

Orange County Jobs First Collaborative

Request for Qualifications- Catalyst Sector Investment Coordinators

Summary

The Orange County Jobs First Collaborative is soliciting proposals in response to Request for Qualifications, for the positions of Catalyst Sector Investment Coordinators. The Orange County Business Council is the program lead and will be your primary point of contact. Charitable Ventures (CV) is the grant fiscal agent and will be your contracting partner, if awarded.

The RFQ is comprised of the following parts:

Section 1 – Proposal Information, Organization, and Content Attachment

Section 2 – Description of Services

Attachment A –Title Page

Attachment B – Sector Investment Coordinator Catalyst Program Narrative Questions

Attachment C– Conflict of Interest Form

Attachment D – Evaluation Guidance

Attachment E– Pre-Development Activities

Attachment F- Preliminary Regional Investment Initiative Project Criteria

Attachment G- Priority Industries

Attachment H- Current Orange County Jobs First Collaborative Members

Attachment I- Letter of Intent to Apply

Attachment J- Notice Regarding California Public Records Act

PROPOSAL TIMELINE	DATE
RFQ Released	May 20, 2024
Intent to Apply	June 1, 2024
Submission Deadline	June 17, 2024
Evaluation of Proposals	June 18-July 3, 2024
Consultant Interviews – If necessary	June 18-July 3, 2024
Final Selection	July 12, 2024

Proposal Submission

Email one (1) PDF copy of your Proposal to jobsfirst@ocbc.org

Orange County Business Council must receive all parts of your proposal before the Proposal Due Date/Time. Any proposal received after the Proposal Due Date/Time will be rejected.

All submissions could be considered a matter of public record.

Note: “proposer,” “consultant,” and “firm” may be used interchangeably throughout this document.

OCBC contact

Maria Linares, Business Initiatives Manager

Orange County Business Council

Email: mlinares@ocbc.org

Please notify Maria Linares of your interest in this RFQ to be added to a distribution list to be notified of updates about this RFQ.

Period of Performance

The estimated period of performance for this contract is 26 months

Selection Process

1. Proposers may or may not be invited for an interview.
2. Charitable Ventures (CV) does not reimburse proposers for any cost of proposal preparation, even if RFQ is cancelled.
3. With the release of this RFQ, communication between the proposer and any voting member of the Orange County Jobs First Collaborative (see attachment H), except when and in the manner expressly authorized in this RFQ. Violation of this restriction is grounds for disqualification.
4. CV shall award the contract for this RFQ to the firm(s) that the Orange County Jobs First Collaborative deems to have provided the best value, most responsive and/or the best qualified for contract award.
5. All proposers should be aware of the Insurance Requirements for contract award. The Certificate of Insurance must be provided by the successful proposer prior to contract award. A contract may not be awarded if insurance requirements are not met.

Endorsements for the following are necessary as a part of meeting the insurance requirements:

- Commercial General Liability
- Business Auto Liability
- Workers' Compensation/Employer's Liability

Endorsements shall include:

- Additional Insured
- Primary, Non-Contributory
- Waiver of Subrogation
- Notice of Cancellation

Please be advised that, CV may only consider minor modifications that clarify clauses in its existing contract template, and shall not entertain making major/substantive changes to or removing any clause, specifically:

- Invoicing for Payment
- Invoicing Format and Content
- Penalty
- Work Products and Related Work Materials
- Ownership, Confidentiality, and Use of Work Products
- Indemnity
- Insurance

CONTRACT LANGUAGE IS SUBJECT TO CHANGE BY CV PRIOR TO CONTRACT EXECUTION. ADDITIONAL LANGUAGE AND REQUIRED DOCUMENTS WILL BE INCLUDED IN CONTRACT DOCUMENTS.

OCBC RIGHTS

1. OCBC reserves the right to:
 - Disqualify any and all proposals that are not submitted in accordance with the required format described in this RFQ;
 - Disqualify any and all proposals that don't comply with OCBC's Conflict of Interest Policy;
 - Reject any and all proposals submitted;
 - Waive what SCAG deems to be a minor irregularity in a firm's submission;
 - Request additional information;
 - Award all or part of the work contemplated in this RFQ;
 - Remedy errors in the RFQ;
 - Cancel the entire RFQ;
 - Issue subsequent RFQ;
 - Approve or reject the use of a particular subconsultant/supplier;
 - Negotiate with any, all or none of the proposers. If SCAG is unable to

- negotiate final contract terms and conditions that are acceptable to SCAG, SCAG reserves the right to award the contract to another proposer;
- Award a contract to other than the lowest priced proposal;
 - Award a contract without interviews, discussions or negotiations;
 - Award a contract to one or more proposers;
 - Only award a contract or any portion thereof to a firm that possesses a valid business license. Firms **must** possess the license from any city or state by the RFQ due date. SCAG must be provided with a copy of this license, if requested; and
 - Only award a contract or any portion thereof to a firm that passes any references checks.
2. If applicable, CV reserves the right to have software developed under CV's contract, not incorporate proprietary and/or third-party software components. This does not preclude the development of deliverables which interface with commonly available off-the-shelf software. However, consultants must determine in advance whether CV already has, or is willing to procure, appropriate licenses for any proprietary and/or third-party software that would be required. Consultants must also provide the impacts of any enhancements and upgrades. CV will require documentation delivery and source code for all electronic intellectual property developed under a CV contract before releasing final payment to the consultant.

