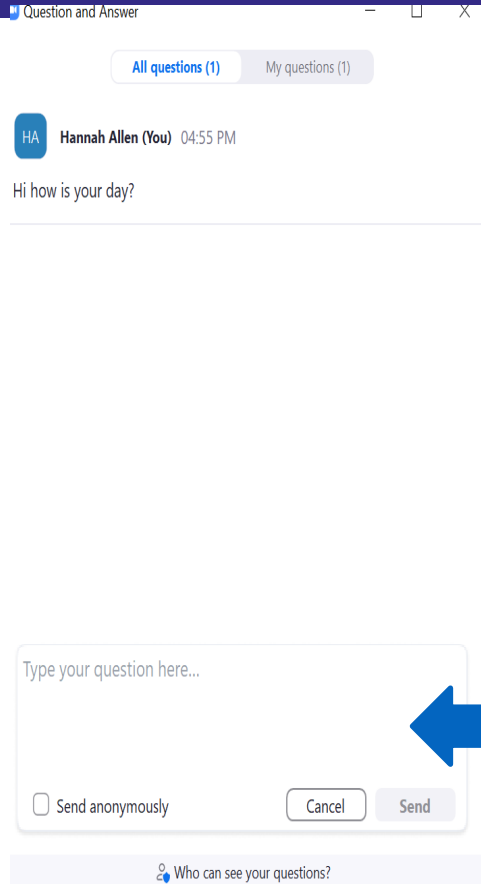


STATE POLICY AND ADVOCACY CONSULTANT REQUEST FOR QUALIFICATIONS (RFQ)

.....

THIS WEBINAR WILL BE RECORDED





Question and Answer

All questions (1) My questions (1)

HA Hannah Allen (You) 04:55 PM

Hi how is your day?

Type your question here...

☐ Send anonymously Cancel Send

Who can see your questions?

- **Questions:** Please submit questions via the chat box to **Daisy Ortiz** during the presentation.
- Official answers to all questions will be released according to timeline detailed in RFQ.

Jamie Zamora, Senior Government Affairs Strategist
Office of Government Affairs & Public Policy (OGAPP)



Inesa Papazyan, Contract Compliance Officer
Contract Administration & Purchasing Department



Daisy Ortiz, Contract Compliance Manager
Contract Administration & Purchasing Department



Today's Agenda

4

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
5. Selection Process and Evaluation Criteria
 - Selection Process
 - Evaluation Criteria
6. How to Apply
7. Timeline
8. Q & A



1. About First 5 LA

- Public agency created by voters in 1998, funded by a tax on cigarettes.
- Focused on young children prenatal to age 5-years old.
- Prioritizing kids because 90 percent of the brain develops in the first 5 years of life.
- 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.
- First 5 LA supports programs and services for children prenatal to age 5 and their families through a competitive and open solicitation process.



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 being more family-centered and child-focused with an emphasis on the following four results:



Results for Children and Families

- Families optimize their child's development.
- Children receive early developmental supports and services.
- Children are safe from abuse, neglect, and other trauma.
- Children have high-quality early care and education experiences.

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**
- **Integrity**
- **Learning**
- **Diversity, Equity and Inclusion (DEI)**

2. Project Overview



Background

- **OGAPP leads First 5 LA's policy and advocacy strategies to advance public policies in support of the First 5 LA's Whole Child and Whole Family framework and Policy Agenda priorities. OGAPP's role includes:**
 - Monitoring the policy landscape related to First 5 LA's Policy Agenda priorities at all levels of government (local, state, and federal).
 - Working across organization offices and teams to develop public policy solutions and build advocacy campaigns to move policy priorities that strengthens early childhood systems of support.
 - Managing the coordination of First 5 LA's participation in the state-wide Early Care and Education (ECE) Coalition.
 - Developing and maintaining relationships with local, state and federal policymakers representing LA County, and educating and connecting them to First 5 LA's advocacy efforts.
 - Managing contracts with key advocacy partners including First 5 LA's state and federal advocates
 - Coordinating the sponsorship of policy and community events to elevate early childhood priorities.

- **Whole Family Whole Child Framework**

- **Policy Agenda Priorities**

- Promote a comprehensive system of family supports to advance positive outcomes for the whole child and whole family.
- Improve systems to promote the optimal development of children through early identification and supports.
- Expand access to affordable, quality early care and education.
- Ensure communities have the resources and environment that supports optimal development of children prenatal to age 5.

