



REQUEST FOR QUALIFICATIONS (RFQ)

FOR

MIXED MEDIA DIVERSITY, EQUITY AND INCLUSION FELLOWSHIP PROGRAMMING

RFQ NO. 4259

Release Date:	Thursday, October 27, 2022	
Proposal Due Date:	Friday, December 2, 2022 3:00 P.M. PST Electronic (link here)	RFQ Administrator: Isaias Cantu Los Angeles City Employees' Retirement System E-mail: isaias.cantu@lacers.org Phone: (213) 369-0141 Fax: (213) 473-7297
All questions must be submitted in writing no later than:	Monday, November 14, 2022, 3:00 P.M. PST Submit questions to the RFQ Administrator. Any questions and all answers will be posted on the LACERS website: https://www.lacers.org/RFPs-contracting-opportunities	
Official RFQ Notices/Addendums:	To ensure that no respondent is provided an advantage over another, all requirements are specified in this RFQ. Any changes to the requirements will be posted as an addendum to the RFQ on the LACERS website: https://www.lacers.org/RFPs-contracting-opportunities . Proposers are solely responsible for monitoring this website and adhering to RFQ addendums.	
Prohibited Communications:	From the RFQ release date until a contract for these services is fully executed, respondents are prohibited from communicating with Board members or staff, other than the RFQ Administrator, concerning this RFQ or the resulting contract. Any communications could be considered attempts to lobby or market services and is therefore prohibited by LACERS' Ethical Contract Compliance Policy. Respondents will be disqualified from contract consideration if the prohibition is not honored.	

TABLE OF CONTENTS

I. INTRODUCTION	3
II. MINIMUM QUALIFICATIONS	3
III. SCOPE OF SERVICES	4
A. REQUIRED SERVICES	4
B. DELIVERABLES	4
IV. CONTENTS OF RFQ RESPONSE	5
A. INTRODUCTION.....	6
B. QUALIFICATIONS AND EXPERIENCE	6
C. PROPOSED FEE SCHEDULE	8
V. RESPONSE SUBMISSION & EVALUATION	8
A. RESPONSE SUBMISSION INSTRUCTIONS.....	8
B. EVALUATION OF RESPONSES	9
VI. GENERAL CONDITIONS AND COMPLIANCE DOCUMENTS	11

I. INTRODUCTION

The Los Angeles City Employees' Retirement System ("LACERS" or the "Plan") is a department of the City of Los Angeles, California, established in 1937 under Article XI of the City Charter. LACERS is under the exclusive management and control of the Board of Administration (the "Board"), which has sole authority for the administration of benefits and investment of the assets of the fund. The Board administers a defined benefit retirement plan and post-employment healthcare plan for approximately 55,000 members, comprised of approximately 27,000 active employees, 8,000 inactive employees, and 20,000 retired Members and beneficiaries of the City of Los Angeles. Supporting the operational directives of LACERS is a staff of approximately 200 employees. In line with the Equal Employment Opportunity Program within the City of Los Angeles, LACERS is seeking to enhance its ability to unlock talent and maximize opportunities for all staff.

Through this Request for Qualifications (RFQ), LACERS seeks to engage Consultant services to facilitate the development of a custom-built Diversity, Equity, and Inclusion initiative that would extend over a two-year period and would entail a hybrid virtual and in-person format designed to open dialogue between staff and executive management on mutual needs and the creation of pathways necessary to ensure every LACERS staff member has an opportunity to contribute and promote to their highest level.

Interested respondents are to provide a brief proposal, describing their approach, proposed timeframe, project team, and costs for services to meet the requirements of this RFQ.

This RFQ details the requirements needed by LACERS and instructs interested respondents on the application and selection process. All respondents meeting the minimum qualifications outlined in Section II of this RFQ are invited to submit a Statement of Qualifications.

The chosen respondent will be awarded a contract for the requested service(s).

II. MINIMUM QUALIFICATIONS

Respondents must clearly demonstrate meeting the minimum qualifications to be considered for pre-qualification.

- The respondent must be defined as a Learning Studio with at least five (5) years of experience providing experiential learning services, in person, virtually, and hybrid.
- Management team should have experience providing both online and in-person experiences to the public sector, member organizations, or Fortune 500 companies.
- The respondent must have demonstrated use of administering online learning portals for staff engagement and education. Preference will be given to respondents adept at using Learnport.com or Circle.so.
- The respondent should have demonstrated experience developing and administering project-based learning programs for professionals and executives.

- Facilitation staff should have advanced degrees in Education, with experience working in diversified industries and organizations, as demonstrated by their client list.
- The respondent should have a Customer Satisfaction (CSAT) score of 8.5 or higher.
- The respondent must answer all questions included in this RFQ in their entirety.

