



February 28, 2024

First 5 LA Annual Reporting Project Request for Qualifications (RFQ) Information Session

***THIS WEBINAR WILL BE RECORDED**

House Rules and Reminders


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
- **If you have a question after this webinar,** please email Daisy Ortiz at dortiz@first5la.org.
- **This webinar's slides and recording will be posted:** [First 5 LA Annual Reporting Project Request for Qualifications \(RFQ\) - First 5 Los Angeles](#)

Welcome and Introductions

HaRi Kim Han, Data Strategy Specialist
Office of Data For Action



Kevin Proff, Contract Compliance Officer
Contract Administration & Purchasing Department





Today's Agenda

- 1. About First 5 LA**
- 2. Project Overview**
 - Background Information
 - Scope of Work
 - Terms of the Project
- 3. Eligibility and Desired Qualifications**
 - Eligibility
 - Desired Qualifications
- 4. Required Documents**
- 5. Evaluation Criteria & Selection Process**
 - Evaluation Criteria
 - Selection Process
- 6. How to Apply**
- 7. Timeline**
- 8. Q & A**



About First 5 LA

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



First 5 LA's 2024-2029 Strategic Plan

On November 9, 2023, First 5 LA's Board of Commissioners unanimously approved the 2024-2029 Strategic Plan. This new Strategic Plan reaffirms our commitment to creating a lasting and measurable impact, centering racial justice and equity in our work, and partnering with renewed urgency to create a future where young children and their families are prioritized in L.A. County and across the state.

The 2024-2029 Strategic Plan features new goals that promote the full developmental potential of L.A. County's young children. Our goals and objectives center our work on children and families, recognizing young children's continuum of needs, building from physiological safety to esteem, love and belonging, and toward self-fulfillment.



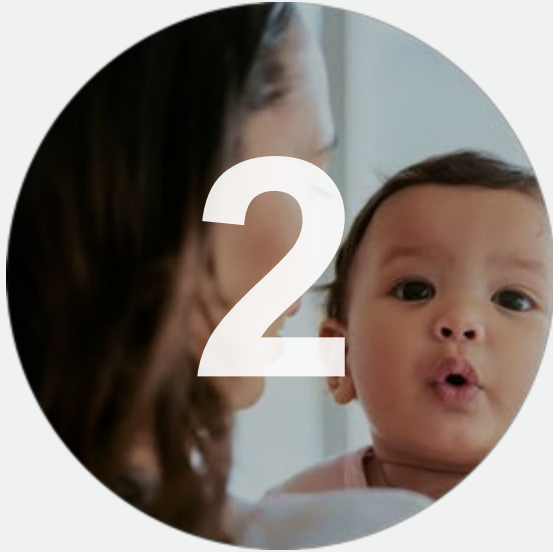
Strategic Plan | 2024-2029

Building a future where every child
is born healthy and thrives in nurturing,
safe and loving communities.

