

ANNUAL REPORTING CONSULTANT REQUEST FOR QUALIFICATIONS (RFQ)

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THIS WEBINAR WILL BE RECORDED




All questions (3) My questions (3)

MG Marilu Guzman (Yo... 08:15 AM
How's your day going?
🔊 This question has been answered live

MG Marilu Guzman (Yo... 08:15 AM
What high school did you go to?

MG Marilu Guzman (Yo... 08:15 AM
Type your question here... 

☒ Send anonymously Cancel Send

- **This webinar is being recorded.**
- **Questions:** Please submit questions via the Q&A  throughout the presentation.
- **This webinar's slides and recording will be posted:** <https://www.first5la.org/article/annual-reporting-consultant-request-for-qualifications-rfq/>

Agnieszka Rykaczewska, Manager of
Evaluation & Learning
Office of Data For Action



Daisy Ortiz, Contract Compliance Officer
Contract Administration & Purchasing Department



1. About First 5 LA
2. Project Overview:
 - Background Information
 - Scope of Work
 - Terms of the Project
3. Eligibility and Desired Qualifications
 - Eligibility
 - Summary of Desired Qualifications
4. Required Documents
 - Required Documents
 - Selection Process and Review Criteria
5. Timeline
6. Q & A



1. About First 5 LA

- Public agency created by voters in 1998, funded exclusively by a tax on cigarettes
- Focused on kids prenatal to age 5
- Prioritizing kids because 90% of the brain is developed by age 5
- First 5 LA pivot from a funder of direct services to an agent of systems change in 2015
- Funder, advocate, convener, collaborator, catalyst and communicator of child and family needs and strategies that make a difference in their lives



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.



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:



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.

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 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.

2. Project Overview

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 dissemination product.



Background

- Requirement of California Children and Families Act (Proposition 10)
- Statewide summary of:
 - Revenues by County Commissions
 - Expenditures by County Commissions
 - Populations Served by County Commissions
- Each County Commission reports to F5CA, which aggregates the data to create the statewide summary

- Includes data related to:
 - Populations served (including key demographics)
 - Fiscal revenues and expenditures
 - Evaluations completed by First 5 LA
 - Qualitative success stories
- This data is collected from First 5 LA staff and grantees

Scope of Work

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1. 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. Development of an L.A. County Data Dissemination Product, such as a data brief, including collaboration with First 5 LA's Communications Team and agency partners for graphic design. (Activities 9-10)
3. Compile qualitative annual report responses to support First 5 LA's use of stories in communications work. (Activity 11)

Activity 1: Orientation and Learning

Subtasks:

- 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).

Deliverables:

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

Subtasks:

- 1) Update reporting tools in alignment with 2020-2021 First 5 California Annual Report Guidance
- 2) Test and revise reporting tool, as necessary

Deliverables:

1. Documentation of recommended revisions to reporting tools
2. Draft reporting tools
3. Final reporting tools

Activity 3: Update Training Materials and Provide Training

Subtasks:

- 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

Deliverables:

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

Subtasks:

- 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.

Deliverables:

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

Subtasks:

- 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

Deliverables:

1. Draft outline for the codebook
2. Draft codebook
3. Final codebook

Activity 6: Analyze AR Data

Subtasks:

- 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

Deliverables:

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

Subtasks:

- 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

Deliverables:

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

Subtasks:

- 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 Board of Commissioners)
- 3) Gather feedback and iterate to finalize presentation materials

Deliverables:

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 Board of Commission meeting

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

Subtasks:

- 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

Deliverables:

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

Subtasks:

- 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

Deliverables:

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

Activity 11: Construct a Finalized Data File for Data Mining

Subtasks:

- 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

Deliverables:

1. One (1) finalized data file to support data mining

Activity 12: Manage the Overall Project

Subtasks:

- 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

Deliverables:

1. One (1) Project Plan

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Terms of the Project

- 12-month agreement
- Project term – Estimated to be up to 7 years (84 months) with an estimated project cost not to exceed \$74,000 per year. The contract may be renewed annually at First 5 LA's sole discretion.
- Anticipated start date – July 1, 2021.
- This project has a fixed-price deliverables budget.
- 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 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.



3. Eligibility Requirements and Desired Qualifications

Proposers must meet the following minimum requirement(s):

Annual Reporting Consultant:
(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.

