

**REPORT FROM**

**OFFICE OF THE CITY ADMINISTRATIVE OFFICER**


Date: January 19, 2024

CAO File No. 0220-00540-1685

Council File No. 23-0568-S1

Council District: Citywide

To: Mayor  
Council

From: *for* Matthew W. Szabo, City Administrative Officer 

Reference: Community Investment for Families transmittal dated November 27, 2023; Received by the City Administrative Officer on December 28, 2023

Subject: **REQUEST FOR PROPOSALS FOR OUTREACH SERVICES FOR THE CHILDREN'S SAVINGS ACCOUNT PROGRAM AND RELATED ACTIONS**

**RECOMMENDATIONS**

That the Council, subject to the approval of the Mayor:

1. Authorize the General Manager of the Community Investment for Families Department (CIFD) to release a Request for Proposals (RFP) to select a contractor(s) to implement outreach services for the Children's Savings Account Program and the State of California Kids Investment and Development Savings Program;
2. Instruct the CIFD to report back to Mayor and Council on the RFP results with selected contractor(s) and funding recommendations;
3. Request the Controller to:
  - a. Establish new accounts and appropriate funds in the CIFD Miscellaneous Grants and Awards Fund No. 65G/21 as follows:

Account	Account Name	Amount
21Y121	Community Investment for Families	\$ 1,079,500
21Y343	CIFD Costs - Reserved	467,380
	<b>Total</b>	<b>\$ 1,546,880</b>

- b. Increase appropriations in the Community Investment for Families Department Fund No. 100/21 as follows:

Account	Account Name	Amount
001090	Overtime General	\$ 60,000
002120	Printing and Binding	152,500
003040	Contractual Services	800,000
006010	Office and Administrative	67,000
	<b>Total</b>	<b>\$ 1,079,500</b>

4. Authorize the CIFD General Manager, or designee, to prepare Controller instructions and/or make technical adjustments as necessary to implement the actions approved by the Mayor and Council, subject to the approval of the City Administrative Officer, and request the Controller to implement the instructions.

## SUMMARY

The Community Investment for Families Department (CIFD) requests authority to release a Request for Proposals (RFP) to solicit contractors to provide outreach services for the City's Children's Savings Account (CSA) Program and the State of California Kids Investment and Development Savings (CalKIDS) Program. The CSA Program, OpportunityLA, was launched in 2020 to provide seed deposits to first grade students for college savings accounts. The CSA Program is administered by the CIFD and implemented in partnership with the Los Angeles County and the Los Angeles Unified School District (LAUSD) under a Memorandum of Agreement. Although initially designed to be scaled up over a five-year period, seed deposits have been made to 100 percent of LAUSD first graders annually since 2021-22.

The State launched CalKIDS Program, administered by the ScholarShare Investment Board (SIB), in 2022. This program provides up to \$1,500 to children born on or after July 2022 and eligible low-income public school students. On April 12, 2023, the SIB released a Request for Applications (RFA) for the CalKIDS and Local Children's Savings Account Program Outreach and Coordination Awards to promote engagement and increase participation for both local and state programs. The CIFD submitted an application and was awarded \$1,546,880 by the SIB, and the grant acceptance was approved by Council on June 21, 2023 (C.F. 23-0568).

### Outreach Services

The CIFD will utilize the SIB grant to contract for outreach services for both the City's CSA Program and the State's CalKIDS Program to include marketing, advertising, developing outreach materials, managing media relations, and organizing outreach events. The grant stipulates that 70 percent of the grant is received in the first year (\$1,079,500 in 2023-24), and the remaining 30 percent in the second year (\$467,380 in 2024-25) provided funds were expended appropriately. The CIFD intends to conduct outreach including a proposer's conference to draw a suitable number of qualified applicants and will report back to Mayor and Council with the RFP results.

Pursuant to Charter Section 1022, the Personnel Department determined that City employees have

the expertise to perform the work. This Office, however, determined that the proposed work can be performed more feasibly by a contractor as there is insufficient staff to perform the work and the work is of limited scope.

### **FISCAL IMPACT STATEMENT**

There is no impact to the General Fund. The proposed contract will be fully funded by the SIB grant.

### **FINANCIAL POLICIES STATEMENT**

The recommendations in this report comply with the City's Financial Policies in that grant funds will be utilized for grant-eligible activities.