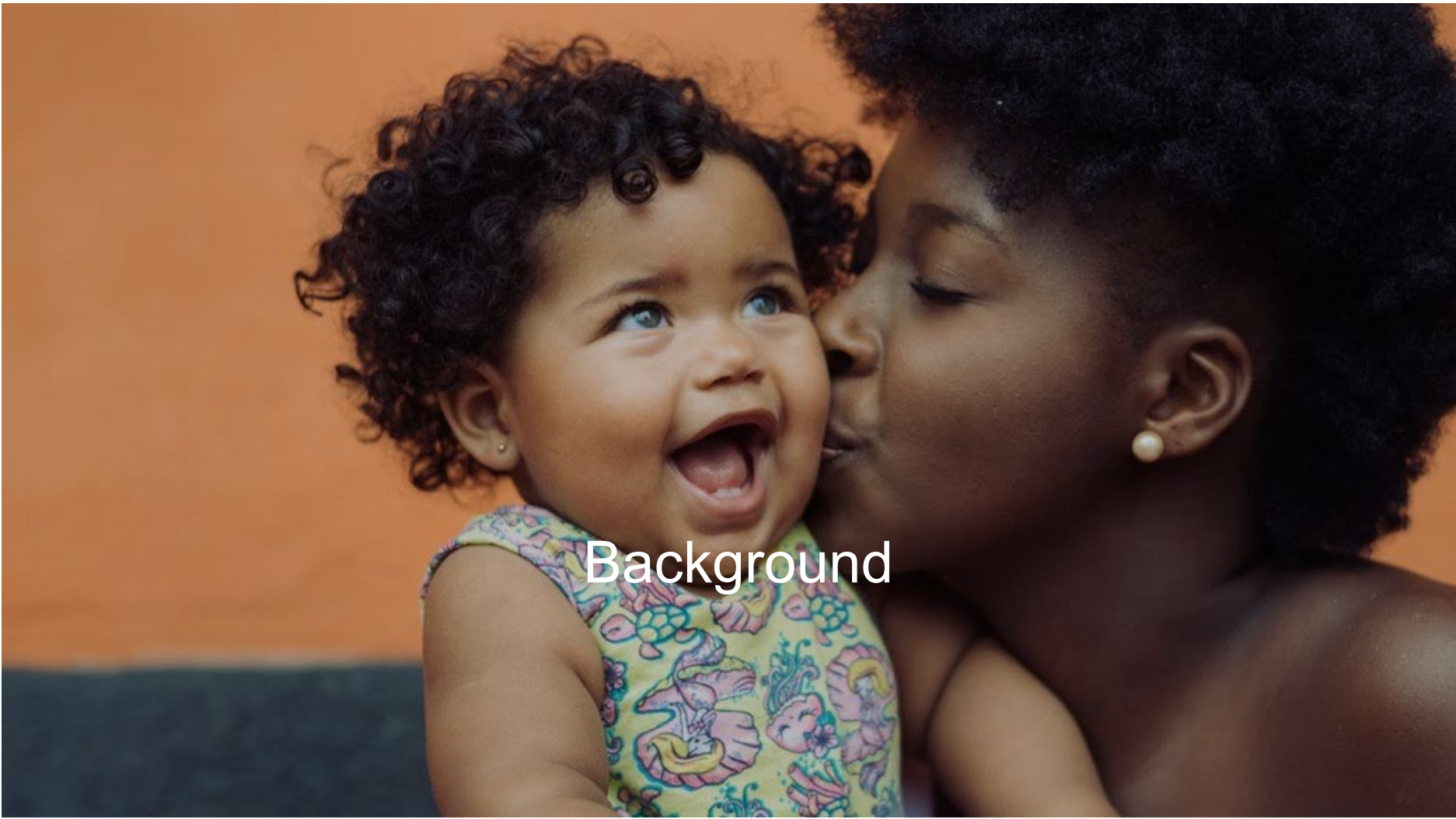

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First 5 LA's 2024-2029 Strategic Plan (Cont.)

Central to achieving these goals is a three-fold approach that prioritizes creating long-lasting impact, building partnerships, and leveraging Results-Based Accountability. First 5 LA will advance the work through three core strategies: catalyze public policies, strengthen public systems, and continue to build a prenatal to age 5 social movement in partnership with community members. With this, First 5 LA aims to go beyond mitigating the effects of growing inequities to address the root cause of disparities and build a more equitable future for our youngest children and their families.



Project Overview



Background

Annual Report

- Requirement of California Children and Families Act (Proposition 10)
- First 5 CA collects data from all 58 First 5 county commissions to summarize the past fiscal year's work
- Each county report includes the following:
 - Section 1: Revenue and Expenditure Summary
 - Section 2: Demographic Worksheet
 - Section 3: Evaluation Summary & County Highlights

Local Data Needs

- Expand scope of Annual Reporting Project to address local data needs and provide increased transparency through the lens of our 2024-2029 Strategic Plan

