



First5LA.org

STATE POLICY AND ADVOCACY CONSULTANT REQUEST FOR QUALIFICATIONS(RFQ)

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

RELEASE DATE: **AUGUST 18, 2022**

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I. TIMELINE FOR SELECTION PROCESS¹

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

First 5 LA will accept proposals responding to this Request for Qualifications (RFQ) 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 RFQ through **5:00 p.m. PT on SEPTEMBER 12, 2022. Proposals submitted after 5 p.m. 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:

Daisy Ortiz, Contract Compliance Manager
E-mail: dortiz@first5la.org

All questions and requests for additional information regarding this RFQ must be received in writing by First 5 LA via email before **5 p.m. PT on SEPTEMBER 6, 2022.** 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.

¹ Note: Dates are subject to change at First 5 LA's sole discretion.

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Informational Webinar

Potential proposers are highly encouraged to participate in the Informational webinar from **2:00 p.m. PT on AUGUST 31, 2022**, to learn more about the RFQ requirements. Please register for the webinar at: https://first5la.zoom.us/webinar/register/WN_XX5Nvz2eRbSeCqWM5XkS1g. 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 [Funding Center - First 5 Los Angeles \(first5la.org\)](#). It is the responsibility of proposers to ensure, prior to submission, that their application reflects the most recent information and RFQ requirements.

II. BACKGROUND

First 5 LA — Giving Kids the Best Start

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.

The First 5 LA 2020-28 Strategic Plan

In November 2019, First 5 LA's Board of Commissioners approved the 2020-28 Strategic Plan, which can be accessed at <https://www.first5la.org/2020-2028-strategic-plan/> that boldly articulates the goal of the organization's "North Star" – that by 2028, all children in Los Angeles County will enter kindergarten ready to succeed in school and life. The new plan will help guide and accelerate all First 5 LA does to make a tangible difference in the lives of children today and tomorrow.

A) First 5 LA's Values

First 5 LA grounds its work in its **values**, that act as guiding principles for how it does its work, the culture it aims to promote, and as a benchmark to measure behaviors and performance:

- **Collaboration**: We promote a collaborative culture and strategies in all that we do.
- **Integrity**: We act in ways that reflect our Values and hold ourselves accountable for our behaviors and the outcomes of our work.
- **Learning**: We integrate learning into all aspects of our decision-making, commit to continuous improvement and share what we have learned.

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- **Diversity, Equity and Inclusion:** We embrace the diversity of L.A. County, advocate for fairness and promote systems that advance the full participation of young children and their families.

B) First 5 LA’s Investment Guidelines

First 5 LA’s Investment Guidelines serve as criteria for decision-making for all major components of the strategic planning process and as ongoing policy guidance for Board and staff during implementation. Together, the Investment Guidelines represent a “six-part identity statement for First 5 LA that explicitly prioritizes adopting an equity lens through our work and addressing the critical challenge of declining First 5 revenue:

- **Equity:** Prioritize children, families and communities in our target population that our work has the greatest potential to impact and advance our North Star.
 - Use data to elevate disparities and achieve equitable outcomes
 - Strengthen existing public systems to be child and family-centered
 - Incorporate the voice of families and communities in systems change
- **Sustainability:** Embed sustainability strategies within all of our work
 - Plan and operate within our fiscal reality
 - Create new revenue and fund leveraging strategies
 - Co-invest with partners
- **Partnership:** Engage partners throughout planning, development, and execution of our work
 - Demonstrate how committed partnerships are engaged and fundamental to our work
- **Prevention:** Focus on early intervention and prevention
 - Invest in early intervention and prevention as the primary focus of our work
 - Link downstream investments to prevention
- **System Change:** Focus on systems change and implementation to impact the most children and families.
 - Focus on strengthening existing systems; rather than creating new systems
 - Consider direct services only when there is significant potential to demonstrate models for scalability and sustainability
- **Evidence and Innovation:** Prioritize scaling up evidence-based practices, balanced with investments in innovative and promising approaches to address community needs
 - Pursue and test innovative and promising approaches, as necessary, to respond to community needs and achieve scale.