- **Advocacy Agenda Official Positions**



FIRST 5 LA POLICY AGENDA

The 2022 First 5 LA Policy Agenda is grounded in learnings from First 5 LA investments and community experiences, and recognizes children ages 5 years and younger as a truly "special population," due to the rapid pace of brain development that occurs during this period. To direct advocacy efforts supporting achievement of the 2020-2028 Strategic Plan's Results for Children and Families, the 2022 Policy Agenda aims, in particular, to reduce barriers to care and ensure our youngest children receive health and learning supports as early as possible, to promote lifelong success. The experience of structural racism, woven throughout many of the systems and institutions families interact with, also powerfully disrupts optimal child development and family stability. As such, all priorities with the 2022 Policy Agenda will:

- Work to close race-based disparities across health, well-being, and opportunity.
- Utilize the best available data and advocate for the availability of full, complete and disaggregated data.
- Promote a holistic system of supports that is linguistically and culturally responsive.

First 5 LA, in partnership with others, helps to strengthen families, communities, and systems of services and supports so that by 2028 all children in Los Angeles County enter kindergarten ready to succeed in school and life. To achieve this, First 5 LA advances the following community-informed priority areas:

- Promote a comprehensive system of family supports to advance positive outcomes for the whole child and whole family.**
 - Build systems that connect families to effective evidence-based, innovative, and community-responsive resources, prioritizing home visiting and early intervention services.
 - Advance and protect family supports to ensure families with young children and pregnant people are economically secure.
 - Reduce barriers and eligibility requirements to children prenatal to 5 years old receive supports and services that promote healthy development at the earliest opportunities.
- Improve options to promote the optimal development of children through early identification and supports.**
 - Promote alignment and integration throughout early identification, early intervention and family strengthening systems.
 - Ensure children receive early and periodic validated developmental, health and behavioral screenings, and appropriate trauma-informed interventions.
 - Incentivize preventative care to close maternal and pediatric health disparities.
- Expand access to affordable, quality early care and education.**
 - Increase public investment in a mixed delivery early learning system prioritizing family choice and infants and toddlers.
 - Ensure an equitable early learning quality support structure that responds to the diverse cultural and linguistic assets of all children and providers.
 - Require benefits and fair pay for all early learning providers that reflect the critical roles they play.
- Ensure communities have the resources and environment that supports optimal development of children prenatal to age 5.**
 - Advocate for communities' increased opportunities to shape resources, services and social conditions to protect the wellbeing of young children and families.
 - Promote local flexibility in policies and systems that directly impact families and neighborhoods.
 - Elevate and utilize disaggregated data on the conditions of children and families to inform efforts in reducing barriers to access and improving the quality of service delivery systems.

Visit us online at first5la.org and follow us on Twitter and Facebook @First5LA

first 5 la
Giving kids the best start

first 5 la
Giving kids the best start

20
years
of
service

- Through this RFQ, First 5 LA is seeking proposals from qualified individuals and firms (with or without subcontractors) will support First 5 LA's early childhood policy and advocacy strategies in the state policy arena.
- The contractor will employ a variety of strategies and activities to support First 5 LA's state policy and advocacy efforts to strengthen systems of support for children ages prenatal to 5-years old including but not limited to:
 - Policy analysis, development, and strategy formation
 - Lobbying
 - Government Affairs
 - Strategic Communication
 - Technical Assistance and Project Management

Scope of Work

The image features a solid blue background. A large white circle is positioned on the left side, containing the text 'Scope of Work'. A smaller, dark blue circle is located in the bottom right corner, partially overlapping the white circle.

This solicitation seeks proposals and qualifications from organizations interested in serving as the State Policy and Advocacy Consultant to support First 5 LA's state policy and advocacy efforts through the following roles and functions.

Role	Functions
Policy Analysis, Development, and Strategy Formation to support the creation of an annual Policy Agenda to inform First 5 LA's state administrative, legislative, budget and implementation policy priorities, while providing strategic guidance to support and identify opportunities for strengthening systems of support for children ages prenatal to 5-years old and assist in the development of policy proposals.	<ul style="list-style-type: none">• Provide analysis and recommend policy positions and strategies to support Policy Agenda priorities.• Support the development of advocacy strategies to advance First 5 LA Policy Agenda priorities, while making policy recommendations and developing policy proposals to advance First 5 LA priorities.• Participate in strategy meetings with OGAPP team to plan and discuss broader strategy, opportunities, tactics and alignment.

Role

Lobbying as the lead advocate for First 5 LA's state administrative, legislative, budget and implementation policy priorities before legislative and administrative policymakers, while providing strategic advice, and analysis of identified opportunities for First 5 LA to engage and advance policy priorities in the state policy arena. *Lobbying activities will be conducted as needed and approved based on First 5 LA policy priorities to be determined by monthly task order.*

Functions

- Identify opportunities to support/oppose, or co-sponsor policy proposals in alignment with Policy Agenda priorities.
- Provide statements of support, opposition, amendment, or other commentary for proposals in meetings with policymakers, staff, and legislative hearings through appropriately registered lobbyists.
- Draft and submit letters, legislative language and other materials as needed to influence policy priorities.
- Track and provide analysis of key policy proposals in alignment with First 5 LA's policy priorities, including administrative proposals that improves or threatens public funding for Proposition 10, including proposal related to tax thresholds, tax policies and administrative issues related to Board of Equalization and the California Department of Tax and Fee Administration.
- As requested, coordinate with First 5 LA and its contractors/consultants, policy grantees and other stakeholders, including First 5 California and First 5 Association to advance policy priorities.
- Identify potential partnerships and coalitions to garner support for long term opportunities to expand increased investment and funding for Policy Agenda priorities.