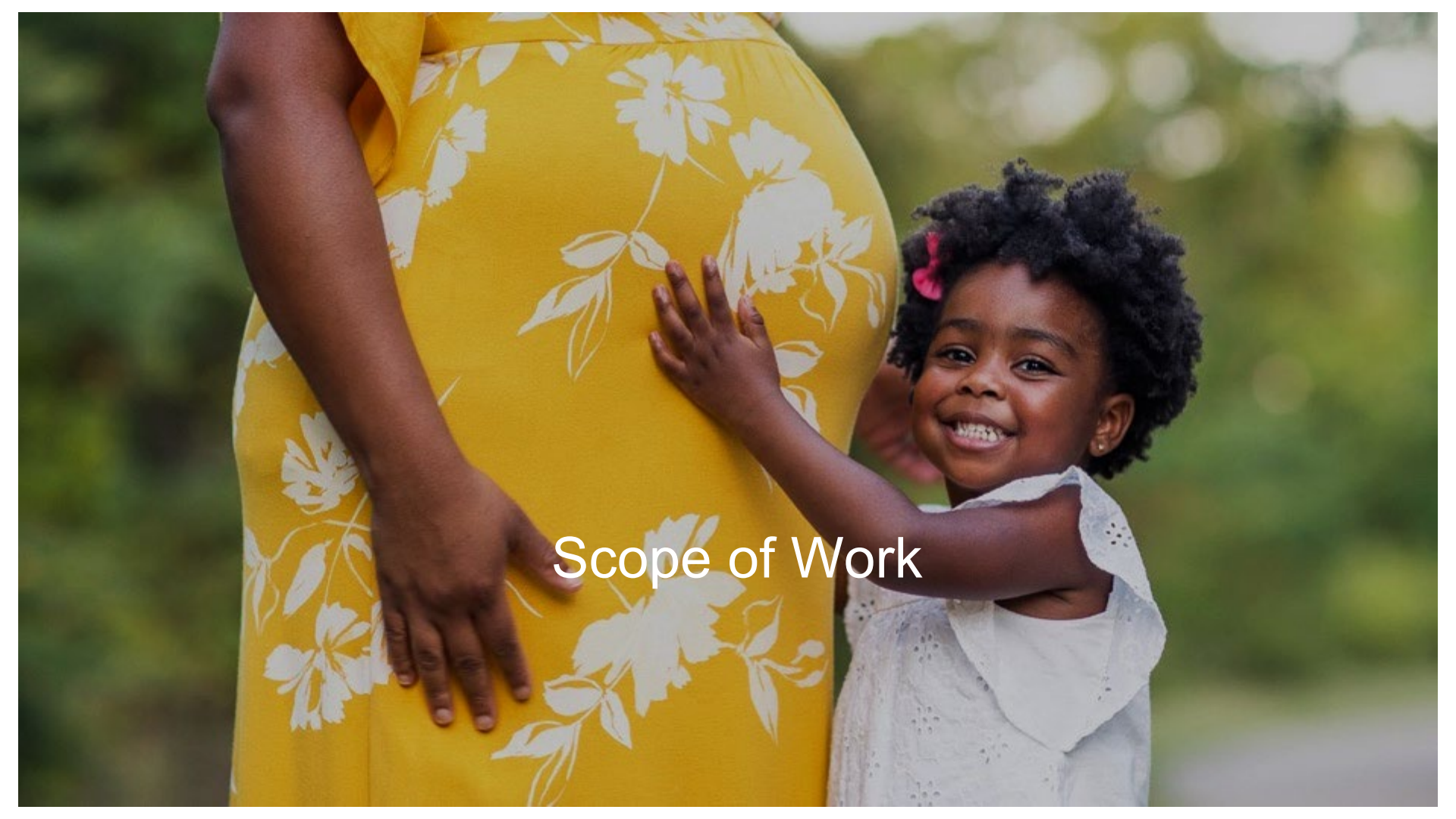
Project Purpose

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 for how those funds are utilized.

Project Goals

The goals of the project are to:

1. Provide transparency on First 5 LA investments to increase public awareness about how funds are being utilized in Los Angeles County.
2. Utilize Annual Reporting data to gain deeper understanding of First 5 LA's investments and grantees and contractors.



Scope of Work

Scope of Work – General Activities

- Preparing to collect Annual Reporting data
- Collecting Annual Reporting data
- Providing support to First 5 LA grantees and contractors
- Analyzing Annual Reporting data
- Developing research products
- Reporting and disseminating data
- General Project Management

Preparing to collect Annual Reporting data

- Providing thought partnership on the development of an approach to address data needs;
- Designing and updating the data collection tools in alignment with state reporting requirements and First 5 LA's local data interests and needs;
- Developing and updating guidance and supplemental materials;
- Preparing and testing online data collection tools.