The following qualifications are desired for the:

Annual Reporting Consultant:

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

The following qualifications are desired for the:

Annual Reporting Consultant:

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



4. Required Documents and Selection Process



Appendix F Application Checklist

The following checklist outlines all items to be provided in response to the RFQ. This checklist is for applicant use only and does not need to be submitted to First 5 LA. If any of the following items are omitted from the application, the application will be considered incomplete and will not be reviewed. If documents exceed the maximum page limit, they will not be reviewed. Please review all documents carefully and check off each item before submitting your proposal.

- ☐ 1. Online Application
- ☐ 2. Statement of Qualifications (Maximum of eight (8) pages single-spaced, size 12 font, 1-inch margins)
- ☐ 3. Resumes or Curricula Vitae for Proposed Key Staff (Maximum Three (3) pages each)
- ☐ 4. Two (2) Work Samples (Maximum of six (6) pages per work sample. Excerpts are permissible) and Work Sample Cover Page – Appendix J
- ☐ 5. Proposed Scope of Work – Appendix K
- ☐ 6. Proposed Budget – Appendix L
- ☐ 7. Budget Narrative – Appendix M (Maximum of eight (8) pages single-spaced, size 12 font, 1-inch margins)
- ☐ 8. Litigation and Contract Compliance Form (Appendix N)
- ☐ 9. Business License (if applicable)

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



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Request for Qualifications (RFQ) for Annual Reporting Consultant. Please answer the following questions:

Do you or your organization have a 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?

-Select One- ▾

Submit

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Organization Information

[Printer Friendly Version](#) | [E-mail Draft](#)

Required before final submission

Request for Qualifications (RFQ) for: Annual Reporting Consultant

Organization Name

Address

* City:

* State:

* Zip Code:

Organization Primary Contact Information

Prefix

- Select One - ▾

* First Name

* Last Name

Required Documents: 1. Online Application

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Attachments

[Printer Friendly Version](#) | [E-mail Draft](#)

Please upload the following documents (PDF, Word or Excel files accepted). Required documents that consist of multiple pages must be combined into one document and then upload. For example, if you are submitting multiple Memoranda of Understandings (MOUs) you must save all MOUs into one document and then upload. This is also the case for excel files (xlsx) with multiple sheets, be sure to upload the document in it entirely.

- 1. Statement of Qualifications (Maximum of 8 pages)
- 2. Resumes or Curricula Vitae
- 3. Work Sample 1 (Appendix J)
- 4. Work Sample 2 (Appendix J)
- 5. Scope of Work (Appendix K)
- 6. Proposed Budget (Appendix L)
- 7. Budget Narrative (Appendix M)
- 8. Litigation and Contract Compliance Form (Appendix N)
- 9. Business License (if applicable)

In order to respond to this RFQ an application packet complete with required documents must be received by First 5 LA before the closing of this solicitation.

Upload

The maximum size for all attachments combined is 1,000 MB. Please note that files with certain extensions (such as ".exe", ".com", ".vbs", or ".bat") cannot be uploaded.

Title:	1. Statement of Qualifications(Required)
File Name:	2. Resumes or Curricula Vitae (Required)
	3. Work Sample 1 (Appendix J) (Required)
	4. Work Sample 2 (Appendix J) (Required)
	5. Scope of Work (Appendix K) (Required)
	6. Proposed Budget (Appendix L) (Required)
	7. Budget Narrative (Appendix M) (Required)
	8. Litigation and Contract Compliance Form (Appendix N) (Required)
	9. Business License (if applicable)

[Save & Finish Later](#)

[Review & Submit](#)

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 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.

Required Documents: 4. Work Samples (Appendix J)

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Appendix J Work Sample 1 Cover Page

Proposers are to submit two work samples from completed projects that demonstrate approach and expertise. Use this cover page to provide a brief description; submit one cover page per work sample; maximum of six (6) pages per work sample not including the cover page. Excerpts are permissible.

Title of work sample: Brief description of the work sample, including project background, work sample purpose and audience, and how the approach taken for said work sample may inform this project.	
Identify project team member(s), if any, involved in the creation of the work sample by: 1) Full Name; 2) Role in the creation of the work sample.	



