

**ENTERPRISE RESOURCE PLANNING  
(ERP) SOFTWARE  
REQUEST FOR PROPOSALS (RFP)**

Los Angeles County Children and Families First –  
Proposition 10 Commission (aka First 5 LA)

RELEASE DATE: 5/26/2026

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**I. TIMELINE FOR SELECTION PROCESS<sup>1</sup>**

ACTIVITY	DATE
RFP Released on First 5 LA’s Funding Center	May 26, 2026
Informational Webinar	June 4, 2026, at 1:00 PM PT
Final date to submit questions regarding the solicitation	June 9, 2026, at 5:00 PM PT
Posting of responses to questions regarding the solicitation	June 11, 2026
Proposal Submission Deadline	June <del>23</del> <b>29</b> , 2026, at 5:00 PM PT
Demonstrations	Week of July 27, 2026
Contractor Selected	August 19, 2026
Board of Commissioners Approval	October 8, 2026
Contract Start Date	October 12, 2026

First 5 LA will accept proposals responding to this Request for Proposals (RFP) from proposers through First 5 LA’s online application system. First 5 LA will accept proposal submissions from the date of the release of this RFP through **June 23-29, 2026 at 5:00 PM PT. Proposals submitted after 5 p.m. PT will not be considered.** It is the proposer’s responsibility to verify submission prior to the deadline. First 5 LA will not be responsible for any technical problems or submission failure. **Failure to submit ALL required documents as identified by Section X. Required Documents by 5:00 p.m. PT may constitute an incomplete proposal and may be grounds for disqualification.**

Questions and requests for additional information must be submitted in writing to:

Jessica Guerrero-Franco, Contract Operations and Compliance Officer  
 E-mail: [jguerrero-franco@First5la.org](mailto:jguerrero-franco@First5la.org)

All questions and requests for additional information regarding this RFP must be received in writing by First 5 LA via email before **5 p.m. PT on June 9, 2026**. First 5 LA reserves the sole right to determine the timing and content of the responses to all questions and requests for additional information, First 5 LA may respond to individual inquiries and then post replies to all questions on F5LA’s website by the posting date.

<sup>1</sup> Note: Dates are subject to change at First 5 LA’s sole discretion.

## Informational Webinar

Potential proposers are highly encouraged to participate in the Informational webinar from **1-2 p.m. PT on June 4, 2026** to learn more about the RFP requirements. Please register for the webinar at: [https://first5la.zoom.us/webinar/register/WN\\_QurNs7chTr-5N6sNGm3utA](https://first5la.zoom.us/webinar/register/WN_QurNs7chTr-5N6sNGm3utA). After registering, you will receive a confirmation email containing information about joining the webinar.

## Updates and Addenda

**Please check the Funding Opportunities 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/article/enterprise-resource-planning-erp-request-for-proposals-rfp/>. It is the responsibility of proposers to ensure, prior to submission, that their application reflects the most recent information and RFP requirements.

## II. BACKGROUND

In 1998, California voters passed Proposition 10, which levied a 50-cent per pack tax on all tobacco products. The resulting tax revenues were earmarked for the creation of a comprehensive system of information and services to advance early childhood development and school readiness within each county in California. In Los Angeles County, the First 5 LA Commission was formed as a public entity to develop and oversee various early childhood initiatives and to manage the funding from Proposition 10.

First 5 LA operates with independent governance under a Commission structure and is responsible for stewarding public funds to support systems, services, and initiatives that benefit children prenatal through age five and their families. While formed by the County, First 5 LA functions as a separate public entity with its own administrative, fiscal, and programmatic operations, and is subject to applicable state and local regulations.

The organization primarily receives funding allocations derived from Proposition 10 revenues, along with other public and private funding sources. These funds are subject to varying restrictions and reporting requirements and are deployed through a combination of grants and contracts often awarded via competitive solicitations. Both grants and contracts require ongoing fiscal and programmatic monitoring, including invoice review, performance tracking, and compliance verification. In some cases, First 5 LA serves as a pass-through entity, administering funds that are distributed to contractors and grantees.

First 5 LA manages a diverse portfolio of agreements to meet operational and programmatic needs of the organization to support our [2024-2029 Strategic Plan](#). This requires managing funding streams and projects spanning multiple years, often renewed on an annual basis. The organization is subject to annual independent financial and compliance audits. The organization maintains budgetary controls and requires robust financial management, contract and grant administration, reporting, and oversight capabilities to ensure responsible stewardship of public resources.

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The Board adopted a 10-Year Long-Term Financial Plan in 2024 that intentionally positions the organization on a sustainable path toward becoming a \$60 million organization while maintaining as much operational stability as possible over an eight-year transition period beginning in FY 2027/28. The plan reflects a deliberate and measured “step-down” approach designed to responsibly align expenditures with long-term revenue realities while preserving core services and organizational capacity.

The organization is currently in the second year of implementing this strategy. Under the adopted plan, the FY 2025/26 budget is set at \$80 million, followed by a reduction to \$70 million in FY 2026/27, ultimately reaching the long-term target of approximately \$60 million beginning in FY 2027/28.

This financial strategy is necessary due to the organization’s continued reliance on a declining primary revenue source, currently estimated at approximately \$46.8 million annually and projected to decrease by roughly 3.25% each year. The Long-Term Financial Plan provides a structured framework that allows the organization to proactively manage this decline, maintain fiscal sustainability, and continue delivering services in a predictable and financially responsible manner. The financial context of the organization will be an important consideration as First 5 LA determines the purchase of new systems.