Note: *This activity will occur twice during the first project year (FY 24-25: July 1, 2024 – June 30, 2025):*

(1) In July 2024 to prepare for data collection for the prior fiscal year (July 1, 2023 – June 30, 2024);

(2) In March through June 2025 to prepare for data collection for FY 24-25 (July 1, 2024 – June 30, 2025).

In subsequent project years, this activity will occur only once.

Collecting Annual Reporting data

- Collecting Annual Reporting data and information from First 5 LA staff, grantees and contractors
 - Note: First 5 LA utilizes Qualtrics to administer surveys to grantees and contractors.
- Conducting quality check on data received, and addressing errors;
- Documenting issues that arise throughout the Annual Reporting process.

Providing support to First 5 LA grantees and contractors

- Preparing for and facilitating information sessions with First 5 LA grantees and contractors;
- Providing support to grantees and contractors during the data collection period (e.g., responding to questions and providing technical assistance).

Analyzing Annual Reporting data

- Developing a data analysis plan;
- Analyzing quantitative and qualitative data;
- Documenting the results of the analysis.

Developing research products

- Providing thought partnership on the conceptualization and development of research products and visualizations;
- Developing accessible and engaging research products and collateral materials.

Reporting and disseminating data

- Submitting First 5 LA's Annual Reporting data to First 5 California upon approval by First 5 LA's Board of Commissioners;
- Co-designing and supporting efforts related to sensemaking, data use, and dissemination of research products and findings to key stakeholders;

General Project Management

- Planning for the Annual Reporting Project, including timelines and approach to the work;
- Responding to First 5 LA requests in a timely manner;
- Informing First 5 LA of progress as well as obstacles or issues encountered;
- Proposing solutions and making adaptations as needed to respond to emerging issues and changing context;
- Working closely and in partnership with the First 5 LA Project Manager.

Note: The contractor cannot subcontract any General Project Management activities.

Scope of Work Highlights – FY 24-25

- **Focus:** Achieve **Goal 1** by submitting Annual Reporting data to First 5 California
- **Planning for data collection** will happen twice in the upcoming fiscal year. In subsequent years, this activity will occur only once.
- Non-negotiable deadline to submit Deliverable 2.3B: Final AR Report (AR 1-3) is **9/15/24**.
- Non-negotiable deadline to submit Annual Reporting data to First 5 California is **10/31/24**.
- Details on FY 24-25 SOW in Appendix H – Scope of Work Template

Scope of Work – FY 24-25

Jul - Oct

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
- Activity 1.2: Collect Annual Reporting data
- Activity 1.3: Provide support to First 5 LA grantees and contractors

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
- Activity 2.2 Develop research products
- Activity 2.3: Input Data into Annual Reporting System and Submit Final Report to the State

Q3 – Q4

Objective 3: Finalize FY 24-25 Annual Reporting data collection tools and guiding materials according to state reporting requirements and First 5 LA's local data needs

- Activity 3.1: Prepare to collect Annual Reporting data

General Project Management

- Activity 4.1: Project Planning
- Activity 4.2: Project Management

A close-up photograph of a young child sitting in a wooden crib, holding a brown teddy bear. The child has a joyful expression with a wide, open-mouthed smile. The background is softly blurred, showing the wooden slats of the crib and some colorful items hanging on the wall. The text "Terms of the Project" is overlaid in white, centered on the image.

Terms of the Project

Terms of the Project

- 12-month agreement
- Project term – may renew annually for a total project term of 3 years, with an option to extend the project term for an additional four years. Contracts may renew annually at First 5 LA's sole discretion, based on business needs.
- Anticipated start date – July 1, 2024.
- This will be a fixed-price, deliverables-based contract.
- The selected applicant shall have technological capabilities for efficient phone and email communication to facilitate interaction with First 5 LA staff and others, as necessary.
- 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.



Eligibility Requirements & Desired Qualifications

Eligibility Requirements

Proposers must meet the following minimum requirement(s):

Annual Reporting Project

Minimum of five (5) years of experience leading research projects, including designing data collection tools, administering surveys, cleaning and analyzing data, and reporting and disseminating data.