Work Sample 2 Cover Page

Proposers are to submit two work samples from completed projects that demonstrate approach and expertise. Use this cover page to provide a brief description; submit one cover page per work sample; maximum of six (6) pages per work sample not including the cover page. Excerpts are permissible.

Title of work sample: Brief description of the work sample, including project background, work sample purpose and audience, and how the approach taken for said work sample may inform this project.	
Identify project team member(s), if any, involved in the creation of the work sample by: 1) Full Name; 2) 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.



APPENDIX K – SCOPE OF WORK TEMPLATE

Agreement Number:

Agreement Period: **July 1, 2021 – June 30, 2022**

Agency Name:

Revision Date:

Project Name: **Annual Reporting**

Project Length: **12 months**

Appendix K Scope of Work Template

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.*

Objectives	Activities and Subtasks	Staff Assignment	Timeline	Deliverables
Include who, what, when, where, how and how much for each objective.	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.	Indicate staff, consultants or subcontractors responsible for the respective activity or subtask.	Indicate start and end period.	Indicate Date Due.
Prepare materials and provide training to ensure reliable and valid AR data collection process.	Activity 1: Orientation and Learning <ol style="list-style-type: none"> 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 <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

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.



Contract # tbd
Contract Period July 1, 2021 - June 30, 2022

Agency Name: _____

Project Name: Annual Reporting Consultant

Month/Period	Task #	Task Description	Deliverable	Payment Amount	Task total
		MAJOR TASK 1 FROM SCOPE OF WORK			\$ -
		ADD SUB-TASK DESCRIPTION	ADD ROWS AS NEEDED		
		MAJOR TASK 2 FROM SCOPE OF WORK			\$ -
		CURRENT YEAR TOTAL		\$ -	\$ -

OTHER DIRECT COSTS (if applicable)	
E.g. Travel	\$ -
E.g. Parking	\$ -
E.g. Printing	\$ -
	\$ -
TOTAL	\$ -

TOTAL TASKS/DELIVERABLES	\$ -
TOTAL OTHER DIRECT COSTS	\$ -
TOTAL COST (All Tasks)	\$ -

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.



Appendix M Budget Narrative Template

Overview

In this section, please provide an overview of your approach to developing your budget. If there are any assumptions you made during your budget calculations that would be important for the proposal reviewers to know, please include those.

Please complete the table below and include all the proposed staff for this project, the project task(s), expected time commitment and a description of their role on the project.

Proposed Staff Name and Title	Project Activities	Expected Time Commitment (%)

Activities

Please complete the following sections for each activity in your budget.

Activity X: INSERT NAME OF ACTIVITIES
Provide a brief overview of the task described.

Deliverables

In this section, provide a list of deliverables related to this task.

Labor


In this section, include a description of the staff who will be contributing to this activity, the work needed to complete the deliverables associated with this activity, and the hours dedicated to this activity.

Other Direct Costs

In this section, describe additional direct costs related to this activity that are not captured in other sections. Some examples of these types of costs to consider would include any subcontracts, travel costs, printing, phone charges and office supplies.

Please read the information on the required Litigation and Contract Compliance form (**Appendix N**) thoroughly and include a signed copy by the proposal deadline.

- ✓ If you checked “Yes” to any of the questions on this form, please explain the circumstances for the response and explain whether this will impact the project on this solicitation.



LITIGATION AND CONTRACT COMPLIANCE FORM

Agency Name: _____	Agreement Number: _____
Agreement Period: _____	

Check YES, NO or Not Applicable (N/A) in response to the following questions. If a YES answer is checked, please fully explain the circumstances and include whether it will have a potential impact on each project. Return via U.S. or electronic mail or personal delivery.

	Yes	No	N/A
1. Is the organization currently, or within the past three (3) years, involved in litigation, arbitration, or mediation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Is the Executive Director or Board of Directors currently, or within the past three (3) years, involved in litigation related to the administration and operation of a program or organization?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Are any key staff members unable to be bonded?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Has your agency been placed on, maintained on or removed from probation, suspension, debarment, or another status of non-compliance by a contracting entity in the past three (3) years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Has there been any negative finding or determination by an auditor or contracting party regarding fiscal management or controls or contract compliance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Has the agency or agency director ever had public or foundation funds withheld?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Has the agency ever had its non-profit status suspended or revoked?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Has the agency or Executive Director or Board of Directors refused to participate in any fiscal audit requested by a government agency or funding source?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Has the agency been the target or subject of any Federal, State or local law enforcement or administrative investigation in the past three (3) years?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Are there any issues surrounding the agency's license, certification or accreditation?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Explanation: For any questions marked YES, please fully explain the circumstances and include whether it will have a potential impact on the project. Use additional pages if necessary.

