FIRST 5 LA
POLICY CONSULTANT POOL
REQUEST FOR QUALIFICATIONS (RFQ)

Los Angeles County Children and Families First – Proposition 10 Commission (aka First 5 LA)
Release Date June 8, 2012
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I) RFQ Timeline

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<td>Applicant Information Webinar</td>
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**RFQ Questions**

All questions must be submitted via email to Stacy Lee (slee@first5la.org). To ensure that all potential applicants receive the same information, questions and answers will be compiled and posted on the RFQ website. Once an application has been submitted, please do not contact First 5 LA for updates on the status of the application.

II) First 5 LA Background

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, the 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 more than $1 billion to support programs, initiatives, research, partnerships, public education and other endeavors in all four of its goal areas:

- Children are born healthy
- Children maintain a healthy weight
- Children are safe from abuse and neglect
- Children are ready for kindergarten

**The First 5 LA FY 2009-2015 Strategic Plan**

In 2009, First 5 LA’s Board of Commissioners adopted a new strategic plan to guide its

1 Note: All dates are subject to change at First 5 LA’s sole discretion.
investments through June 2015. The plan, *Strengthening Families and Communities in L.A. County*, marked a significant evolution in First 5 LA’s approach to grantmaking. In addition to a countywide approach that focuses on policy change, public education, workforce development and other strategies, the strategic plan also commits a sizeable portion of funds to improve the well-being of children in specific geographic communities.

The Commission selected 14 *Best Start* communities based on lessons learned from First 5 LA’s first decade and research, which shows that the role of safe and supportive neighborhoods is just as important to a young child’s quality of life as supportive and informed parents and caregivers.

This combined place-based and countywide approach allows the Commission to concentrate its limited resources in areas of high need and to sustain those efforts over time. The strategic plan will allow First 5 LA to continue focusing on strengthening families while deepening our commitment to fostering a community’s ability to create and sustain safe and nurturing places for children to grow.

**Figure 1: First 5 LA Prioritized Pathway**

In the Strategic Plan, the Commission identified a pathway for our investments that leads to our desired outcomes for children, families and communities in our four goal areas.
The Place-Based Approach, Best Start

The First 5 LA commissioners’ place-based approach focuses on the places where families live — combining efforts to strengthen families with those that build community capacity to create and sustain thriving and healthy environments for all children. The research and promising practices emerging from decades of place-based efforts make a strong case for First 5 LA’s shifting a significant amount of resources to this funding strategy. The place-based approach allows First 5 LA to focus on families most in need, creating a seamless pipeline to effectively serve families along the continuum of a child’s development. This approach also creates unique partnerships with families, community residents and other funders, resulting in a better measure of our impact.

Parents, civic and business leaders, members of the clergy, representatives from community-based organizations and others are working together to develop partnerships within each of the 14 communities. By June, each community partnership will have submitted proposals to the First 5 LA commissioners for future investments. These can include building safe parks, providing early childhood education programs or supporting other strategies that achieve Best Start’s primary goals that children in each community grow up safe, healthy and ready to learn.

To learn more about Best Start, visit www.beststartla.org.

Countywide Approach

The strategic plan also outlines the critical role of strong, coordinated and responsive systems in supporting families and improving outcomes for children prenatal through age 5. These systems include the actual structures through which health and human services are provided in L.A. County, as well as less formalized systems. By focusing on countywide systems improvement and change, strategic plan investments can have a widespread impact on children across the county, while, at the same time, helping to improve the sustainability of the place-based approach and outcomes. 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 the Best Start communities.

The countywide approach is a comprehensive effort through a variety of programs, strategies and initiatives. For example, First 5 LA is launching nearly two dozen commissioner-developed investments in areas such as autism identification and service referrals; early child care and education workforce development; nutrition and physical activity programs for families and child care facilities and parental support projects. In addition, among other strategies, First 5 LA continues to strive for increased access to health care and insurance for pregnant women, children and their families; provide telephonic or online and printed resource directories for families and support and enhance

the impact of our investments with effective, strategic partnerships and leveraging social
and financial capital via our newly-developed Community Investments Department.

