



First5LA.org

ANNUAL REPORTING CONSULTANT REQUEST FOR QUALIFICATIONS (RFQ)

Los Angeles County Children and Families First –
Proposition 10 Commission (aka First 5 LA)

RELEASE DATE: APRIL 6, 2020

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I. TIMELINE FOR SELECTION PROCESS¹

ACTIVITY	DATE
RFQ Released	4/6/21
Information Session	4/16/21
Final date to submit questions and requests for additional information	4/23/21
Posting of responses to questions	4/27/21
Proposal Due	4/30/21
Interviews	6/3/21 through 6/8/21
Contractor Selected	6/17/21
Contract Start Date	7/1/21

In order to respond to this Request for Qualifications (RFQ), the proposer must submit all required documents through the online application system designated by First 5 LA no later than **5 p.m. PST on 4/30/2021**. It is the proposer’s responsibility to verify submission prior to the deadline. First 5 LA will not be responsible for any technical problems or submission failure. **Failure to submit ALL required documents by 5 p.m. PT on 4/30/2021 may constitute an incomplete proposal and may be grounds for disqualification.**

Questions and requests for additional information must be submitted in writing to:

Daisy Ortiz, Contract Compliance Officer
E-mail: dortiz@first5la.org

All questions and requests for additional information regarding this RFQ must be received in writing by First 5 LA via email before **5 p.m. PST on 4/23/2021**. First 5 LA reserves the sole right to determine the timing and content of the responses to all questions and requests for additional information. First 5 LA may respond to individual inquires and then post replies to all questions by the posting date.

Potential proposers are highly encouraged to participate in the Informational webinar from **11:00 a.m. PST on 04/16/2021** to learn more about the RFQ requirements. Please register for the webinar at: <https://first5la.zoom.us/meeting/register/tJYrc--pqzMuGtNx1BDadZgHGdOtZqnHZLeU>.

After registering, you will receive a confirmation email containing information about joining the webinar. A recording of the webinar will also be made available on the Funding Opportunities webpage: <https://www.first5la.org/article/annual-reporting-consultant-request-for-qualifications-rfq/>

¹ Note: Dates are subject to change at First 5 LA’s sole discretion.

Please check the Funding Opportunities webpage regularly for updates and addenda. First 5 LA has the right to amend this solicitation by written addendum. First 5 LA is responsible only for that which is expressly stated in the solicitation document and any authorized written addenda thereto. Such addenda shall be made available via the online funding center. Failure to address the requirements of such addendum may result in the application not being considered, at the sole discretion of First 5 LA. Addenda to this solicitation, if any, will be posted on First 5 LA's website, which may be accessed by clicking <https://www.first5la.org/article/annual-reporting-consultant-request-for-qualifications-rfq/> It is the responsibility of proposers to ensure, prior to submission, that their application reflects the most recent information and RFQ requirements.

II. **BACKGROUND**

First 5 LA — Giving Kids the Best Start

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.

The First 5 LA 2020-28 Strategic Plan

In November 2019, First 5 LA's Board of Commissioners approved the [2020-28 Strategic Plan \(See Appendix A- First 5 LA's 2020-28 Strategic Plan\)](#) that boldly articulates the goal of the organization's "North Star" – that by 2028, all children in Los Angeles County will enter kindergarten ready to succeed in school and life. The new plan will help guide and accelerate all First 5 LA does to make a tangible difference in the lives of children today and tomorrow.

A) First 5 LA's Values

First 5 LA grounds its work in its **values**, that act as guiding principles for how it does its work, the culture it aims to promote, and as a benchmark to measure behaviors and performance:

- **Collaboration**: We promote a collaborative culture and strategies in all that we do.
- **Integrity**: We act in ways that reflect our Values and hold ourselves accountable for our behaviors and the outcomes of our work.
- **Learning**: We integrate learning into all aspects of our decision-making, commit to continuous improvement and share what we have learned.
- **Diversity, Equity and Inclusion**: We embrace the diversity of L.A County, advocate for fairness and promote systems that advance the full participation of young children and their families.