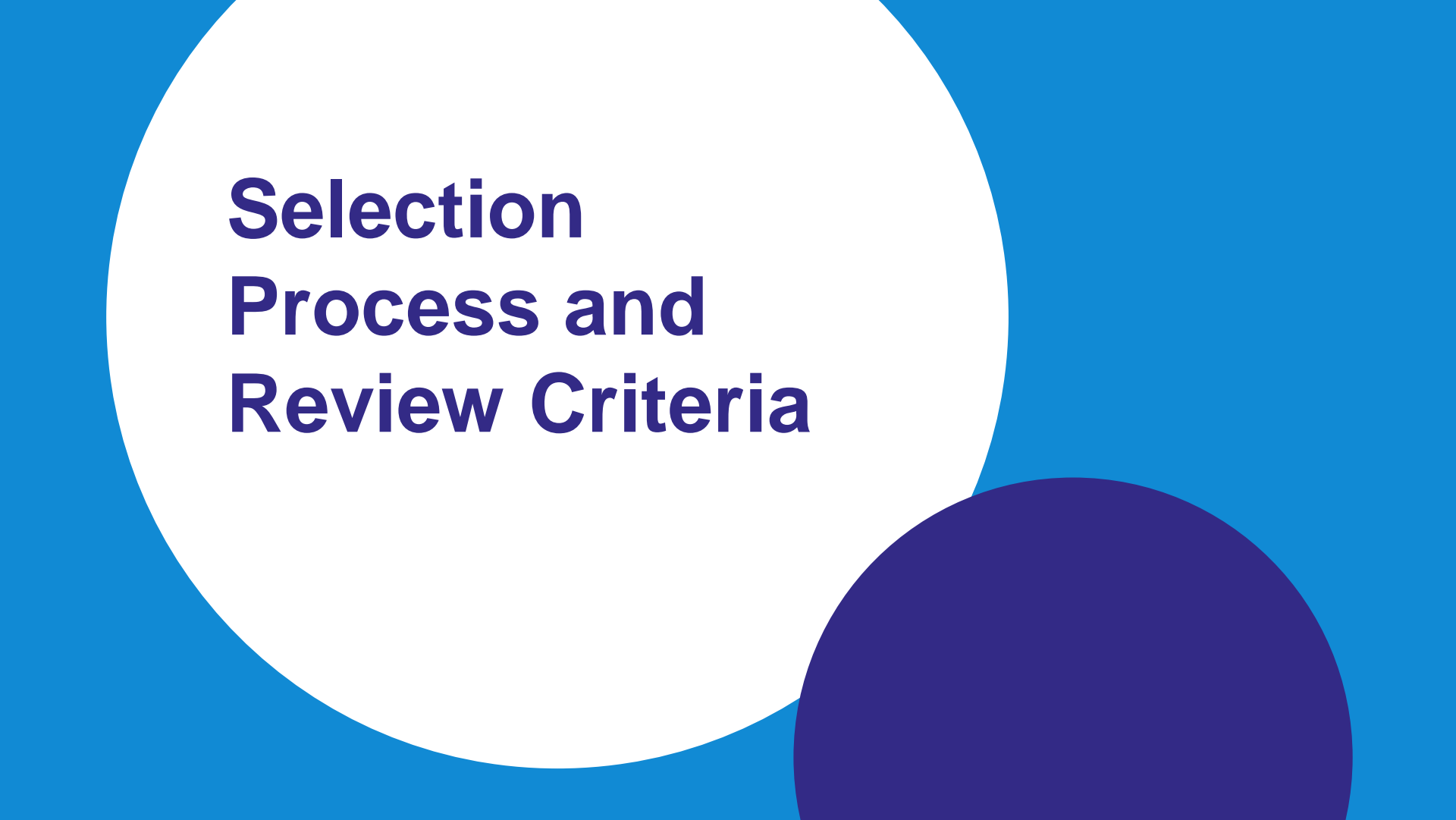
As part of the contract process the Commission, at its own discretion, may implement additional procedures to validate or further investigate any of the proposed Contractor/Grantee's responses. The Commission reserves the right to terminate the contracting process without entering into an agreement if the proposed Contractor/Grantee submits false or incorrect information.