Notification of Right to Protest Contract Award

Proposers have the right to protest the contract award. A written protest must be filed with OCBC within five (5) working days after posting the Notice of Intent to Award. OCBC will not accept any verbal protests. The protest must be a detailed, written statement of the protest grounds. The protest must be submitted to OCBC via email at:

Jesse Ben-Ron, Vice President of Business Initiatives
Orange County Business Council
Email: jbenron@ocbc.org

The contract award is held up when OCBC receives the protest on time. The contract may not be awarded until the protest is either withdrawn or a decision has been rendered.

Section 1- Proposal Information, Organizations, and Content Attachment

All proposals shall contain the following information, at a minimum:

Completion of Title Page (Attachment A)

Profile of Firm

- Please provide a brief history/background of your organization, including a statement indicating if the firm is local or national and a summary of the

representative's background and preferably recent or current clients/projects.
(Max 250 words)

- Identification of the individuals who will perform the work, including officers, project manager and key staff. Include bios or resumes for key individuals. **Do not include social security numbers, non-business (personal) phone numbers or address in a resume as this information may become public under the California Public Records Act.**

Completion of Program Narrative Questions (Attachment B)

Cost Proposal (Budget Template Excel, Separate Attachment)

- Propose fully burdened hourly rate for each individual in the proposal and estimate of average monthly total hours along with other expenses. Please complete Sector Investment Coordinator Budget Template for further guidance. Submit your budget with your full proposal.

References

- Provide a list of at least three references, including the names of contacts within the firms.

Letter of Intent to Apply (Attachment I)

- It is mandatory that an applicant complete and deliver a Letter of Intent to Apply that lists all tasks (see Description of Services Page) that the applicant will be applying for. This letter is due by 5:00 pm PST June 1, 2024.

Other Required Forms

- The Conflict-of-Interest Statement (Attachment C) must be fully completed by any current voting member of the Orange County Jobs First Collaborative or if the firm has vested interest in the success of a voting member of the Orange County Jobs First Collaborative (prime and all subconsultants).
- The Notice Regarding California Public Records Act (Attachment J) must be completed by any applicant.

Background:

California Jobs First (formerly CERF) is a program developed by the state of California to build a community-led, climate-forward economy by aligning investments and maximize benefits across state agencies and departments who are responsible for economic, business, and workforce development.

\$5 million dollar planning grants were distributed to 13 different regions covering all of California to support the development of a highly diverse collaborative. These collaboratives will encourage engagement, create inclusive and equitable economic plans, build capacity, and break down silos. Plans developed during the Planning Phase (currently ongoing) will inform projects eligible for funding during the Regional Investment Initiative Phase. The Regional Investment Initiative will consist of \$275 million over three years to fund regionally approved projects to accelerate economic and workforce projects throughout the state. These projects should have the primary focus of uplifting disinvested communities and protecting our environment. For further details of the project criteria for the Regional Investment Initiative see Attachment F.

During the Planning Phase, the state introduced Catalyst funding to ensure the Regional Investment Initiative effects systemic changes in regional economies, the Catalyst Program reserves up to \$14 million for each California Jobs First region to bridge the gap between each region's Jobs First Strategies and implementing projects designed to achieve outcomes that align with those strategies. Catalyst funds will support each region's Jobs First Collaborative to invest \$9 million in pre-development activities, enabling regions to take projects from exploratory and last-mile to ready-to-go projects that can access local, state, and federal government funds, as well as private and philanthropic investments. The projects that will ultimately be realized through the support for Catalyst Funds will have similar if not the same criteria as the Regional Investment Initiative in Attachment F.

Objective:

This contract's purpose is to obtain services of up to five consultants, known as Sector Investment Coordinators, to support the Orange County Jobs First Collaborative in execution of the Catalyst grant awarded to the region. The collaborative seeks to engage sector investment coordinators, with the description of services listed below, to advise it on how to fund \$9 million in pre-development activities. A list of pre-development activities can be found in Attachment E. Although not a requirement, experience in Orange County, and especially in Orange County's historically disinvested communities, is preferred.

The proposal must describe the qualifications and proposed approach specific to the desired work assignments. The collaborative will select up to five sector investment coordinators for a contract term through September 2026 and may request on-call services for any of the elements listed in the description of services.