C) What’s Needed to Make First 5 LA’s North Star a Reality?

To reach its North Star, First 5 LA wants systems to work better for all families in L.A. County by making them more family-centered and child-focused with a focus on four results areas that include:

1. Families have the resources, opportunities, relationships and environments to optimize their child’s development.
2. Children enter kindergarten without any previously unidentified developmental delays and connected to developmentally appropriate services and supports.
3. Children are safe from abuse, neglect, and other trauma.

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4. Children have high quality early care and education (ECE) experiences prior to kindergarten entry.

First 5 LA will seek these results through policy change, practice change and public-will building. It will do so with diverse partners who share First 5 LA's aspirations for children and bring an intentional focus on equity for children and families facing disparities in outcomes and opportunities.

D) Whole Child and Whole Family Framework

The Whole Child and Whole Family framework, which First 5 LA is working to fully develop and implement as an approach to policy and advocacy, recognizes the interconnection of the multiple domains of child development, especially during the first five years of life, including physical well-being/motor development, social emotional development, language and literacy development, and cognition. A whole child approach recognizes that a child cannot fully learn and develop without addressing and understanding the context in which the child lives, grows, and develops. Health and well-being are critical to successful academic learning; trauma and adverse experiences negatively impact a child's ability to learn. Whole family approaches must center the care and development of a growing child as well as the stability and strength of the family, including income supports and employment policy, and the physical and behavioral well-being of all members of the household. This framework also takes into consideration the community, as built environments affect a family's and child's health and health prospects. Clean open spaces, walkable streets and access to healthy food are also central to the consideration of whole child and whole family policymaking.

The Whole Child and Whole Family framework also recognizes the overarching impact and pervasiveness of structural racism that disrupts children's health and well-being and family stability. Children of color, for example, endure higher rates of low birth weight, asthma, hospitalizations, homelessness, racism, and poverty, all of which have devastating impacts on health. The inequitable health outcomes that have plagued children of color and their communities are rooted in oppression from racist or xenophobic systems, laws and policies. Overall, Whole Child and Whole Family policymaking must account for and work to overcome the pre-existing discrimination and racism woven within institutions and structures across society that only compound the challenges children and families of color face, and that negatively impact optimal developmental and family success.

E) First 5 LA Policy Agenda

The 2022 First 5 LA Policy Agenda guides organizational policy and advocacy efforts at the local, state and federal levels. The agenda is centered on the Whole Child and Whole Family framework, and features specific goals and priorities related to Family Supports, Health Systems, Early Learning and Communities as mutually interconnected components. As such, the Policy Agenda seeks to uplift key interdependencies across systems, critical because First 5 LA exists at the intersection of systems change and policy change. See [First 5 LA's 2022 Policy Agenda](#) for more information. Supporting achievement of the adopted 2020-2028 Strategic Plan's Results for Children and Families, the agenda is grounded in First 5 LA's unique experiences and expertise, rooted in learnings from local investments, and informed by community- and family-priorities. Foundational to the agenda is an understanding that children ages prenatal to 5-years old represent a special population, because the brain develops more rapidly during the earliest years of life than at any other time. Due to this, the Policy Agenda emphasizes an upstream approach to care, and the need to reduce barriers and increase flexibilities in how families

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access services, so that young children can receive supports as early as possible. The current 2022 Policy Agenda features four overarching policy priorities:

1. Promote a comprehensive system of family supports to advance positive outcomes for the whole child and whole family.

- Build systems that connect families to effective evidence-based, innovative, and community-responsive resources, prioritizing home visiting and early intervention services.
- Advance and protect family supports to ensure families with young children and pregnant people are economically secure.
- Reduce barriers and eligibility requirements so children prenatal to 5 years old receive supports and services that promote healthy development at the earliest opportunities.

2. Improve systems to promote the optimal development of children through early identification and supports.

- Promote alignment and integration throughout early identification, early intervention and family strengthening systems.
- Ensure children receive early and periodic validated developmental, health and behavioral screenings, and appropriate trauma-informed interventions.
- Incentivize preventative care to close maternal and pediatric health disparities.