**III. PROJECT OVERVIEW**

First 5 LA (F5LA) is seeking proposals from qualified firms to provide a modern Enterprise Resource Planning (ERP) software solution and related implementation services. The selected solution is intended to replace or augment existing financial, grants, procurement, and administrative systems (most notably Blackbaud Financial Edge NXT, Blackbaud Grantmaking, ADP, and Questica PowerPlan) to better support F5LA’s operational needs, reporting obligations, and long-term strategic objectives. Version numbers for systems in scope for replacement have been included below.

Current System	Version Number	Functions
Blackbaud Financial Edge NXT	SAAS/latest version	General ledger, accounts payable, accounts receivable, fixed assets, purchasing
Blackbaud Grantmaking (BBGM)	SAAS/latest version	Grantmaking
ADP-Workforce Now	26.19.01	Human resources, payroll
Questica PowerPlan	2025.1.5.2580	Budgeting

This project addresses critical operational and systems challenges that limit F5LA’s ability to efficiently manage financial resources, grants, contracts, and organizational data in a unified, scalable, and secure manner. As F5LA continues to advance its mission to improve outcomes for children and families and steward public funds responsibly, a robust, integrated ERP solution is required to strengthen internal controls, improve decision-making, and support organizational effectiveness.

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This project supports First 5 LA’s Strategic Plan by strengthening organizational effectiveness and supporting responsible stewardship of public funds through enhanced systems, execution, and long-term impact.

**IV. SCOPE OF SOFTWARE**

First 5 LA is requesting proposals from qualified ERP software providers for the following scope of software modules. First 5 LA prefers a single proposer capable of delivering all or the majority of required functionality described herein; however, First 5 LA will accept and consider any of the following proposal models:

- A single vendor, full ERP solution providing all required modules and services;
- A partnership or multi-respondent solution, in which two or more vendors jointly propose an integrated ERP solution, with one vendor identified as the prime vendor; or
- A standalone, best-of-breed proposal from a vendor offering a partial solution, individual module, or functional component of the overall ERP system.

Proposals involving multiple respondents or partnerships must present a fully integrated solution and shall clearly define governance, roles, responsibilities, and single point accountability across all vendors, including responsibility for implementation, integration, performance, and issue resolution.

ERP FUNCTIONAL MODULES	TECHNICAL/ADMINISTRATION TOOLS
Accounts payable	Cloud hosting
Accounts receivable	Reporting and dashboards
Budgeting	Integrations
Fixed assets	Workflow
General ledger	Document management
Grantmaking	Authentication and authorization security
Human resources	Data management
Payroll	Reconciliation
Purchasing	

The proposed ERP solution's accounting, financial management, budgeting, procurement, grant management, and reporting functions must operate in compliance with all applicable governmental accounting and financial reporting standards, including but not limited to:

- Generally Accepted Accounting Principles (GAAP)
- Governmental Accounting Standards Board (GASB) requirements
- California public agency accounting and reporting requirements
- Applicable federal, state, and local fiscal compliance regulations
- Audit and internal control requirements applicable to publicly funded entities

Applicable financial modules of the ERP system must support governmental accounting and financial reporting functions including, but not limited to:

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- Fund accounting
- Encumbrance accounting
- Grant and restricted funding tracking
- Multi-year budgeting and forecasting
- Audit trails and transaction history
- Segregation of duties and role-based security
- Financial statement preparation and reporting
- Compliance reporting for governmental and nonprofit/public sector operations

First 5 LA requires that proposers itemize software costs by module to the fullest extent possible, such that First 5 LA can add or remove modules (and their associated costs) from the scope of the awarded proposer's solution if it so chooses. First 5 LA reserves the right to award any combination or configuration of modules to any proposer if it so chooses, including a single module only, multiple modules, or all modules. First 5 LA also reserves the right to make multiple awards to different proposers if it determines that a best-of-breed approach best meets its needs. Additionally, First 5 LA reserves the right to make no award to any proposer for any module or combination of modules, in the event it elects to maintain current applications already in place at First 5 LA. Detailed requirements for each of the ERP modules and technical/administration tools components listed above have been outlined in Appendix B.

## V. SCOPE OF SERVICES

In addition to ERP software, First 5 LA requires implementation services from either a qualified third-party partner or the software provider itself. Required implementation services will include the following:

- |                                     |                                    |
|-------------------------------------|------------------------------------|
| • Project management                | • Training                         |
| • Software configuration            | • Testing                          |
| • Data conversion                   | • Change management                |
| • Report and dashboard development  | • Knowledge transfer               |
| • Integration/interface development | • System documentation development |

Requirements and expectations with regards to each of these services are described below. Questions with regards to each of these services are included in **Appendix B A**.

### A. Project Management

First 5 LA expects the proposer to apply a structured and transparent project management methodology that ensures alignment with First 5 LA's strategic goals, timelines, and budget. The proposer must lead all phases of the ERP implementation, including planning, execution, monitoring, and closure, while facilitating cross-functional coordination and stakeholder engagement. Best practices include weekly status meetings, functional team meetings, executive steering committee updates, and risk reporting. The proposer should also support First 5 LA in defining governance structures and decision-making protocols to ensure accountability and timely resolution of issues.