Section 2- Description of Services

Element 1

Support the collaborative in outreach about the Catalyst Program funding opportunities and the application process. The Sector Investment coordinator will also need to aid prospective applicants to better understand what pre-development activities that are relevant to their project(s), and the overall process to get projects implementation funding eligible and/or support fellow Sector Investment coordinators in doing the same. A strong candidate would have experience with outreach and engagement to diverse stakeholders and providing technical assistance to grant applicants for community development projects serving historically disinvested communities. An understanding of any industries listed in Attachment G and items listed in Attachment K is preferred

Element 2

Once applications are submitted catalog projects as “exploratory” (agreed-upon ideas that are at the very initial phases) “last-mile” (agreed-upon projects that need the final piece of the puzzle to begin development), “shovel ready,” or identify projects as non-viable. Identify projects that align with priority industry sectors, career pathways that have or lead to quality jobs, and transition the region to net zero-powered economy. Meet with project sponsors to learn more about the projects and to prepare additional background, including an analysis of project viability within the constraints of CJF funding. Provide the Collaborative with recommendations on which activities should receive funding. A strong candidate would have experience with the pre-development activities listed in Attachment B and understand the project entitlement process. An understanding of any industries listed in Attachment G and items listed in Attachment K is preferred

Element 3

Coordinate with state staff and regional partners to find and apply for state, federal, regional, local and private grants, and other models of financing. Based on the priority industries and strategies determined in the planning phase, and the applications for funding being received, the sector investment coordinator(s) will help provide grant writing consultation and direct support that could fund further pre-development activities and/or funding for ready-to-go projects. Where possible, assist project sponsors in aligning Collaborative-Identified projects with Federal and State funding. A strong candidate would have extensive experience in working on applications awarded federal and state grants, with extra consideration for experience in regional, local and private grants, and other models of financing, especially in historically disinvested communities. An understanding of any industries listed in Attachment G and items listed in Attachment K is preferred.

Element 4

Track the progress of project sponsors and facilitate the resolution of impediments to their successful completion, including delivery of community benefits associated with Coalition-identified projects. This may include facilitating training opportunities, procurement technical assistance, and business matchmaking to ensure local workers and businesses understand and can access employment and procurement related to approved projects.

Element 5

Based on the Regional Economic Development Plans developed during the Jobs First Planning Phase, assist the Coalition in reviewing and submitting comments on the draft RFP to ensure Coalition-supported projects are competitive. Based on the priority industries and strategies determined in the planning phase, and the applications for funding being received, the sector investment coordinator(s) will help identify and provide grant writing consultation services that could fund "ready to go" projects, with a priority for their time being projects that serve historically disinvested communities. A strong candidate would have extensive experience working on applications awarded federal grants, especially in historically disinvested communities. An understanding of any industries listed in Attachment G and items listed in Attachment K is preferred

Element 6

Liaise with workforce and economic development partners, High Road Training Partnerships, community-based organizations, and others capable of contributing to the success of strategies and priorities in the regional plan and Coalition-identified projects. The goal is the project to build an ecosystem around identified industries or sectors. This role will support the regional convener in promoting catalyst funding throughout the community, but especially historically disinvested ones. This role will also look to connect prospective or funded pre-development activities to other similar initiatives to support better collaboration and partnerships. A strong candidate would have familiarity with the partners listed above in Orange County, and especially in historically disinvested communities. An understanding of any industries listed in Attachment G and items listed in Attachment K is preferred. A list of all the pre-development activities can be found in Attachment E.

Element 7

Work with the collaborative and the regional convener on growing industries prioritized in the Planning Phase. Based on the priority industries and strategies determined in the planning phase this role will provide technical advice on how their fellow sector investment coordinators and the collaborative can grow those industries. This would entail recommendations on talent pipeline, state and federal technical assistance and funding, financing mechanisms, small business participation, supply chain resilience, landscape analysis of missing assets and components to grow priority industries. The priority industries are listed in Attachment G. A strong candidate would understand successful regional economic development models locally, nationally, and/or internationally.

Element 8

Provide or procure Technical Assistance for pre-development activities and implementation grant applications and administration. This role will provide support to the organization(s) whose implementation ready project receives funding from the Regional Investment Initiative.

Note that this RFQ will select up to five investment coordinators to satisfy the description of services. It is not expected that one entity/person be able to adequately complete every task. Each applicant will have the chance to respond to all tasks they believe are a good candidate for but do not need to respond to every element.

Projected Timeline

Anticipated tasks will occur from the execution of a contract with the fiscal agent (Charitable Ventures), until September 2026. However, activities outlined in the various tasks could see a significant drop-off in work required once the funding is awarded and projects are fully initiated by project sponsors.

Attachment A-Title Page

SECTION 1. GENERAL CONTACT INFORMATION

Primary Contact _____

Title _____

Telephone No. _____

E-mail Address _____

Website _____

Address (If
Applicable) _____

SECTION 2. REMITTANCE ADDRESS (IF DIFFERENT FROM FORM W-9)

Company Name _____

Address _____

City _____

State _____

Zip Code _____

Telephone No. _____

SECTION 3 PROPOSER'S/BIDDER'S LIST INFORMATION (REQUIRED)

Is your firm a
Disadvantaged
Business
Enterprise
(DBE)?