Role

Government Affairs strategy development and implementation to support First 5 LA's policymaker education and engagement activities in order to establish and sustain transformational relationships to empower LA County specific state legislators and administrative policymakers within their respective jurisdictions to strengthen systems for children ages prenatal to 5-years old.

Functions

- Deepen relationships with LA County state policymakers and their staff, key administration officials, advocacy groups and others to further establish First 5 LA as a resource and leader on early childhood issues.
- Provide guidance on the development and coordination of First 5 LA advocacy days, legislative briefings, staff webinars, and early childhood in-district site visits.
- Engage with relevant administrative agencies, including but not limited to the Office of the Governor, State Board of Education (SBE), California Department of Education (CDE), California Health and Human Services Agency (CHHS) & its relevant Departments, and California Department of Tax and Fee Administration (CDTFA)
- As requested, engage with the First 5 network to advance First 5 LA's goals such as supporting First 5 Association Advocacy Days, partner advocacy days, and attend network regional meetings.

Role

Strategic Communications to elevate the importance of First 5 LA's policy and advocacy priorities through the development and implementation of issue campaigns and other communication outreach tactics within the state policy arena and with early childhood partners, and coalitions. *Strategic Communications activities will be conducted as needed and approved based on First 5 LA policy priorities to be determined by monthly task order.*

Functions

- Provide strategic advice on the development of communications strategies including collateral or online material to elevate policy priorities and advocacy efforts.
- Coordinate with First 5 LA or subcontractors to draft policy updates, talking points, fact sheets, press statements, and online content as needed.

Role	Functions
Technical Assistance and Project Management to coordinate update meetings, policymaker meetings, written analyses on advocacy strategies, and state policy activities.	<ul style="list-style-type: none">• Arrange meetings and events on behalf of First 5 LA and partner agencies as necessary with state legislators and administration policymakers, and advocacy partners to elevate awareness of First 5 LA policy priorities.• Provide timely written updates analyzing major state policy activity including January budget proposal summary, May Revise budget proposal summary, Final budget deal, close of legislative session, and as needed that are in alignment with First 5 LA's policy priorities.• As requested, provide feedback and/or assist with presentations to the First 5 LA Board of Commissioners and other partners, and periodic updates to the Board, and present to other partners such as the First 5 Association and First 5 California as necessary.• Coordinate regular calls and agendas with designated staff and designated contractors/consultants to discuss policy priorities, and tactics.• Submit regular data reports and updates to both comply with First 5 LA contract requirements, and Fair Political Practices Commission (FPPC) reporting.

- Additional tasks aligned to the objectives and outcomes may be issued through a task order. Performance of the selected contractor will be measured by the ability to fulfill the primary roles and functions outlined above. A schedule of regular progress reports will be jointly determined by First 5 LA and the selected contractor. The roles and functions of the selected contractor described in this RFQ will be reviewed and may be revised annually based on lessons learned.

The background features a solid blue field with two large, overlapping circles. A large white circle is positioned in the upper-left to center area, and a smaller, dark blue circle is located in the lower-right area, partially overlapping the white one.

Terms of the Project

- The total project term is estimated to be up to **5 years (60 months)**. First 5 LA expects to enter into a 12-month initial agreement with the selected contractor for a not-to-exceed amount of \$366,000, with an anticipated start date of December 1, 2022.
- The contract will renew annually at First 5 LA's sole discretion for a total project term of 5 years and for a total estimated project cost of \$1,830,000.
- **This will be a blended task order and retainer contract**

In the retainer payment structure, funds will be granted through monthly invoices based on incurred expenses from the retainer fee on a reimbursement basis. The following scope of work activities will be included in the retainer payment structure:

Category
Policy Analysis, Development, and Strategy Formation
Government Affairs
Technical Assistance and Project Management

A portion of the contract amount will be issued via a task order payment structure. First 5 LA will issue task orders for project tasks, with specific scope, schedule and budget as needed. The task orders may be fixed price or time & material at the sole discretion of First 5 LA. The following scope of work activities will be included in the task order payment structure:

Category
Lobbying
Strategic Communications
Special Projects as need in alignment to this project's objectives and outcomes



3. Eligibility Requirements and Desired Qualifications

The State Policy and Advocacy Consultant RFQ is an open solicitation, and **all** successfully submitted applications that meet the eligibility and desired qualifications will be evaluated.