Public Policy and Advocacy as a Countywide Strategy
First 5 LA works proactively to advocate for public policy improvements to achieve large
scale and lasting change in the lives of children 0-5 and their families. Public policy reform
is an important component of First 5 LA’s investments.

As stated in the strategic plan, the Commission’s policy efforts will be pursued through the
following activities:

- **Policy Development:** Our activities will include research and analysis of issues,
  proposals, and legislation; environmental assessments of the policy landscape; review of
  policy research; identification of barriers; and formulation of policy
  recommendations/positions. Convening and consulting experts and grantees, as well as
  engaging in coalitions and task forces will inform this work.

- **Issue Education:** Efforts to build public will among key stakeholders and the general
  public will include conducting issue education campaigns; sponsoring forums, trainings
  and policy conferences; publishing white papers, policy briefs and fact sheets; and
  collecting and sharing research to document the need for policy change.

- **Advocacy:** Our strategies will include convening and consulting stakeholders to
  collaborate on advocacy strategies; creating media visibility for policy positions;
  engaging grantees in issue education; communicating directly with policymakers; and
  promoting leadership development in advocacy in our targeted communities, as well as
  at the countywide levels.

- **Public Policy Grantmaking:** We will explore opportunities to fund others in
  support of First 5 LA’s policy goals, including funding for coalitions, projects to identify
  policy solutions, regional or local campaigns to build support for the Policy Agenda
  goals, professional advocates, leadership development in policy/advocacy, efforts to build
  media visibility on problems and potential solutions, and research to inform and create
  movement towards policy change related to the ten policy goals.

- **Collaboration:** First 5 LA recognizes the critical role partnerships and coalitions
  play in advancing our policy goals and improving systems. As such, First 5 LA will
  identify and actively participate in existing collaborations and seek out new and
  expanded partnerships and relationships with County agencies, other funders,
  nonprofits and community-based organizations.”

III) Policy Consultant Pool RFQ

The First 5 LA Policy Department is seeking applicants to be included in a pool of approved
consultants to support the Policy’s department’s work. This support may include a range of
diverse tasks, from relationship building with key decision-makers, policy strategy
assistance, policy communications strategies and other relevant policy tasks. To that end,
we are seeking a diverse set of skills to be represented in the pool reflective of skills that enhance and support the organization’s policy activities.

The sections below describe areas of qualification and expertise that we are seeking for the consultant pool, see section IV for complete application instructions.

A. Qualifications

1. Location
The applicant must be based in Los Angeles County or near Sacramento, CA; location may be a consideration in specific contract solicitations. Applicants may also need to be available to regularly attend meetings in the state Capitol. The applicant must also have the technological capabilities for efficient phone and email communication.

2. Areas of Expertise
In order to ensure that we are able to properly review and assess each applicant’s skills and expertise we are asking applicants to review the skill and expertise areas identified below in Table 1 and indicate the areas you wish to be considered for. In addition, we ask that applicants rank the areas of expertise they select with one representing their highest level of expertise relative to their selected areas of expertise. See Section IV Application for more details on ranking.

Table 1: Policy Strategy Skills & Expertise

- Developing strategies for and successfully navigating legislative offices to effectively educate and communicate policy issues and positions
- Developing strategies for and successfully navigating administrative offices to effectively educate and communicate policy issues and positions
- Expertise in executing legislative briefings and other events to raise awareness on priority issues
- Clear understanding of young children’s policy landscape
- Strong relationships and strategic insight related to effective messaging to members of one or both major political parties
- Strong relationships and strategic insight related to effective outreach to members of one or both major political parties
- Experience with development and sponsorship of legislation preferably on issues relevant to children 0-5 and their families
- Expertise in state budget process, preferably relevant to children 0-5 and their families
- Developing and implementing policy communications strategies for policymakers.
- Developing relationships with key news outlets and journalists interested in L.A. County, California and Federal policy issues affecting children 0-5 years of age.
- Planning and executing policy focused press relations campaigns including (but not limited to) media events, press release and news conferences, and editorial board meetings.
3. **Content Knowledge**