Yes

No

As defined in Title 49 Part 26.11 of the Code of Federal Regulations, complete the required information below regardless of whether your firm is a DBE or non-DBE:

Signed by:

Signature:

Date:

Attachment B- Sector Investment Coordinator Catalyst Program Narrative Questions

Instructions: Answer any applicable questions regarding the Sector Investment Coordinator application for Catalyst Program funds. Refer to Catalyst Sector Investment Coordinators RFQ for more information, if needed. In this document, the term “disinvested communities” is referenced several times. One of the baseline requirements for this work is that at least 40% of funds provide direct, meaningful, and assured benefits to disinvested communities; applicants will need to identify and explain benefits in their applications. To see the census tracts that qualify as disinvested communities in Orange County, they can be found on Map 2 of 4, Map 3 of 4, and Map 4 of 4 [here](#). If you have any questions about this application, please contact jobsfirst@ocbc.org.

Below are the main elements that this position will undertake. As mentioned in the RFQ, there is not an expectation that any one applicant can satisfy all the requirements, but up to five of these positions will be selected to ensure that every element can be adequately addressed.

Element 1

Support the collaborative in outreach about the Catalyst Program funding opportunities and the application process. The Sector Investment coordinator will also need to aid prospective applicants to better understand what pre-development activities that are relevant to their project(s), and the overall process to get projects implementation funding eligible and/or support fellow Sector Investment coordinators in doing the same. A strong candidate would have experience with outreach and engagement to diverse stakeholders and providing technical assistance to grant applicants for community development projects serving historically disinvested communities. An understanding of any industries listed in Attachment G and items listed in Attachment K is preferred

Element 2

Once applications are submitted catalog projects as “exploratory” (agreed-upon ideas that are at the very initial phases) “last-mile” (agreed-upon projects that need the final piece of the puzzle to begin development), “shovel ready,” or identify projects as non-viable. Identify projects that align with priority industry sectors, career pathways that have or lead to quality jobs, and transition the region to net zero-powered economy. Meet with project sponsors to learn more about the projects and to prepare additional background, including an analysis of project viability within the constraints of CJF funding. Provide the Collaborative with recommendations on which activities should receive funding. A strong candidate would have experience with the pre-development activities listed in Attachment B and understand the project entitlement process. An understanding of any industries listed in Attachment G and items listed in Attachment K is preferred

Element 3

Coordinate with state staff and regional partners to find and apply for state, federal, regional, local and private grants, and other models of financing. Based on the priority industries and strategies determined in the planning phase, and the applications for funding being received, the sector investment coordinator(s) will help provide grant writing consultation and direct support that could fund further pre-development activities and/or funding for ready-to-go projects. Where possible, assist project sponsors in aligning Collaborative-Identified projects with Federal and State funding. A strong candidate would have extensive experience in working on applications awarded federal and state grants, with extra consideration for experience in regional, local and private grants, and other models of financing, especially in historically disinvested communities. An understanding of any industries listed in Attachment G and items listed in Attachment K is preferred

Element 4

Track the progress of project sponsors and facilitate the resolution of impediments to their successful completion, including delivery of community benefits associated with Coalition-identified projects. This may include facilitating training opportunities, procurement technical assistance, and business matchmaking to ensure local workers and businesses understand and can access employment and procurement related to approved projects.

Element 5

Based on the Regional Economic Development Plans developed during the Jobs First Planning Phase, assist the Coalition in reviewing and submitting comments on the draft RFP to ensure Coalition-supported projects are competitive. Based on the priority industries and strategies determined in the planning phase, and the applications for funding being received, the sector investment coordinator(s) will help identify and provide grant writing consultation services that could fund "ready to go" projects, with a priority for their time being projects that serve historically disinvested communities. A strong candidate would have extensive experience working on applications awarded federal grants, especially in historically disinvested communities. An understanding of any industries listed in Attachment G and items listed in Attachment K is preferred

Element 6

Liaise with workforce and economic development partners, High Road Training Partnerships, community-based organizations, and others capable of contributing to the success of strategies and priorities in the regional plan and Coalition-identified projects. The goal is the project to build an ecosystem around identified industries or sectors. This role will support the regional convener in promoting catalyst funding throughout the community, but especially historically disinvested ones. This role will also look to connect prospective or funded pre-development activities to other similar initiatives to support better collaboration and partnerships. A strong candidate would have familiarity with the partners listed above in Orange County, and especially in historically

disinvested communities. An understanding of any industries listed in Attachment G and items listed in Attachment K is preferred. A list of all the pre-development activities can be found in Attachment E.

Element 7

Work with the collaborative and the regional convener on growing industries prioritized in the Planning Phase. Based on the priority industries and strategies determined in the planning phase this role will provide technical advice on how their fellow sector investment coordinators and the collaborative can grow those industries. This would entail recommendations on talent pipeline, state and federal technical assistance and funding, financing mechanisms, small business participation, supply chain resilience, landscape analysis of missing assets and components to grow priority industries. The priority industries are listed in Attachment G. A strong candidate would understand successful regional economic development models locally, nationally, and/or internationally.

Element 8

Provide or procure Technical Assistance for pre-development activities and implementation grant applications and administration. This role will provide support to the organization(s) whose implementation ready project receives funding from the Regional Investment Initiative.

1. Based on the elements listed above, please list which one(s) you would like to do under this role. Please copy and paste element(s) and description into the body.

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2. Based on the elements listed in Question 1. Please provide your qualifications to better understand why you would be a strong candidate for this role. Please list the element, and then provide your answer. Please keep your answers to a max of 500 words per element.

