**Appendix K Scope of Work Template**

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| **Project Description:** *The selected contractor will be responsible for implementing the First 5 annual reporting process and support the development of dissemination products that will support data use. The goals of the project are to improve access and sharing of data related to First 5 LA’s investments, reach, and impact with staff and local stakeholders and ensure First 5 LA maintains compliance with Proposition 10 reporting requirements. The selected contractor will complete the annual reporting process, develop an LA County Data Brief, and develop a finalized data file for data mining. The objectives outlined below will contribute to the achievement of the project goals.* |

| Agreement Number: |  |
| --- | --- |
| Agency Name: |  |
| Project Name: | **Annual Reporting** |
| Project Length: | **12 months** |
|  |  |

| Agreement Period: | **July 1, 2021 – June 30, 2022** |
| --- | --- |
| Revision Date: |  |
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| **Objectives**Include who, what, when, where, how and how much for each objective. | **Activities and Subtasks**Indicate the activities and subtasks leading to the fulfillment of the objective. Include benchmarks or milestones in chronological order. Include the appropriate quantity or frequency of the associated activities or subtasks. | **Staff Assignment**Indicate staff, consultants or subcontractors responsible for the respective activity or subtask. | **Timeline**Indicate start and end period. | **Deliverables**Indicate Date Due.  |
| --- | --- | --- | --- | --- |
| Prepare materials and provide training to ensure reliable and valid AR data collection process. | **Activity 1: Orientation and Learning**1. Gather and review information and documentation on the First 5 Annual Report 2020-2021 Guidance, First 5 LA 2020-2028 Strategic Plan, the First 5 AR platform, and F5LA AR internal documents
2. Attend a project launch meeting for the purpose of orientation to the project with Project Manager (PM)
 |  | July 1, 2021 – August 6, 2021 | **Activity 1: Orientation and Learning**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
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| **Activity 2: Update Reporting Tools** 1. Update reporting tools in alignment with 2020-2021 First 5 California Annual Report Guidance
2. Test and revise reporting tool, as necessary
 |  |  | **Activity 2: Update Reporting Tools and Training Materials**1. Documentation of recommended revisions to reporting tools
2. Draft reporting tools
3. Final reporting tools
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| **Activity 3: Update Training Materials and Provide Training**1. Update annual report training materials for Program Officers and/or grantees which may include but is not limited to report instructions (Decision Tree), training/webinar PowerPoint slides.
2. Facilitate at least two (2) trainings for First 5 LA staff via Zoom or similar platform
 | **Activity 3: Update Training Materials and Provide Training**1. Draft training materials
2. Final training materials
3. A minimum of two (2) training sessions
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| Collect reliable and valid data on First 5 LA’s past fiscal year’s investments, impact, and accomplishments. | **Activity 4: Collect AR Data from First 5 LA and Grantees**1. Collect First 5 LA-funded grantees for 2020-2021 list from Contracts And Purchasing Team
2. Collect financial data (revenues, expenditures, fund balance, and net change in fund balance) from Finance Team
3. Collect AR reporting data from First 5 LA grantees via email including survey link, instructions, materials, and direction to contact Program Officers with questions
4. Download AR data and review for matching totals
5. Follow up with grantees for error correction, as needed
6. Provide ongoing communication to First 5 LA staff.
 |  | August 1, 2021 – August 31, 2021 | **Activity 4: Collect AR Data from First 5 LA and Grantees**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
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| Clean and process data collected for the AR and conduct a rigorous analysis of the data to document First 5 LA’s past fiscal year’s investments, impact, and accomplishments. | **Activity 5: Develop AR Codebook** 1. Prepare an outline for the codebook
2. Prepare draft codebook for AR data fields including documentation of the assumptions and decisions made when matching First 5 CA and First 5 LA
3. Facilitate a meeting to solicit feedback
4. Iterate and finalize the AR Codebook
 |  | August 1, 2021 – September 9, 2021 | **Activity 5: Develop AR Codebook** 1. Draft outline for the codebook
2. Draft codebook
3. Final codebook
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| **Activity 6: Analyze AR Data** 1. Create a draft and final data analysis plan
2. Analyze AR data in adherence to reporting requirements set by First 5 AR Guidance
3. Draft “Success Story” drawn from qualitative data and solicit feedback
4. Finalize “Success Story” for AR system entry
 | **Activity 6: Analyze AR Data and Administrative Data**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
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| Disseminate findings to First 5 LA Board of Commissioners and ensure timely submission of AR to First 5 CA. | **Activity 7: Enter AR Data to State Reporting System**1. Enter Financial (County Revenue and Expenditure Summary) Data into State Commission online system (AR1)
2. Enter Demographic (County Service Demographic) Data into State Commission online system (AR2)
3. Enter Evaluation (County Evaluation Summary and Highlights) Data into State Commission online system (AR3)
4. Download and compile copies of reports and submit to First 5 California State System
 |  | August 15, 2021 – October 30,2021 | **Activity 7: Enter AR Data to State Reporting System**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)
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| **Activity 8: Develop AR Final Report Findings Presentation**1. Facilitate a meeting with the Project Manager to align the purpose and intended audience for the presentation and materials
2. Prepare a draft of presentation materials (PowerPoint, AR handouts) for Project Manager to present the final report to the First 5 LA’s Board of Commissioners (Projects and Planning Committee (PPC) and Full Board)
3. Gather feedback and iterate to finalize presentation materials
 | **Activity 8: Develop AR Final Report Findings Presentation**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
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| Develop an L.A. County Data Dissemination Product Content to support local use of AR data | **Activity 9: Develop L.A. County Data Dissemination Product Content**1. Facilitate meeting with Project Manager & Communications Office to discuss vision and purpose
2. Determine content, structure, audiences and dissemination process with First 5 LA
3. Perform additional data analysis, as needed
4. Draft product content and iterate with feedback
5. Finalize product content
 |  | November 1, 2021 – June 30, 2022 | **Activity 9: Develop LA County Dissemination Product Content**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