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## **B. Software Configuration**

The proposer must configure the ERP system to reflect First 5 LA's operational workflows, compliance requirements, and future vision for business processes. It is expected that the proposed will conduct configuration workshops to understand First 5 LA's requirements and collaboratively develop configuration designs that meet needs and align with industry best practices. It is important to note that while configuration services are required, First 5 LA intends to avoid customization or any modifications to system code. The proposer is expected to document all configuration decisions, validate them through stakeholder walkthroughs, and ensure alignment with First 5 LA's process improvement goals.

## **C. Data Conversion**

First 5 LA requires the proposer to manage a comprehensive data conversion strategy that includes mapping, cleansing, validation, and reconciliation of legacy data. The proposer must conduct mock conversions and provide rollback procedures to mitigate risk. Data integrity and auditability are paramount, and the proposer must ensure that converted data supports First 5 LA's reporting and compliance needs. The proposer should also assist in identifying data gaps and recommend remediation strategies.

## **D. Report and Dashboard Development**

The proposer must design and implement reports and dashboards that provide actionable insights into First 5 LA's financial, operational, and strategic performance. This includes both standard and custom reports, as well as analytical tools for self-service reporting. Dashboards should be role-based and tailored to the needs of executives, contracts staff, HR, IT Security, finance staff, and program managers. The proposer must ensure data accuracy, visual clarity, and decision-making frameworks.

## **E. Integration/Interface Development**

The ERP system must be capable of integrating with a variety of 3<sup>rd</sup>-party software systems and data sources. As an add/alternate service, First 5 LA has requested that proposers provide pricing for 100 hours of integration development services (see Appendix A – Pricing Form). If this add/alternate service is selected, the proposer will be expected to develop secure, scalable interfaces using APIs or middleware, and document all integration points. Testing protocols must validate data flows, error handling, and performance under load. The proposer should also provide monitoring tools and support for ongoing interface maintenance.

## **F. Training**

First 5 LA expects the proposer to deliver a comprehensive training program that includes role-based instruction, hands-on workshops, and post-go-live support. Training should cover system navigation, process changes, reporting tools, and troubleshooting. The proposer must provide training materials in accessible formats and offer refresher sessions as needed. First 5 LA values a learning culture, and the proposer should tailor training to accommodate varying levels of technical proficiency.

## **G. Testing**

The proposer must lead a rigorous testing process that includes unit, system, integration, and user acceptance testing (UAT), as well as parallel payroll testing in the case that the HCM module is implemented. Test scripts should reflect real-world scenarios and be developed in collaboration with First 5 LA stakeholders. The proposer must track defects, manage resolution workflows, and ensure that the system meets functional, performance, and security requirements. Testing must also validate compliance with First 5 LA's internal controls and audit standards.

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## H. Change Management

First 5 LA recognizes that ERP implementation involves significant organizational change. The proposer must lead change management efforts, including stakeholder engagement, communication planning, and readiness assessments. The proposer should develop strategies to address resistance, promote adoption, and align the ERP rollout with First 5 LA's mission and values. The proposer's change management team is expected to support the development and execution of the training plan to ensure alignment with change objectives and a stakeholder-centric design. Deliverables include change impact analyses, communication templates, and feedback mechanisms.

## I. Knowledge Transfer

The proposer must ensure that First 5 LA staff are equipped to maintain and enhance the ERP system post-implementation. This includes structured knowledge transfer through documentation, shadowing, and mentoring. The proposer should provide user guides, FAQs, and decision logs that capture key implementation choices. The goal is to build internal capacity and reduce reliance on external support.

## J. System Documentation Development

First 5 LA expects the proposer to produce comprehensive documentation covering system architecture, configuration, workflows, and user procedures. Documentation must be updated throughout the project lifecycle and stored in a centralized, accessible repository. The proposer should also provide templates and tools for First 5 LA to maintain documentation going forward.

## VI. ELIGIBILITY

The proposed system must meet the following minimum requirements. If your system does not comply, please do not submit a proposal:

- A. Legal status** - Eligible proposers must be a legally recognized entity in good standing and, if required to register with the California Secretary of State, must have an "active" status at the time of proposal submission. First 5 LA will verify status through the California Secretary of State's website.
- B. Current version** - The proposed solution must currently be operational with other clients. Do not respond based on a future release or version. By implication, you must be able to demo a live (albeit anonymous) database.
- C. SaaS-based** - The system must be a Software-as-a-Service (SaaS) offering and be hosted in the United States by the proposer or a qualified third-party site hosting partner.
- D. Web-based** - The system must be accessible via a variety of web browsers (i.e. Chrome, Safari, Edge, Firefox, etc.) and from any location with an internet connection. The system should not require any locally installed software in order to operate.
- E. Integration** - All modules and functions across the proposed solution must integrate seamlessly. The proposed solution must also have the ability to integrate with third-party systems using configurable API's.
- F. Reporting tools** - The system must have flexible, intuitive reporting tools, accessible to end users, that can access data from all proposed modules, and have the ability to select, filter, sort, correlate, and summarize.

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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 and Review Criteria*).

## VII. EVALUATION CRITERIA

For both Level 2 and Level 3 evaluation, proposers will be reviewed based on the following evaluation criteria. During Level 2, proposals will be evaluated solely on content of proposals in order to identify a short-list using all or a subset of criteria listed below. During Level 3, shortlisted proposers will be evaluated on all information collected throughout the RFP process (proposal content, demonstrations, reference checks, etc.).