Proposers must meet the following minimum requirements:

A. Location

- The proposer must have an office in Sacramento, CA.
- The proposer must be available to regularly attend meetings in Sacramento, CA and on limited occasions, travel to Los Angeles and the Bay Area.

B. Registered Lobbyist or Lobbying Firm

- The proposer shall be a registered lobbyist or a registered lobbying firm.
- Neither the proposer nor the lobbyists on staff shall currently have, nor will they have, any conflict of interest with First 5 LA. The proposer shall be able to represent First 5 LA independently and free from competing obligations or alliances/affiliations with other agencies or firms.

Eligibility requirements are the minimum requirements to apply. If your entity is required to register with the California Secretary of State's website, First 5 LA will verify an "active" status via California Secretary of State's website: <https://bizfileonline.sos.ca.gov/>.

Proposers that do not meet the requirements above or do not have an "active" status via California Secretary of State's website (if applicable) will not pass the first level of review (see Section IX. Selection Process).

The ideal proposer will have experience in policy analysis, strategy development, direct lobbying, establishing and cultivating relationships with state legislative and administrative policymakers, developing communication strategies including issue campaigns, and coordinating policy briefings. The ideal proposer will be familiar with the fields of early childhood policy including health, education, social services and budget.

Experience

- Experience with the analysis, development, sponsorship, and monitoring of state administrative, legislative, and budget proposals, preferably on policy priorities related to children prenatal to 5 and their families.
- Experience navigating administrative and legislative engagement to effectively educate, lobby, and communicate policy priorities and positions.
- Experience in developing and executing advocacy days, legislative briefings, webinars, and other events to raise awareness on policy priorities.
- Experience with developing and executing convenings with key partners such as coalitions, funders, and community leaders, preferably those in Los Angeles County.

Knowledge

- Knowledge and expertise of the political landscape, and relationships with key state policymakers and staff, committee leadership, and administrative leadership within the state policy arena.
- Knowledge and expertise in policy advocacy and systems change efforts in Los Angeles County and California related to early childhood development and family success. General understanding of issues related to First 5 LA's 2022 Policy Agenda policy priorities.
- Strong relationships with advocacy organizations working to advance early childhood priorities as well as strong relationships in the broader advocacy fields of education, health, economic security and family supports.
- Knowledge and expertise of all applicable state lobbying compliance guidelines, and Fair Political Practice Commission (FPPC) reporting standards.

Skills

- In-house or subcontract expertise to address the state systems related to First 5 LA policy priorities including Medi-Cal, Proposition 98, Title19, and Affordable Care Act (ACA) policy.
- In-house or subcontract expertise to develop and support strategic communications tactics.
- Strong operations and organizational efficiency and staffing.



4. Required Documents and Selection Process

Proposal Checklist

The following checklist outlines all items to be provided in response to the State Policy and Advocacy Consultant Request for Qualifications (RFQ). This checklist is for proposer use only and does not need to be submitted to First 5 LA.

Please note that First 5 LA will only review the information submitted on the application.

Online Application
Litigation and Contract Compliance Form (Appendix C)
Organizational Conflict of Interest Form (Appendix D)
Business License (if applicable)
California State Lobbyist Registration Printout
Proposal Narrative (Maximum 5 pages, single-spaced, Arial Font size 11)
Scope of Work (Appendix E)
Qualifications Summary (Maximum 7 pages, single-spaced, Arial Font size 11)
Resumes or Curricula Vitae
Budget/Pricing Narrative (Appendix F)
Two (2) Work Samples (Appendix G ; Maximum 6 pages per sample, not including cover page)
References (Appendix H)

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 [STATE POLICY AND ADVOCACY CONSULTANT REQUEST FOR QUALIFICATIONS \(RFQ\) - First 5 Los Angeles \(first5la.org\)](#)

To access the online application:

https://www.grantrequest.com/SID_725?SA=SNA&FID=35365

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Please answer the following questions:

1. Do you or your organization have an office in Sacramento, CA?

-Select One- ▼

2. I certify that the proposer and/or staff will be available to regularly attend meetings in Sacramento, CA and on limited occasions, travel to Los Angeles and the Bay Area.

-Select One- ▼

3. I certify that the proposer is a registered lobbyist and/or a registered lobbying firm.

-Select One- ▼

4. I certify that the proposer and/or staff will be able to represent First 5 LA independently and free from competing obligations or alliances/affiliations with other agencies or firms.

-Select One- ▼

Submit



Organization Information | Attachments | Review My Application

Organization Information

Printer Friendly Version | E-mail Draft

Required before final submission

State Policy and Advocacy Consultant RFQ

Organization Name

Address City: State: Zip Code:

California Secretary of State Requirement:
If your entity is required to register with the California Secretary of State's website, please provide the name your agency is registered under. First 5 LA will verify an "active" status via California Secretary of State's website <https://bizfileonline.sos.ca.gov/>.