III. SCOPE OF SERVICES

The budget for Consulting services is not to exceed \$65,000 for the first year. Respondents should put together their best offer in meeting the objectives and within budget.

A. REQUIRED SERVICES

The minimum services sought are as follows:

- Assist LACERS in developing an experiential, cohort-based learning pilot program (up to 25 staff members of varying job classes).
- Develop a project-based learning curriculum for cohort, for delivery in both in-person and virtual environments.
- Develop and administer an online learning platform for engagement and continued education (learnport.com or Circle.so preferred).
- Summarize and document meeting outcomes and decisions including a final report on 1st year program.
- Develop roadmap for organization wide deployment in second year.

B. DELIVERABLES

The Consultant shall provide the following deliverables:

- Program Design Discovery Services
 - Stakeholder interviews (up to 25 staff members at varying job classes)
 - Synthesized report of findings, inclusive of recommendations on program design
- Design of Pilot cohort program:
 - Architect Online Learning Portal resources
 - Develop pre-coursework for inclusion into Portal
 - Workshops (up to 5)
 - Coaching Sessions (up to 5)
 - Develop post-workshop reflection coursework
 - Culmination Project / Celebration
 - Develop metrics of successful completion of program and after-action report
- Delivery

- Administer online learning journey through selected portal, inclusive of pre-and post-work
- Monitoring and engaging with participant pre-and post-work
- Deliver each workshop with two onsite facilitators
- Deliver coaching sessions with two onsite facilitators
- Host culmination project that includes:
 - Participant presentation
 - Reflections
 - Committed actions
- Future Program Design Planning
 - Complete recap report of pilot program
 - Develop roadmap for organization wide deployment

GENERAL EXPECTATIONS FOR SERVICE DELIVERY:

- A. Respondents shall meet and communicate with LACERS staff regularly and upon request.
- B. Contractor services shall include all general duties required by LACERS' General Conditions and Compliance Documents (Appendix A).
- C. Maintain confidentiality of any information resulting from this engagement except with written consent from the General Manager of LACERS or designee, prior to the release of any such information. This includes, but is not limited to, press releases, research, reports, and any publicity given to the Contractor for work provided under the resulting contract. LACERS shall be credited as the sponsoring agency.
- D. Notify LACERS immediately of any anticipated changes in personnel assigned under the terms of this engagement. The Contractor shall submit resumes of any proposed replacement personnel and obtain written approval from LACERS for any change in the personnel assigned to the work.
- E. In accordance with LACERS' Contractor Disclosure Reporting Policy, notify LACERS staff in writing in the event if any conflict of interest or possible conflict of interest is discovered regarding the provision of services.
- F. Any breach of the Confidentiality & Non-Disclosure of Member Information Policy (Attachment 1) is subject to cancellation of contract and the contractor being held liable for damages.

IV. CONTENTS OF RFQ RESPONSE

Interested respondents must provide the information requested below to be considered responsive to the RFQ. Please provide responses in the following order, labeled accordingly:

C. INTRODUCTION

- A. **Title Page** - The title page must clearly state "Proposal for Design and Delivery of LACERS Fellowship Program" along with vendor's name, address, and contact information.
- B. **Table of Contents**
- C. **Cover Letter**
- 1) The cover letter shall have the following statement:
"This response is genuine, and not sham or collusive, nor made in the interest or on behalf of any person not named therein; the proposer has not directly or indirectly induced or solicited any other proposer to put in a sham bid, or any other person, firm or corporation to refrain from submitting a proposal, and the proposer has not in any manner sought by collusion to secure for themselves an advantage over any other proposer."
 - 2) The legal business name, address, telephone number, website URL, and business status (Individual, limited liability partnership, corporation, etc.) of the respondent.
 - 3) The person or persons authorized to represent the respondent in negotiations with LACERS with respect to the RFQ and any subsequently awarded contract. Provide the representative's name, title, address, telephone number, e-mail address and any limitation of authority for the person named.
 - 4) If a respondent is proposing any alternatives or different conditions to requirements detailed within this RFQ, the cover letter must mention those suggested alternatives and/or conditions. LACERS reserves the right to reject responses if it determines the alternative/conditions are not acceptable.
 - 5) The cover letter is to be signed by a person or persons authorized to bind the respondent to all of the provisions of the RFQ, any subsequent changes to the RFQ, and to any contracts awarded in the future. If the respondent is a partnership, the response must be signed by a general partner in the name of the partnership. If the respondent is a corporation, the response must be signed on behalf of the corporation by two authorized officers [a Chairman of the Board, President or Vice-President, and a Secretary, Treasurer or Chief Financial Officer] or an officer authorized by the Board of Directors to execute such documents on behalf of the corporation.