<b>Criteria/Sub-Criteria</b>	<b>Weight</b>
<b>Functionality</b>	<b>35%</b>
Module functional compliance (based on RFP specification responses)	
Overall ease of use/graphical user interface/intuitiveness	
Reporting, analytics, and BI features	
Demonstration results and feedback	
<b>Vendor background and experience</b>	<b>17.5%</b>
Financial stability	
Market presence and trend	
Industry focus and experience	
Number of installations in comparable organizations (nonprofit and Government)	
References	
<b>Implementation and support approach</b>	<b>17.5%</b>
Implementation timeline and phasing	
Staffing approach and allocation of effort between vendor/client	
Project management approach	
Training approach	
Data conversion approach	
Ongoing support and maintenance	
<b>Technical solution</b>	<b>10%</b>
Authentication/authorization security (SSO, MFA, dynamic permissions, etc.)	
Hosting provider's qualifications	
Integration capabilities, APIs, etc.	
Best-of-breed vs. full integrated ERP approach	
<b>Cost</b>	<b>20%</b>
Implementation and professional services costs	
Annual licensing and operational costs	

## VIII. TERMS OF PROJECT

First 5 LA expects to enter into a 5-year initial agreement with the selected vendor with an anticipated start date of October 12, 2026, subject to negotiations and approval by the First 5 LA Board of Commissioners. The contract may renew annually at First 5 LA’s sole discretion for a total project term

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of up to 8 years. Subsequent budgets will be determined by the scope of work and needs of this project. Contract renewal will be based on First 5 LA business need, vendor performance and may be contingent upon approval by the First 5 LA Board of Commissioners. First 5 LA reserves the right to terminate the contract if the system or quality of services is not to First 5 LA's satisfaction. Nothing in this RFP shall be construed as a continuing entitlement or right to contract renewal beyond First 5 LA's discretion.

A schedule of regular reports will be jointly determined by First 5 LA and the selected proposer. Additional contract management requirements and/or reports will be determined by First 5 LA and selected proposer during negotiations. The selected proposer shall have technological capabilities for efficient phone and email communication to facilitate interaction with First 5 LA staff and other partners as necessary.

This will be a fixed-price contract. Payments will be based on a fixed price that is not subject to any adjustment by reason of costs experienced by vendor in the performance of the contract. A final budget will be negotiated with the selected proposer.

## **IX. SELECTION PROCESS**

First 5 LA will review proposals 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 Internal Review

First 5 LA will evaluate all proposals for completeness, compliance with minimum requirements, and cost reasonableness. 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 VI. Eligibility. Proposals with omissions of any required documentation are subject to disqualification. First 5 LA reserves the right to eliminate proposals for cost reasons at this stage.

First 5 LA will also conduct a due diligence review which includes a review of the Due Diligence form (Appendix C: Due Diligence 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.

### Level 2 Proposal Review

Reviewers will score proposers based on the criteria described in Section VII of the RFP.

- **Full ERP Solution proposals** (from either a single vendor or multiple vendors in one single proposal) will be evaluated and scored comparatively against one another. The two (2) or three (3) highest scoring full ERP proposals will be shortlisted to advance to Level 3.
- **Standalone Best-of-breed solution proposals** will be evaluated independently and qualitatively based on their proposed functionality, integration approach, value, and alignment

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with First 5 LA's requirements. Standalone proposals that achieve a minimum score of 75 points may, at First 5 LA's discretion, be invited to advance to Level 3.

Reviewers may participate in a calibration session prior to finalizing scores.

### Level 3 Demonstrations and Reference Checks

#### Demonstrations

Proposers advancing beyond Level 2 may be invited to provide virtual software demonstrations to First 5 LA. Demonstrations may include:

- Shortlisted **Full ERP Solutions**, and
- **Standalone Best-of-breed Solutions** that meet or exceed the minimum scoring threshold.

Tentative demonstration dates are included in **Section I: Timeline for Selection Process** and are subject to change at First 5 LA's sole discretion. Demonstrations will be conducted via a virtual platform (e.g., Zoom or Microsoft Teams). First 5 LA reserves the right to request additional written materials before or after demonstrations and to schedule additional meetings, as needed.

#### Reference Checks

Reference checks will be conducted for proposers participating in Level 3 Demonstrations. First 5 LA must be able to contact at least two (2) references provided by the proposer. If references cannot be reached after reasonable attempts, First 5 LA may, at its sole discretion, request alternate references or deem the proposer nonresponsive.

#### Final Scoring

After completion of Software Demonstrations and Reference Checks, reviewers will score proposers from Level 3 based on the criteria described in Section VII. Reviewers may participate in a calibration session prior to finalizing scores.

#### Award of Contract

Based on final scoring and overall best value determination, First 5 LA may:

- Select **one (1) ERP solution** for contract award or recommendation to the First 5 LA Board of Commissioners, and/or:
- Select one or more **Standalone Best-of-breed solutions**, if their proposed modules or functionality are determined to better meet First 5 LA's needs than comparable modules offered within the selected ERP solution.

First 5 LA reserves the right to award any combination or configuration of modules to any proposer if it so chooses, including a single module only, multiple modules, or all modules. First 5 LA also reserves the right to make multiple awards to different proposers if it determines that a best-of-breed approach best meets its needs. Additionally, First 5 LA reserves the right to make no award to any proposer for any module or combination of modules, in the event it elects to maintain current applications already in place at First 5 LA. First 5 LA reserves the right to make no award, to award multiple contracts, or to negotiate with one or more proposers, in the best interests of First 5 LA.