3. Expand access to affordable, quality early care and education.

- Increase public investment in a mixed delivery early learning system prioritizing family choice and infants and toddlers.
- Ensure an equitable early learning quality support structure that responds to the diverse cultural and linguistic assets of all children and providers.
- Require benefits and fair pay for all early learning providers that reflect the critical roles they play.

4. Ensure communities have the resources and environment that supports optimal development of children prenatal to age 5.

- Advocate for communities' increased opportunities to shape resources, services and social conditions to protect the wellbeing of young children and families.
- Promote local flexibility in policies and systems that directly impact families and neighborhoods.
- Elevate and utilize disaggregated data on the conditions of children and families to inform efforts in reducing barriers to access and improving the quality of service delivery systems.

F) Diversity, Equity, and Inclusion

First 5 LA embraces the diversity of L.A. County, advocates for justice, and promotes systems that advance the full participation of young children and families. Furthermore, First 5 LA grantmaking

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intends to serve the broader goals of dismantling structural racism in public and community systems, and promoting equity across the full spectrum of health, well-being and opportunity.

III. PROJECT OVERVIEW

A. Overview of OGAPP

The Office of Government Affairs and Public Policy (OGAPP) leads First 5 LA's policy and advocacy strategies to advance public policies in support of the First 5 LA's Whole Child and Whole Family framework and Policy Agenda priorities.

The office's Public Policy team monitors the policy landscape related to First 5 LA's Policy Agenda priorities at all levels of government (local, state, and federal), works across organization offices and teams to develop public policy solutions and builds advocacy campaigns to move policy priorities that strengthens early childhood systems of support. The team also manages the coordination of First 5 LA's participation in the state-wide Early Care and Education (ECE) Coalition.

The office's Government Affairs team develops and maintains relationships with local, state and federal policymakers representing LA County, and educates and connects policymakers to First 5 LA's advocacy efforts. In addition, the Government Affairs team manages contracts with key advocacy partners including First 5 LA's state and federal advocates, coordinates the sponsorship of policy and community events to elevate early childhood priorities, and maintains relationships with key sector leaders (business, higher education, and philanthropy) which shape and influence early childhood public policy.

In addition to representing the specific interests of First 5 LA in LA County, OGAPP works closely with the First 5 Association, which represents all of California's 58 local County commissions, and First 5 California, the state-level Commission. To the extent First 5 LA's interest in state policy and advocacy has broader California-wide impact, First 5 LA will invite colleagues from the First 5 Association and First 5 California to support and engage in policy and advocacy efforts.

B. Project Overview

The selected contractor will support First 5 LA's early childhood policy and advocacy strategies in the state policy arena. The contractor will employ a variety of strategies and activities to support First 5 LA's state policy and advocacy efforts to strengthen systems of support for children ages prenatal to 5-years old including but not limited to:

- Policy analysis, development, and strategy formation
- Lobbying
- Government Affairs
- Strategic Communication
- Technical Assistance and Project Management

Further detail will be provided in Section IV. Scope of Work below. The selected contractor will work to achieve the following objectives and outcomes in alignment with First 5 LA's Whole Child and Whole Family framework and Policy Agenda priorities.

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C. Desired Objectives and Outcomes

The objectives below refer to the results First 5 LA will seek to achieve within the project's life cycle, given its level of resources and funding.

Objectives for selected contractor include:

- Support the development of First 5 LA annual state Policy Agenda priorities and advocacy strategies within the state administrative, legislative, and budget processes.
- Identify and advocate for public policies that will advance First 5 LA's Policy Agenda priorities.
- Support First 5 LA's policymaker engagement and education strategies targeting LA County-specific state policymakers and state-wide administrative leaders, to establish First 5 LA as a knowledgeable, influential voice, on the importance of strengthening systems of support for children ages prenatal to 5-years old.
- Provide strategic communications advice to elevate policy priorities, and early childhood specific issue campaigns aligned with the Policy Agenda.
- Provide technical assistance to coordinate update meetings, policymaker meetings, written analyses on advocacy strategies, and state policy activities.

The outcomes below are the longer-term policy and advocacy strategies and impacts that will result from the selected contractor's efforts, given achievement of the project's objectives.