3. See Attachment E in the RFQ. Please provide examples of projects or activities that you have experience with that would meet any or all the outcomes or criteria listed in the attachment. If possible, focus as much of your response around examples and outcomes in disinvested communities. Please keep your answers to 500 words max.

4. See Attachment K in the RFQ. Please provide examples of projects or activities that you have experience with that would meet any or all the outcomes listed. If possible, focus as much of your response around examples and outcomes in disinvested communities. Please keep your answers to 500 words max.

5. Discuss the activities and approach that would address the intent of each element that you're proposing on?

Attachment C- Conflict of Interest Statement

SECTION I: INSTRUCTIONS

All voting members of the Orange County Jobs First Collaborative seeking this contract must submit a Conflict-of-Interest Statement along with the proposal. This requirement also applies to any proposed subconsultant(s). Failure to comply with this requirement may cause your proposal to be declared non-compliant. If you are not a voting member of the Orange County Jobs First Collaborative, you may disregard this section.

SECTION II: CONFLICT OF INTEREST STATEMENT

As a voting member of the Orange County Jobs First Collaborative, I acknowledge that I will be prohibited from voting on allocating catalyst funding to pre-development activities that directly benefit my current employer, and/or current client, and/or serve on a board or executive committee of. I will also not deliberately modify my approach or assessment of the activities that directly benefit my current employer, and/or current client, and/or serve on a board or executive committee of or any that would reasonably be considered as competition to those activities.

This Validation Statement must be completed and signed by at least one General Partner, Owner, Principal, or Officer authorized to legally commit the proposer.

DECLARATION

**I, (printed full name) _____, hereby declare that I am
the (position or title) _____ of (firm name) _____,
and that I am duly authorized to execute this Validation Statement on behalf of this
entity. I hereby state that this Conflict-of-Interest Statement dated _____
is correct and current as
submitted. I acknowledge that any false, deceptive, or fraudulent statements on this
Validation Statement will result in rejection of my contract proposal.**

Signature of Person Certifying for
Proposer (original signature required)

Date

NOTICE

A material false statement, omission, or fraudulent inducement made in connection with this Conflict of Interest Form is sufficient cause for rejection of the contract proposal or revocation of a prior contract award.

Attachment D-Evaluation Guidance

Criteria	Maximum Points
Approach clearly described, meets or exceeds project intent	20
Experience with projects of the similar size and scope	20
Experience with projects serving disinvested communities	20
Qualifications of key individuals	20
Cost is realistic for the services to be performed	20
References	Pass/Fail
Letter of Intent	Pass/Fail

Proposals must score 70 and above to be considered. Final decisions will be made to ensure that the applicant(s) that are selected can execute all aspects of the Request for Qualifications and at or under the budget cap of \$1.5 million.

Attachment E- Pre-Development Activities

Catalyst Pre-development grants can fund all or a specific portion of a multi-phased project. Projects include new and expanded programs, services, technology upgrades, and physical buildings and infrastructure. Pre-development activities include, but are not limited to:

i. Strategic Planning and Pre-Development

Feasibility studies; market analysis; environmental assessments, surveys, and remediation; site acquisition; site and development plans; project designs; permitting; establishing a regional tax increment financing district (TIF); drafting and negotiating Community Benefits Agreements and Community Workforce Agreements; establishing public-private partnerships, Community Development Corporations and Community Development Financial Institutions; revolving loan funds; joint powers authorities; financial planning (e.g., preliminary budget and construction financing); with the goal of establishing long-term funding opportunities for implementation of Planning Phase regional strategies;

ii. Environmental Infrastructure Development

Basic environmental infrastructure pre-development, construction, and development of long-term operations and maintenance plans for infrastructure such as: clean water supply systems; wastewater systems; waste disposal systems; pollution control services;

iii. Capacity Building and Project Support

Support costs for building and sustaining the capacity of project leads and partners, such as: investments in partner and local staff development; funding new and/or critical positions; acquiring or utilizing tools and resources to increase partner capacity for project planning and implementation; organizational capacity activities such as access to financial services or legal review; developing new pilot or demonstration projects and programs; participation and/or partnership with existing workforce programs; providing or securing technical assistance for partners.

Within these three project categories, Catalyst funds can be used for:

Exploratory Projects - Exploratory projects are in the early stages of development. They may be an idea or a back-of-the-envelope plan and may need dedicated funding to study and develop into potential projects and conduct feasibility assessments. There are no additional requirements of exploratory projects other than the basic requirements for all projects described above.

Last Mile Projects - Last-mile projects have completed feasibility assessments and are considered feasible and viable projects to achieve their stated objectives. These projects have undergone initial steps towards development and must clear a few additional hurdles (e.g. , site selection, permitting, and environmental review) before being considered ready to go.

Attachment F- Preliminary Regional Investment Initiative Project Criteria

PURPOSE

This document outlines target outcomes and baseline criteria for California Jobs First: Regional Investment Initiative Catalyst and Implementation Projects.