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| **Activity 10: Maintain Coordination with First 5 LA Graphic Designer**1. Participate in kick-off meeting with First 5 LA Communication team and other agency partners for graphic design
2. Participate in meetings with First 5 LA Communication team and other agency partners for graphic design, as needed
3. Review draft design templates and provide input
4. Supply completed content to First 5 LA Communications team and agency partners for graphic design
5. Collaborate with First 5 LA Communication team and other agency partners for graphic design to finalize L.A. County Data Dissemination Product
 |  |  | **Activity 10: Maintain Coordination with First 5 LA Graphic Designer**1. Mock-up of the L.A. County Data Dissemination Product design template
2. Final L.A. County Data Dissemination Product design template
3. PDF of final L.A. County Data Dissemination Product
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| Create an accessible dataset(s) to support First 5 LA’s continued use of qualitative data | **Activity 11: Construct a Finalized Data File for Data Mining**1. Gather input from First 5 LA staff on format of data file to support data use
2. Prepare and organize the data in an efficient and effective manner
3. Format data file to facilitate future updates
4. Specify guardrails and variables to be included
 |  | November 1, 2021 – June 30, 2022 | **Activity 11: Construct a Finalized Data File for Data Mining**1. One (1) finalized data file to support data mining
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| Achieve all aspects of project management, including communication with First 5 LA staff and grantees participating in the project, as appropriate, and oversight of timely completion of milestones | **Activity 12: Manage the Overall Project**1. Develop a project plan that includes tasks, timelines, milestones, and approach to timely completion of the project
2. Schedule and facilitate project meetings for regular check-in’s and progress updates
3. Notify and problem-solve with the PM, as needed
 |  | July 1, 2021 – June 30, 2022 | **Activity 12: Manage the Overall Project**1. One (1) Project Plan
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