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## X. REQUIRED DOCUMENTS

The documents listed in this section are required in the proposer's response to this RFP to be considered a responsive proposal. Omission of any document/form will constitute an incomplete proposal and may be grounds for disqualification. Proposals that exceed 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 Level 2: Proposal Review. The removed page(s) will not be made available to reviewers.

Unless explicitly requested below, do not embed hyperlinks in your proposal documents. Any hyperlink included in proposal documents will be deactivated before the Level 2: Proposal Review and will not be made available to reviewers.

- **Online Application:** In order to respond to this RFP, 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 accessing the online application may be found at [First 5 LA Online Application Help | First 5 Los Angeles](#)

To access the online application: <https://bbgm-apply.yourcausegrants.com/apply/programs/a3979d9c-29a5-4653-ad60-df136f855a5d>

- **Due Diligence Form (Appendix C):** Please read the information on the required Due Diligence Form in Appendix C thoroughly and include a signed copy by the proposal deadline. If you checked "Yes" to any of the questions on this form, please explain whether this will impact the project on this solicitation.
- **Organizational Conflict of Interest Form (Appendix D):** Please read the information on the required Appendix D Organizational Conflict of Interest Form thoroughly and submit a signed completed form. Only complete the section applicable to you (No conflict or potential conflict of interest, but not both sections).
- **Business License, if applicable** (e.g., Business license, if required by the City or County in which your organization operates)
- **Proposal Narrative:** The proposal narrative should be submitted as a **single machine-readable PDF** and should include the following information (*35 pages maximum*). Information required to fulfill the response requirements should be provided as directly and succinctly as possible.
  - A. **Cover Letter** – Indicating intent to provide ERP software to First 5 LA and providing at least three (3) date/time options during the **week of July 27, 2026** when the responding vendor is available to demonstrate their software to First 5 LA, if short-listed. (*1 page maximum*)
  - B. **ERP Solution Informational Packet** – Providing information on ERP modules(s) offered by proposing vendors. Informational packets should, at minimum, contain a list of software modules offered within the responding vendor's ERP solution. Informational packets may also contain marketing materials describing key features and differentiators of ERP modules,

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system screenshots, case studies, testimonials, descriptions of relevant experience, etc. (10 pages maximum)

- C. **General Experience** – Describe your company’s experience providing ERP software to nonprofit organizations of similar size/scope/mission and with similar GASB/governmental accounting requirements to First 5 LA. This description should include a sample customer list, and may also include testimonials, case studies, and other content illustrating relevant experience. (5 pages maximum)
- D. **Project Plan** - Provide a comprehensive project plan describing the proposed approach to planning, executing, and delivering the ERP implementation. The project plan should include a detailed timeline with key phases, milestones, and deliverables. The plan should demonstrate a clear and achievable path to successful implementation in alignment with First 5 LA’s requirements as described in the RFP. (This section does not count towards page limits)
- E. **Staffing Plan** - Provide a comprehensive staffing plan that identifies both vendor and client implementation staff required to support the project. The staffing plan should clearly describe roles, responsibilities, and reporting relationships across the duration of the implementation. For *client* staff, the response must identify each proposed role and provide an estimated level of effort, including the percentage of time each role is expected to be engaged during each phase of the project. For *vendor* staff, the response must identify all proposed implementation team roles, including any subcontractors, and describe their responsibilities and areas of expertise. The staffing plan should demonstrate that the proposed team structure is sufficient to successfully deliver the project on schedule and in alignment with First 5 LA’s requirements. (5 pages maximum)
- F. **Resumes** - Resumes for the proposed Project Team, including the vendor Project Manager, demonstrating relevant experience with ERP implementations of similar size, scope, and complexity. (This section does not count towards page limits)
- G. **Implementation Methodology** – Provide detailed information on your methodologies and ability to meet First 5 LA’s requirements for each of the implementation services described in Section V of this RFP. For each service area (project management, software configuration, data conversion, report/dashboard development, integration/interface development, training, testing, change management, knowledge transfer, system documentation, temporary staff augmentation, and accounting/finance subject matter expertise), describe your approach, relevant experience, and proposed deliverables. Include a detailed timeline and project plan that describes sequencing and duration of events, phasing, and anticipated kickoff and go-live dates. (10 pages maximum)
- H. **Product Roadmap and Emerging Technologies** - Provide a detailed timeline of current and planned future releases for the ERP software. Include major features, enhancements, and updates that are scheduled for the next 12-24 months. Additionally, describe how your company is incorporating emerging technologies into your ERP solution. This may include, but is not limited to, artificial intelligence (AI), machine learning (ML), blockchain, Internet of Things (IoT), and advanced analytics. Explain how these emerging technologies will enhance the functionality, performance, and user experience of the ERP software. (4 pages maximum)