Desired Qualifications

The following qualifications are desired for the:

Annual Reporting Project

Research Experience

- Experience designing and developing data collection tools
- Experience using online survey platforms (e.g., Qualtrics)
- Experience with quantitative and qualitative data cleaning and analysis
- Experience collaborating on the conceptualization and design of research and research products
- Experience with GIS mapping

Research Reporting & Dissemination

- Experience producing findings, research briefs, and other research products for a variety of audiences (technical and non-technical)
- Experience producing findings, research briefs, and other research products to promote use of data
- Experience reporting on government or funding agencies

Desired Qualifications

The following qualifications are desired for the:

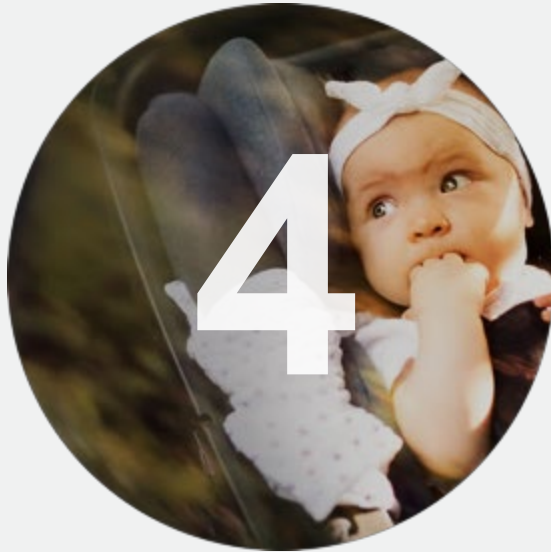
Annual Reporting Project

Content Knowledge

- Experience documenting and elevating disparities, including analyzing and interpreting disaggregated data
- General understanding of the conditions First 5 LA will address as described in the 2024-2029 Strategic Plan (see <https://www.first5la.org/first-5-la-2024-2029-strategic-plan/>)

Project Management

- Experience successfully managing projects in dynamic and complex environments with competing priorities and deadlines that require flexible and nimble responses
- Experience effectively communicating with stakeholders (i.e., facilitating trainings, conducting meetings, etc.) in virtual, in-person, and hybrid settings



Required Documents

Required Documents to Submit



Appendix E Application Checklist

The following checklist outlines all items to be provided in response to the First 5 LA Annual Reporting Project RFQ. This is meant to be used to support you in the process. This checklist does not need to be submitted.

- Online Application
- Statement of Qualifications (maximum six (6) pages, single-spaced, 11-point Arial or Times New Roman font with 1-inch margins)
- Resumes or Curricula Vitae for Proposed Key Personnel (Maximum Three (3) pages each)
- Proposed Budget Template (Appendix G)
- Proposed Scope of Work (Appendix H)
- One (1) Work Sample (Maximum of four (4) pages. Excerpts are permissible) and Work Sample Cover Page (Appendix I)
- Litigation and Contract Compliance Form (Appendix J)
- Conflict of Interest Form (Appendix K)
- Business License (if applicable)

Required Documents: 1. Online Application

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/first-5-la-annual-reporting-project-request-for-qualifications-rfq/>

To access the online application: <https://us.grantrequest.com/application.aspx?sid=725&fid=35376>

Required Documents: 1. Online Application



Please answer the following questions:

Do you or your organization have a minimum of five (5) years of experience leading research projects, including designing data collection tools, administering surveys, cleaning and analyzing data, and reporting and disseminating data?

-Select One- ▼

Submit

Required Documents: 1. Online Application



Organization Information
Attachments
Review My Application

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Organization Information

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

* Required before final submission

FIRST 5 LA ANNUAL REPORTING PROJECT REQUEST FOR QUALIFICATIONS (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/search/business>

Organization Primary Contact Information

* Prefix * First Name * Last Name

- Select One -

Required Documents: 1. Online Application



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[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. Statement of Qualifications (maximum six (6) pages, single-spaced, 11-point Arial or Times New Roman font with 1-inch margins)
- 2. Resumes or Curricula Vitae for Proposed Key Personnel (Maximum Three (3) pages each)
- 3. Proposed Budget (Appendix G)
- 4. Proposed Scope of Work (Appendix H)
- 5. One (1) Work Sample (Maximum of four (4) pages. Excerpts are permissible) and Work Sample Cover Page (Appendix I)
- 6. Litigation and Contract Compliance Form (Appendix J)
- 7. Conflict of Interest Form (Appendix K)
- 8. Business License (if applicable)

In order to respond to this RFP 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

Required Documents: 2. Statement of Qualifications

Statement of Qualifications: (maximum six (6) pages, single-spaced, 11-point Arial or Times New Roman font with 1-inch margins). Applicants should provide a description of how the applicant'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. Please include examples of similar projects when appropriate.