B) First 5 LA's Investment Guidelines

First 5 LA's Investment Guidelines serve as criteria for decision-making for all major components of the strategic planning process and as ongoing policy guidance for Board and staff during implementation. Together, the Investment Guidelines represent a "six-part identity statement for First 5 LA that explicitly

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prioritizes adopting an equity lens through our work and addressing the critical challenge of declining First 5 revenue:

- **Equity:** Prioritize children, families and communities in our target population that our work has the greatest potential to impact and advance our North Star.
 - Use data to elevate disparities and achieve equitable outcomes
 - Strengthen existing public systems to be child and family-centered
 - Incorporate the voice of families and communities in systems change
- **Sustainability:** Embed sustainability strategies within all of our work
 - Plan and operate within our fiscal reality
 - Create new revenue and fund leveraging strategies
 - Co-invest with partners
- **Partnership:** Engage partners throughout planning, development, and execution of our work
 - Demonstrate how committed partnerships are engaged and fundamental to our work
- **Prevention:** Focus on early intervention and prevention
 - Invest in early intervention and prevention as the primary focus of our work
 - Link downstream investments to prevention
- **System Change:** Focus on systems change and implementation to impact the most children and families.
 - Focus on strengthening existing systems; rather than creating new systems
 - Consider direct services only when there is significant potential to demonstrate models for scalability and sustainability
- **Evidence and Innovation:** Prioritize scaling up evidence-based practices, balanced with investments in innovative and promising approaches to address community needs
 - Pursue and test innovative and promising approaches, as necessary, to respond to community needs and achieve scale.

C) What's Needed to Make First 5 LA's North Star a Reality?

To reach its North Star, First 5 LA wants systems to work better for all families in L.A. County by making them more family-centered and child-focused with a focus on four results areas that include:

1. Families have the resources, opportunities, relationships and environments to optimize their child's development.
2. Children enter kindergarten without any previously unidentified developmental delays and connected to developmentally appropriate services and supports.
3. Children are safe from abuse, neglect, and other trauma.
4. Children have high quality early care and education (ECE) experiences prior to kindergarten entry.

First 5 LA will seek these results through policy change, practice change and public-will building. It will do so with diverse partners who share First 5 LA's aspirations for children and bring an intentional focus on equity for children and families facing disparities in outcomes and opportunities.

D) First 5 California Annual Report

The purpose of the First 5 California Annual Report is to provide a statewide summary of county commission revenues, expenditures, and population served as required by the California Children and Families Act (Proposition 10). On an annual basis, First 5 LA creates an annual report (AR) for submission to First 5 California in alignment with Proposition 10 requirements.

For more information regarding the First 5 California Annual Report, please visit [Annual Report Guidelines FY 2020-2021 \(ca.gov\)](#) or refer to Appendix B – First 5 California Annual Report Guidelines Fiscal Year 2020-21.

III. PROJECT OVERVIEW

First 5 LA is seeking proposals from individuals or organizations with the qualifications necessary to implement the annual reporting process and develop dissemination products that will support data use. The purpose of the annual reporting process is to comply with Proposition 10 requirements and to enable First 5 LA to hold itself accountable to its mission and vision for LA County children and families. The goals of the project are to:

1. Ensure First 5 LA maintains compliance with Proposition 10 reporting requirements through timely submission of required reporting to First 5 California.
2. Improve access and sharing of data related to First 5 LA's investments, reach, and impact with staff and local stakeholders by generating a local data brief.

The annual report (AR) work will provide First 5 LA with an overview of its contribution to improving conditions for young children and their families in L.A. County. First 5 LA's annual reporting includes data related to populations served, fiscal revenues and expenditures, completed evaluations, and qualitative success stories. The data reported through the AR process will also help First 5 LA examine the demographics of those served by its investments and identify any disparities to inform First 5 LA's future investments. Specifically, the dissemination of data disaggregated by race/ethnicity and geography will facilitate access by First 5 LA staff, grantees, and partners. Understanding the possible disparities elevated in First 5 LA's investments can also serve to inform First 5 LA's investment policies and practices.

IV. SCOPE OF WORK

The Annual Reporting Consultant's Scope of Work can be summarized into three main workstreams. The following describes each in turn:

1. The first workstream will implement the annual reporting process, including preparation and training, the collection and analysis of grantee data, development of an annual reporting codebook, and the submission of the reported data to the First 5 LA Board of Commissioners and First 5 California annual reporting online system (Activities 1-8).
2. The second workstream will include the development of an L.A. County Data Dissemination Product, such as a data brief, including collaboration with First 5 LA's Communications Team and a graphic design consultant. (Activities 9-10)

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3. The third workstream will compile qualitative annual report responses to support First 5 LA's use of stories in communications work. (Activity 11)

A) Major Activities

First 5 LA expects the contractor to complete the activities outlined below. Anticipated sub-tasks and deliverables are included in the Scope of Work Template (Appendix K).

