

## **COMMUNITY ECONOMIC RESILIENCE FUND (CERF) IN ORANGE COUNTY OUTREACH & ENGAGEMENT RFP**

### **OVERVIEW OF GUIDELINES AND PROPOSAL INSTRUCTIONS**

Thank you for your interest in conducting CERF outreach in Orange County.

Proposals are due via email by 7:00 p.m. PT, Friday, May 26, 2023.

Please review the following application requirements and submittal instructions below.

### **OVERVIEW OF FUNDING OPPORTUNITY**

#### **Funding Opportunity**

The CERF Orange County High Road Transition Collaborative is seeking applications from organizations interested in conducting outreach and engagement to residents, businesses, and other stakeholders, with a focus on disinvested community members in Orange County.

Selected grantees will conduct outreach to residents, businesses and other stakeholders in July and August 2023, with the goal of positively impacting the future economy of our region. These grants fund nonprofit organizations and foundations, community-based organizations, California Native American Tribes, or a consortium of California Native American Tribes.

#### **About CERF**

The Community Economic Resilience Fund, or CERF, was created by the State of California in 2022 to help local regions develop economic development plans. [Community Economic Resilience Fund Program, [UIC section 14531](#)]

CERF is a new initiative that will support communities in producing regional roadmaps for economic recovery that prioritize creating accessible, good-paying jobs in sustainable industries.

There are two phases to CERF, Phase I/Planning and Phase II/Implementation. We are currently in the Planning Phase, during which a local multi-sector collaborative will map regional strengths and opportunities and ultimately design a new economic development plan for Orange County.

Here in Orange County, our new economic plan will:

1. Prioritize creating good-paying jobs that are accessible to all;
2. Protect our planet.

By June 2024, with the help of diverse stakeholders from across our region, CERF Orange County will have developed a detailed plan for a healthy, inclusive, sustainable economy – what

it looks like and how we get there. We hope to be awarded funds for Phase II/Implementation, during which we can make the plan a reality.

This initiative is guided by the Orange County High Road Transition Collaborative (HRTC), a planning group that consists of a diverse membership of regional stakeholders.

### **Purpose of Contract**

The primary purpose of the contract is to identify organizations capable of conducting targeted outreach and engagement (O&E) to/with residents, businesses, and other stakeholders, with a focus on disinvested community members in Orange County.

CERF defines 'disinvested communities' as:

1. Census tracts identified as 'disadvantaged' by the California Environmental Protection Agency;
2. Or census tracts with median household incomes at or below 80 percent of the statewide median income or Housing and Community Development's definition of "Low Income" for a family of four in Orange County, which is \$95,280.
3. Or California Native American tribes as defined by the list maintained by the Native American Heritage Commission.

Please see the interactive map at [www.ocbc.org/cerf](http://www.ocbc.org/cerf) to understand what Orange County census tracts fall into the 'disinvested community' definition as outlined by the State.

During outreach and engagement, grantees will report back to the HRTC on

- Clients'/constituents' assets and needs;
- Race and systemic barriers that have prevented them from accessing economic opportunities;
- Their assessment of their community's health and environmental equity;
- Plus, strategies and solutions to overcoming these challenges/barriers are welcomed.

### **Source of Funding**

The available funding is administered by the CERF Leadership Team, consisting of the California Labor and Workforce Development Agency (LWDA), the Governor's Office of Planning and Research (OPR), and the Office of Business and Economic Development (GO-Biz). The CERF Leadership Team has awarded an Orange County Planning Grant to the Orange County Business Council as regional convener and Charitable Ventures as fiscal sponsor.

### **Contract Obligations**

As grantees of a public contract, awardees will be required to provide qualitative and quantitative updates. Examples of data reporting will be provided. In addition, grantees will be required to attend a strategy convening in June 2023 to align efforts around outreach and goals.

## **Range and Number of Grant Awards**

A total of \$820,000 is available in this funding cycle; award amounts will range between \$15,000 and \$50,000. An organization requesting \$15,000 should be able to reach 200-250 individuals. An organization requesting \$50,000 should be able to reach 500-700 individuals, or more. Please note: Those organizations receiving between \$25,000 and \$50,000 in grant awards will be expected to facilitate outreach and engagement through September 2023.

## **What Constitutes CERF Outreach?**

Outreach activities can include, but are not limited to:

- Educational events where community members can learn about the connection between a resilient economy and combating the climate crisis, and Orange County's new economic plan;
- Community or stakeholder events or workshops where members of disinvested communities can share their lived experiences and offer thoughts for Orange County's new economic plan;
- Setting up focus groups to seek feedback and input from disinvested community members or an employee base;
- Encouraging individuals to respond to a CERF "Economic Development Roadmap" survey [this survey will be provided to grantees, and will be modified by audience (resident, employee, etc.)];
- Door-to-door canvassing to gather feedback;
- Recruiting and training neighborhood champions/ambassadors to provide information and collect feedback;
- Writing articles and blog posts for your organization's newsletters and social media to raise awareness and educate your clients/constituents;
- Front lawn chats, block parties, community events, festivals, and webinars;
- Media outreach to traditional or digital outlets.