Required Documents: 3. Resumes or Curricula Vitae

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.

Please do not embed any hyperlinks in the Resumes or Curricula Vitae.

Required Documents: 4. Proposed Budget

Proposed Budget: Develop a budget organized by activity using the template provided (Appendix G – Proposed Budget Template). Instructions for complete the proposed budget template are included in Appendix F – Deliverable Based Budget Instructions. The proposed budget should include costs for deliverables, as specified in Appendix H - Scope of Work Template. The proposed budget should be reflective of the initial 12-month agreement period (July 1, 2024- June 30, 2025). Travel expenses, if any, should not exceed 5% of the total project’s budget. As discussed in Section VIII. Terms of Project, final Scope of Work and Budget will be negotiated with the selected contractor.



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APPENDIX G - PROPOSED BUDGET TEMPLATE

Agency Name: _____

Project Name: First 5 LA Annual Reporting Project

Contract # TBD

Contract Period July 1, 2024 - June 30, 2025

Month/Period	Obj #	Activity Description	Deliverable	Payment Amount	Objective total
	1	INSERT SHORT OBJECTIVE DESCRIPTION FROM SCOPE OF WORK INSERT BRIEF DESCRIPTION OF ACTIVITIES FROM THE SOW	INSERT SHORT DELIVERABLE		\$ -
		ADD ROWS FOR ADDITIONAL ACTIVITIES AS NEEDED	ADD ROWS FOR ADDITIONAL DELIVERABLES AS NEEDED	COST TO COMPLETE ACTIVITY AND PRODUCE DELIVERABLE	
	2	INSERT SHORT OBJECTIVE DESCRIPTION FROM SCOPE OF WORK			\$ -
	3	INSERT SHORT OBJECTIVE DESCRIPTION FROM SCOPE OF WORK			\$ -
	4	INSERT SHORT OBJECTIVE DESCRIPTION FROM SCOPE OF WORK			\$ -
	5	ADD ROWS FOR ADDITIONAL OBJECTIVES AS NEEDED			\$ -
		TOTAL DELIVERABLES		\$ -	\$ -

	OTHER DIRECT COSTS (if applicable)
	E.g. Travel \$ -
	E.g. Printing \$ -
	ADD ROWS AS NEEDED \$ -
	TOTAL \$ -
TOTAL ACTIVITIES/ DELIVERABLES	\$ -
TOTAL OTHER DIRECT COSTS	\$ -
TOTAL COST (All Tasks)	\$ -

Required Documents: 5. Scope of Work (Appendix H)

Scope of Work: A Scope of Work template for fiscal year 2024-2025 (FY 24-25) has been provided as Appendix H – Scope of Work Template. Refer to Section IV. Scope of Work for general scope of work throughout the project period. Include specific team member name(s) in the Scope of Work template, and their respective roles (ex: lead, analyst, etc.). There is one non-negotiable deadline - Deliverable 2.3B: Final AR Report (AR1-3) needs to be delivered by 09/16/24 in order for First 5 LA to receive approval from First 5 LA's Board of Commissioners to submit the Annual Report to First 5 California. Please note that the focus of the scope of work in FY 24-25 will be on achieving Goal 1 as outlined in Section III. Project Overview.