D. QUALIFICATIONS AND EXPERIENCE

Please provide a thorough answer immediately following each question. If any attachments are provided in response to a question, identify in the answer the specific attachment and/or pages associated with the response to the question.

- 1) Provide a brief introduction of respondent's history, products and services offered, the respondent's primary business activity, and clients served. Additionally, identify affiliated companies of the respondent.
- 2) Identify the licenses, credentials/designations, affiliations, special knowledge, qualifications, expertise, or awards held by the respondent and its key managers. Briefly describe how this translates to the service(s) to be provided to LACERS.

3) References

- a. Provide at least three references from previous clients served within the last five years. Include scope of work, dates of contract, contract amount, contact person, and telephone number.
- b. Provide a list of all current clients for whom you are providing consulting services. Include name of client, contact person, and telephone number.

General Questions about the Respondent

- 4) Indicate your legal business name, address, telephone number, website URL, and legal entity type (individual, limited liability partnership, corporation, etc.).
- 5) Indicate the person(s) authorized to represent in negotiations with LACERS with respect to the RFQ and a subsequently awarded agreement, including contact names, titles, telephone and fax numbers, and e-mail addresses.
- 6) Provide a list of all the major services provided by the respondent even if they are not specific to the scope of services being requested by this RFQ.
- 7) Provide links to respondent's social media presence (e.g., Facebook, Twitter, Instagram, etc.).
- 8) Provide an organizational chart indicating roles of all individuals involved in the project. Include a curriculum vitae/biography for each team member, including the hourly rates proposed to be charged to LACERS for each team member. What experience does the team have working together?
- 9) Are ownership changes planned or anticipated at this time?
- 10) Describe the turnover in key professional personnel in the last five years. Do you anticipate that any of the team members proposed to work with LACERS will leave the in the next year?
- 11) Disclose the nature of any past, present, or pending relationship with any LACERS Board Member, consultant, or staff. How have you reviewed this potential engagement for conflicts of interest? Were there any conflicts, potential conflicts, or other issues that could raise a reasonable appearance of a conflict of interest?

Questions Concerning Your Statement of Qualifications

- 12) Is the respondent requesting any alternatives and/or substitutions to this RFQ and/or LACERS' standard conditions or mandatory contract provisions? See General Conditions (Appendix A) and the Standard Provisions for City Contracts (Appendix B). LACERS reserves the right to accept or reject any proposed alternatives or substitutions.

Respondent's Ownership

- 13) Is the respondent certified by a governmental entity as a Women-Owned Business, Minority-Owned Business, or Other Business Entity? If yes, please attach a copy of your certification. Note: The response to this question is retained for data collection purposes only. It is not included in any decision-making criteria nor used in any way to evaluate the qualifications of the respondent.

A. PROPOSED FEE SCHEDULE

Provide a fee schedule, with full breakdown of costs associated with each type of service included in your response. LACERS reserves the right to negotiate fees and expenses after a respondent has been approved. All proposed fees must be valid for three years from the date of the RFQ response and must include any/all overhead expected to be paid by LACERS. In no case will the negotiations result in a fee that is higher than the fee contained in the proposal. The full breakdown should include:

- 1) An hourly fee schedule, for costs associated with the work you propose to provide and/or a schedule of fees by deliverable.
- 2) An hourly fee schedule by professional classification associated service.
- 3) Per diem, mileage, boarding, and transportation costs to conduct in-person activities in the City of Los Angeles.
- 4) A schedule of incidental fees that are commonly charged by type of service.

V. RESPONSE SUBMISSION & EVALUATION

E. RESPONSE SUBMISSION INSTRUCTIONS

- 1) Deadline and the location for submitting proposals are located on the cover sheet of this RFQ.
- 2) **Electronic Submissions** – The complete proposal package shall be clearly labeled with the name of the respondent, and “Strategic Planning Facilitation of the LACERS Board of Administration RFQ”.
 - a. When submitting your proposal package electronically, please provide one copy of your entire response in PDF format, inclusive of any work samples, exhibits, and other required forms, with file naming format: “Strategic Planning Facilitation of the LACERS Board of Administration RFQ.” Submit your proposal through this upload portal: [Form Submission](#)
- 3) **If your response contains any trade secrets or other proprietary, confidential information that the proposer claims is exempt from disclosure under the California Public Records Act, then you must submit separately one (1) redacted copy of the response in addition to the original version. The redacted version must include a cover letter that includes language affirming that the respondent agrees to indemnify and defend LACERS in the event of any legal challenge to LACERS’ reliance on the respondent’s assertion of confidentiality protections.**

Note: Respondents that are selected to make presentations to the Board/Committee may be required to submit 10 additional hard copies of their responses.

