

**California Jobs First Collaborative Meeting**

**December 6, 2024**

**9:00 to 10:00am**

**Zoom Video Conferencing**

**<https://us02web.zoom.us/j/86993468590?pwd=bkRibjZGaCtoSVFZMTNxNEtwN2ZJdz09>**

**Webinar ID:**

**869 9346 8590**

**AGENDA**

1. Call to Order
2. Informational: Tradeable Sectors and Activation Plans
3. Discussion: Regional Investment Initiative Surveys and Recommendations for NOFO
4. Informational: Grant Analysis
5. Collaborative Comments and Updates
6. Adjourn
7. Information Items: State Economic Blueprint  
*\*includes investment playbook*

# CALIFORNIA JOBS FIRST REGIONAL ACTIVATION PLAN

**Example**

The purpose of this document is to share an example of an Activation Plan that regions will develop as part of the Regional Investment Initiative under California Jobs First.

This document was created at the request of the Employment Development Department (EDD). Sources of insight include working sessions the Governor's Office of Business and Economic Development (GO-Biz) and the Labor and Workforce Development Agency (LWDA), expert interviews, and the Community Economic Resilience Fund Program, Program Year 2022-24 Solicitation for Proposals.

The approaches and considerations included in this document are preliminary and may be further developed based on additional inputs from EDD, GO-Biz, and LWDA.

## **Context:**

The Regional Investment Initiative (RII) initially required Jobs First Collaboratives to develop project lists as part of their Regional Plans Part 2<sup>1</sup> In response to feedback, Collaboratives will now fulfill this requirement by creating Activation Plans for select strategies.

An Activation Plan can serve as an important tool for Jobs First Collaboratives to operationalize the goals of their Regional Plans Part 2 and will include the following components:

- **Strategy:** What are the key strategic initiatives that will help the region advance the selected sector (e.g., ensure a more accessible and sustainable talent pipeline)?
- **Tactic:** What primary steps will the Collaborative and its partners take over the next 12-18 months to achieve the region's sector strategy (e.g., build an industry-workforce partnership)?
- **Tasks:** What specific actions are individuals or organizations responsible for, and by when (e.g., [organization] will conduct outreach to 5 community colleges and workforce training programs by [date])? Tasks may include new projects or refocusing existing programs, as well as day-to-day activities of different organizations.

The goal of the Activation Plan is to ensure Collaboratives have the steps in place to achieve their proposed strategies, from building funding stacks to developing critical partnerships to identifying and creating plans to address regulatory barriers.

## **Action:**

**Each Collaborative will submit a draft Activation Plan for one target sector already identified in its Regional Plan Part 2 by January 31, 2025.** A template is provided below. If needed, Collaboratives can adapt the format to fit their operational needs, though should still include all requested information

Concurrently, the California Jobs First team will work with Collaboratives to identify a potential approach to developing Activation Plans for additional strategies, with an estimated submission date of June 30, 2025.

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<sup>1</sup> Community Economic Resilience Fund Program, Program Year 2022-24 Solicitation for Proposals

## Activation Plan: Strategy Overview Template

Topic	Sub-topic
<b>Target Sector Strategy - Brief Overview</b>	<ul style="list-style-type: none"> <li>a. Describe the proposed target sector and supporting strategies. <i>This information is in Part 2 of most Regional Plans already and copying or summarizing it is encouraged.</i></li> <li>b. Explain why this sector was prioritized for immediate action.</li> <li>c. Provide an overview of tactics (minimum of 5) to focus implementation over 12-18 months (to be detailed in the “Tactical workplan template”)</li> </ul>
<b>Operating Structure to Organize and Execute</b>	<ul style="list-style-type: none"> <li>a. Describe the organizational model for executing the sector strategy (including staff roles, operations, and governance model)</li> <li>b. Identify regional partners for implementing tactics (including their roles and existing engagement with California Jobs First)</li> </ul>
<b>Resourcing Across the Strategy</b>	<ul style="list-style-type: none"> <li>a. Summarize total costs required to support strategy execution</li> <li>b. Describe existing financing awarded/approved and associated sources, including utilization of Regional Investment Initiative Catalyst and Sector Coordination resources.</li> <li>c. Describe remaining funding required, potential sources that have been identified, and the general approach to securing investments</li> </ul>