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

Required Documents: 5. Scope of Work (Appendix H)



APPENDIX H – SCOPE OF WORK TEMPLATE

Agreement Number:

Agreement Period: **July 1, 2024 – June 30, 2025**

Agency Name:

Revision Date:

Project Name: **First 5 LA Annual Reporting Project**


Project Length: **36 months**

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.*

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. Include roles (lead, analyst, etc.)	Indicate start and end period.	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 <ol style="list-style-type: none"> Update Annual Reporting guidance/ supplemental materials for grantees, including: <ul style="list-style-type: none"> Annual Reporting instructions for data collection tools Frequently Asked Questions 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 <ol style="list-style-type: none"> Distribute Annual Reporting survey to First 5 LA grantees/ contractors Work with First 5 LA project manager to gather Annual Reporting data from relevant staff Update First 5 LA on completion status of Annual Reporting survey, including details on: list of survey recipients, full completes, partial 		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)

Required Documents: 6. Work Samples (Appendix I)


Work Sample: Provide one (1) sample of a research product that demonstrate the applicant's expertise. The sample should be a maximum of four (4) pages, not including the cover page. Excerpts of a longer research product is permissible and counts as a work sample. Using Appendix I – Work Sample Cover Page, please provide a brief description of the work sample, including project background, work sample purpose and audience. In addition, please identify the applicant(s) role in the creation of the work sample.



**Appendix I
Work Sample Cover Page**

Applicants are to submit one work sample of a research product that demonstrate expertise. Use this cover page to provide a brief description of the work sample. The sample should be a maximum of four (4) pages, not including the cover page. Excerpts of a longer research product is permissible.

Title of work sample: Brief description of the work sample, including background, purpose and audience.	
Identify the applicant(s) role in the creation of the work sample:	



Required Documents: 7. Litigation and Contract Compliance Form (Appendix J)

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.

Required Documents: 8. Conflict of Interest Form (Appendix K)

Organizational Conflict of Interest

Prohibited Conflicts of Interest

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:

1. First 5 LA employees;
2. Profit-making firms or businesses in which First 5 LA employees serve as officers, principals, partners, or major shareholders;
3. Persons who, within the immediately preceding 12 months, came within the provisions of number 1, and who:
 - a. Were employed in positions of substantial responsibility in the area of service to be performed by the contract; or
 - b. Participated in any way in developing the solicitation or contract or its service specifications/scope of work; and
4. Profit-making firms or businesses in which the former employees, described in number 3, serve as officers, principals, partners, or major shareholders.

By checking this box, you, the proposer, _____, hereby represent that you ARE NOT any of the persons or entities specified above.

Name: _____ Date: _____

Title: _____

Organizational Conflict of Interest Disclosure Statement or Representation

It is First 5 LA's policy to avoid situations that place a proposer (or any of its affiliates or proposed consultants or subcontractors of 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").

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.

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.

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.

Disclosure Statement

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 advise, or that has given the proposer an unfair competitive advantage.

Required Documents: 9. Business License - if applicable

Please submit your organization's Business License if applicable.



Evaluation Criteria & Selection Process

Selection Process and Review Criteria

Level 1 – Internal Review

First 5 LA will evaluate all applications for completeness and minimum requirements. Basic requirements include timely receipt of application, submission of all required documents sought in Section X. Required Documents, and adherence to eligibility requirements described in Section V. Eligibility. Applications 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 (Appendix J - Litigation & Contract Compliance Form), a review of whether applicant (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 applicants including subcontractors.

Level 2- Proposal Review

Applicants that pass Level 1 will proceed to Level 2 Application Review. Reviewers will score applicants using the evaluation criteria set forth in Section VII. Evaluation Criteria. Reviewers will be assessed for conflicts of interest with applicants and sign a Conflict-of-Interest form to certify that there are no conflicts of interest.

Level 2 Review Tool (Appendix D)



Appendix D
Level 2 Review Tool

APPLICANT NAME:

REVIEWER ID:

SUMMARY SCORES:

I. Qualifications and Experience

Score (max)

(60)

III. Work Sample

(15)

IV. Budget

(25)

TOTAL SCORE:

(100)