TARGET OUTCOMES

Catalyst and Implementation Projects should aim to improve economic competitiveness and economic resilience across the region.

€ Economic Competitiveness

- Projects should aim to strengthen the region to compete effectively in the global economy and deliver prosperity to the region. This includes leveraging a region's comparative advantage, diversifying its economy, and training its workforce to prepare for jobs in emerging industries.
- Project activities may include, but are not limited to:
 - Expand access to capital
 - Expand capacity for innovation and entrepreneurship
 - Retain existing businesses or promote new business development or expansion
 - Build the region's skilled workforce

€ Economic Resilience

- Projects should improve the region's ability to avoid, withstand, and recover from economic shocks. This includes foreseeing, adapting to, and leveraging changing conditions to a region's economic advantage.
- Project activities may include, but are not limited to:
 - Build capacity of organizations serving disinvested communities to compete for and administer federal and state grants
 - Build wealth in disinvested communities
 - Diversify regional economy

PROJECT CRITERIA

Catalyst and Implementation projects will be subject to the following criteria to be eligible for California Jobs First Regional Investment Initiative funding. Included below are baseline requirements that all projects must meet, qualities that will lead to

additional points on an Implementation application, and prohibitions on Catalyst and Implementation funds.

Baseline requirements that all Regional Investment Initiative projects must meet.

€ Equity

- At least 40% of funds provide direct, meaningful, and assured benefits to disinvested communities; applicants will need to identify and explain benefits in their applications
- Include an applicant or co-applicant located in or serving a disinvested community
- Align with EO N-16-22, Racial Equity Executive Order
- Include equity impact assessment
- Include displacement analysis (and avoidance strategy if necessary)
- Include community engagement strategy with feedback mechanisms

€ Climate

- Align with major state climate goals and policies (e.g. SGMA, EO N-82-20, CARB Scoping Plan)

€ Job Quality and Access

- Promote the creation of family-sustaining jobs with healthcare and retirement benefits, upward mobility, access to training, consistent scheduling, safe working conditions, and opportunities for collective worker input
- Ensure equitable access to quality jobs for communities throughout the region

€ Other requirements approved by the collaborative yet to be determined

€ Approval by the region's Jobs First Collaborative

Implementation projects that include any of the following will receive additional points on their applications.

- € Greater than 40% of funds provide direct, meaningful, and assured benefits to disinvested communities, with points increasing with higher percentages
- € Create assets or programs owned or controlled by members of disinvested communities
- € Include local or targeted hire provisions
- € Include a Project Labor Agreement (PLA) or Community Workforce Agreement (CWA), or a Community Benefits Agreement (CBA)
- € Target training and support services to workers with employment barriers as defined in Chapter 2 of the California Unemployment Insurance Code

- € Fund alternative models of ownership for land, businesses, or other assets, such as worker-owned cooperatives, community land trusts, community investment, funds, or others
- € Directly leverage regional assets, investments, and processes with have additional funding attached
- € Other requirements approved by the collaborative yet to be determined

Activities prohibited from using Regional Investment Initiative funds.

- € New fossil fuel extraction infrastructure or activity, or enhancements to expand fossil fuel production

Attachment G- NAICS Priority Industries

Ambulatory Health Care Services

Hospitals

Social Assistance

Computer and Electronic Product Manufacturing

Miscellaneous Manufacturing

Education Services

Construction of Buildings

Specialty Trade Contractors

Accommodation

Food Services and Drinking Places

Attachment H- List of Current Orange County Jobs First Collaborative Members

CEO Leadership Alliance Orange County
American Indian Chamber of Commerce of California
Apolonio Cortes
Boilermakers Local 92
Chapman University
Charitable Ventures
Chrysalis
Cielo
Citizens Climate Lobby
City of Garden Grove
City of Santa Ana
Climate Action Campaign
Coastal Corridor Alliance
Cogstone Resource Management/Member of Gabrielino Tongva Community
Community Action Partnership of Orange County
Concordia University Irvine
Cooperacion Santa Ana
Cox Business
CSUF
CSUF Center for Entrepreneurship
Donia Kayali
Family Assistance Ministries
First 5 Orange County
Goodwill of Orange County
Greater Irvine Chamber
Hope Builders
Hospitality Training Academy
International Association of Machinists and Aerospace Workers Local 1930
International Brotherhood of Electrical Workers Local 441
Iron Workers Local 416
Iron Workers Local 433
Irvine Valley College
Jamboree Housing
Johnice Williams
Karen Sarabia
Kevin Phung
LA/OC Building and Construction Trades
Latino Health Access
League of California Cities OC
Maria Guadalupe Villa Vasquez
North Orange County Community College District
OC Black Chamber of Commerce
Orange County Conservation Corps
OC Grantmakers

OC Labor Federation
OCAPICA
OCCORD
Octane
OCBC
Orange County Coastkeeper
Orange County Community Foundation
Orange County Department of Education
Orange County Hispanic Chamber of Commerce
Orange Workforce Alliance
Payomkawichum Kaamalam
Plumbers & Steamfitters, Local 582
Sarah Riggs
SCAG
Sheet Metal Worker Local 105
SoCal Gas
Sokollin Tes
Sunrise Movement Orange County
Sustain SoCal
The Cambodian Family Community Center
The Kennedy Commission
THRIVE Santa Ana
UA Local Union 250
UMass Global
UNITE HERE Local 11
United Way of Orange County
UCI
Vital Link