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- I. **Vendor Sample Agreement** – Vendor's standard software agreement, including all relevant agreement documents and any exceptions to Section XII-Special Terms and Conditions (if any). *(This section does not count towards page limits)*
- **Pricing and Vendor Response Forms (Appendix A):** Appendix A includes the required pricing templates and vendor response forms that proposers must complete and submit as part of their proposal. This appendix is intended to ensure a consistent and comparable format for vendor pricing, including detailed cost information, licensing, implementation services, optional services, and any ongoing maintenance or support fees. Additionally, this Appendix contains forms for vendors to provide details regarding experience, the proposed software suite, and proposed services, as well as a references form. Vendors must complete forms and fields, and adhere to the instructions provided to allow F5LA to clearly evaluate pricing, assumptions, and proposed contract terms. *This Appendix must be returned as a separate attachment in Excel format.*
  - **ERP Functional Requirements (Appendix B):** Appendix B outlines F5LA's functional requirements for the proposed solution, organized by business and system areas. Vendors are required to indicate the degree to which their proposed solution meets each requirement, using the response options and guidance provided. This appendix supports a structured evaluation of functional fit, identifies configuration versus customization needs, and helps F5LA assess how well each solution aligns with its operational, reporting, and workflow requirements. *This Appendix must be returned as a separate attachment in Excel format.*

**Failure to submit all required attachments may constitute an incomplete proposal and may be grounds for disqualification.** Proposers are responsible for any errors and omissions in their proposals and applications. In order to respond to this RFP, please complete and submit your proposal and all required documents to First 5 LA via online portal no later than ~~June 22, 2026~~ **June 23 29, 2026** at 5:00 PM PT. **Proposals received after this deadline will not be considered and will be automatically disqualified.**

It is the responsibility of the proposer to ensure, prior to submission, that its proposal reflects the requirements of this solicitation, including any addenda First 5 LA may have issued. Proposers should not wait to submit documents through the online application system minutes before the submission deadline. First 5 LA will not be responsible for any delays proposers may encounter with the online application system.

## **XI. TERMS OF THE RFP**

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 an addendum may result in the proposal not being considered, at the sole discretion of First 5 LA. It is the responsibility of proposers to ensure, prior to submission, that their application reflects the most recent addenda information and RFP requirements. Addenda to this solicitation, if any, will be posted on First 5 LA's website at <https://www.first5la.org/news-resources/funding-center/>.

First 5 LA reserves the right to reject all bids and re-advertise for bids, and that failure to comply with bid specification may be grounds for disqualification of bids. Each bidder or proposer shall be required

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to honor the price and specifications quoted for a minimum of ninety (90) calendar days following submission of the bid unless otherwise approved by First 5 LA. First 5 LA may waive any irregularity in bids or proposals if the irregularity does not provide an unfair competitive advantage over other bidders or proposers. First 5 LA also reserves the right to cancel this RFP, in its sole discretion, at any time before execution of a contract.

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 RFP. Any cover letters, résumés and curriculum vita, including attached materials, submitted in response to this RFP shall become First 5 LA's property and subject to public disclosure.

Each proposal shall be retained for official files and will become public record upon submittal unless the proposal or specific parts of the proposal can be shown to be exempt from disclosure by law. The budget, scope of work and other contractual information may be included in board materials which are made public if the contract requires board approval. Each proposer may clearly label parts of a proposal as "CONFIDENTIAL" if the proposer thereby agrees to indemnify and defend First 5 LA for honoring such a designation. The failure to so label any information that is released by First 5 LA shall constitute a complete waiver of all claims for damages caused by any release of the information. If a public records request for information labeled confidential is received by First 5 LA, First 5 LA will notify the proposer of the request. Within seven (7) calendar days after First 5 LA's notification to the proposer, it will be the proposer's duty to act in protection of the labeled information. The proposer's failure to so act shall constitute a complete waiver.

The proposer agrees that, by submitting application proposal, the proposer authorizes First 5 LA to verify any or all information and/or references submitted in the proposal.

False, misleading, statements in connection with a proposal shall be sufficient cause for rejection of the proposal at any time. The evaluation and determination in this area shall be at First 5 LA's sole judgment.

First 5 LA may waive any irregularity in bids or proposals if the irregularity does not provide an unfair competitive advantage over other bidders or proposers.

## **XII. SPECIAL TERMS AND CONDITIONS**

- A. **Entire Agreement** – First 5 LA will require that this RFP and the resulting vendor proposal be included as addenda to any subsequent contracts between the proposer and First 5 LA. It should be understood by the proposer that this means First 5 LA expects the proposer to satisfy substantially all requirements and reports listed within the RFP. Exceptions to the terms and conditions of this RFP should be explicitly noted within proposals. When indicating exceptions, please denote the relevant document and section number to which exception is taken. For any term or section of these documents to which vendors have not indicated any exceptions, First 5 LA assumes that vendors fully comply.
- B. **Warranty Of Fitness For A Particular Purpose** – First 5 LA has presented detailed functional and technical specifications of the particular purpose for which the software and equipment is intended. First 5 LA has provided detailed descriptions and criteria of how the system can be defined to

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accomplish this particular purpose. First 5 LA has also defined the exact procedures and techniques to be employed in testing whether the system has achieved the defined performance of this particular purpose. Given this advanced preparation concerning, and documentation about, First 5 LA's particular purpose, the proposer, at the time the Agreement is in force, has reason and opportunity to know (i) the particular purpose for which products are required, and (ii) that First 5 LA is relying on the proposer's experience and knowledge of these products to provide those that are most suitable and appropriate. Therefore, the proposer warrants that the system is fit for the purposes for which it is intended as described in this document.