<b>Goals and Metrics Across the Strategy</b>	<ul style="list-style-type: none"> <li>a. Identify measures for sector-level outcomes expected from interventions over the next 5-10 years (e.g., increases in target sector employment and number of quality jobs)</li> <li>b. Identify measures to track shorter-term progress towards desired sector-level outcomes (do not include measures linked to individual tactics, as those can be included in the tactical workplan template below)</li> <li>d. Describe expectations for reporting progress on measures</li> </ul>
<b>Dependencies and Challenges</b>	<ul style="list-style-type: none"> <li>a. Describe key dependencies and risks to tactical work plan execution and how the strategy addresses them</li> </ul>

## Activation Plan: Tactical Workplan Template

Strategy:			
Tactic & Overview	Task	Responsible Party	Timeline
<b>1.1: Tactic 1</b>  a. <b>Purpose:</b> Description of the goal of tactic  b. <b>Program design:</b> Design factors of tactic	Task 1: Description of task (+ output if applicable)		
	Task 2: Description of task (+ output if applicable)		
	Task 3: Description of task (+ output if applicable)		

<ul style="list-style-type: none"> <li>c. <b>Team:</b> Who will be leading the tactic and what partners will be involved in implementation</li> <li>d. <b>Costs:</b> Operating (space, staff, equipment, etc.) and program-specific costs, including potential funding sources</li> <li>e. <b>Potential metrics:</b> Measures to assess progress toward the tactic</li> </ul>			
<p><b>1.2: Tactic 2</b></p> <ul style="list-style-type: none"> <li>a. <b>Purpose:</b> Description of the goal of tactic</li> <li>b. <b>Program design:</b> Design factors of tactic</li> <li>c. <b>Team:</b> Who will be leading the tactic and what partners will be involved in implementation</li> <li>d. <b>Costs:</b> Operating (space, staff, equipment, etc.) and program-specific costs,</li> </ul>	Task 1: Description of task (+ output if applicable)		
	Task 2: Description of task (+ output if applicable)		
	Task 3: Description of task (+ output if applicable)		

including potential funding sources  e. <b>Potential metrics:</b> Measures to assess progress toward the tactic			
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EXAMPLE

## Example Activation Plan Strategy Overview & Tactical Workplan<sup>2</sup>

### Example Strategy Overview: Sector strategy

Topic	Response
<p><b>Target Sector Strategy Overview - Brief Overview</b></p>	<p>This target sector strategy aims to accelerate [region's] place as a globally competitive [sector] hub and reinforce the region's base of quality jobs accessible to workers of different skill levels.</p> <p>The [sector] was prioritized for immediate implementation for the following reasons:</p> <ol style="list-style-type: none"> <li>1. Growth of the sector nationwide, with [X%] projected employment growth expected by 2027; sector comprised an outsized [X%] share of regional job growth from 2018-2023</li> <li>2. Sector provides a large share of quality jobs [X%], including a significant portion [X%] that are accessible to those without a college degree</li> <li>3. Momentum evidenced by recent creation of multiple workforce and education programs that are expected to build a pipeline of skilled workers to meet the needs of [sector] employers, including a first-of-its-kind industry recognized credential for [specific sector skill]</li> </ol> <p>The region will advance this target sector over the first 18 months of implementation through the following strategies, included in in the Regional Plan Part II. These</p>

<sup>2</sup> Adapted from an anonymized Activation Plan prepared within the past five years; information is redacted to protect confidentiality. Content and dates are illustrative and should not be assumed to be relevant for each region's specific context. Example should be seen as providing guidance on the content and form that should be included in the Activation Plan but should not be interpreted as the optimal level of detail.



strategies have been prioritized for their critical role in establishing core infrastructure for further action and their potential to achieve early “wins” to sustain momentum.

1. **Strategy 1: Sector Support Infrastructure:** Launch a cluster leadership organization to serve as the primary united coordinator and voice for [sector] interests of the region addressing gaps in internal collaboration and supports and external advocacy and visibility.