By signing this form, I certify, on behalf of agency named above that the responses contained herein are true and complete to the best of my knowledge.

Signature: _____ Date: _____
(Must be signed by an Authorized Signatory)

Printed Name: _____ Title: _____

Please submit your organization's Business License if applicable.

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Selection Process and Review Criteria

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 minimum requirements.

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

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 2 – Proposal Review Tool (Appendix E)

54



Appendix E Level 2 Review Tool

PROPOSER NAME:

REVIEWER ID:

SUMMARY SCORES:

Score (max)

I. Proposed Project Team Qualifications and Experience

(65)

II. Work Samples

(15)

III. Budget and Budget Narrative

(20)

TOTAL SCORE:

(100)



I. PROPOSED PROJECT TEAM QUALIFICATIONS AND EXPERIENCE

66 points

The proposer will be evaluated by the extent to which their proposal demonstrates the desired qualifications outlined in the RFQ, including:

Qualifications	Score
<p>a. Degree to which proposal demonstrates the following desired research experience qualifications (20 points):</p> <ol style="list-style-type: none"> 1. Experience developing and administering surveys (5 points) 2. Experience with quantitative and qualitative data cleaning and analysis (5 points) 3. Experience with document reviews (5 points) 4. Experience with developing and documenting codebooks and code definitions (5 points) 	
<p>b. Degree to which proposal demonstrates the following desired research knowledge qualifications (8 points):</p> <ol style="list-style-type: none"> 1. Knowledge of equity-focused research practices that document and elevate disparities, including analyzing and interpreting disaggregated data (4 points) 2. 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) (4 points) 	
<p>c. Degree to which proposal demonstrates the following desired research dissemination qualifications (16 points):</p> <ol style="list-style-type: none"> 1. Experience with reporting to government or funding agencies (4 points) 2. Experience producing findings, research briefs, and other products for a variety of audiences (technical and non-technical) to support local use of data (4 points) 3. Experience illuminating trends, themes, and opportunities across complex data (4 points) 4. Experience designing and implementing effective dissemination strategies (4 points) 	
<p>d. Degree to which proposal demonstrates the following desired collaboration qualifications (6 points):</p> <ol style="list-style-type: none"> 1. Experience effectively facilitating trainings in virtual spaces (3 points) 2. Experience working with funders, grantees, and contractors (3 points) 	
<p>e. Degree to which proposal demonstrates the following desired content knowledge qualifications (4 points):</p> <ol style="list-style-type: none"> 1. General understanding of the context of Los Angeles County, including, but not limited to, racial inequities and issues related to diversity, equity, and inclusion (2 points) 2. General understanding of issues that young children and families may experience in Los Angeles County (2 points) 	
<p>f. Degree to which proposal demonstrates the following desired project management qualifications (8 points):</p> <ol style="list-style-type: none"> 1. Experience successfully managing projects in complex and changing environments with competing priorities and deadlines that require flexible and nimble responses (6 points) 	
<p>g. Degree to which list of similar types of projects are comparable and appropriate to the project (6 points).</p>	

Required Document Source(s): Statement of Qualification; Resumes
Please detail any notes and/or questions on a separate sheet:

Score: 00 (maximum score = 66)

Name of Proposer:



II. WORK SAMPLES

16 points

The proposer will be evaluated by the extent to which their application demonstrates comparable and appropriate samples of previous work outlined in the RFQ, including:

Criteria	Score
<p>a. Degree to which work samples demonstrate quality (16 points):</p> <ol style="list-style-type: none"> 1. The work sample uses easy to understand language (4 points) 2. The narrative presents findings in an objective manner (4 points) 3. The product is tailored to the audience identified (4 points) 4. The product communicates complex information in an accessible and compelling manner (3 points) 	

Required Document Sources: Work Samples

Please detail any notes and/or questions on a separate sheet:



III. BUDGET AND BUDGET NARRATIVE

20 points

The proposal will be evaluated based on the reasonableness and alignment of the proposed budget and budget narrative given the needs of the project outlined in the RFQ, including:

Criteria	Score
<p>a. The proposed deliverables are appropriate given the goals of the project (8 points)</p>	
<p>b. The cost of the deliverables is reasonable given the justification provided (16 points)</p>	

Required Document Sources: Budget; Budget Narrative; and Scope of Work

Please detail any notes and/or questions on a separate sheet:

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.