- C. **Final Acceptance Of The System** - The system proposed shall be defined to be finally accepted by First 5 LA after the installation of the software equipment, training, and successful completion of the following performance examinations: system hardware examination, performance examination, system functional competence examination, system capacity examination, full-load processing capacity examination, system availability examination, training, and system documentation. First 5 LA shall be the sole judge of whether all conditions for final acceptance criteria have been met.
- D. **Data Ownership And Extraction Rights** – First 5 LA retains sole ownership of all data entered into, created by, or generated through the use of the ERP system. Upon request at any time during the term of the Agreement and following expiration or termination for any reason, the Proposer shall provide First 5 LA with a complete export of First 5 LA's data, including configuration and transactional data, in an industry standard, machine readable format reasonably acceptable to First 5 LA. Data exports shall be provided without restriction, encryption barriers, or proprietary lock in that would prevent First 5 LA or its designated successor from reasonably accessing, interpreting, and using the data.

The Proposer must ensure that the data extraction process is completed within 30 days of termination, at no additional cost to First 5 LA. The Proposer shall also offer reasonable assistance to ensure the integrity and usability of the extracted data. Additionally, the Proposer must securely delete all copies of First 5 LA's data from their systems, except where retention is required by law.

- E. **Regression Protection** – The Proposer shall ensure that updates, upgrades, patches, or new releases to the proposed solution do not materially degrade existing functionality, performance, security, integrations, reports, or business processes previously available to First 5 LA.

The Proposer shall not remove, disable, or materially alter core functionality relied upon by First 5 LA without reasonable advance notice and First 5 LA's written concurrence, except where required to address security vulnerabilities or comply with applicable law.

If an update or release results in a material degradation of functionality or performance ("Regression"), the Proposer shall promptly, and at no additional cost to First 5 LA:

- Correct the Regression; or
- Provide a reasonable workaround acceptable to First 5 LA; or
- Restore the prior functional state until the Regression is resolved.

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First 5 LA shall be entitled to defer acceptance or deployment of any update or release that materially fails to meet applicable requirements until such Regression is remedied.

- F. **Data Breach and Security Incident Obligations** – The Proposer shall be responsible for safeguarding First 5 LA data in accordance with applicable law, industry-accepted security standards, and the requirements of the Agreement.

In the event of any unauthorized access, disclosure, acquisition, or use of First 5 LA data that compromises the confidentiality, integrity, or availability of such data (“Security Incident”), the Proposer shall:

- Promptly notify First 5 LA in accordance with applicable law and contractual requirements;
- Investigate and remediate the Security Incident;
- Cooperate with First 5 LA in meeting any legal, regulatory, or contractual notification obligations; and
- Take commercially reasonable steps to prevent recurrence.

- G. **Data Breach Indemnification** – To the extent a Security Incident is caused by the Proposer’s failure to comply with its security obligations under the Agreement, the Proposer shall indemnify and hold harmless First 5 LA from third-party claims, regulatory fines or penalties, and reasonable, documented costs incurred by First 5 LA in connection with the Security Incident, including notification, credit monitoring (if required by law), and remediation efforts. Data breach indemnification obligations shall apply notwithstanding any general limitation of liability, except to the extent prohibited by law.

- H. **Cybersecurity Liability Insurance** – In addition to First 5 LA’s general and standard insurance requirements, the proposer, at the proposer’s sole cost and expense, shall procure and maintain, during the life of the Agreement, Cyber Liability Insurance with limits of liability of not less than \$1,000,000 per occurrence or claim. Cybersecurity insurance coverage shall be sufficiently broad to respond to the duties and obligations as are undertaken by the proposer in the Agreement and shall include, but not be limited to, claims involving infringement of intellectual property, including but not limited to infringement of copyright, trademark, trade dress, invasion of privacy violations, information theft, damage to or destruction of electronic information, release of private information, alteration of electronic information, extortion, and network security. The policy shall provide first party and third-party coverage for breach response costs as well as regulatory fines and penalties as well as credit monitoring expenses with limits sufficient to respond to these obligations.

- I. **Transition Services** - In the event of termination by either party, First 5 LA may request that Provider provide reasonable transition services to assist with First 5 LA’s migration to a new provider. The parties agree to work together in good faith to create a mutually agreeable scope for those services, to be provided at proposer’s then-current rates. In no event shall proposer be required to disclose any confidential information to any such new provider. Proposer will reasonably cooperate in response to requests to provide information as such is commercially and reasonably available.

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J. **Project Manager Designation and Replacement** – The Proposer understands that the successful installation, testing, and operation of the system that is the subject of this document shall be accomplished by a cooperative effort. To most effectively manage this process, the Proposer shall designate a single representative to act as project manager, who shall have the authority to act on behalf of the Proposer on all matters pertaining to the Agreement.

In the event that an employee of the Proposer is, in the opinion of First 5 LA, uncooperative, inept, incompetent, or otherwise unacceptable, the Proposer agrees to remove such person from responsibility in the project. In the event of such a removal, the Proposer shall, within 15 days, fill this representative vacancy as described above. Regardless of whom the Proposer has designated as the representative, the Proposer's organization remains the ultimate responsible party for performing the tasks and responsibilities.