Organization Primary Contact Information

Prefix: First Name: Last Name:

Title: Office Phone Number:

E-mail: Website:

Proposal Primary Contact Information

☐ Same as Organization Primary Contact

Prefix: First Name: Last Name:

Title: Office Phone Number: E-mail:

Save & Finish Later Next

[Contact Us](#) | [Help](#) | [Exit](#)[Organization Information](#) | [Attachments](#) | [Review My Application](#)

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. Litigation and Contract Compliance Form (Appendix C)
- 2. Organizational Conflict of Interest Form (Appendix D)
- 3. Business License (if applicable)
- 4. California State Lobbyist Registration Printout
- 5. Proposal Narrative (Maximum 5 pages, single-spaced, Arial Font size 11)
- 6. Scope of Work (Appendix E)
- 7. Qualifications Summary (Maximum 7 pages, single-spaced, Arial Font size 11)
- 8. Resumes or Curricula Vitae
- 9. Budget/Pricing Narrative (Appendix F)
- 10. Two (2) Work Samples (Appendix G; Maximum 6 pages per sample, not including cover page)
- 11. References (Appendix H)

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:


File Name: No file chosen

Organizational Conflict of Interest Form: Please read the information on the required Organizational Conflict of Interest Form (Appendix D) thoroughly and submit a signed completed form.

APPENDIX D	
Organizational Conflict of Interest	
<p>Prohibited Conflicts of Interest</p> <p>First 5 LA shall not contract with, and shall reject any responses submitted by, the persons or entities specified below unless First 5 LA finds that special circumstances exist which would allow for the award of such contract:</p> <ol style="list-style-type: none">First 5 LA employees;Profit-making firms or businesses in which First 5 LA employees serve as officers, principals, partners, or major shareholders;Persons who, within the immediately preceding 12 months, came within the provisions of number 1, and who:<ol style="list-style-type: none">Were employed in positions of substantial responsibility in the area of service to be performed by the contract; orParticipated in any way in developing the solicitation or contract or its service specifications/scope of work; andProfit-making firms or businesses in which the former employees, described in number 3, serve as officers, principals, partners, or major shareholders. <p><input type="checkbox"/> By checking this box, you, the proposer, _____, hereby represent that you ARE NOT any of the persons or entities specified above.</p> <p>Name: _____ Date: _____</p> <p>Title: _____</p> <p>Organizational Conflict of Interest Disclosure Statement or Representation</p> <p>It is First 5 LA's policy to avoid situations that place a proposer (or any of its affiliates or proposed consultants or subcontractors (if any tier) in a position where its judgment may be biased because of any past, present, or currently planned interest (financial, contractual, or otherwise). The proposer may have that relates to the work to be performed or services to be provided pursuant to this RFP, or where the proposer's performance of such work or services may provide it with an unfair competitive advantage (collectively, "actual or potential organizational conflicts of interest").</p> <p>Any proposer with an actual or potential organizational conflict of interest shall review the instructions below and attach a statement disclosing such actual or potential organizational conflicts of interest. If a proposer has determined that it has no actual or potential organizational conflict of interest to report, please complete and sign the representation below.</p> <p>The refusal to provide the disclosure statement or representation shall result in the proposer's disqualification for award. The nondisclosure or misrepresentation of any relevant interest may also result in the proposer's disqualification for award, or if such nondisclosure or misrepresentation is discovered after award, First 5 LA may terminate the contract for default, and the proposer may be disqualified by First 5 LA from subsequent contracts.</p> <p>First 5 LA will not make an award until First 5 LA has evaluated the proposer's disclosure statement or representation. Failure to provide a disclosure statement or representation will be deemed to be a minor informality and the proposer or contractor shall be required to promptly correct the omission.</p> <p>Disclosure Statement</p> <p>The proposer shall attach a signed and dated statement that describes in a concise manner all relevant facts concerning any actual or potential organizational conflicts of interest that may prevent the proposer from being able to render impartial, technically sound, and other objective assistance or advice, or that has given the proposer an unfair competitive advantage.</p>	<p>The proposal shall provide enough information to allow First 5 LA's meaningful evaluation of the potential effect of the actual or potential conflict of interest in the performance of the work or services.</p> <p>The proposer may also provide relevant facts that show how the proposer intends to avoid or mitigate an actual or potential organizational conflict of interest.</p> <p>First 5 LA will review each proposer's submitted disclosure statement and may require additional relevant information from the proposer. All such information, and any other relevant information will be used by First 5 LA to determine whether an award to the proposer may create an actual or potential organizational conflict of interest. If found to exist, First 5 LA may (1) impose appropriate conditions that avoid such conflict(s), or (2) disqualify the proposer if no conditions can be imposed to avoid such conflict(s).</p> <p>Depending on the nature of the contract activities, the proposer may, because of actual or potential organizational conflicts of interest, propose to exclude specific kinds of work or services from the proposal, unless the RFP specifically prohibits such exclusion. Any such proposed exclusion by a proposer shall be considered by First 5 LA in the evaluation of proposals, and if First 5 LA considers the proposed excluded work to be an essential or integral part of the required work or services, First 5 LA may reject the proposal as nonresponsive even if the RFP did not specifically prohibit such exclusion.</p> <p>Representation</p> <p>In the absence of any relevant interest referred to above, the proposer shall certify below that to its best knowledge and belief no such facts exist relevant to possible organizational conflicts of interest.</p> <p><input type="checkbox"/> By checking this box, you, the proposer, _____, hereby represent that you ARE NOT aware of any actual or potential organizational conflicts of interest relating to the work or services to be performed under the contract resulting from the RFP/Q titled _____ that will prevent your ability to render impartial, technically sound, and objective assistance or advice or that will result in you being given an unfair advantage. This representation applies to all your affiliates and your proposed consultants and subcontractors of any tier.</p> <p>Name: _____ Date: _____</p> <p>Title: _____</p> <p><input type="checkbox"/> By checking this box, you, the proposer, _____, hereby represent that you ARE aware of actual or potential organizational conflicts of interest relating to the work or services to be performed under the contract resulting from the RFP/Q titled _____ and have attached an Organizational Conflict of Interest Disclosure Statement to your proposal.</p> <p>Name: _____ Date: _____</p> <p>Title: _____</p>