- 4) Late responses will not be considered for review. LACERS reserves the right to determine the timelines of all submissions. At the day and time appointed, all timely submitted responses will be opened and the name of the Proposers announced. No other information about the responses will be made public until such time as any recommendation is made to the Board.

- 5) Please direct comments and questions to the RFQ Administrator indicated on the cover page of this RFQ. All contact regarding this RFQ or any matter relating thereto must be in writing and may be e-mailed, mailed, or faxed to the administrator listed on the cover page.
- 6) If LACERS receives no more than one submission in response to this solicitation, or only one response that offers services in a particular service category, LACERS reserves the right to classify this RFQ as a failed RFQ and either re-release the RFQ or include the sole respondent on the shortlist.
- 7) LACERS reserves the right to select more than one party to provide any of the services contemplated by this RFQ.
- 8) If a firm knowingly and willfully submits false information or other data, LACERS reserves the right to reject that response. If a contract was awarded as a result of false statements or other data submitted in response to this RFQ, LACERS reserves the right to terminate that contract.
- 9) LACERS reserves the right to withdraw this RFQ at any time without prior notice and the right to reject any and all responses. LACERS makes no representation that any contract will be awarded to any firm responding to this RFQ. LACERS also reserves the right to extend the deadline for submission.

F. EVALUATION OF RESPONSES

- 1) The selected proposer must successfully pass all the following levels of review:

a. Level I – Administrative Responsiveness

LACERS will conduct a preliminary evaluation of all responses submitted by the deadline to determine compliance with response requirements and mandatory document submissions. Respondent's response must address the administrative requirements outlined in the RFQ. Respondent's ability to adhere to LACERS' standard contract provisions will also be considered (see General Conditions (Appendix A) and the Standard Provisions for City Contracts (Appendix B)).

b. Level II – Review of Qualifications, Experience, & References

Respondent must demonstrate it meets the minimum qualifications including experienced staff able to provide the services required for this RFQ.

c. Level III – Proposed Services and Compensation (“Proposal”)

Respondent's proposed plan of services, and fees for providing the required services are evaluated and ranked by LACERS' designated evaluation panel. Interviews may also be conducted by this panel.

d. Level IV – Final Approval by LACERS General Manager

The respondent(s) determined by the evaluation panel to be the most qualified to provide the required services at the best overall value to LACERS will be recommended for final approval by LACERS General Manager.

EVALUATION CRITERIA	POSSIBLE WEIGHT
<p>Professionalism</p> <p>Respondent demonstrated professionalism in its response to the RFQ (e.g., clear, easy-to-follow presentation, well-written summary of the important features of the RFQ, etc.)</p>	30
<p>Proposed Scope of Services Description and Methodology</p> <p>Respondent demonstrates strong understanding of services needed by LACERS. Respondent meets all service requirements for assisting organizations in developing multi-year strategic plans.</p>	25
<p>Qualifications, Experience, and Accomplishments</p> <p>Demonstration of expertise based on sample work provided and content of response to this RFQ; demonstration of being able to meet deadlines and turn around projects within an agreed time frame including rushed deadlines; and strength of favorable references during reference verification process.</p>	25
<p>Value of Cost</p> <p>The evaluation of the relative cost and value for each respondent based upon its submission of the proposed fee schedule by phase and proposed services. This evaluation will also consider cost on a qualitative basis, not exclusively on a quantitative basis. LACERS expects the cost proposal to include details of all costs associated with the scope of services contained in this RFQ.</p>	20
<p>TOTAL POINTS</p>	100

2) Tentative Schedule

This schedule indicates estimated dates for the RFQ process and engagement. LACERS reserves the right to adjust this schedule when appropriate.

Date	Event
10/27/2022	Release of RFQ
11/14/2022	Deadline for RFQ questions

11/18/2022	RFQ question responses posted
12/02/2022 3:00 P.M. PST	Deadline for proposal submissions
01/07/2023	Target date for contract award
01/14/2023	Initiate engagement

VI. GENERAL CONDITIONS AND COMPLIANCE DOCUMENTS

Respondents are to submit required documents specified in the General Conditions and Compliance Documents (Appendix A). The General Conditions also indicate several standard contracting provisions (Appendix B) and requirements of every LACERS and City of Los Angeles contract. You are encouraged to read the documents thoroughly as they may result in additional expense to your firm, such as certain insurance requirements and a Los Angeles Business Tax Registration Certificate. This RFQ is for new contracts to be awarded after respondents are placed on the shortlist. Previous document submittals and/or waivers do not apply. New forms must be completed and processed.