The results/feedback collected by grantees will be given to the Orange County HRTC, and will inform the development of Orange County's new economic plan.

## **CERF Timeline**

The 2023 timeline that potential grantees will be working alongside is as follows:

- May 26: Deadline for CERF Orange County O&E proposal submissions
- June 9: Decisions made; applicants notified of acceptance or declination
- Week of June 12: Contracts underway; all contracts to be executed by June 23
- Week of June 26 (date, time, location TBD): Awardee strategy convening
- July - August: O&E conducted
- September 15: Qualitative and quantitative narrative submission
  - However, some data will be collected on an ongoing basis during July and August 2023.
- Please note: Grantees will have until May 2024 to expend their funds

Given the tight timeline, we are seeking applicants with existing organizational capacity to implement this project – including staffing, leadership, and operational management. This O&E effort should be integrated into your current work; we are not asking for any new programs to be created.

### **Eligibility Requirements**

If you are interested in becoming a CERF Orange County grantee of available public funds, you must meet these eligibility requirements:

- Be a nonprofit organization or fiscally sponsored by one, foundation, community-based organization, California Native American Tribe, or a consortium of California Native American Tribes;
- Have the ability to complete outreach in July and August 2023;
- Have the organizational capacity to implement and report on the outcomes from the engagement;
- Organizations must not discriminate based on race, color, national origin, citizenship status, creed, religion, religious affiliation, age, gender, marital status, sexual orientation, gender identity, disability, veteran status or any other protected status under applicable law.

### **A Note About the Review Process**

Applications will be vetted and reviewed by the Outreach & Engagement Sub-Committee, a subset of the Orange County HRTC. Eligible applicants must demonstrate previous experience conducting successful community engagement and outreach work. Eligible applicants must demonstrate the organizational capacity to manage any contractual scope of work agreed upon by the applicant and Charitable Ventures (the fiscal agent).

The following criteria will also be used to evaluate proposals:

- Experience working with communities (respective to the applicant) and issues that impact them;
- Experience in culturally-competent community engagement, social impact campaigns, and/or robust and coordinated activities;
- Track record in community organizing, movement building, and/or working as part of a coalition;
- Clarity and feasibility of project plan description and assessment of outreach activities;
- Clarity of responses to application questions;
- Strong motivation to get a large number of disinvested community members to share their feedback.

### **Application Requirements**

All applicants must provide the following:

1. A completed Grantee Application form (see below)
2. A proposal narrative not to exceed three pages
3. An outreach work plan, not to exceed one page

4. Most recent organization budget, including explanation of any deficit or operating reserve
5. Most recent Statement of Activity and Financial Position
6. Most recent IRS Form 990 – first 8 pages
7. Required for fiscally sponsored organizations: A copy of the Letter of Agreement with the fiscal sponsor and a budget for the fiscally sponsored organization with itemized income and expenses
8. A program budget, showing planned expenditures (that reflects the narrative)

A complete application will have responses to each question and required documents attached. Please note that during the review period, applicants may be contacted to provide or discuss additional information. Final contract amounts and scope of project may differ from the amount requested.

### **Grant Applicant Technical Assistance**

Questions regarding the application will be accepted by email through May 12. Please email questions to [cerf@ocbc.org](mailto:cerf@ocbc.org).

### **Evaluation, Monitoring, and Learning**

- Grantees will be expected to meet CERF Orange County's requirements for a final financial and narrative/data report.
- Grantees may be invited to participate in convenings and/or technical assistance opportunities to enhance O&E.
- In an effort to learn and improve future O&E efforts, grantees will be asked to participate in a post-project evaluation to share information on project activities, best practices, and overall experience.

### **Submittal Instructions**

Applications should be submitted using the following formatting guidelines for the proposal narrative:

- Single-sided, 8.5" x 11" paper
- 1" margins
- Typed, double-spaced
- Legible size font (e.g., Arial 11 or Times New Roman 12)
- Page numbers and header or footer identifying request and organization

Applications must be submitted in a single PDF by email only. The applicant must submit a copy by EMAIL by 7:00 p.m. PT, Friday, May 26, 2023. Late applications will not be accepted. Email one copy of the proposal in a single PDF file to [cerf@ocbc.org](mailto:cerf@ocbc.org).

Applicants will be notified by June 9 concerning the status of their request. Subcontracts will be executed between June 12 and June 23, 2023.

Thank you for your application. We look forward to reading your proposal.