Please read the information on the required Litigation and Contract Compliance form (**Appendix C**) thoroughly and include a signed copy with your proposal submission 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: _____

- **Business License, if applicable** (e.g., Business license, if required by the City or County in which your organization operates)
- **California State Lobbyist Registration Printout:** Please include a screenshot of the California Secretary of State's Registered Lobbyist(s)' Cal-Access "General Information" and "Financial Activity/Filing History" pages.

Proposal Narrative: Please provide a narrative of no more than five (5) pages (single-spaced, Arial Font size 11) which includes the following:

- 1) Describe key issues related to the political landscape in LA County and California identifying opportunities that you perceive to be relevant and propose a strategy with specific tactics in which you recommend First 5 LA engage over the next 12-24 months to advance First 5 LA priorities. Please include the justification for choosing the proposed policy opportunities and activities.
 - a) Describe what role your firm would play in executing the plan;
 - b) Describe at least one obstacle your firm expects to confront and how the firm would plan to address this challenge; and
 - c) Describe what outcomes you expect to achieve by implementing this plan.
- 2) Describe your firm's approach to working with clients on issues related to policy analysis and development, lobbying, government affairs, policymaker engagement, and strategic communications within the state policy arena.
- 3) Describe obstacles your firm expects to confront given the proposed roles and functions of the project as detailed in Section IV. Scope of Work, and how your firm would plan to address these challenges. Provide examples, if applicable, to illustrate your firm's approach.

Scope of Work (Appendix E): Proposers must submit a Proposed Scope of Work using Appendix E: Scope of Work Template. The Proposed Scope of Work should detail the proposed objectives, key activities and related deliverables for the initial 12-month period. The Proposed Scope of Work should also include a short description identifying subcontracted work, if any, and how it will be controlled, monitored, & evaluated during the project. *This Proposed Scope of Work may serve as the starting point for contract negotiations with the selected proposer.*



APPENDIX E SCOPE OF WORK

Project Description: The State Policy and Advocacy Consultant will support First 5 LA's early childhood policy and advocacy strategies in the state policy arena. The consultant will employ a variety of strategies and activities to support First 5 LA's state policy and advocacy efforts to strengthen systems of support for children ages prenatal to 5-years old including but not limited to: Policy analysis, development, and strategy formation; lobbying; government affairs; strategic communication; and technical assistance.

Contract Number:	N/A
Agency Name:	First 5 LA
Project Name:	State Policy and Advocacy Consultant
	(Office Use Only)
Report Period:	12/1/2022-11/30/2023
Submission Date:	N/A

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.
1.	1A.			1A.
2.	2A.			2A.
3.	3A.			3A.
4.	4A.			4A.
5.	5A.			5A.
6.	6A.			6A.
7.	7A.			7A.