» **Near-Term Tactics:**

- Establish robust Executive leadership and staffing for the cluster initiative.
- Create an Advisory Council, including securing representation from major private and public institutions and establish regular working relationships with other relevant regional, extra-regional, and state interests (e.g. [organizations] and [initiative list]).
- Launch a sector-specific business retention and expansion (BRE) program.

2. **Strategy 2: Tech Transfer and Commercialization:** Boost business dynamism and innovation through mutually-beneficial collaboration among firms and [partner] facilities by (i) utilizing expertise and physical assets to advance private entrepreneurial commercial use and joint-problem solving, and (ii) commercialization of marketable technologies to spur broader regional ecosystem-building and growth.

» **Near-Term Tactics**

	<ul style="list-style-type: none"> <li>• Establish a central location or “storefront” (first virtual, then physical) to anchor the cluster’s tech transfer and commercialization efforts, centralize programming, and serve clients.</li> </ul> <p>3. <b>Strategy 3: Workforce Development:</b> Ensure a more accessible and sustainable talent pipeline for the <b>[sector]</b> by broadening pathways to good and promising jobs for mid-skill workers and residents historically disconnected from such opportunities.</p> <p>» <b>Near-Term Tactics</b></p> <ul style="list-style-type: none"> <li>• Build an industry-workforce partnership to unite and bring scale to existing disparate efforts to serve industry talent pipelines and improve worker access to the sector.</li> </ul>
<p><b>Operating Structure to Organize and Execute</b></p>	<p>In the immediate term, implementation will be incubated at the region’s existing economic development organization (EDO), <b>[name]</b>, given that entity’s expertise and strong relationships with both sector firms and other relevant entities (e.g. local governments, workforce development board, university, community college). Of particular relevance, this organization has a track record of delivering programs, including <b>[names]</b>.</p> <p><b>[Economic development organization]</b> has agreed to devote 50% of time from <b>[name]</b> (Senior Vice President) and 100% from <b>[name]</b> (Project Manager) to the effort for up to a year, plus provide office space and other administrative support for up to three years.</p> <p>Senior Vice President <b>[name]</b> has ten years of economic development experience, including a prior role focused specifically on this sector in another California region, <b>[name]</b>. This individual is adept at deploying economic development tools and</p>

models, has experience engaging external institutions as collaborators to achieve common goals by directing their internal activities toward shared strategies and outcomes, and is knowledgeable on relevant state, and federal economic development programs, regulations, and policy.

Project Manager **[name]** has four years of experience at the intersection of economic and workforce development, including supporting a business-led apprenticeship network. This individual is both a subject-matter expert and skilled at managing complex processes and operations.

Economic development organization **[name]** will receive **[dollar amount]** of sector coordination funds to support this activity. The organization will report on progress biweekly to the Regional Convener project director and monthly to the Regional Convener leads. The organization may also be asked to participate in monthly Regional Governance Committee meetings.

As a core element of strategy implementation, this interim sector leadership will advance longer-term infrastructure for sector support in the form of a cluster initiative. The initiative will be incubated at the economic development organization pending anticipated spinoff as an independent 501(c)(3) within 3 years. It is anticipated to ultimately have a physical office sited to serve the geographic concentration of **[sector]** firms and assets in **[location]**, and biweekly satellite office presence in **[university]** and **[economic development organization]** space at **[location]** and **[location]**.

By the end of 18 months, the cluster initiative will be led by a senior-level Executive Director with **[sector]** experience and the expertise, connections, and cachet to bridge technical and business perspectives, working across private and public interests. A high-level Advisory Council from major private and public institutions will