Activity 1: Orientation and Learning

At the onset of the project, the contractor will attend a project launch meeting which will serve the purposes of reviewing contract and project management expectations, orienting the contractor to the AR process, orienting the contractor to the 2020-2028 Strategic Plan, 2020-2021 AR Guidance, and other internal AR documents, and identify action items, next steps and key decisions for a successful project launch.

Activity 2: Update Reporting Tools

The contractor will review First 5 LA's reporting tools and determine whether revisions are required in consideration of the 2020-2021 First 5 CA Annual Reporting Guidelines (See Appendix B for Annual Reporting Guidelines and Appendix C for FY19-20 Reporting Tool). The contractor will communicate the necessary revisions to First 5 LA and will implement the revisions. The contractor will test reporting tools as necessary. The contractor will ultimately ensure First 5 LA's reporting tools are up to date and aligned with current guidance.

Activity 3: Update Training Materials and Provide Training

Additionally, the contractor will review First 5 LA's annual report training materials to identify revisions to ensure alignment with revised reporting tools and current guidance (See Appendix D for FY19-20 Annual Reporting Survey Training materials). The contractor will communicate the necessary revisions to First 5 LA and will implement the revisions. The contractor will facilitate a minimum of two (2) trainings for First 5 LA staff. Trainings will focus on the Annual Reporting process, including purpose, goals, roles and responsibilities, and resources.

Activity 4: Collect AR Data from First 5 LA and Grantees

The contractor will collect annual reporting data from First 5 LA staff and First 5 LA grantees. The contractor will provide First 5 LA staff with technical assistance to identify the appropriate reporting tool for each grantee, and financial data will be gathered by the contractor from the First 5 LA Finance Team.

Additionally, the contractor will collect data from First 5 LA grantees via email by sharing the reporting tool and reporting instructions and other materials. Throughout data collection, the contractor will respond to First 5 LA grantee questions to ensure accurate responses to the reporting tool and will review the data for completeness and errors. The contractor will follow up with grantees directly and keep First 5 LA staff informed of any necessary corrections.

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Activity 5: Develop AR Codebook

First 5 CA and First 5 LA utilize different approaches to categorize investments. To ensure data quality and accuracy of reporting, the contractor will develop a codebook to align the First 5 CA AR coding system with First 5 LA's during the analysis of AR data. The purpose of the codebook is to ensure consistency in coding and reporting practices across fiscal years. The contractor will be responsible for implementing an approach to code alignment, documenting key assumptions and decisions, and facilitating the process for receiving feedback on the approach. The contractor will produce a finalized AR codebook which will be based on their experience implementing the reporting process.

Activity 6: Analyze AR Data

The contractor will analyze quantitative and qualitative data and produce summary statistics, including disaggregation by race/ethnicity and geography, and narrative success stories that capture key themes in the qualitative data.

Activity 7: Enter AR Data to State Reporting System

The contractor will enter the analyzed data into the First 5 CA reporting system. The contractor will download copies of completed reports in PDF format to provide to First 5 LA.

Activity 8: Develop AR Final Report Findings Presentation

The contractor will facilitate a meeting with First 5 LA to gain understanding and context for three First 5 LA Board of Commissioner's presentations: (1) Budget and Finance Committee, (2) Planning and Program Committee, and (3) Full Board of Commissioners. The discussion will include the presentations' purpose, audience, and requirements. The contractor will draft presentation materials and solicit feedback to iterate until the finalization and attend the First 5 LA Board of Commissioners meetings to answer questions as needed.

Activity 9: Develop L.A. County Data Dissemination Product Content

The contractor will lead the development of a lay-audience dissemination product, such as a data brief, that utilizes the AR reported data to highlight First 5 LA's work and investments in L.A. County, including disaggregation by race/ethnicity and geography. The contractor will plan and facilitate meetings with First 5 LA to discuss the vision and purpose of the dissemination product. This process will determine the content, structure, audiences, and dissemination process for the product. Additional data analysis will be required. The contractor will draft the content for the product and iterate it with feedback. This task will be concurrent with Task 10 to ensure coordination and alignment during the development process.

Activity 10: Maintain Coordination with First 5 LA Graphic Designer

The contractor will coordinate with First 5 LA's Communication Team and other agency partners for Graphic Design, by participating in coordination meetings, providing input on design templates, and providing finalized content for the L.A. County Data Dissemination Product.