Qualifications Summary: Please provide a summary of no more than seven (7) pages (single-spaced, Arial Font size 11) which should include the following:

- a) A brief summary of organizational history that makes the firm a strong candidate for the work as described in this RFQ. The summary should describe your firm's responsiveness to the qualifications listed in Section VI. Summary of Desired Qualifications.
- b) A list of similar types of contracts that were successfully concluded, with a brief summary of each project. Describe any relevant work with public agencies, other First 5 Commissions and/or philanthropies.
- c) Describe your firm's past experience with the development and execution of policy analysis, policy proposal development, lobbying, government affairs, policymaker engagement, and communications strategy to support client goals.
- d) A description of the lead personnel and anticipated supporting personnel assigned to this project and their qualifications to perform the work. If subcontractors are contemplated, identification of those persons or firms, and the work to be done by the subcontractors, how they were selected and why, and a description of how subcontracted work will be controlled, monitored, and evaluated.


Resumes or Curricula Vitae Include resumes or curricula vitae for key personnel including proposed subcontractors, if applicable, who will exercise a major policy, administrative, or consultative role in carrying out the work described in Section IV. Scope of Work. *Do not embed hyperlinks in resumes.*

Budget/Pricing Narrative: Using Appendix F: Budget Narrative Template, detail the proposed 1) task order budget and 2) monthly retainer fee for the first term of the project (12 months) acknowledging that a portion of this contract's budget will go towards task orders. It is expected that proposers budgets will be clearly justified and appropriate to the work detailed in the Scope of Work. The budget narrative should include the following:

- a) Include an organizational chart of the project team and a brief description of each individual's role and services to be delivered in the contract. If subcontractors are contemplated, please include the subcontractor's role, services to be delivered, and monetary percentages of the work to be done by the subcontractor(s).
- b) Include an estimate of personnel costs inclusive of subcontracted work, and task order expenses for lobbying activities that correspond to the Scope of Work (Appendix E).
- c) Include an estimate of your proposed travel expenses that correspond with the Scope of Work (Appendix E).

This Proposed Budget/Pricing Narrative may serve as the starting point for contract negotiations with the selected proposer.

Attachment F Budget Narrative Form



APPENDIX F
Budget Narrative Template

Overview

In this section, please provide an overview of your approach to developing your proposed task order and monthly retainer, as well as including an organizational chart of the project team, including any proposed subcontractors. If there are any assumptions you made during your budget calculations that would be important for the proposal reviewers to know, please include those.


Proposed Task Order Budget

Please identify the budget reserved for prospective Task Orders expenses and activities for lobbying, strategic communications and any special projects as needed in alignment with this project's objectives and outcomes.

Proposed Monthly Retainer

Please detail the proposed monthly retainer fee based on the Scope of Work, for the first term of the project, 12 months. The budget should include personnel costs inclusive of subcontracted work, and travel expenses.

Example of Organization Chart



```
graph TD; PD[Name  
Project Director] --> PM[Name  
Project Manager]; PM --> TL1[Name  
Task 1 Leader]; PM --> TL2[Name  
Task 2 Leader]; PM --> TL3[Name  
Task 3 Leader];
```

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 Task	Expected Time Commitment (%)	Description of Project Role

Task X: INSERT NAME OF ACTIVITIES AND SUBTASKS
Provide a brief overview of the task described.

Labor

State Policy and Advocacy Consultant RFQ

In this section, include a description of the staff who will be contributing to this task, as well as their role and the hours dedicated to this task.


Required Documents: Two Work samples

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Two (2) Work Samples (maximum of 6 pages for each sample not including the work sample cover page): First 5 LA is requesting two (2) work samples from proposers. Please use Appendix G: Work Sample Cover Page to submit your work sample submissions.

Please see details below:

- **Work Sample #1:** Please provide a work sample detailing a successful advocacy campaign including strategic communications and government affairs tactics that the proposer has developed for a previous project or client and describe the final product as well as the process utilized to achieve lasting policy change.
- **Work Sample #2:** Please provide a work sample detailing the creation of government affairs strategy and implementation plan that the proposer has developed for a previous project or client and describe the final product as well as the process utilized to achieve lasting relationships. First 5 LA defines a government affairs strategy as strategies and tactics to establish and sustain transformational relationships through education and engagement activities to empower legislative and administrative policymakers to take action on specific policy priorities.



Appendix G
Work Sample #1
Policy Analysis and Development Strategy
Sample Cover Page


Proposers are to submit work samples from completed projects that demonstrate approach and expertise.

Work Sample #1: Please provide a work sample detailing a successful advocacy campaign including strategic communications and government affairs tactics that the proposer has developed for a previous project or client and describe the final product as well as the process utilized to achieve lasting policy change.

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, what the sample is (bill, memo, etc.), work sample original purpose and audience, why this sample was selected 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.	

STATE POLICY AND ADVOCACY CONSULTANT RFQ



Work Sample #2
Government Affairs Strategy
Work Sample Cover Page

Proposers are to submit a work sample from completed projects that demonstrate approach and expertise.