Attachment I-Letter of Intent to Apply

Orange County Jobs First Collaborative,

Please see this letter of intent on behalf of (organization name), as proof of our/my desire to serve as a sector investment coordinator under the Catalyst Program for the California Jobs First Initiative. Specifically, I/we have an interest in the element(s) (list element number(s))

Signed by:

Signature:

Date:

Attachment J- Notice Regarding California Public Records Act

Summary

A proposal submitted in response to this RFQ may be subject to public disclosure pursuant to the California Public Records Act, Cal. Gov. Code section 6250 et. seq., (the "Act"). The Act provides generally that all records relating to a public agency's business are open to public inspection and copying, unless specifically exempt from public disclosure under one of several exemptions set forth in the Act. If you believe that any portion of your proposal is exempt from disclosure under the California Public Records Act, **you must: 1). Mark such portion "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY," within your proposal; 2). Complete Section 2 below, and 3). Include this Attachment in your submittal,** or your proposal will be subject to public disclosure under the Act. Proposals marked "TRADE SECRET," "CONFIDENTIAL," OR "PROPRIETARY" in their entirety will not be honored, and CV will not deny public disclosure of proposals so marked. By submitting a proposal with specific material marked "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY," you represent you have a good faith belief that the material is exempt from disclosure under the Act; however, such designations will not necessarily be conclusive. You may be required to further justify in writing why such material should not, upon request, be disclosed by SCAG under the Act. Fee and pricing proposals are not considered "TRADE SECRETS", "CONFIDENTIAL", or "PROPRIETARY".

If CV denies disclosure, then by submitting your proposal you agree to reimburse CV for, and to indemnify, defend, and hold harmless CV, its officers, fiduciaries, employees, and agents from and against any and all claims, damages, losses, liabilities, suits, judgments, fines, penalties, costs, and expenses including, without limitation, attorneys' fees, expenses and court costs of any nature whatsoever (collectively, "Claims") arising from, in connection with, or relating to CV's non-disclosure. By submitting your proposal, you also agree to defend, indemnify, and hold harmless CV from and against any and all Claims arising from, in connection with, or relating to CV's public disclosure of any such designated portions of your proposal if CV reasonably determines disclosure is deemed required by law, or if disclosure is ordered by a court of competent jurisdiction.

Exemption Request

Page Number of Proposal	Brief Explanation for the Exemption Under the Act and any Other Comments

Attach additional pages as necessary

Check here if proposer claims no exemption

Signature:

Attachment K- Regional Plan Part 2

- 1) Regional Strategies: Regions should develop strategies in all three categories.
 - a) **Target Sector Strategies** (Follow for each Target Sector)
 - i) **Define Sector and Justify Prioritization by Region (required)**
 - (1) **Sector Development:** This section should provide a snapshot of current trends and projected growth for the Target Sector. It should consider, but is not bound by, existing relevant plans such as CEDS (if applicable and appropriate) along with the following elements that work together to support creation of quality jobs:
 1. Clear Local Market Signals: Assess how proposed sector and affiliated investments align with market trends and local/state/federal policies.
 2. Value Chain and Infrastructure: Explain how investments support the growth and clustering of businesses in the value chain of the proposed sector. Identify specific infrastructure required to grow the sector.
 3. Innovation Ecosystem: Describe how investments connect the private sector to local innovation resources, facilitate the movement of new technologies to market, incubate early-stage businesses, etc.
 4. Regional Assets: Describe specific resources within the region – local services, expertise, natural resources, community spaces and networks, etc. – that will be leveraged to strengthen the development of the target sector.
 - (2) **Increasing Economic Diversification and Resilience:** Describe the growth, diversification, and/or resilience potential of the target sector.
 - ii) **Alignment with Job Quality & Access, Equity, and Climate (required):**
 - (3) **Job Quality & Access:** Explain how the Target Sector Strategy will prioritize family-sustaining jobs with healthcare and retirement benefits, career advancement opportunities, access to training, consistent scheduling, safe working conditions, and opportunities for collective worker input and representation. This could include creating new high-quality jobs, retaining existing high-quality jobs, or improving the quality of existing jobs. Quality jobs should focus on equitable access for members of disinvested communities, including – but not limited to – tailored training programs, clear pathways for attaining necessary education or skills, and inclusive recruitment practices.
 1. Specifically, refer to the analyses of workforce and demographic trends and focus on closing gaps, reaching universal levels of service, and/or include outcomes disaggregated by race, ethnicity, income, etc.
 2. Strategy must support workers potentially impacted by at-risk industries and must prevent displacement of incumbent workers or replacement of high-road jobs with low-quality jobs.