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Activity 11: Construct a Finalized Data File for Data Mining

The contractor will gather input from First 5 LA staff to determine the most appropriate format to store the qualitative AR data to support data mining and data use. In addition, the contractor will implement the necessary steps to prepare the qualitative data for data mining.

Activity 12: Manage the Overall Project

The contractor will be responsible for project management and oversight of timely completion of milestones on an ongoing basis. Additionally, the contractor will schedule and facilitate regular check-in meetings with the PM to provide project updates. Satisfactory completion of deliverables will be used as a measure for evaluating performance of the scope of work.

B) Additional Activities

First 5 LA may require the contractor to perform additional activities related to the work described above. These activities may be incorporated in a revised project plan, budget, and scope of work, as appropriate. The contractor will furnish the necessary personnel, materials, services, and otherwise do all things necessary or incident to performing this research, unless otherwise stated in this document.

C) Summary of Activities and Deliverables

Activity	Deliverable(s)
Activity 1: Orientation and Learning	<ol style="list-style-type: none"> 1. One (1) memo summarizing orientation meeting action items, next steps, key decisions and agreements 2. One (1) list of First 5 LA and AR documents reviewed
Activity 2: Update Reporting Tools	<ol style="list-style-type: none"> 1. Documentation of recommended revisions to reporting tools and training materials 2. Draft reporting tools 3. Final reporting tools
Activity 3: Updating Training Materials and Provide Training	<ol style="list-style-type: none"> 1. Draft training materials 2. Final training materials 3. A minimum of two (2) training sessions
Activity 4: Collect AR Data from First 5 LA and Grantees	<ol style="list-style-type: none"> 1. Memo summarizing technical support provided during data collection phase 2. One (1) list of grantees that completed their responses 3. Follow-up thank you emails to grantees with copy of completed response in PDF format
Activity 5: Develop AR Codebook	<ol style="list-style-type: none"> 1. Draft outline for the codebook 2. Draft codebook 3. Final codebook

Activity	Deliverable(s)
Activity 6: Analyze AR Data	<ol style="list-style-type: none"> 1. Draft analysis plan 2. Final analysis plan 3. Downloaded and cleaned quantitative and qualitative data file(s) 4. Summary statistics and narrative success story
Activity 7: Enter AR Data to State Reporting System	<ol style="list-style-type: none"> 1. Draft Revenue and Expenditures Report (AR1) 2. Draft Demographics Report (AR2) 3. Draft Evaluation Summary and Highlights Report (AR3) 4. Final Report (AR1-3, PDF)
Activity 8: Develop AR Final Report Findings Presentation	<ol style="list-style-type: none"> 1. Draft of Budget and Finance Committee presentation and materials 2. Final Budget and Finance Committee presentation and materials 3. Draft of Programs and Planning Committee (PPC) presentation and materials 4. Final PPC presentation and materials 5. Revised presentation and materials for Full Board of Commission meeting
Activity 9: Develop LA County Data Dissemination Product Content	<ol style="list-style-type: none"> 1. One (1) memo that outline the purpose, audiences, content, and structure for the L.A. County Data Dissemination Product 2. Draft product content 3. Final product content
Activity 10: Maintain Coordination with First 5 LA Graphic Designer	<ol style="list-style-type: none"> 1. Mock-up of L.A. County Data Dissemination Product design template 2. Final L.A. County Data Dissemination Product design template 3. PDF of L.A. County Data Dissemination Product (final report)
Activity 11: Construct a Finalized Data File for Data Mining	<ol style="list-style-type: none"> 1. One (1) finalized data file to support data mining
Activity 12: Manage the Overall Project	<ol style="list-style-type: none"> 1. One (1) Project Plan

V. ELIGIBILITY

Proposers must meet the following minimum requirement(s):

- (1) Minimum of five (5) years of experience leading research projects, including conducting survey data collection, data cleaning and analysis, and carrying out data reporting processes.

Proposers that do not meet the minimum requirement(s) above will not pass the first level of review (see *Section VIII. Selection Process and Review Criteria*).