	<p>shape direction and create accountability. The initiative will also secure at least two additional staff members, focused on innovation and workforce.</p> <p>Initiative leads will work closely on a day-to-day basis with designees at anchor organizations, such as Innovation Team Lead [names] at [organization] and [organization]. To accomplish activities and services outlined, the initiative will seek an [institutional agreement vehicle] with [organization list], and other relevant entities. At the discretion of the Executive Director and leads, workgroups or subcommittees will be formed to facilitate ongoing input and collaboration in designated areas.</p>
<p><b>Resourcing Across the Strategy</b></p>	<p>The total cost of implementing the full strategy as outlined in Regional Plan Part II is expected to be <b>[\$33,272,500]</b> over ten years (2025-2035). This includes:</p> <ul style="list-style-type: none"> <li>• <b>Strategy 1: Sector Support Infrastructure</b> <ul style="list-style-type: none"> <li>○ Cluster Initiative standup and operations (staffing, office space, travel to industry events, etc.) -- \$850K/year (2025-2035) = \$8.5M total</li> <li>○ Advisory Council standup and operations – <i>included in cluster initiative operations</i></li> <li>○ Sector-specific business retention and expansion program -- \$150K/year (2025-2035) = \$1.5M total</li> <li>○ Sector branding/marketing campaign -- \$175K in first year (2027); \$75K in years 2028-2035 = \$700K total</li> </ul> </li> <li>• <b>Strategy 2: Tech Transfer and Commercialization</b> <ul style="list-style-type: none"> <li>○ University/installation intellectual property inventory/portal -- \$250K in first year (2026); \$30K/year in years 2027-2035 = \$490K total</li> </ul> </li> </ul>

- Innovation “storefront” (physical space, equipment, and staffing for concierge/technical assistance services) -- \$5.5M for standup (2029); \$1.2M/year in 2030-2035 = \$11.5M total
- Innovation voucher program, providing access to problem-solving expertise for small and mid-size firms -- \$300K/year (2027-2035) = \$2.4M total
- Federal SBIR/STTR grant matching program -- \$425K/year (2028-2035) = ~\$3M total

- **Strategy 3: Workforce Development**

- Industry-workforce partnership standup and operations (including staffing/consultants, data analysis and convening costs) -- \$275K/year (2026-2035) = \$2.47M total
- K-12 sector awareness campaign -- \$150K in first year (2027); \$50K in years 2028-2035 = \$500K total
- Talent attraction campaign -- \$250K in first year (2028); \$50K in years 2029-2035 = \$550K total

Costs for initial activities described in this Activation Plan over a period of 18 months are expected to be **[\$1.662,500]**

- **Cluster initiative stand-up [\$1.275M]**

- Interim staffing, office space, and administrative support at EDO -- \$475K
- Recruiting firm contract for Executive Director, Innovation Lead, and Workforce Lead searches -- \$50K
- Executive Director salary and fringe; relocation stipend (August 2025-June 2026) -- \$315K
- Innovation Lead salary and fringe (January 2026-June 2026) -- \$100K
- Workforce Lead salary and fringe (January 2026-June 2026) -- \$100K

	<ul style="list-style-type: none"> <li>○ Contract for business retention and expansion program (February 2025- June 2026) -- \$200K</li> <li>○ Convening costs for Advisory Council -- \$20K</li> <li>○ Travel to industry events -- \$15K</li> </ul> <ul style="list-style-type: none"> <li>● Tech transfer and commercialization activities: <b>[\$250,000]</b> – all year 1 expenses other than staffing under cluster initiative to be dedicated in first six months <ul style="list-style-type: none"> <li>○ Communications contract for web portal construction, data entry, and branding / messaging assistance -- \$190K</li> <li>○ Website fees -- \$10K</li> <li>○ Stipends for university/installation participation in data / inventory preparation -- \$50K</li> </ul> </li> </ul> <ul style="list-style-type: none"> <li>● Workforce development activities: <b>[\$137,500]</b> <ul style="list-style-type: none"> <li>○ Research contract for detailed sector skills demand analysis -- \$90K</li> <li>○ Contract for facilitation support -- \$35K</li> <li>○ Convening costs and collaboration portal -- \$12,500K</li> </ul> </li> </ul> <p>Initial seed funds include:</p> <ul style="list-style-type: none"> <li>● <b>[\$XM] in funding to hire a sector coordinator aligned to this sector strategy</b></li> <li>● <b>[\$XM] from [philanthropic organization]</b> (awarded May 2024)</li> <li>● <b>[\$XM] from [federal funding]</b> (awarded July 2024)</li> </ul> <p>The region expects to allocate California Jobs First Catalyst funding to support this work.</p> <p>Additional potential sources identified include: private sector stakeholder investments for operating support or individual programs; local government economic development and workforce development focused funding, including</p>
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	<p>[<b>organization</b>] and [<b>program</b>]; [<b>agency</b>] contributions via core program budgets, detailed staff, or drawing national programs into the region (e.g. [<b>program</b>]); federal and state grants for specific strategies, such as the [<b>program</b>] and [<b>program</b>] to establish a “storefront” incubator / accelerator, etc.; and fee for service for particular programs.</p>
<p><b>Goals and Metrics Across the Strategy</b></p>	<p>Overall measures for sector outcomes expected from the full set of strategy interventions may include:</p> <ul style="list-style-type: none"> <li>• Regional job creation in the sector</li> <li>• New regional start-ups in the sector</li> <li>• Number of commercialized technologies brought to market from interventions</li> <li>• Production of graduates from sector-specific training programs (and placements at regional firms)</li> <li>• Utilization of business supports (e.g. number of partnerships and collaboration agreements between firms, partner facilities, and other stakeholders).</li> </ul> <p>Short-term measures to track progress: progression toward formation and activity of advisory council; operational milestones such as hiring Executive Director and senior staff, securing initial seed funds, developing a business plan</p> <p>Performance on measures will be reported quarterly to [<b>funding organizations</b>] and will be shared publicly via an annual report.</p>
<p><b>Dependencies and Challenges</b></p>	<p>Because the Executive Director is a specialized role, hiring may be delayed, impacting progress on additional sub-strategies and tactics. An extension of the interim staffing structure at the EDO may be required.</p>