The primary **outcomes** that selected contractor will work to achieve include:

- Increased investment for voluntary **home visiting** programs
- Increased investment for quality **early learning** programs
- Ensuring all children receive timely and appropriate **developmental screens**
- Ensuring all service providers adopt **trauma-informed practices**

Together, the objectives and outcomes described in this section represent the overall goals of First 5 LA's policy and advocacy efforts in support of First 5 LA's Whole Child and Whole Family framework and Policy Agenda priorities in the state policy arena.

D. Lobbying Compliance

First 5 LA, as an independent government agency, and steward of public funds, can directly influence or take official positions on local (school districts, cities), state, and federal proposed public policies through advocacy, and lobbying policymakers by informing, proposing changes and taking positions on public policy proposals, provided appropriate lobbying tracking and public filing and disclosure requirements are met.

First 5 LA is not permitted to participate in "grassroots lobbying" activities, and as such, cannot take any action to ask, persuade, encourage, or elevate to members of the public the opportunity to take any action on a new or existing public policy proposal. The selected contractor will ensure funded activities follow all lobby compliance rules and regulations. Upon award, First 5 LA will share the full set of lobby compliance guidelines with the selected contractor. Specific prohibited activities include, but are not limited to, the following:

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- Funded contractor cannot direct members of the public to ask policymakers to take any action on new or existing public policy proposals.
- Funded contractor cannot direct members of the public to take official support or oppose positions on new or existing public policy proposals.
- Funded contractor cannot pay for another organization to direct or persuade their clients to take any action on new or existing public policy proposals.
- Funded contractor cannot communicate to members of the public the opportunity to sign-on to “coalition letters” or participate in any “call to action” activities to support or oppose new or existing public policy proposals.

IV. **SCOPE OF WORK**

First 5 LA is seeking proposals from qualified organizations (with or without subcontractors) to serve as the State Policy and Advocacy Consultant to support First 5 LA’s state policy and advocacy efforts. Specifically, this solicitation seeks proposals and qualifications from organizations interested in serving as the State Policy and Advocacy Consultant to support First 5 LA’s state policy and advocacy efforts through the following roles and functions.

- **Policy Analysis, Development, and Strategy Formation** to support the creation of an annual Policy Agenda to inform First 5 LA’s state administrative, legislative, budget and implementation policy priorities, while providing strategic guidance to support and identify opportunities for strengthening systems of support for children ages prenatal to 5-years old and assist in the development of policy proposals.

Functions

- Provide analysis and recommend policy positions and strategies to support Policy Agenda priorities.
 - Support the development of advocacy strategies to advance First 5 LA Policy Agenda priorities, while making policy recommendations and developing policy proposals to advance First 5 LA priorities.
 - Participate in strategy meetings with OGAPP team to plan and discuss broader strategy, opportunities, tactics and alignment.
- **Lobbying** as the lead advocate for First 5 LA’s state administrative, legislative, budget and implementation policy priorities before legislative and administrative policymakers, while providing strategic advice, and analysis of identified opportunities for First 5 LA to engage and advance policy priorities in the state policy arena. *Lobbying activities will be conducted as needed and approved based on First 5 LA policy priorities to be determined by monthly task order.*

Functions

- Identify opportunities to support/oppose, or co-sponsor policy proposals in alignment with Policy Agenda priorities.
- Provide statements of support, opposition, amendment, or other commentary for proposals in meetings with policymakers, staff, and legislative hearings through appropriately registered lobbyists.
- Draft and submit letters, legislative language and other materials as needed to influence policy priorities.

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- Track and provide analysis of key policy proposals in alignment with First 5 LA's policy priorities, including administrative proposals that improves or threatens public funding for Proposition 10, including proposal related to tax thresholds, tax policies and administrative issues related to Board of Equalization and the California Department of Tax and Fee Administration.
 - As requested, coordinate with First 5 LA and its contractors/consultants, policy grantees and other stakeholders, including First 5 California and First 5 Association to advance policy priorities.
 - Identify potential partnerships and coalitions to garner support for long term opportunities to expand increased investment and funding for Policy Agenda priorities.
- **Government Affairs** strategy development and implementation to support First 5 LA's policymaker education and engagement activities in order to establish and sustain transformational relationships to empower LA County specific state legislators and administrative policymakers within their respective jurisdictions to strengthen systems for children ages prenatal to 5-years old.