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VI. DESIRED QUALIFICATIONS

The following qualifications are desired:

Research Experience

- Experience developing and administering surveys
- Experience with quantitative and qualitative data cleaning and analysis
- Experience with document reviews
- Experience with developing and documenting codebooks and code definitions

Research Knowledge

- Knowledge of equity-focused research practices that document and elevate disparities, including analyzing and interpreting disaggregated data
- Knowledge of systems thinking, systems change initiatives, and approaches to systems research (please refer to [2020-28 Strategic Plan](#) for what these terms pertain to First 5 LA)

Research Dissemination

- Experience with reporting to government or funding agencies
- Experience producing findings, research briefs, and other products for a variety of audiences (technical and non-technical) to support local use of data
- Experience illuminating trends, themes, and opportunities across complex data
- Experience designing and implementing effective dissemination strategies

Collaboration

- Experience effectively facilitating trainings in virtual spaces
- Experience working with funders, grantees, and contractors

Content Knowledge

- General understanding of the context of Los Angeles County, including, but not limited to, racial inequities and issues related to diversity, equity, and inclusion.
- General understanding of issues that young children and families may experience in Los Angeles County

Project Management

- Experience successfully managing projects in complex and changing environments with competing priorities and deadlines that require flexible and nimble responses

VII. TERMS OF PROJECT

The project term is estimated to be up to 7 years (84 months) with an estimated project cost not-to-exceed \$74,000 per year. First 5 LA expects to enter an initial 12-month agreement with the selected proposer with an anticipated start date of July 1, 2021 subject to approval by the First 5 LA Executive Director.

The contract may be renewed annually at First 5 LA's sole discretion for up to 7 years. While there is no guarantee of a renewal, First 5 LA is seeking proposer's that can potentially continue beyond the estimated project term for annual reporting in future years. Contract renewal will be based on contractor performance, First 5 LA's business needs, and contingent upon approval by the First 5 LA Executive

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Director. First 5 LA reserves the right to terminate the contract if the quality of services are not to First 5 LA's satisfaction.

Additional contract reporting requirements and/or deliverables will be determined by First 5 LA during negotiations. First 5 LA may require the selected contractor to perform additional activities related to the scope of work described above in Section IV. The selected contractor will be responsible for furnishing the necessary personnel, materials, services, and technological capabilities for efficient communication (phone and email) needed to carry out all tasks as outlined in Section IV. Scope of Work.

First 5 LA will execute a deliverables-based contract which will include pre-determined, fixed-price deliverables consistent with the structure described in the introduction of Section IV. Scope of Work. Payments will be based on a fixed price that is not subject to any adjustment by reason of costs experienced by proposer in the performance of the contract. The duration, extension, renewal, and amendment of the contract may be contingent upon the First 5 LA Executive Director's approval.

It is expected that the proposed budget will be clearly justified in the budget narrative and will be appropriate to the work proposed. Travel expenses, if any, should not exceed 5% of the total project's budget. A final Scope of Work and Budget will be negotiated with the selected contractor and subject to approval by First 5 LA Executive Director.

First 5 LA will retain sole ownership of the primary data gathered and/or generated by the selected contractor during the life of the project and in consideration of all data sharing agreements for this project.

VIII. SELECTION PROCESS AND REVIEW CRITERIA

First 5 LA will review the proposers based on the multi-stage review process detailed below. Proposal must score satisfactorily in each level of review in order to move on to the next level of review or for final selection, as applicable.

Level 1 Internal Review:

First 5 LA will evaluate all proposals for completeness and minimum requirements. Basic requirements include: timely receipt of proposal, submission of all required attachments, and adherence to eligibility requirements. Proposals with omissions of any required documentation are subject to disqualification.

First 5 LA will also conduct a due diligence review which includes a review of the Litigation and Contract Compliance form and a review of whether proposer (that are current and former contractors, grantees and vendors) currently remain placed in non-compliant status by First 5 LA under any existing and past agreement with First 5 LA. If applicable, First 5 LA will evaluate past and current performance under a First 5 LA agreement to inform Level 1 review. First 5 LA reserves the right to request additional information, if needed, to validate eligibility and/or and minimum requirements.

Additionally, First 5 LA will conduct a conflict of interest review for proposers including subcontractors.

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Level 2 Proposal Review:

Proposers that pass Level 1 review will proceed to Level 2 review. Reviewers will score submissions using the Level 2 Review Tool listed as Appendix E. The Proposal Review Panel will be comprised of First 5 LA staff. Prior to beginning the review process, proposal reviewers will be assessed for conflicts of interest with proposers and sign a Conflict-of-Interest form to certify that there are no conflicts of interest. Reviewers will participate in a calibration session prior to finalizing scores. Proposers scoring highly in Level 2 Review will proceed to Level 3 Review.

