflict of interest or the appearance of any such conflict. A conflict of interest exists when one has the opportunity to advance or protect one’s own interest or private interest of others, with whom one has a relationship, in a way that is detrimental to the interest, or potentially harmful for the integrity or fundamental mission of the COMMISSION. Contractor shall maintain the confidentiality of any confidential information obtained from the COMMISSION during the Contract and shall not use such information for personal or commercial gain outside the Contract. By agreeing to the Contract and accepting financial compensation for services rendered hereunder, Contractor agrees that he/she/it will not subsequently solicit or accept employment or compensation under any program, grant or service that results from or arises out of the funded project and related initiative(s). During the term of the Contract and for one year thereafter, Contractor will not knowingly solicit or accept employment and/or compensation from any COMMISSION collaborator or Contractor without the prior written consent of the COMMISSION.

The Applicant agrees that they or their employees do not currently have, nor will they have, any conflict of interest between themselves, the agencies, or the Commission. Any perceived or potential conflict of interest shall be disclosed in the proposal.

B. Compliance

Current/Former grantees and/or Contractors must be in good standing and in compliance with all aspects of their contract with the COMMISSION in order to be eligible to apply for the current Request for Qualifications (RFQ). The COMMISSION may deem an applicant
ineligible if it finds in its reasonable discretion, that applicant has done any of the following, including but not limited to: (1) violated any significant terms or conditions of Grant Agreement/Contract; (2) committed any act or omission which negatively reflects on Applicant’s quality, fitness or capacity to perform services listed in RFQ with the COMMISSION or any other public entity, or engaged in a pattern or practice which negatively reflects on the same; (3) committed an act or offense which indicates a lack of business integrity or business dishonesty; or (4) made or submitted a false claim against the COMMISSION or any other public entity.

C. Contract Information

1. The COMMISSION may, at its sole discretion, reject any or all submissions in response to this RFQ. The COMMISSION also reserves the right to cancel this RFQ, at its sole discretion, at any time before execution of a contract. The COMMISSION shall not be liable for any costs incurred in connection with the preparation of any submissions in response to this RFQ. Any cover letters, résumés, and/or curriculum vita, including attached materials, submitted in response to this RFQ shall become property of the COMMISSION and subject to public disclosure.

2. The agency/organization submitting an application agrees that by submitting an application it authorizes the COMMISSION to verify any or all information and/or references given in the application.

3. The COMMISSION reserves the right, after contract award, to amend the resulting contract, scope of work, and any other exhibits as needed throughout the term of the contract to best meet the needs of all parties.

4. The COMMISSION reserves the right to request additional financial information to verify applicant’s past and current financial status. This information includes, but is not limited to: the most recent independent audit ending Calendar Year 2010 Fiscal Year June 30, 2010, Cash Flow Statement, Statement of Activities (Income Statement), and Statement of Financial Position (Balance Sheet).

5. Consistent with the intent of Proposition 10: California Children and Families Act of 1998, no monies for this Project may be used to supplant Federal, State, County and/or other monies available to the organization for any purpose. Activities funded under this proposal must be new or enhancements to existing activities.

6. The award of a contract by the COMMISSION to an individual/agency/organization that proposes to use sub-contractors for the performance of work under the contract resulting from this application process shall not be interpreted to limit the COMMISSION’s right to approve subcontractors, assemble teams and/or assign leads. Each applicant will be evaluated independently for added value to the overall team. A copy of executed subcontract(s) related to Program funding must be provided to the COMMISSION.

7. The selected Contractor will be required to sign the contract at least two (2) weeks prior to the intended start date of the contract, as outlined in Terms of Contract section, to
assure the timely completion of the signature process by all parties. If the contract is not signed prior to the intended start date, the commencement of any activities under the Exhibit A – Scope of Work will not begin until the contract execution date (the date all parties have signed the contract) and Contractor will not be eligible to obtain reimbursement for any costs incurred prior to the contract execution date, unless otherwise approved by the COMMISSION in writing. If this Contract is not signed within the thirty-day (30) period from the intended start date, the COMMISSION has the right to withdraw the contract award. Any agreed upon changes to the intended start date must be confirmed in writing by both parties.

8. Unless otherwise submitted during the application process, the selected Contractor will be required to submit the required documentation listed on the Contractor Checklist, which includes, but not limited to, the following documents before the Contract can be fully executed:

- Agency Involvement in Litigation and/or Contract Compliance Difficulties Form
- Bylaws (if applicable)
- Articles of Incorporation (if applicable)
- Board of Directors or List of Partners (as applicable)
- Signature Authorization Form
- Form RRF-1 (required and filed annually with the California Attorney General’s Registry of Charitable Trusts) and IRS Form 990 (if applicable)
- Annual Independent Audit for prior fiscal year or calendar year (if applicable)
- Appropriate business licenses (for vendors or private organizations)
- IRS Letter of Determination (if applicable) and completed IRS Form W-9
- Memorandums of Understanding (for any sub-contractors, collaborators, and/or partners listed under Contracted Services and Evaluation sections of Appendix F – Budget Form)
- Certificates of Insurance for all insurance requirements outlined in the contract

9. Per the COMMISSION’s Policy and Guidelines for Hiring Consultants (Section 7), the total composite rate for a Consultant may not exceed $150 an hour. This means that the total cost of billable hours associated with a contract divided by the total number of hours billed must be equal to or less than $150. A blended rate is allowable. For example, for a contract totaling $150,000, a consultant may bill 500 hours for Consultant A at $200/hour, and 500 hours for Consultant B at $100/hour, with a total composite rate of $150/hour (1,000 total hours divided by $150,000 in billable hours = $150/hour).

10. The sample contract and contracting requirements are attached (Appendix J). If successful, the Contractor will be required to meet all of the terms and provisions set forth in these documents and within the timeframe identified.

X. APPENDICES

All appendices are included as separate attachments.