Work Sample #2: Please provide a work sample detailing the creation of government affairs strategy and implementation plan that the proposer has developed for a previous project or client and describe the final product as well as the process utilized to achieve lasting relationships. First 5 LA defines a government affairs strategy as strategies and tactics to establish and sustain transformational relationships through education and engagement activities to empower legislative and administrative policymakers to action on specific policy priorities.

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, what the sample is (bill, memo, etc.), work sample original purpose and audience, why this sample was selected 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.	

STATE POLICY AND ADVOCACY CONSULTANT RFQ


References: Using Appendix H, please submit three references for which the proposer has performed similar work as described by the RFQ.



APPENDIX H – Reference Form

Provide a list of three (3) current or former references for which the bidder has performed similar work. If two (2) references cannot be reached, First 5 LA must be able to contact at a minimum of two (2) references provided by proposer. If two (2) references cannot be reached, First 5 LA may deem the proposer ineligible for this opportunity.

Name of Business or Entity	
Contact Person	
Telephone Number	
Email Address	
Summary of the Work Performed and Role in that Work	



5. Selection Process and Evaluation Criteria

Evaluation Criteria

Please note that First 5 LA will only review the information submitted on the application.

EVALUATION CRITERIA

Proposals will be reviewed based on the following evaluation criteria.

- **Proposal Narrative** – 60 maximum points possible
- **Scope of Work** – 15 maximum points possible
- **Qualifications Summary** – 45 maximum points possible
- **Work Samples** – 10 maximum points possible
- **Resumes** – 10 maximum points possible
- **Budget Narrative** - 30 maximum points possible
- **Total possible points - 170**

The background features a solid blue field with two large, overlapping circles. The larger circle on the left is white, and the smaller circle on the right is a dark blue. The text is positioned within the white circle.

Selection Process

First 5 LA will review the proposers based on the multi-stage review process detailed below. *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.*

- Level 1 Administrative Review
- Level 2 Proposal Review
- Level 3 Interview
- Reference Checks

Level 1 – Administrative Review

First 5 LA will evaluate all proposals for completeness and minimum requirements. Basic requirements include timely receipt of proposal, submission of all required documents sought in Section X. Required Documents, and adherence to eligibility requirements described in Section V. Eligibility. Proposals with omissions of any required documentation subject to disqualification.

First 5 LA will also conduct a due diligence review which includes a review of the Litigation and Contract Compliance form (Appendix C: Litigation & Contract Compliance Form), 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 and verify an “active” status via California Secretary of State (if applicable). 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. Proposal must past Level 1 review in order to move to Level 2.

Level 2- Proposal Review

Proposals that pass Level 1 will proceed to the Level 2 Proposal Review. Reviewers will score proposers using the evaluation criteria set forth in Section VII. Evaluation Criteria. Reviewers may participate in a calibration session prior to finalizing scores. Highly scoring proposals from Level 2 will proceed to Level 3 Interview.

Level 3 - Interview	Reference Checks	Award of Contract
<p>Only key personnel included in the proposal 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 either at First 5 LA or via telephone or a virtual platform (e.g. Zoom or Microsoft Teams). Reviewers may 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.</p>	<p>Reference checks will be completed after Level 3 Interview. Information obtained through reference checks will complement the results of Level 3 review. First 5 LA must be able to contact three (3) references provided by the proposer. Otherwise, First 5 LA may deem the proposer ineligible for this opportunity.</p>	<p>The highest scoring proposer from Level 2 (Proposal Review) and Level 3 (Interview), in combination with information obtained through reference checks if conducted will be awarded the contract agreement or recommended to First 5 LA's Board of Commissioners for award of the contract or grant agreement.</p>

6. How to Apply

For more information on how to apply, please visit:

[STATE POLICY AND ADVOCACY
CONSULTANT REQUEST FOR
QUALIFICATIONS \(RFQ\) - First 5 Los
Angeles \(first5la.org\)](https://first5la.org)

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 PM on September 12, 2022**:

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](#).

Proposers 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 had been submitted proposers cannot make edits.

- Proposals 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 – September 12, 2022 - 5:00 pm PT.**
- 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.

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.

7. Timeline

We are here

Save the Date

ACTIVITY	DATE
RFQ Released on First 5 LA's Funding Center	AUGUST 18, 2022
Informational Webinar	AUGUST 31, 2022
Final date to submit questions regarding the solicitation	SEPTEMBER 6, 2022
Posting of responses to questions regarding the solicitation	SEPTEMBER 8, 2022
Proposal Submission Deadline	SEPTEMBER 12, 2022
Interviews	SEPTEMBER 26-30, 2022
Contractor Selected	OCTOBER 5, 2022
Board of Commissioners Approval	NOVEMBER 11, 2022
Contract Start Date	DECEMBER 1, 2022

Q&A

dortiz@first5la.org