Level 3 Interview:

Highly scoring submissions from Level 2 Review will proceed to Level 3 Review. Only key personnel on the proposed RFQ can participate in the interview. Tentative interview dates are included in *Section I: Timeline for Selection Process* and are subject to change at First 5 LA's sole discretion. Interviews will be held virtually through Zoom or similar platform. Members of the Interview Panel will be assessed for conflicts of interest with proposers and sign a Conflict-of-Interest form to certify that there are no conflicts of interest. Members of the Interview Panel will participate in a calibration session prior to finalizing scores. Further written materials may be requested prior to or after the interview. First 5 LA reserves the right to schedule additional interviews/meetings.

Award of Contract:

Proposer with the highest combined score from Level 2 and Level 3 will be recommended to First 5 LA's Executive Director for award of the contract.

IX. REQUIRED DOCUMENTS

The documents listed in this section are required to respond to this RFQ. Appendix F – Application Checklist is available to assist in application completion.

Omission of any document/form will constitute an incomplete proposal and may be grounds for disqualification. Applications that exceed First 5 LA's page limitation requirements will be adjusted by the removal of page(s) from the application. Pages will be removed before the Level 2: Proposal Review. The removed page(s) will not be made available to reviewers.

- **Online Application:** In order to respond to this RFQ, proposers must complete an online application form and submit all required documents specified below through the online application system. Proposers must set-up an online account in order to access the application form. Instructions on setting up the account and access the online application may be found at <https://www.first5la.org/article/annual-reporting-consultant-request-for-qualifications-rfq/>

To access the online application:

https://www.GrantRequest.com/SID_725?SA=SNA&FID=35347

- **Statement of Qualifications:** Provide a description of how the proposed project team's qualifications and experience aligns with the qualifications outlined in Section VI. Desired Qualifications and how these qualifications will contribute to accomplishing the work described in the Section IV. Scope of Work. In addition, provide a list of two (2) types of similar projects

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that were successfully concluded, including short descriptions of the work and any proposed personnel who were involved in those projects. The Statement of Qualifications should be a maximum of eight (8) pages single-spaced, size 12 font, with 1-inch margins.

- **Resumes or Curricula Vitae:** Include resumes or curricula vitae for key personnel who will exercise a major role in carrying out the work described in Section IV Scope of Work. Each resume or curricula vitae should be a maximum of three (3) pages.
- **Work Samples:** Provide two (2) samples of data briefs that demonstrate the proposer's approach and expertise. Each sample should be a maximum of six (6), not including the cover page. Excerpts of a longer data brief is permissible and counts as one work sample. Using Appendix J – Work Sample Cover Page, please provide a brief description of each work sample, including project background, work sample purpose and audience, and how the approach taken for said work sample may inform this project. In addition, please identify project team member(s) involved and specify their role in the creation of the work sample.
- **Scope of Work:** A draft Scope of Work has been provided for this project in Appendix K – Scope of Work. Refer to Section IV for required Scope of Work activities. Include specific team member name(s) in the Scope of Work template. Proposers are encouraged to add, delete, revise, expand and otherwise edit the activities and deliverables in the proposed Scope of Work to enhance the project so long as they remain consistent with the overall project purpose, goals, and budget. Activity timelines may be adjusted so long as the following three non-negotiable deliverable deadlines are met:
 - Final presentation materials for Project and Planning Committee (PPC) Meeting: Due September 2nd, 2021
 - Final presentation materials for Board of Commissioners Meeting: Due September 23rd, 2021
 - Final Report Submission to First 5 California: Due October 30th, 2021

As discussed in Section VII. Terms of Project, final Scope of Work and Budget will be negotiated with the selected contractor.

- **Proposed Budget:** Develop a budget organized by activity using the template provided (Appendix L – Proposed Budget). Instructions for completing the proposed budget template are included in Appendix H – Budget Instructions and a supplemental tool to support budget development is included in Appendix I. The proposed budget should include costs for deliverables produced in Activities 1 through 12 as specified in Section IV. Scope of Work, as well as activities associated with any revisions to the Scope of Work made by the proposer. The proposed budget should be reflective of the initial 12-month agreement period (July 1, 2021- June 30, 2022) and should not exceed \$74,000. Travel expenses, if any, should not exceed 5% of the total project's budget. As discussed in Section VII. Terms of Project, final Scope of Work and Budget will be negotiated with the selected contractor.
- **Budget Narrative:** Include a budget narrative using the template provided in Appendix M – Budget Narrative to accompany the budget. The budget narrative should justify the cost of the proposed work by supplementing the information provided in the budget and SOW documents. The budget narrative should be a maximum of eight (8) pages single-spaced, size 12 font, with 1-inch margins.