	Standup of tech transfer and commercialization efforts may also be slowed by administrative steps and approvals at regional universities and other innovation institutions. It may be necessary to partner with [organization], which has an existing partnership agreement with these institutions.
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Sample Tactical Workplan: Sector strategy

Tactic & Overview	Task	Responsible Party	Timeline
<b>Strategy: Sector Support Infrastructure</b>			
<p><b>Tactic 1:</b> Establish robust Executive leadership and other staffing for the cluster initiative.</p> <ul style="list-style-type: none"> <li>a. <b>Purpose:</b> Ensure the initiative has the requisite capacity and expertise to define and implement strategic priorities</li> <li>b. <b>Program design:</b> Attract and hire experienced professionals with the necessary expertise to lead the initiative, ensuring alignment with existing organizations and fostering effective collaboration within the regional ecosystem</li> </ul>	<p>1. Identify interim staff support that can execute on below programmatic activities until the Executive Director is identified (complete; housed at regional EDO)</p>	<p>Convener</p>	<p>by Dec 1 2024</p>
	<p>2. Draft job description for executive director; soft-launch search (e.g. develop list of potential national and/or regional candidates; hold preliminary conversations).</p>	<p>EDO, with Convener review</p>	<p>by Jan 1 2025</p>



<p>c. <b>Leadership:</b> The EDO managing implementation on an interim basis will lead the recruitment process, with input from the Regional Convener.</p> <p>d. <b>Costs:</b> Initial costs will include recruitment expenses, salaries, and benefits for the Executive Director and senior staff, as well as potential consulting fees for interim contract support and the establishment of an operational budget</p> <p>e. <b>Potential metrics:</b></p> <ul style="list-style-type: none"> <li>• <b>Time to Hire:</b> The duration taken to define job descriptions and successfully recruit the Executive Director and senior staff</li> <li>• <b>Staff Retention Rates:</b> The percentage of senior staff retained within the first year of hiring</li> <li>• <b>Operational Integration:</b> The number of formal agreements or partnerships established with existing organizations to support the initiative's activities and goals</li> </ul>	3. Launch recruitment process for executive director, using existing Sector Coordinator funds	EDO, with Convener input	by February 1 2025
	4. Draft additional job descriptions (e.g. Innovation Lead, Workforce Lead), to be finalized with Executive Director	EDO	By March 15, 2025
	5. Complete recruitment process and onboard executive director.	EDO	by August 15, 2025
	6. Fully transition responsibilities from interim lead (EDO Senior VP) to executive director	EDO	By October 31, 2025
	7. Launch recruitment for additional roles	Executive Director	Fall 2025