In order to ensure that we are able to properly review and assess each applicant’s content knowledge, applicants should select the areas of specific content knowledge from First 5 LA Policy Agenda as outlined in Table 2. Applicants are not required to rank these selections.

**Table 2: First 5 LA Policy Agenda: Policy Areas of Focus for Children 0-5**

(Please see Appendix A & B for full description of the First 5 LA Policy Agenda.)

- State budget funding for early childhood programs and services
- Health insurance
- Data systems integration and sharing of data
- Voluntary home visiting
- Breastfeeding
- Drug, alcohol and tobacco use by parents/caregivers
- Early identification and intervention
- Family strengthening principles and prevention practices in the child welfare system
- Early care and education program quality
- Prenatal to 5 workforce
- Healthy food and physical activity policies

**B. **Contracting Process**

Admittance into the Policy Department Consultant Pool will allow members to receive solicitations for contract opportunities from the department. First 5 LA will issue a solicitation to the pool members on a project by project basis. Pool members may respond to the solicitations that fit their areas of expertise and experience, in addition to considerations for availability and capacity to execute the project. Selected consultants may be required to submit additional documentation in order to complete the contracting process. If the contracting process takes more than ten business days, First 5 LA reserves the right to select another consultant from the pool. Please see Section VI - Terms of Participation & Contractual Considerations for more details.

Please note that consultants will be accepted into the pool for a one year period. However, the consultant pool will be open for new applicants on an as needed basis, with applications accepted at additional times during the year, as determined by the Commission.

At the end of the one year term, determined by the dates specified in the award letter received by the consultant, and coinciding with the enrollment process, consultants will be offered the opportunity to renew their membership in the pool for an additional year at the sole discretion of the Commission.

The term of the contracts issued to members of the pool will be no longer than one year. The First 5 LA Commission reserves the right at its sole discretion to extend the term of the contracts issued under this RFQ. A contract will not be issued with any member of the pool until work has been solicited. Participation in the pool is not a guarantee of a contract with First 5 LA, and consultants in the pool may exit at any time.
IV) APPLICATION: Statement of Qualifications

Required Documents:
The qualifications, including all required attachments, must be submitted online at www.first5la.org/Funding-Center no later than July 6, 2012 5 p.m. PST.

1. Cover letter: A cover letter introducing the applicant and clearly showing the applicant’s name and/or organization name, address, telephone number, e-mail address, the date, and a statement that the letter is in response to the RFQ for the Policy consultant pool. An original signed copy of the cover letter must be received at First 5 LA by the application deadline. Additionally, applicants will be required to upload a copy of the cover letter to the online application system;

2. Narrative application – Please provide the requested information in one separate document and attach with your online application.
   a. The ranked list of the applicant’s areas of expertise relevant to First 5 LA Policy work (based on Table 1) and add in additional areas that appear to be relevant to First 5 LA’s work. The list should only include areas within the applicant’s expertise and experience;
   b. Select one of the First 5 LA Policy Agenda (see Table 2 and Appendix A & B) goals you feel should be the top priority for the organization: 1) Explain why you selected the issue; and 2) describe the policy role/activities that you recommend First 5 LA engage in given its role as a public entity, funder and early childhood leader in Los Angeles County and the state; 3) describe what role you/your firm would play in executing that plan. (2 page maximum)
   c. Summaries of up to three previous projects the applicant feels best reflect their expertise and content knowledge most closely related to First 5 LA’s Policy Agenda. The summaries should include a brief overview of the project, the project goals and ultimate outcomes. Specify the applicants’ specific role in the project (1 page maximum per project);
   d. Please indicate if applicant is a registered lobbyist with the California Office of the Secretary of State and indicate if you are up-to-date on quarterly reporting filings, if applicable (registration as a lobbyist is NOT required in order to be accepted into the pool but may be a requirement for specific contract opportunities);

3. Résumé: Include the résumé of the applicant; if the application is for a firm, include résumés for key staff people who would lead or manage the projects with First 5 LA.