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- **Litigation and Contract Compliance Form:** Please read the information on the required Litigation and Contract Compliance form thoroughly and include a signed copy by the proposal deadline (see Appendix N). If you checked “Yes” to any of the questions on this form, please explain whether this will impact the project on this solicitation. Omission of the form will constitute an incomplete proposal and may be grounds for disqualification.
- **Business License** (if applicable)

Failure to submit all required attachments may constitute an incomplete proposal and may be grounds for disqualification. Proposers are responsible for any errors and omissions in their proposals and applications. In order to respond to this RFQ, please complete and submit your proposal and all required documents to First 5 LA no later than **5:00 PM PST on 4/30/2021**. **Proposals received after this deadline will not be considered.** It is the responsibility of the proposer to ensure, prior to submission, that its proposal reflects the requirements of this solicitation. Proposers should not wait to submit documents through the online application system minutes before the closing time. First 5 LA will not be responsible for any delays proposers may encounter with the online application system due to multiple proposers uploading documents before the closing time.

X. TERMS OF THE RFQ

First 5 LA has the right to amend this solicitation by written addendum. First 5 LA is responsible only for that which is expressly stated in the solicitation document and any authorized written addenda thereto. Such addenda shall be made available via the online funding center. Failure to address the requirements of an addendum may result in the proposal not being considered, at the sole discretion of First 5 LA. It is the responsibility of proposers to ensure, prior to submission, that their application reflects the most recent addenda information and RFQ requirements. Addenda to this solicitation, if any, will be posted on First 5 LA’s website at <https://www.first5la.org/news-resources/funding-center/>.

First 5 LA reserves the right to reject all proposals and re-solicit for proposals. Failure to comply with proposal specifications shall be grounds for disqualification of proposals. Each proposer shall be required to honor the price and specifications quoted for a minimum of sixty (60) calendar days following submission of the proposal. First 5 LA also reserves the right to cancel this RFQ, in its sole discretion, at any time before execution of a contract.

First 5 LA shall not be liable for any costs incurred in connection with a proposer’s preparation of a submission in response to this RFQ. Any cover letters, résumés and curriculum vita, including attached materials, submitted in response to this RFQ shall become First 5 LA’s property and subject to public disclosure.

Each submission shall be retained for official files and will become public record upon submittal unless the submission or specific parts of the submission can be shown to be exempt from disclosure by law. The budget, scope of work, and other contractual information may be included in board materials which are made public if the contract requires board approval. Each proposer may clearly label parts of a proposal as “CONFIDENTIAL” if the proposer thereby agrees to indemnify and defend First 5 LA for honoring such a designation. The failure to so label any information that is released by First 5 LA shall constitute a complete waiver of all claims for damages caused by any release of the information. If a public records request for information labeled confidential is received by First 5 LA, First 5 LA will notify the proposer of the request. Within seven (7) calendar days after First 5 LA’s notification to the

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proposer, it will be the proposer's duty to act in protection of the labeled information. The proposer's failure to so act shall constitute a complete waiver.

The proposer agrees that, by submitting application proposal, the proposer authorizes First 5 LA to verify any or all information and/or references submitted in the proposal.

False, misleading, incomplete, or deceptively unresponsive statements in connection with a proposal shall be sufficient cause for rejection of the proposal at any time. The evaluation and determination in this area shall be at First 5 LA's sole judgment.

First 5 LA may elect to waive any minor irregularity in a proposal if the sum and substance of the proposal is present.

First 5 LA may, at its discretion, request that the Contractor undertake additional, unanticipated, activities that are aligned to the project objectives of this RFQ and incorporate such activities into the final Scope of Work and Budget, if applicable.

XI. CONTRACTUAL CONSIDERATIONS

The successful proposer must sign and adhere to the provisions of the First 5 LA Contract (see sample Contract - Appendix G). The successful proposer must execute the Contract without substantive alteration. All proposers must review the sample Contract in detail and fully understand the contractual obligations described in the Contract, including all insurance requirements. If a satisfactory agreement cannot be negotiated within 30 days of award, First 5 LA may, at its sole discretion, begin negotiations with the next qualified proposer, as determined by First 5 LA. First 5 LA may, after contract award, amend the awarded contract, scope of work and any other exhibits in accordance with the terms of the contract and as needed throughout the contract term to best meet the needs of First 5 LA.