<p><b>Tactic 2:</b> Create an Advisory Council, including securing representation from major private and public institutions and establish regular working relationships with other relevant regional, extra-regional, and state interests (e.g. [<b>organizations</b>] and [<b>initiative list</b>])</p> <p>a. <b>Purpose:</b> Provide strategic direction, accountability, and enhanced collaboration by creating an Advisory Council with representation from major private and public institutions and establishing regular working relationships with key regional, extra-regional, and state interests.</p> <p>b. <b>Program design:</b> The program will involve selecting influential leaders from diverse sectors to form an Advisory Council, alongside developing formal mechanisms for regular communication and collaboration with relevant organizations and initiatives.</p> <p>c. <b>Leadership:</b> The Executive Director will lead organizing and stewardship of the Advisory Council. The EDO will initiate prep (e.g. prospect list, business plan development) ahead of the Executive Director onboarding.</p>	1. Develop list of target firms and executives for recruitment	EDO	By July 1, 2025
	2. Draft business plan / structure for council (e.g. duties/responsibilities, membership tiers and fees)	EDO	By July 1, 2025
	3. Identify and build relationship(s) with industry champions (e.g. existing participant on EDO board) who can help recruit peers	EDO, with Executive Director once onboard	August-September 2025
	4. Brief and recruit potential private-sector members; refine concept and value proposition in response to feedback.	Executive Director	October-November 2025

<p>d. <b>Costs:</b> Costs will include expenses related to organizing and facilitating Advisory Council meetings, travel and accommodation for council members, and administrative support for maintaining regular communication with other relevant organizations.</p> <p>e. <b>Potential metrics:</b></p> <ul style="list-style-type: none"> <li>• <b>Council Formation Time:</b> The time taken to identify, invite, and confirm members of the Advisory Council</li> <li>• <b>Meeting Frequency and Attendance:</b> The number and regularity of Advisory Council meetings held, and the attendance rate of council members</li> <li>• <b>Collaboration Agreements:</b> The number of formal working relationships or agreements established with regional, extra-regional, and state organizations and initiatives</li> </ul>	<p>5. Officially launch Advisory Council with seed funding secured and initial formal commitments from private-sector members.</p>	<p>Executive director</p>	<p>by February 1, 2026</p>
<p><b>Tactic 3:</b> Launch a sector-specific business retention and expansion (BRE) program</p>	<p>1. Define scope of work and finalize contract with Chamber</p>	<p>EDO Senior VP (Interim cluster leadership)</p>	<p>February 2025</p>

<p>a. <b>Purpose:</b> The region does not currently perform dedicated regular outreach to [sector] firms to assess ongoing needs and provide connections to mainstream economic and workforce development resources. Filling this gap will both provide the cluster initiative with ongoing market intelligence to steer efforts and improve the competitiveness of firms by boosting their utilization of available supports.</p> <p>b. <b>Program design:</b> The cluster initiative will contract with [organization] to add a special [sector] supplement to the organization’s sector-neutral business retention and expansion program. Activities will include twice-annual contacts to firms to:</p> <ul style="list-style-type: none"> <li>a. Collect data on common challenges and needs that could be addressed by the cluster initiative</li> <li>b. Identify firms that may either be positioned to scale with appropriate supports or leave the area barring regional intervention</li> <li>c. Provide referrals to existing regional economic and workforce development programming (e.g.</li> </ul>	2. Develop firm outreach list and materials (e.g. list of local/state services and grant programs available to the regional sector)	Chamber, with Senior VP input	March 2025
	3. Launch first program; round; regularly report back to cluster initiative re; progress	Chamber	April – June 2025
	4. Distill findings and outcomes from first round into summary memo; submit to cluster initiative	Chamber	July–August 2025
	5. Launch and complete additional program rounds	Chamber	Launch second round in November 2025; ongoing