Functions

- Deepen relationships with LA County state policymakers and their staff, key administration officials, advocacy groups and others to further establish First 5 LA as a resource and leader on early childhood issues.
 - Provide guidance on the development and coordination of First 5 LA advocacy days, legislative briefings, staff webinars, and early childhood in-district site visits.
 - Engage with relevant administrative agencies, including but not limited to the Office of the Governor, State Board of Education (SBE), California Department of Education (CDE), California Health and Human Services Agency (CHHS) & its relevant Departments, and California Department of Tax and Fee Administration (CDTFA)
 - As requested, engage with the First 5 network to advance First 5 LA's goals such as supporting First 5 Association Advocacy Days, partner advocacy days, and attend network regional meetings.
- **Strategic Communications** to elevate the importance of First 5 LA's policy and advocacy priorities through the development and implementation of issue campaigns and other communication outreach tactics within the state policy arena and with early childhood partners, and coalitions. *Strategic Communications activities will be conducted as needed and approved based on First 5 LA policy priorities to be determined by monthly task order.*

Functions

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

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- **Technical Assistance and Project Management** to coordinate update meetings, policymaker meetings, written analyses on advocacy strategies, and state policy activities.

Functions

- Arrange meetings and events on behalf of First 5 LA and partner agencies as necessary with state legislators and administration policymakers, and advocacy partners to elevate awareness of First 5 LA policy priorities.
- Provide timely written updates analyzing major state policy activity including January budget proposal summary, May Revise budget proposal summary, Final budget deal, close of legislative session, and as needed that are in alignment with First 5 LA’s policy priorities.
- As requested, provide feedback and/or assist with presentations to the First 5 LA Board of Commissioners and other partners, and periodic updates to the Board, and present to other partners such as the First 5 Association and First 5 California as necessary.
- Coordinate regular calls and agendas with designated staff and designated contractors/consultants to discuss policy priorities, and tactics.
- Submit regular data reports and updates to both comply with First 5 LA contract requirements, and Fair Political Practices Commissions (FPPC) reporting.

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

V. ELIGIBILITY

Proposers must meet the following minimum requirements:

A. Location

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

B. Registered Lobbyist or Lobbying Firm

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

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

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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).

VI. DESIRED QUALIFICATIONS

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

Experience

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

Knowledge

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

Skills

- In-house or subcontract expertise to address the state systems related to First 5 LA policy priorities including Medi-Cal, Proposition 98, Title 19, and Affordable Care Act (ACA) policy.
- In-house or subcontract expertise to develop and support strategic communications tactics.
- Strong operations and organizational efficiency and staffing.

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VII. EVALUATION CRITERIA

Proposals will be reviewed based on the following evaluation criteria.

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

VIII. TERMS OF PROJECT

First 5 LA expects to enter into a 12-month initial agreement with the selected contractor for a not-to-exceed amount of \$366,000, with an anticipated start date 12/1/2022, subject to approval by the First 5 LA Board of Commissioners. The contract will renew annually at First 5 LA’s sole discretion for a total project term of up to 5 years and for a total estimated project cost of \$1,830,000. Subsequent budgets will be determined by the scope of work and needs of this project. Contract renewal will be based on contractor performance and contingent upon approval by the First 5 LA Board of Commissioners. First 5 LA reserves the right to terminate the contract if the quality of services is not to First 5 LA’s satisfaction.

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 virtual meeting, phone and email communication to facilitate interaction with First 5 LA staff and other partners as necessary.

First 5 LA will execute a blended Retainer and Task Order contract.

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

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

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

Category
Lobbying
Strategic Communications

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Special Projects as need in alignment to this project's objectives and outcomes

A final budget will be negotiated with the selected contractor based on experience and expertise. The number of hours per assignment shall be negotiated before work commences. First 5 LA reserves the right to negotiate hourly rates. The selected proposer is responsible for supplying all business equipment needed to carry out its duties (e.g., computer, printer, internet access, etc.).