*MWS:JLJ:02240061c*

Attachment

## TRANSMITTAL

To: **THE COUNCIL**

Date: **12/15/23**

From: **THE MAYOR**

**TRANSMITTED FOR YOUR CONSIDERATION. PLEASE SEE ATTACHED.**

A handwritten signature in black ink, appearing to read "Carolyn Webb de Macias". The signature is fluid and cursive, with a large loop at the end.

(Carolyn Webb de Macias for)

**KAREN BASS**

**Mayor**



November 27, 2023

Council File: 23-0568  
Council District: Citywide  
Contact Persons:  
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Veronica McDonnell: 213-928-9060  
Abigail R. Marquez: 213-808-8462

Honorable Karen Bass  
Mayor, City of Los Angeles  
Room 303, City Hall  
200 North Spring Street  
Los Angeles, CA 90012

Attention: Heleen Ramirez, Legislative Coordinator

**COUNCIL TRANSMITTAL: REQUEST APPROVAL OF ACTIONS RELATED TO THE  
OPPORTUNITY L.A. COLLEGE SAVINGS ACCOUNTS PROGRAM**

**SUMMARY**

The General Manager of the Community Investment for Families Department (CIFD) respectfully requests that your office review this transmittal and forward it to the City Council for further consideration. Through this transmittal, CIFD seeks authority to release a procurement to select vendors to expend up to \$775,000 of special funds to implement outreach strategies and associated actions to implement the California Scholarshare Investment Board (SIB) grant to promote Opportunity L.A.

**RECOMMENDATIONS**

That the City Council, subject to the approval of the Mayor:

- I. AUTHORIZE the General Manager of CIFD, or designee, to release a Request for Proposals (RFP) to select a vendor(s) to implement Children's Savings Account (CSA) outreach strategies on behalf of CIFD;
- II. INSTRUCT CIFD to report back the results of the RFP with recommended vendor(s) for contract approval;
- III. AUTHORIZE the Controller to:
  - A. Establish new accounts and increase accounts within the OpportunityLA Fund No. 65G/21 as follows:

Account	Title	Amount
21Y121	Community Investment for Families	\$1,079,500
21Y343	CIFD Costs-Reserved	\$467,380

	<b>Total</b>	<b>\$1,546,880</b>
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B. Increase appropriations within the Community Investment for Families Department Fund No. 100/21 as follows:

<b>Account</b>	<b>Title</b>	<b>Amount</b>
001090	Salaries - Overtime	\$60,000
002120	Printing and Binding	\$152,500
003040	Contractual Services	\$800,000
006010	Office and Administration	\$67,000
	<b>Total</b>	<b>\$1,079,500</b>

IV. AUTHORIZE the General Manager of CIFD, or designee, to make necessary technical adjustments, subject to the approval of the City Administrative Officer (CAO), and REQUEST the Controller to implement the instructions.

### **BACKGROUND**

Two-thirds of Angelenos, primarily from communities of color, do not have a bachelor's degree, therefore lacking an essential resource for socio-economic mobility to help break the cycle of generational poverty. To help address this challenge, a growing body of research tied to the impact of college savings accounts shows that children from low- to moderate-income families with college savings accounts are three times more likely to enroll in college and four times more likely to graduate from college than children with no savings.

In 2020, the City and County of Los Angeles, in partnership with the Los Angeles Unified School District (LAUSD), launched Opportunity L.A. (OLA), a Children's Savings Account (CSA) program. In June 2021, a Memorandum of Agreement (MOA) was signed, detailing the roles and responsibilities of the Los Angeles Unified School District, the City of Los Angeles, and the County of Los Angeles concerning the CSA Program. As part of the program's obligations, the County of Los Angeles is tasked with funding administrative expenses and seed deposits for LAUSD's first-grade students residing in unincorporated areas of the County and cities outside the City of Los Angeles.

CIFD currently manages the program. It was built on a proven model for increasing college enrollment and graduation, automatically enrolling all first graders at qualifying LAUSD schools and providing them with a designated college savings account. To start their savings journey, each student receives seed funding of at least \$25 and opportunities to increase savings.