<p>exports assistance offered by the region’s World Trade Center, Employment Training Panel resources for incumbent worker training)</p> <ul style="list-style-type: none"> <li>d. Help navigate State/local incentive opportunities, permitting processes, and related regulatory issues</li> <li>e. Promote participation in other strategy programming (e.g. industry-workforce partnership, innovation storefront)</li> </ul> <p>c. <b>Team:</b> The program will be managed by [organization], which runs an existing sector-neutral business retention and expansion program. The cluster initiative will contract with the [organization] to perform these duties. Scaling this existing program to serve the sector will enable the cluster initiative to realize greater efficiencies than starting up a new business retention and expansion program on its own.</p> <p>d. <b>Costs:</b> \$150,000/year for [organization] contract</p> <p>e. <b>Potential metrics</b></p>			
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<ul style="list-style-type: none"> <li>a. <b>Firm Contacts:</b> Number of firms reached through program touchpoints</li> <li>b. <b>Referrals:</b> Number of referrals made to service providers</li> <li>c. <b>Influence on Firm Decisions:</b> Number of expansions and retentions directly supported by the program</li> </ul>			
<b>Strategy 2: Tech Transfer and Commercialization</b>			
<p><b>Tactic 4:</b> Establish a central location or “storefront” (first virtual, then physical) to anchor the cluster’s tech transfer and commercialization strategy, centralize programming, and serve clients.</p> <ul style="list-style-type: none"> <li>a. <b>Purpose:</b> Utilization of the region’s immense sector-relevant innovation assets at <b>[sector]</b> partners for commercial potential is constrained by lack of awareness and access to offerings. A centralized “hub” will close these gaps and facilitate greater market activity.</li> <li>b. <b>Program design:</b> In its first stage, the effort will establish a common online inventory of commercially-relevant intellectual property strengths, capable of 1) facilitating detailed</li> </ul>	<p>1. Convene university/installation tech transfer and commercialization leads to establish parameters for the inventory (e.g. intellectual property areas to pilot) and inform workplan (considering any required institutional approvals, etc.)</p>	<p>Innovation Lead (or Executive Director, if not yet hired)</p>	<p>December 2025</p>
	<p>2. Prepare/release Request for Proposals and onboard communications firm to 1) build online portal, 2) build external-facing website and marketing collateral, and 3) potentially perform data entry.</p>	<p>Innovation Lead, in consultation with Executive Director and <b>[sector]</b> partners</p>	<p>January 2026</p>

<p>searches for firms/innovators and, 2) informing higher-level marketing of regional assets to improve national and global visibility of the sector. In subsequent phases, the effort will extend to a physical space housing more intensive supports, such as a concierge / navigator to advise on the catalog and additional technical assistance for early-stage firms looking to commercialize innovations (e.g. accelerator programs).</p> <p>c. <b>Team:</b> The cluster initiative executive director and staff (i.e. innovation lead) will lead implementation, working with tech transfer and commercialization leads at <b>[sector]</b> partners. Communications / marketing contractors will supplement staff in designing the web portal and creating marketing collateral. Additional contractors may also be necessary to facilitate data transfer/entry.</p> <p>d. <b>Costs:</b> Costs for initial activities (e.g. creating a virtual asset inventory) are expected to be relatively modest (e.g. staff time, online platform, communications/marketing contracts) and covered by Sector Coordinator resources. More intensive resources will be required to</p>	3. Prepare inventory data, following agreed-upon format	<b>[Sector]</b> partners	January - April 2026
	4.. Build platform and website	Communications firm	March - June 2026
	5. Synthesize / add up IP strengths into public-facing messaging to promote sector	Innovation Lead/communications firm	May 2026
	6. Finalize website (including user testing and development of launch plan to reach priority audiences)	Communications firm with input from Innovation Lead and <b>[sector]</b> partners	June/July 2026
	7. Launch platform	Innovation Lead	August 2026
	8. Develop business plan for future phases (e.g. buildout of physical hub)	Innovation Lead/Executive Director	By December 1, 2026