### **XIII. CONTRACTUAL CONSIDERATIONS**

Proposers must submit a copy of their standard software agreement(s) and contracting documents with their proposal response. The successful proposer's standard agreement will be used as a starting point for contract negotiations. First 5 LA expects the final negotiated agreement to incorporate all special terms and conditions stated within Section XII of this RFP. The final negotiated agreement will also include this RFP and the successful Proposer's proposal as exhibits to the agreement. Proposers must disclose any exceptions within Section XII. Special Terms and Conditions, within their proposal response. If exceptions to any terms are not explicitly stated, First 5 LA will assume that proposers fully comply with those terms. Successful negotiation of all terms within Section XII is a condition for award. If a satisfactory agreement cannot be negotiated within 30 days of award, First 5 LA may, at its sole discretion, terminate negotiations and begin negotiations with the next qualified proposer, as determined by First 5 LA. First 5 LA may, after contract award, amend the awarded contract, scope of work and any other exhibits in accordance with the terms of the contract and as needed throughout the contract term to best meet the needs of First 5 LA.

Current and former First 5 LA grantees, contractors and vendors must be in good standing and compliant with all aspects of current and former agreements with First 5 LA in order to be eligible to respond to this RFP. First 5 LA may deem a proposer ineligible to respond to this RFP if it finds, in its sole discretion, that the proposer has done any of the following: (1) violated any term or condition of a First 5 LA agreement; (2) committed any act or omission, or engaged in a pattern or practice, that negatively reflects on the proposer's quality, fitness or capacity to perform services listed in this RFP; (3) committed an act or offense that indicates a lack of business integrity or business dishonesty; or (4) made or submitted a false claim to First 5 LA or any other public entity.

As stewards of public funds First 5 LA's Funding Guidelines (<https://www.first5la.org/article/funding-guidelines/>) are intended to provide information about the restrictions on the use of First 5 LA funds. Although these Funding Guidelines are applicable generally, the terms of individual funding agreements will always take precedence over these guidelines.

The award of a contract by First 5 LA to an individual/agency/organization that proposes to use subcontractors for the performance of work under the contract resulting from this RFP process shall not

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limit First 5 LA's right to approve subcontractors, assemble teams and/or assign leads. Each proposer will be evaluated independently for added value to the overall team.

The commencement of any activities under the contract's Scope of Work will not begin until the contract execution date (the date all parties have signed and delivered the contract) and the successful proposer will not be eligible to obtain reimbursement for any costs incurred prior to the contract execution date, unless otherwise approved in writing by First 5 LA. If the awarded contract is not signed by the successful proposer within thirty (30) calendar days from the proposed intended start date, First 5 LA may withdraw the contract award. First 5 LA may revise the proposed effective date prior to final execution of the awarded contract.

If the value of the contract is \$150,000 or more in the aggregate in any fiscal year, the award and execution of the contract is subject to First 5 LA's Board of Commissioners approval. Any performance of services commenced prior to obtaining all written approvals by First 5 LA shall be considered voluntary prior to final execution of the contract.

The Vendor shall ensure that its employees and subcontractors, as well as the participants in any program or service conducted hereunder, comply with all applicable federal, State and local public health orders to protect against the spread of the COVID-19 virus or other public health threat, including, without limitation, maintaining social distancing requirements, avoiding unnecessary or non-essential gatherings, and providing or requiring personal protective devices such as face masks, gloves and cleaning supplies.

Unless otherwise submitted during the RFP process, the successful proposer will be required to submit additional required documentation including, but not limited to, the following documents before the awarded contract can be fully executed:

- Due Diligence Form
- Signature Authorization Form and supporting documents as described in form

*If Applicable:*

- By-laws
- Articles of Incorporation
- Board of Directors or List of Partners
- Annual Independent Audit for prior fiscal year or calendar year
- Appropriate business licenses
- IRS Determination Letter for non-profit status
- Completed IRS Form W-9
- Memorandums of Understanding and Subcontracts (for any sub-contractors, collaborators, and/or partners)
- SSAE 18 SOC 2 Type II audit report

It is First 5 LA's intent to contract with independent contractors as defined under California's AB 5 and not to create an employer/employee relationship.

#### **XIV. APPEALS POLICY**

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First 5 LA reserves the right, without prejudice, to reject any or all submitted proposals. An appeal shall be permitted only on the grounds that the decision violated applicable law, First 5 LA policies and procedures, or the terms of the solicitation. Appeals challenging First 5 LA's decisions on the merits or qualifications of bidders or proposers, or the scoring of proposals shall not be permitted. Appeals regarding First 5 LA's decisions on procedural or formatting errors, such as failure to include required documentation or failure to comply with page limits, shall not be permitted. An appeal of a First 5 LA decision shall be in writing and filed within ten (10) business days following the date the notification of decision is made by First 5 LA. The appeal must be filed by email to the designated contact person on the solicitation or other method described in the solicitation. An appeal shall be deemed filed on the date it is received by First 5 LA. Any appeal received by First 5 LA after the close of business on the tenth (10th) business day following the date the notification of decision is issued shall be rejected. Please be advised that your agency has the right to appeal the decision. First 5 LA's Appeals Policy can be found at <https://www.first5la.org/wp-content/uploads/2021/10/Procurement-Policy-2021.pdf>. Please refer to Section XIV. Appeals for more information.

## **XV. APPENDICES**

The following appendices have been included as attachments to the RFP and require submission along with the narrative proposal response as described in Section X of the RFP.

- Appendix A – Pricing and Vendor Response Forms
- Appendix B – ERP Functional Requirements
- Appendix C – Due Diligence Form
- Appendix D – Organizational Conflict of Interest Form

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