### **PROGRAM BUDGET**

Initially, Opportunity L.A. was planned to be a five-year expansion, with 10% of first-grade students enrolled in year one, 25% in year two, 50% in year three, 75% in year four, and 100% in year five. The department previously secured a grant of \$1.49M for year two (FY 2021-22) from the California Student Aid Commission (CSAC), and the City Council allocated \$1.1M to fast-track the program to 100% coverage, making it the nation's largest universal CSA program. Currently, the program is staffed by a Senior Project Coordinator, a Project Coordinator, and a Management Assistant.

On April 12, 2023, the California Scholarshare Investment Board (SIB) issued Request For Applications NO. 2023-A, aimed at enhancing the California Kids Investment and Development Savings Program (CalKIDS) and Local Children's Savings Account (CSA) Programs outreach and coordination. CIFD applied and successfully secured \$1,546,880 in state funding to boost awareness and participation in local and state CSA programs, measured through account registration rates and savings balances.

The SIB grant stipulates that the program receives 70% of awarded funds in year one (\$1,079,500 in Fiscal Year 2023-2024) and the remaining 30% in year two (\$467,380 in Fiscal Year 2024-2025) provided that the first year of funding was suitably spent. The deadline for spending overall is June 30, 2025.

### **PROGRAM IMPLEMENTATION**

CIFD requests authorization to release a Request for Proposals (RFP) to select vendors to expend up to \$775,000 in Scholarshare Investment Board Outreach Award funds. This request will allow CIFD to contract with external vendors who will facilitate several outreach activities to raise awareness and participation for OLA and CalKIDS. Our program staff will engage with 500 schools, enroll 35,000 students in OLA, form strategic partnerships, offer incentives, and execute continuous outreach to encourage families to save for their child's post-secondary education.

The contracted services will include marketing, advertising, and direct outreach activities, playing a pivotal role in facilitating the eventual transition of OLA into CalKIDS. Services include, but are not limited to, the following:

- Designing comprehensive outreach materials (flyers, posters, brochures, postcards, videos, etc.) to explain the OLA and CalKIDS programs.
- Utilizing various advertising channels (neighborhood posters, billboards, bus shelter ads, bus bench ads, door hangers, and community advertising) to increase program awareness.
- Coordinating with media outlets, including local newspapers and online publications, to schedule interviews with program participants and local leaders to secure coverage that effectively reaches the target audience of vulnerable parents and families.
- Directing in-person engagement
- Conducting interactive meetings and workshops with translation services
- Personalized one-on-one coaching

### ***Procurement Process***

CIFD has designed the RFP process to ensure an equitable, open, and fair selection of the optimal partner(s) to implement the Opportunity L.A. outreach grant. Key milestones include:

- Eligibility Requirements - The RFP will be open to any interested communications consultants or public relations firms experienced in managing campaigns and designing outreach materials that reach vulnerable families in Los Angeles. The RFP will also seek proposals from nonprofit organizations with a track record in executing outreach

campaigns to help raise awareness and participation among families and students for OLA and CalKIDS.

- Outreach Strategy - CIFD will conduct an extensive outreach effort, including posting on L.A. RAMP, CIFD website, and social media to increase the number of proposals. Additionally, CIFD will disseminate the RFP opportunity to CIFD's current contractors and community partners and share the RFP with previously contracted communication firms. This approach aims to attract diverse and qualified proposers to respond to the RFP.
- Evaluation - CIFD will establish an evaluation committee of qualified individuals without conflicts of interest to review and score all complete proposals using these criteria:
  - Demonstrated Ability: Assessing qualifications and program/administrative capability, considering a track record of providing similar services over three years within the past ten years.
  - Proposed Program Design and Framework: Evaluation based on the ability of organizations to articulate how they will execute the required activities.
  - Cost Reasonableness and Financial Viability: Scrutinizing the preparation of a budget to ensure cost reasonableness and overall financial viability.
- Timeline:
  - CIFD will release the RFP, conduct a proposers' conference in January, and close the RFP in January, 2024.
  - CIFD will evaluate proposals four weeks after releasing the RFP on L.A. RAMP.
  - CIFD intends to present the results of the RFP and recommended contractor(s)/vendor(s) to the City Council and Mayor in March, 2024.
  - CIFD will execute new contracts with the selected contractor within 30 days of approval by the City Council and the Mayor.

### **FISCAL IMPACT**

There is no fiscal impact on the General Fund because this RFP and outreach program utilize grant funds.

Thanks,



ABIGAIL R. MARQUEZ  
General Manager