4. Client references: Names and contact information for at least three references from current and/or former clients. The applicant may not name a First 5 LA staff member as a reference. See Appendix C for an example of a client reference form;

5. Hourly rate form: Applicants must submit a form detailing their hourly rate. Per the Commission’s Policy and Guidelines for Hiring Consultants (Section VII), the total composite rate for a Consultant may not exceed $150 an hour. See Appendix D for the hourly rate form;
6. **Work samples:** Two (2) samples of applicant’s completed work products that are most applicable to the work that Policy will be undertaking in the course of the new strategic plan described above, and that best demonstrates the applicants’ competency in their declared area of expertise or knowledge domain.

7. **Signature Authorization Form** (one original SIGNED with BLUE INK): 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. See Appendix E. Original form must be received at First 5 LA by the RFQ deadline. An unsigned form or its omission will constitute an incomplete application and will be grounds for disqualification.

8. **Agency Involvement in Litigation and/or Contract Compliance Difficulties:** 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 (Appendix F).

9. **W-9 Form** (1 original SIGNED with BLUE INK): Applicants must submit a W-9 form directly to First 5 LA, and it must be received at First 5 LA by the RFQ deadline. All documents must be submitted through the online application system. In addition, as outlined above hard copies of the following 3 documents must be received by First 5 LA by **July 6, 2012 5 p.m. PST:** 1) Original and signed copy of the application cover letter, 2) First 5 LA’s “Signature Authorization Form,” and 3) Agency Involvement in Litigation Form. Submit these documents to:

Craig Steele, Interim CEO  
c/o Stacy Lee, Policy Manager  
First 5 LA  
750 N Alameda Street, Suite 300  
Los Angeles, CA 90012  
Attention: First 5 LA Policy Consultant Pool RFQ

V) **Review Criteria and Selection Process**

**General**

In order for applications to be considered acceptable and eligible for award they must be prepared in accordance with the instructions given in this solicitation. Individual applicants with an hourly rate greater than $150/hour will not be admitted into the pool. Provided that the application was submitted on time with all relevant materials, qualifications will be evaluated from a technical standpoint based on the applicant’s proven ability in their area of expertise as described in the criteria defined below.
Review Criteria & Process

Qualifications will be scored by a team of external reviewers. Please see Appendix G for a copy of the review tool that will be used to guide the scoring of applicants by the external reviewers. Qualified consultants that pass external review and agree to First 5 LA contract terms will be accepted into the consultant pool.

The Commission reserves the right to, without prejudice, reject any or all submitted qualifications.

Statement of Qualifications Review Process

1. **Level 1**: First 5 LA staff will review each application to ensure that basic requirements are met. Basic requirements include: timely receipt of application, format as required, inclusion of all appropriate attachments, etc. Proposals with omissions of any required documentation are subject to disqualification.

2. **Level 2**: Applications will be reviewed by a team of external reviewers using the Statement of Qualifications Review Tool posted with the RFQ (Appendix G). External reviewers are required to sign a Conflict of Interest and Confidentiality Statement.

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

Award notifications are anticipated to be sent out to consultants accepted into the consultant pool in August 2012.³

VI) Terms of Participation

1. **Acceptance into the consultant pool is not a guarantee of work.** For those consultants who are accepted into the consultant pool, work will be solicited based on First 5 LA needs. Policy staff will select a consultant from the pool based on qualifications and availability, and other criteria as specified at the time of the solicitation. The selected consultant and Policy staff will negotiate a scope of work and final budget during the contracting process.