- (4) **Equity:** Explain how the Target Sector Strategy will provide indirect and/or direct community benefits, particularly to disinvested communities. Describe how the needs and interests of disinvested communities impacted the selection of the Target Sector Strategy.
1. Analysis and recommendations must highlight how this strategy will serve historically marginalized and disinvested groups and how those groups will be engaged and learn about proposed interventions.
- (5) **Climate:** Explain how the Target Sector Strategy will limit the impacts of economic development activities on the natural environment. The strategy must also avoid exacerbating the effects of climate change and include pathways for mitigating the effects of anticipated climate impacts on targeted industries and occupations. It must also address public health needs, with special attention to the needs of disinvested communities.
- b. **Workforce Development (required):** Explain how the strategy plans to match skills to available jobs, address talent and recruitment, and facilitate strategic collaboration among businesses, training and education institutions, labor, etc.
- c. **Alignment with State Strategies (required):** An assessment of how the Target Sector Strategy can align with, support, and be supported by existing state strategies in areas like clean energy, air pollution reduction, transportation decarbonization, climate adaptation, sustainable water management, and natural and working lands. Examples of State Strategies include, but are not limited to:
- California Climate Adaptation Strategy
 - California Climate Scoping Plan
 - Sustainable Groundwater Management Act (SGMA)
 - California's 30x30 Initiative
- d. **Strategy Implementation (recommended):** Describe the necessary partnerships and resources required for sector development. Explain the Collaborative's and/or other partners' roles in the management and governance of the strategy. If possible, include an anticipated budget and/or possible funding sources, a high-level workplan with example tasks and assignments, and a mitigation plan for any potential risks associated with the strategy. Sector investment coordinators will continue this work during the Catalyst Predevelopment Phase.
- b) **Sector-Neutral and Economic Mobility Strategies** (e.g., building more climate-resilient infrastructure, strengthening locally serving sectors, etc.) (follow for each sector-neutral and/or economic mobility strategy)
- a. **Identify Problem and Opportunity (required):** Define the strategy and demonstrate the need in the region. Incorporate findings from the Regional Plan Part 1 analyses, including information from the stakeholder mapping exercise, regional summary, labor market analysis, industry cluster analysis, and/or the SWOT analysis.

- (1) **Regional Assets:** Describe specific resources within the region – local services, expertise, natural resources, community spaces and networks, etc. – that will be leveraged to strengthen the development of the strategy.
- b. **Increasing Economic Diversification and Resilience (required):** Describe the growth, diversification, and/or resilience potential of the particular strategy.
- iii) **Alignment with Job Quality & Access, Equity, and Climate (required):**
 - (1) **Job Quality & Access:** Explain how the strategy will prioritize family-sustaining jobs with healthcare and retirement benefits, career advancement opportunities, access to training, consistent scheduling, safe working conditions, and opportunities for collective worker input and representation. This could include creating new high-quality jobs, retaining existing high-quality jobs, or improving the quality of existing jobs. Quality jobs should focus on equitable access for members of disinvested communities, including – but not limited to – tailored training programs, clear pathways for attaining necessary education or skills, and inclusive recruitment practices.
 - (a) Specifically, refer to the analyses of workforce and demographic trends and focus on closing gaps, reaching universal levels of service, and/or include outcomes disaggregated by race, ethnicity, income, etc.
 - (b) Strategy must support workers potentially impacted by at-risk industries and must prevent displacement of incumbent workers or replacement of high-road jobs with low-quality jobs.
 - (2) **Equity:** Explain how the strategy will provide indirect and/or direct community benefits, particularly to disinvested communities. Describe how the needs and interests of disinvested communities impacted the selection of the Target Sector Strategy.
 1. Analysis and recommendations must highlight how this strategy will serve historically marginalized and disinvested groups and how those groups will be engaged and learn about proposed interventions.
 - (3) **Climate:** Explain how the strategy will limit the impacts of economic development activities on the natural environment. The strategy must also avoid exacerbating the effects of climate change and include pathways for mitigating the effects of anticipated climate impacts on targeted industries and occupations. It must also address public health needs, with special attention to the needs of disinvested communities.
- c. **Workforce Development (required):** Explain how the strategy plans to match skills to available jobs, address talent and recruitment, and facilitate strategic collaboration among businesses, training and education institutions, labor, etc.
- d. **Alignment with State Strategies (required):** An assessment of how the strategy can align with, support, and be supported by existing state strategies in areas like clean energy, air pollution reduction, transportation decarbonization, climate adaptation, sustainable water management, and natural and working lands. Examples of State Strategies include, but are not limited to:
 - California Climate Adaptation Strategy

- California Climate Scoping Plan
- Sustainable Groundwater Management Act (SGMA)
- California's 30x30 Initiative

i) Strategy Implementation (recommended): Describe the necessary partnerships and resources required for this strategy. Explain the Collaborative's and/or other partners' roles in the management and governance of the strategy. If possible, include an anticipated budget and/or possible funding sources, a high-level work plan with example tasks and assignments, and a mitigation plan for any potential risks associated with the strategy.

c) Additional Regional and Community Development Strategies (recommended)

Include description of strategies that are critical to building resilient regions and communities but are outside the scope of the Regional Investment Initiative. These strategies include, but are not limited to:

- Housing
- Transportation
- Food Access and Security
- Mental Health Services