|  |
| --- |
| **Project Description:** *The purpose of the Annual Reporting Project is to provide transparency on how First 5 LA expends public funds and to position First 5 LA to be accountable on how those funds are utilized. The overarching goals of the project are: 1) Provide transparency on First 5 LA investments in compliance with Proposition 10 requirements to increase public awareness about how funds are being utilized in Los Angeles County; and 2) Utilize Annual Reporting data to gain deeper understanding of First 5 LA’s investments and grantees and contractors.* |

| Agreement Number: |  |
| --- | --- |
| Agency Name: |  |
| Project Name: | **First 5 LA Annual Reporting Project** |
| Project Length: | **36 months** |
|  |  |

| Agreement Period: | **July 1, 2024 – June 30, 2025** |
| --- | --- |
| Revision Date: |  |
|  | |
|  |  |
|  |  |

| **Objectives**  Include who, what, when, where, how and how much for each objective. | **Activities and Subtasks**  Indicate the activities and subtasks leading to the fulfillment of the objective. Include benchmarks or milestones in chronological order. Include the appropriate quantity or frequency of the associated activities or subtasks. | **Staff Assignment**  Indicate staff, consultants or subcontractors responsible for the respective activity or subtask. Include roles (lead, analyst, etc.) | **Timeline**  Indicate start and end period. | **Deliverables**  Indicate Date Due. |
| --- | --- | --- | --- | --- |
| **Objective 1**: Collect Annual Reporting data for FY 23-24 on 100% of the contracts subject to Annual Reporting | **Activity 1.1:** **Prepare to collect Annual Reporting data**   1. Update Annual Reporting guidance/ supplemental materials for grantees, including:    * Annual Reporting instructions for data collection tools    * Frequently Asked Questions 2. Set up and test Annual Reporting survey to distribute to grantees/contractors in Qualtrics, and revise as necessary |  | 7/1/24 – 7/17/24 | 1.1A: Draft Annual Reporting guidance/ supplemental materials for grantees (Draft: 7/11/24)  1.1B: Final Annual Reporting guidance/ supplemental materials for grantees (Final: 7/17/24)  1.1C: PDF of AR Survey, which includes links to survey on data collection platform (Final: 7/15/24) |
| **Activity 1.2: Collect Annual Reporting data**   1. Distribute Annual Reporting survey to First 5 LA grantees/ contractors 2. Work with First 5 LA project manager to gather Annual Reporting data from relevant staff 3. Update First 5 LA on completion status of Annual Reporting survey, including details on: list of survey recipients, full completes, partial completes (drop-off), incompletes (never started), overall response rate per type of survey 4. Conduct quality check on data received, and correct errors 5. Document and address any issues that arises throughout the data collection period |  | 7/18/24 – 8/8/24 | 1.2A: One (1) detailed list of contracts with survey completion status (Final: 8/30/24)  1.2B Issues log with details on solutions and support provided during data collection phase (Final: 9/30/24) |
| **Activity 1.3: Provide support to First 5 LA grantees and contractors**   1. Plan and facilitate at least two (2) information sessions with Q&A for grantees and contractors 2. Update FAQ document based off of Q&A from the information sessions 3. Provide ongoing communication, reminders, and technical assistance throughout the data collection period 4. Send follow-up emails to grantees with copy of completed response in PDF |  | 7/18/24 – 8/8/24 | 1.3 A: Draft information session materials (Draft: 7/17/24)  1.3 B: Final information session materials (Final: 7/22/24)  1.3 C: Updated FAQ based on Q&A from information sessions (Final: 8/2/24)  1.3 D: Attendance list for a minimum of two (2) information sessions for grantees and contractors (Final: 8/8/24) |