Current and former First 5 LA grantees, contractors and vendors must be in good standing and compliant with all aspects of current and former agreements with First 5 LA in order to be eligible to respond to this RFQ. First 5 LA may deem a proposer ineligible to respond to this RFQ if it finds, in its sole discretion, that the proposer has done any of the following: (1) violated any term or condition of a First 5 LA agreement; (2) committed any act or omission, or engaged in a pattern or practice, that negatively reflects on the proposer's quality, fitness or capacity to perform services listed in this RFQ; (3) committed an act or offense that indicates a lack of business integrity or business dishonesty; or (4) made or submitted a false claim to First 5 LA or any other public entity.

As stewards of public funds [First 5 LA's Funding Guidelines](#) are intended to provide information about the restrictions on the use of First 5 LA funds. Although these Funding Guidelines are applicable generally, the terms of individual funding agreements will always take precedence over these guidelines.

The award of a contract by First 5 LA to an individual/agency/organization that proposes to use subcontractors for the performance of work under the contract resulting from this RFQ process shall not limit First 5 LA's right to approve subcontractors, assemble teams and/or assign leads. Each proposer 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 First 5 LA.

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First 5 LA, in its sole discretion, may conduct an evaluation of this project. Contractors will be required to comply with First 5 LA's evaluation and any requests for information arising out of such evaluations within the timeframe specified by First 5 LA.

If the awarded contract is not signed prior to the intended start date, the commencement of any activities under the contract's Scope of Work/Performance Matrix (Exhibit A) will not begin until the contract execution date (the date all parties have signed and delivered the contract) and the successful proposer will not be eligible to obtain reimbursement for any costs incurred prior to the contract execution date, unless otherwise approved in writing by First 5 LA. If the awarded contract is not signed by the successful proposer within thirty (30) calendar days from the proposed intended start date, First 5 LA may withdraw the contract award. First 5 LA may revise the proposed effective date prior to final execution of the awarded contract.

If the value of the contract is \$75,000 or more in the aggregate in any fiscal year, the award and execution of the contract is subject to First 5 LA's Board approval. Any performance of services commenced prior to obtaining all written approvals by First 5 LA shall be considered voluntary.

The Contractor shall ensure that the Contractor, its employees and subcontractors, as well as the participants in any program or service conducted hereunder, comply with all applicable federal, State and local public health orders to protect against the spread of the COVID-19 virus or other public health threat, including, without limitation, maintaining social distancing requirements, avoiding unnecessary or non-essential gatherings, and providing or requiring personal protective devices such as face masks, gloves and cleaning supplies.

Unless otherwise submitted during the RFQ process, the successful proposer will be required to submit additional required documentation including, but not limited to, the following documents before the awarded contract can be fully executed:

- Litigation and Contract Compliance 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 Determination Letter for non-profit status (if applicable)
- Completed IRS Form W-9
- Memorandums of Understanding and Subcontracts (for any sub-contractors, collaborators, and/or partners)
- Certificates of Insurance for all insurance requirements outlined in the sample Contract.

It is First 5 LA's intent to contract with independent contractors as defined under California's AB 5 and not to create an employer/employee relationship.

XII. APPEALS POLICY

First 5 LA reserves the right, without prejudice, to reject any or all submitted proposals. 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 this RFQ. Appeals challenging First 5 LA's decision on the merits or

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qualifications of 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 Executive Director, or his or her designee, within ten (10) business days following the date the notification of decision is made by First 5 LA. For more information, please refer to the Appeals Policy located at <https://www.first5la.org/policies/>.

XIII. APPENDICES

For Informative Purposes:

- Appendix A – First 5 LA 2020-2028 Strategic Plan
- Appendix B – First 5 CA Annual Reporting Guidelines FY2020-21
- Appendix C – First 5 LA FY19-20 Reporting Tool
- Appendix D – First 5 LA Annual Reporting Survey Training materials FY19-20
- Appendix E – Level 2 Review Tool
- Appendix F – Application Checklist
- Appendix G – Sample Contract
- Appendix H – Budget Instructions
- Appendix I – Supplemental Budget form for Negotiations

For Submission:

- Appendix J – Work Sample Cover Page
- Appendix K – Scope of Work Template
- Appendix L – Proposed Budget Template
- Appendix M – Budget Narrative
- Appendix N – Litigation and Contract Compliance Form