I. QUALIFICATIONS AND EXPERIENCE

60 points

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

Qualifications	Score
a. Degree to which application demonstrates the following desired research experience qualifications (22 points maximum): <ol style="list-style-type: none"> Experience designing and developing data collection tools (6 points) Experience using online survey platforms (e.g., Qualtrics) (4 points) Experience with quantitative and qualitative data cleaning and analysis (6 points) Experience collaborating on the conceptualization and design of research and research products (4 points) Experience with GIS mapping (2 points) 	
b. Degree to which application demonstrates the following desired research reporting and dissemination qualifications (19 points maximum): <ol style="list-style-type: none"> Experience producing findings, research briefs, and other research products for a variety of audiences (technical and non-technical) to promote use (6 points) Experience producing findings, research briefs, and other research products to promote use of data (6 points) Experience with reporting on government or funding agencies (6 points) 	
c. Degree to which application demonstrates the following desired content knowledge qualifications (12 points maximum): <ol style="list-style-type: none"> Experience documenting and elevating disparities, including analyzing and interpreting disaggregated data (6 points) General understanding of the conditions First 5 LA will address as described in the 2024-2029 Strategic Plan (see https://www.first5la.org/first-5-la-2024-2029-strategic-plan/) (6 points) 	
d. Degree to which application demonstrates the following desired project management qualifications (9 points maximum): <ol style="list-style-type: none"> Experience successfully managing projects in complex and changing environments with competing priorities and deadlines that require flexible and nimble responses (6 points) Experience effectively communicating with stakeholders (i.e., facilitating trainings, conducting meetings, etc.) in virtual, in-person, and hybrid settings (2 points) 	

Required Document Source(s): Statement of Qualifications; Resume(s); Work Sample

Score: (maximum score = 60)



II. WORK SAMPLE

15 points

The applicant 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
a. Degree to which the work sample demonstrates applicant's expertise and approach to developing the research product (15 points): <ol style="list-style-type: none"> The product communicates complex information in an accessible and compelling manner (5 points) The work sample demonstrates the desired qualifications listed in Section VI. Desired Qualifications (4 points) The narrative presents findings in an objective manner (3 points) The product is appropriate for the audience identified (3 points) 	

Required Document Sources: Work Sample

Score: (maximum score = 15)

III. BUDGET

25 points

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

Criteria	Score
Degree to which application demonstrates the following: (25 points maximum): <ol style="list-style-type: none"> The proposed budget is reasonable given the time and resources needed to implement the scope of work (23 points) The proposed total budget accounts for the activities and deliverables outlined in the scope of work (2 points) 	

Required Document Sources: Scope of Work; Proposed Budget

Score: (maximum score = 25)

Selection Process and Review Criteria

Level 3 - Interview

Applicants scoring a minimum of 70% or higher from Level 2 Proposal Review will proceed to Level 3 Interview. Only key personnel included in the application 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). 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

The highest scoring applicant from Level 2 and Level 3 (Application Review and Interview) will be awarded the contract.



How to Apply

Application Submission

- 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 – March 18, 2024 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.

How to Apply

For more information on how to apply, please visit:

<https://www.first5la.org/article/first-5-la-annual-reporting-project-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 pm PT on March 18, 2024**:

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.

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.



Timeline

Timeline



ACTIVITY	DATE
RFQ Released	2/20/2024
Information Session	2/28/2024
Final date to submit questions and requests for additional information	3/5/2024
Posting of responses to questions	3/11/2024
Proposal Due	3/18/2024 at 5:00 p.m. PT
Interviews	4/10/2024 – 4/12/2024
Contractor Selected	5/1/2024
Contract Start Date	7/1/21

Where to find:

ACTIVITY	Where to find:
<p>Information Session PowerPoint Slides and Recording</p>	<p>Funding Center: https://www.first5la.org/news-resources/funding-center/</p>
<p>Q&A (includes all questions received through this Info Session Webinar and via email to dortiz@first5la.org)</p>	<p>State Reporting Consultant RFQ Webpage: https://www.first5la.org/article/first-5-la-annual-reporting-project-request-for-qualifications-rfq/</p>



Q & A

Ask us Questions



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

Question and Answer

All questions (4) My questions (4)

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

Where will this recording be posted?

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?

Type your question here...

Send anonymously

Question and Answer

All questions (4) My questions (4)

D Daisy 02:54 PM

This recording will be posted on:
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AP Abigail Proff (She/hers) (You) 02:54 PM

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

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

A photograph of a pregnant woman in a bright yellow dress with a white floral pattern. A young girl with dark curly hair and a pink bow is smiling and touching the woman's belly. The background is a soft-focus green outdoor setting.

Thank You
dortiz@first5la.org