| **Objective 2:** Comply with Prop 10 requirements through timely submission of FY 23-24 Annual Reporting data to First 5 CA | **Activity 2.1: Analyze Annual Reporting data**   1. Create a draft and final data analysis plan based on state reporting requirements & First 5 LA data needs 2. Analyze Annual Reporting data 3. Compile final Annual Reporting data files |  | 8/8/24 – 9/16/24 | 2.1A: Draft analysis plan (Draft: 8/6/24)  2.1B: Final analysis plan (Final: 8/12/24)  2.1C: Final Annual Reporting data files (Final: 9/16/24) |
| **Activity 2.2: Develop research products**   1. Develop findings memo with summary statistics and highlights narrative based on state reporting requirements and First 5 LA’s data needs |  | 8/13/24 – 9/4/24 | 2.2A: Draft findings memo with summary statistics and highlights narrative (Draft: 8/28/24)  2.2B: Final findings memo with summary statistics and highlights narrative (Final: 9/4/24) |
| **Activity 2.3: Input Data into Annual Reporting System and Submit Final Report to the State**   1. Generate draft AR1 Financial Data (County Revenue and Expenditure Summary), AR2 Demographic Data (County Service Demographic), AR3 Highlights Data (County Evaluation Summary and Highlights) Reports through inputting data into the State Commission reporting system 2. Review and make necessary revisions based on First 5 LA feedback 3. Download and compile copies of final versions of the AR reports (AR 1-3) 4. Submit final annual reporting data to State Commission reporting system after Board approval by October 31st deadline |  | 9/4/24 – 10/31/24 | 2.3A: Draft AR Report - Revenue and Expenditures Report (AR1) Demographics Report (AR2) Evaluation Summary and Highlights Report (AR3) (Draft: 9/12/23)  2.3B: Final AR Report (AR1-3, PDF) (**Final: 09/16/24** **– non-negotiable)** |
| **Objective 3**: Finalize FY 24-25 Annual Reporting data collection tools and supplemental materials according to state reporting requirements and First 5 LA’s local data needs | **Activity 3.1: Prepare to collect Annual Reporting data**   1. Collaborate in determining any refinements to Annual Reporting data collection process and data collection tools 2. Update Annual Reporting data collection tools in alignment with state reporting requirements and First 5 LA’s local data needs. Tools may include:    * Annual Reporting Survey to grantees/ contractors – including additional questions that addresses local data needs, as needed    * Evaluation Form to First 5 LA staff    * Finance Template to First 5 LA staff 3. Update any guidance/ supplemental materials 4. Set up and test Annual Reporting survey to distribute to grantees/contractors in Qualtrics, and revise as necessary |  | 3/4/25 – 6/30/25 | 3.1A: Draft Annual Reporting data collection tools (Draft: 4/7/25)  3.1B: Final Annual Reporting data collection tools (Final: 4/29/25)  3.1C: Draft Annual Reporting guidance/ supplemental materials (Draft: 5/5/25)  3.1D: Final Annual Reporting guidance/ supplemental materials (Final: 5/26/25)  3.1E: PDF of AR Survey, which includes links to survey on data collection platform (Final: 6/9/25) |
| **General Project Management** | | | | |
|  | **Activity 4.1: Project Planning**   1. Attend a project launch meeting for the purpose of reviewing the contract, orienting to the project, and forming agreements on project management expectations 2. Gather and review information and documentation on the First 5 Annual Reporting FY 2023-2024 Guidance, the First 5 CA Annual Reporting online platform, and internal Annual Reporting documents 3. Prepare draft of project plan, including: timeline, milestones, check-in points, and approach to the work 4. Solicit and incorporate feedback from First 5 LA and finalize initial project plan 5. Refine project plan, if needed as directed by First 5 LA |  | 7/1/24 – 8/30/24 | 4.1A: Draft Project Plan including: timeline, milestones, check-in points, and approach to the work (Draft: 7/11/24)  4.1B: Final Project Plan (Final: 8/8/24) |
| **Activity 4.2 Project Management**   1. Schedule, attend, and facilitate project meetings for regular check-in’s and progress updates 2. Solicit and incorporate feedback from First 5 LA staff throughout the project |  | 7/1/24 – 6/30/25 | 4.2 A: Check in Meeting Agendas and Notes (6/30/25) |