**GRANTEE APPLICATION**

**Part I: Contact Details and Questions**

Organization Name: \_\_\_\_\_  
Organization Address, City, State, Zip: \_\_\_\_\_  
Organization Website: \_\_\_\_\_  
Organization Mission: \_\_\_\_\_

Project Lead Contact Name: \_\_\_\_\_  
Project Lead Contact Title: \_\_\_\_\_  
Project Lead Contact Email: \_\_\_\_\_  
Project Lead Contact Phone Number: \_\_\_\_\_

Authorized Signer Contact Name: \_\_\_\_\_  
Authorized Signer Contact Title: \_\_\_\_\_  
Authorized Signer Contact Email: \_\_\_\_\_

Do you have a fiscal sponsor? Yes      No  
Fiscal Sponsor Name: \_\_\_\_\_  
Fiscal Sponsor EIN: \_\_\_\_\_

Amount Requested: \_\_\_\_\_  
Duration of Project (in months): \_\_\_\_\_

Has your organization experienced any significant leadership changes in the past year?  
Yes      No

Are you a member of the Orange County High Road Transition Collaborative? Yes   N   No

Organization's Required Signature: \_\_\_\_\_

**Part II: Communities and Stakeholders**

a). Which disinvested community populations do you serve? Check all that apply.

- Latinos
- African Americans
- Native Americans and Tribal Communities
- Asian Americans & Pacific Islanders (API)
- Middle Eastern North Africans (MENA)
- Immigrants and Refugees
- Farm-workers
- People with Disabilities
- Lesbian, Gay, Bisexual, Transgender, and Queer/Questioning (LGBTQ+)
- Seniors/Older Adults
- Homeless Individuals and Families
- Veterans
- Areas with low broadband subscription rates and limited or no access

- Households with limited English proficiency
- Other: \_\_\_\_\_

b). How does your organization's leadership and/or staff reflect the race, ethnicity and/or languages spoken of the identified community? \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

c). What stakeholder groups will you outreach to? For instance, youth, residents, business owners, tenants, landlords, etc. Write in all groups that are applicable: \_\_\_\_\_  
\_\_\_\_\_

d). Describe in 2-3 brief sentences why your organization is a trusted partner with the above communities you selected. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Part III: Identified Geographic Areas**

Which Orange County census tracts are you confident you can conduct outreach in? Please respond with census tracts in which you have experience working. Note that by looking at the maps at [ocbc.org/cerf](http://ocbc.org/cerf), you can find the census tract number by zooming in and clicking within the boundary. List here:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Part IV: FTE Staffing**

a). How many FTE staffing can you dedicate to CERF O&E? Note that this is asking for Full Time Equivalences, so if you have four people who will each spend half of their time on this project, you should enter 2.0, not 4: \_\_\_\_\_

b). How many total staff people does your answer above represent? \_\_\_\_\_

c). What are the staff positions that will be engaged in this work? \_\_\_\_\_  
\_\_\_\_\_

d). In which languages are the staff counted above proficient? \_\_\_\_\_  
\_\_\_\_\_

**Part V: Organizations and Collaboratives**

What partnerships, associations, or collaborative networks could you leverage for outreach?  
Please list up to five, with names only.

- 1). \_\_\_\_\_
- 2). \_\_\_\_\_
- 3). \_\_\_\_\_
- 4). \_\_\_\_\_
- 5). \_\_\_\_\_

**Part VI: Proposal Narrative**

Please provide the following narrative responses in a separately formatted document:

- a. In two to three brief sentences, a summary of your strategy and activities to solicit feedback and input from clients/constituents/disinvested communities.
- b. An overview of your organization’s mission, current services, and past experience of conducting outreach. Please provide at least one recent example of successful community outreach and engagement. (Not to exceed 500 words.)
- c. Describe your organizational capacity to implement this project and how it aligns with your existing work. (Not to exceed 300 words.)

**Part VII: Outreach Work Plan**

In the following chart, briefly describe your proposed plan for outreach, including your activities and strategy. Please outline your grant activities, how you will measure activities, and share expected outcomes you will use to evaluate the success of your plan (e.g., # of focus groups, # of completed surveys, etc.). Chart should be no larger than one 8.5” x 11” page.

<b>GRANT ACTIVITIES</b> Ex: Focus group in tracts X, Y, and Z	<b>HOW WILL YOU MEASURE GRANT ACTIVITIES?</b> Ex: Sign-in sheet at every focus group	<b>EXPECTED OUTCOMES</b> Ex: A minimum # focus groups in tracts X, Y, and Z	<b>TIME PERIOD FOR ACTIVITY</b> (must take place July - Aug 2023)

At the bottom of your chart, please share the number of individuals you believe you can connect with through O&E efforts: \_\_\_\_\_



**Part VIII: Project Budget**

Please fill out the budget form below, listing key expenses related to your outreach plan.

Expense categories can include, but are not limited to: Salaries, stipends, marketing, events, materials, incentives, overhead.

<b>Outreach Expenditure</b>	<b>Estimated Cost</b>
Administrative overhead	
Employees (salaries and benefits)	
Translation	
Outreach materials and supplies	
Other	
Other	
Other	
<b>TOTAL BUDGET</b>	