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 and minimum requirements. Basic requirements include timely receipt of proposal, submission of all required documents sought in Section X. Required Documents, and adherence to eligibility requirements described in Section V. Eligibility. Proposals with omissions of any required documentation 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 C: Litigation & Contract Compliance Form), a review of whether proposer (that are current and former contractors, grantees and vendors) currently remain placed in non-compliant status by First 5 LA under any existing and past agreement with First 5 LA and verify an "active" status via California Secretary of State (if applicable). First 5 LA reserves the right to request additional information, if needed, to validate eligibility and/or and minimum requirements.

Additionally, First 5 LA will conduct a conflict of interest review for proposers including subcontractors. Proposal must past Level 1 review in order to move to Level 2.

Level 2 Proposal Review

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

Level 3 Interview

Only key personnel included in the proposal can participate in the interview. Tentative interview dates are included in Section I: Timeline for Selection Process and are subject to change at First 5 LA's sole discretion. Interviews will be held either at First 5 LA or via telephone or a virtual platform (e.g. Zoom or Microsoft Teams). Reviewers may participate in a calibration session prior to finalizing scores. Further written materials may be requested prior to or after the interview. First 5 LA reserves the right to schedule additional interviews/meetings.

Reference Checks

Reference checks will be completed after Level 3 Interview. Information obtained through reference checks will complement the results of Level 3 review. First 5 LA must be able to contact three (3) references provided by the proposer. Otherwise, First 5 LA may deem the proposer ineligible for this opportunity.

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Award of Contract

The highest scoring proposer from Level 2 (Proposal Review) and Level 3 (Interview), in combination with information obtained through reference checks if conducted will be awarded the contract agreement or recommended to First 5 LA's Board of Commissioners for award of the contract or grant agreement.

X. REQUIRED DOCUMENTS

The documents listed in this section are required in proposer's response to this RFQ to be considered a responsive proposal. Appendix B – Proposal Checklist is available to assist in application completion. 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.

1. **Online Application:** In order to respond to this RFQ, proposers must complete an online application form and submit all required documents specified below through the online application system. Proposers must set-up an online account in order to access the application form. Instructions on setting up the account and access the online application may be found at [STATE POLICY AND ADVOCACY CONSULTANT REQUEST FOR QUALIFICATIONS \(RFQ\) - First 5 Los Angeles \(first5la.org\)](https://www.first5la.org/state-policy-and-advocacy-consultant-request-for-qualifications-rfq)

To access the online application:

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

2. **Litigation and Contract Compliance Form:** Please read the information on the required Litigation and Contract Compliance Form (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.
3. **Organizational Conflict of Interest Form:** Please read the information on the required Organizational Conflict of Interest Form (Appendix D) thoroughly and submit a signed completed form.
4. **Business License, if applicable** (e.g., Business license, if required by the City or County in which your organization operates)
5. **California State Lobbyist Registration Printout:** Please include a screenshot of the California Secretary of State's Registered Lobbyist(s)' Cal-Access "General Information" and "Financial Activity/Filing History" pages.
6. **Proposal Narrative:** Please provide a narrative of no more than five (5) pages (single-spaced, Arial Font size 11) which includes the following:

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- 1) Describe key issues related to the political landscape in LA County and California identifying opportunities that you perceive to be relevant and propose a strategy with specific tactics in which you recommend First 5 LA engage over the next 12-24 months to advance First 5 LA priorities. Please include the justification for choosing the proposed policy opportunities and activities.
 - a) Describe what role your firm would play in executing the plan;
 - b) Describe at least one obstacle your firm expects to confront and how the firm would plan to address this challenge; and
 - c) Describe what outcomes you expect to achieve by implementing this plan.
 - 2) Describe your firm's approach to working with clients on issues related to policy analysis and development, lobbying, government affairs, policymaker engagement, and strategic communications within the state policy arena.
 - 3) Describe obstacles your firm expects to confront given the proposed roles and functions of the project as detailed in Section IV. Scope of Work, and how your firm would plan to address these challenges. Provide examples, if applicable, to illustrate your firm's approach.
7. **Scope of Work (Appendix E):** Proposers must submit a Proposed Scope of Work using Appendix E: Scope of Work Template. The Proposed Scope of Work should detail the proposed objectives, key activities and related deliverables for the initial 12-month period. The Proposed Scope of Work should also include a short description identifying subcontracted work, if any, and how it will be controlled, monitored, & evaluated during the project. *This Proposed Scope of Work may serve as the starting point for contract negotiations with the selected proposer.*
8. **Qualifications Summary:** Please provide a summary of no more than seven (7) pages (single-spaced, Arial Font size 11) which should include the following:
- a) A brief summary of organizational history that makes the firm a strong candidate for the work as described in this RFQ. The summary should describe your firm's responsiveness to the qualifications listed in Section VI. Summary of Desired Qualifications.
 - b) A list of similar types of contracts that were successfully concluded, with a brief summary of each project. Describe any relevant work with public agencies, other First 5 Commissions and/or philanthropies.
 - c) Describe your firm's past experience with the development and execution of policy analysis, policy proposal development, lobbying, government affairs, policymaker engagement, and communications strategy to support client goals.
 - d) A description of the lead personnel and anticipated supporting personnel assigned to this project and their qualifications to perform the work. If subcontractors are contemplated, identification of those persons or firms, and he of the work to be done by the subcontractors, how they were selected and why, and a description of how subcontracted work will be controlled, monitored, and evaluated.
9. **Resumes or Curricula Vitae** Include resumes or curricula vitae for key personnel including proposed subcontractors, if applicable, who will exercise a major policy,

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administrative, or consultative role in carrying out the work described in Section IV. Scope of Work. Do not embed hyperlinks in resumes.

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

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

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

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

Please see details below:

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

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

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 RFQ, please complete and submit your proposal

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and all required documents to First 5 LA via online portal no later than **5:00 PM PDT/PST on SEPTEMBER 12, 2022**. **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 RFQ

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 RFQ 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 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 RFQ, in its sole discretion, at any time before execution of a contract.

The Fiscal Sponsor is considered the Contractor/Grantee and therefore it is responsible for all legal aspects of the contract/grant. As the Contractor/Grantee, the Fiscal Sponsor agrees to be accountable to First 5 LA for the programmatic and financial outcomes of the contract/grant. All information requested in the on-line application for the applicant organization is that of the Fiscal Sponsor.

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, résumés and curriculum vita, including attached materials, submitted in response to this RFQ 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.

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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. CONTRACTUAL CONSIDERATIONS

The successful proposer must sign and adhere to the provisions of the First 5 LA Contract (see sample Contract – Appendix A). The successful proposer must execute the Contract without substantive alteration. All proposers must review the sample Contract in detail and fully understand the contractual obligations described in the Contract, including all insurance requirements. If a satisfactory agreement cannot be negotiated within 30 days of award, First 5 LA may, at its sole discretion, 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.

First 5 LA may, at its discretion, request that the Contractor undertake additional, unanticipated, activities that are aligned to the project objectives of this RFQ and incorporate such activities into the final Scope of Work/Performance Matrix and Budget, if applicable.

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 RFQ. First 5 LA may deem a proposer ineligible to respond to this RFQ 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 RFQ; (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 RFQ process shall not 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. A copy of executed subcontract(s) related to Program funding must be provided to First 5 LA.

The commencement of any activities under the contract's Scope of Work/Performance Matrix (Exhibit A) will not begin until the contract execution date (the date all parties have signed and delivered the

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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 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 Contractor shall ensure that the Contractor, 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 RFQ 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:

- Litigation and Contract Compliance 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)

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.

XIII. APPEALS POLICY

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

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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 XIII. Appeals for more information.

XIV. APPENDICES

For Informative Purposes:

- Appendix A – Sample Contract
- Appendix B – Proposal Checklist

For Submission:

- Appendix C – Litigation and Contract Compliance Form
- Appendix D – Organizational Conflict of Interest Form
- Appendix E – Scope of Work Template
- Appendix F – Budget Narrative Template
- Appendix G – Work Sample Cover Page
- Appendix H – Reference Form

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