- Applications that fail to adhere to 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 Proposal Review. The removed page(s) will not be made available to reviewers.
- **Failure to submit all required documents will constitute an incomplete proposal and may be grounds for disqualification.**
- Proposers are responsible for any errors and omissions in their proposals and applications. It is the responsibility of the proposer to ensure, prior to submission, that its proposal reflects the requirements of this solicitation.
- **Proposals received after the deadline will not be considered – April 30, 2021 5:00 pm PST.**
- 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.
- First 5 LA shall not be liable for any costs incurred in connection with a proposer's preparation of a proposal in response to this RFQ. Any cover letters, resumes and curriculum vita, including attached materials, submitted in response to this RFQ shall become First 5 LA's property and subject to public disclosure.

For more information on how to apply, please visit:

<https://www.first5la.org/article/annual-reporting-consultant-request-for-qualifications-rfq/>

HOW TO APPLY

To respond to this RFQ, please submit your proposal and all required documents through the online application system designated by First 5 LA by no later than **5:00 p.m. PST on April 30, 2021**, by taking the following steps:

Step 1: Create a user account by clicking [here](#).

Step 2: Once a user account has been created, click [here](#) to access the application.

Step 3: Once an application has been started, click [here](#) to modify and/or submit your application. Please do not create a new application once you have started your application.

For help with the online application click [here](#).

Applicants must submit all required documents specified in the RFQ through this online form. It is highly recommended that you print a copy of your application for your records prior to clicking "Submit." To do this, click "Printer-Friendly Version." You should review the printed copy prior to submitting the application electronically. In addition, you should ensure that the attachments were successfully uploaded by reviewing the list of attachments included.

NOTE: Once the online application is submitted, proposers cannot make edits.

Please check the Funding Center 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 proposal 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/news-resources/funding-center/>. It is the responsibility of proposers to ensure, prior to submission, that their application reflects the most recent information and RFQ requirements.

5. Timeline

The background of the slide is a solid red color. It features two large, overlapping circles. The first circle is white and is positioned in the upper-left quadrant. The second circle is blue and is positioned in the lower-right quadrant, partially overlapping the white circle.

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

We are here

Save the Date

ACTIVITY	Where to find:
Information Session PowerPoint Slides and Recording	Funding Center: https://www.first5la.org/news-resources/funding-center/
Q&A (includes all questions received through: this Info Session Webinar and via email (to dortiz@first5la.org) will be posted on:	State Reporting Consultant RFQ Webpage: https://www.first5la.org/article/annual-reporting-consultant-request-for-qualifications-rfq/



Question and Answer

Welcome to Q&A

Questions you ask will show up here. Only host and panelists will be able to see all questions.

Type your question here...

☒ Send anonymously

Cancel Send

Question and Answer

All questions (4) My questions (4)

AP Abigail Proff (She/hers) (You) 02:53 PM

Where will this recording be posted?

Collapse all (1) ^

D Daisy 02:54 PM

This recording will be posted on:
<https://www.first5la.org/article/annual-reporting-consultant-request-for-qualifications-rfq/>

AP Abigail Proff (She/hers) (You) 02:54 PM

Can the budget be flexible based on our anticipated hourly rates?

Collapse all (1) ^

Type your question here...

☐ Send anonymously

Cancel Send

Question and Answer

All questions (4) My questions (4)

D Daisy 02:54 PM

This recording will be posted on:
<https://www.first5la.org/article/annual-reporting-consultant-request-for-qualifications-rfq/>

AP Abigail Proff (She/hers) (You) 02:54 PM

Can the budget be flexible based on our anticipated hourly rates?

Collapse all (1) ^

D Daisy 02:57 PM

Thank you for your question. This question will be responded to in written form and will be posted on this solicitation's webpage on 4/27/2021.

Type your question here...

☐ Send anonymously

Cancel Send

Q&A

dortiz@first5la.org