2. The term of membership in this pool, and the term of any contracts issued to members of this pool is one year. The First 5 LA Commission reserves the right at its sole discretion to extend the term of the contracts issued under this RFQ. The consultant pool will be reassessed quarterly and consultants in the pool will be offered the opportunity to renew their membership at the end of their 1 year period in the consultant pool for an additional one year at the sole discretion of the Commission. Additionally, applications will be accepted for additional applicants to the pool on an as needed basis.

³ Note: All dates are subject to change at First 5 LA's sole discretion.
3. Consultants will not be bound to remain in the pool, and consultants may exit at any
time by mailing a signed, original letter to First 5 LA. Accepted consultants are not
bound to accept work solicited by First 5 LA. However, consultants in the pool will
be required to abide by the contractual considerations in this RFQ.

4. The Commission may, at its sole discretion, reject any or all submissions in response
to this RFQ. Please see Section I for information on the appeals process.

5. The Commission reserves the right to amend the Policy Consultant Pool as needed
to best meet the needs of all parties. At the Commission’s discretion, consultants
may be revised or removed.

VII) 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 will
all of the provisions in the attached sample contract (See Appendix H)

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.

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.

Contract Information
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.

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.

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 the COMMISSION.

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, Cash Flow Statement, Statement of Activities (Income Statement), and Statement of Financial Position (Balance Sheet).

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.

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.

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/Term of Grant 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 in writing by the COMMISSION. 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. The COMMISSION reserves the right to revise the effective date prior to final execution of the contract.

The contractor shall not be authorized to deliver or commence performance of services as described in this RFQ until final execution of the contract (contract must be signed by both parties). Final execution of the contract is contingent on First 5 LA’s Board approval of the negotiated scope of work and budget. Any performance of services commenced prior to obtaining all written approvals by First 5 LA shall be considered voluntary.
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
- By-laws (if applicable)
- Articles of Incorporation (if applicable)
- Board of Directors or List of Partners (as applicable)
- Signature Authorization Form
- 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)
- Completed IRS Form W-9
- Memorandums of Understanding (for any sub-contractors, collaborators, and/or partners listed under Contracted Services and Evaluation sections of Exhibit B – Budget Forms)
- Certificates of Insurance for all insurance requirements outlined in the contract.

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).

The selected contractor/s will be required to adhere to all contractual obligations as outlined in this document, including the First 5 LA Contract (See Sample Contract Appendix H). The selected applicant shall be expected to execute the contract without substantive alteration. If applicant cannot accept the terms of the contract without substantive alterations, the applicant should refrain from applying. It is imperative that all applicants review the contract language in detail and fully understand contractual obligations should they be selected.

**APPEALS POLICY**

First 5 LA reserves the right, without prejudice, to reject any or all submitted applications. An Appeal shall be permitted only on the grounds that the decision violated applicable law, First 5 LA policies and procedures, or the terms of the bid, RFP or RFQ. Appeals challenging First 5 LA’s decision on the merits or qualifications of bidders or proposers or the scoring of proposals shall not be permitted. An appeal of a First 5 LA decision shall be in writing and filed with the office of the CEO within ten (10) business days following the date the notification of decision is made by First 5 LA. For more information, please see First 5 LA’s Appeals Policy. (Appendix J)

**VIII) APPENDICES**

All Appendices are available on the RFQ website
Appendix A. First 5 LA 2010-15 Policy Agenda Brochure
Appendix B. First 5 LA 2010-15 Policy Agenda Full Description
Appendix C. Client Reference Form
Appendix D. Hourly rate form
Appendix E. Signature Authorization Form
Appendix F. Agency Involvement in Litigation Form
Appendix G. Statement of Qualifications Review Tool
Appendix H. First 5 LA Sample Contract
Appendix I. W-9
Appendix J. Appeals Policy