<p>establish a physical space and offer more extensive supports (e.g. concierge service).</p> <p>e. <b>Potential metrics:</b></p> <ul style="list-style-type: none"> <li>• <b>Platform reach:</b> Numbers of visits to platform/website</li> <li>• <b>Improvements in commercialization:</b> Numbers of regional firms utilizing IP highlighted in inventory</li> </ul>			
<p><b>Strategy 3: Workforce Development</b></p>			
<p><b>Tactic 5:</b> Build an industry-workforce partnership to unite and bring scale to existing disparate efforts to serve industry talent pipelines and improve worker access to the sector.</p> <p>a. <b>Purpose:</b> Talent availability was raised by sector firms as a primary barrier to regional competitiveness; meanwhile, clearer paths to training and skills development are needed for more local residents to access the quality jobs concentrated in the sector. Education and training programs led by universities, community colleges, K-12 districts, and other providers to serve the sector are currently fragmented and</p>	<p>1. Recruit sector firms to join partnership; identify “industry champions” to help engage peers</p>	<p>Workforce Lead, with Executive Director</p>	<p>January-March 2026</p>
	<p>2. Recruit workforce/educational institutions to join partnership</p>	<p>Workforce Lead</p>	<p>January-March 2026</p>
	<p>3. Contract with research firm to perform detailed sector talent demand analysis to frame partnership launch</p>	<p>Workforce Lead</p>	<p>January 2026; analysis to be complete by April</p>



<p>struggling to create sufficient pipelines in required timeframes. Organizing an industry-workforce partnership will address these challenges by creating a central table for employers to communicate needs and inform interventions, and for providers to coordinate to meet these demands at appropriate speed and scale.</p> <p>b. <b>Program design:</b> The industry-workforce partnership will provide infrastructure (via staffing, convening support, and joint activities like data analysis) for sector firms and education/workforce providers to meet regularly (i.e. quarterly) to pinpoint demands, drive interventions, and monitor progress. Between meetings, the partnership staff will project manage completion of activities assigned to employer and provider participants, such as development of a new curriculum or launch of a new internship opportunity.</p> <p>c. <b>Team:</b> The partnership will be led by the Workforce Lead staff member housed at the Cluster Initiative. Additional support will be delivered through contractors (e.g., facilitation support) and additional staff (e.g., a program coordinator) to be hired in subsequent years. Each firm and provider</p>	<p>4. Plan for kickoff convening, including securing facilitation assistance</p>	<p>Workforce Lead</p>	<p>March-May 2026</p>
	<p>5. Hold kickoff convening; outline timeline for next year of activity and make preliminary assignments to attendees</p>	<p>Workforce Lead, with facilitator</p>	<p>June 2026</p>
	<p>6. Manage follow-up / task delivery ahead of Fall convening</p>	<p>Workforce Lead</p>	<p>Summer 2026</p>

<p>participant will be required to name an official designee, who will be responsible for completing (or coordinating others' contributions to) assigned tasks.</p> <p>d. <b>Costs:</b> Primary costs are staffing / contracts (i.e., the workforce lead, potential program coordinator, and facilitation support). Other costs include additional technical assistance/contracts (e.g. data analysis) and convening/meeting expenses.</p> <p>e. <b>Potential metrics:</b></p> <ul style="list-style-type: none"> <li>• <b>Employer engagement:</b> Number of employers engaged in the partnership; employer feedback on program effectiveness</li> <li>• <b>Participation:</b> Number of participants in new programs (e.g. apprenticeships, internships)</li> <li>• <b>Placements:</b> Number of placements at member employers from member talent provider programs</li> <li>• <b>Diversity:</b> Increased representation of BIPOC and female workers in the sector</li> </ul>			
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EXAMPLE

An aerial photograph of a city at dusk, featuring a prominent white building with a grid-like facade. The image is overlaid with a blue rectangular frame and two vertical red bars on the left and right sides. The text is centered within the white area of the frame.

# **December 6th Collaborative Meeting**

# Regional sector priority crosswalk: Orange County

DRAFT | PRE-DECISIONAL | NOT FOR DISTRIBUTION

AS OF 9/16/2024

NON-EXHAUSTIVE

PRELIMINARY

X Above average X Below average

Region-identified sector priorities <sup>1</sup>	Potential Jobs First sector categorization <sup>2</sup>	Top tradable sectors by regional employment <sup>3</sup>	Regional employment, 2023	Regional specialization (LQ) <sup>4</sup>
<b>Tradable</b>	Manufacturing	Manufacturing – Precision		
	<ul style="list-style-type: none"> <li>Computer &amp; electronic product manufacturing (incl. computers, semiconductors)</li> <li>Miscellaneous (incl. medical equipment and supplies)</li> </ul>	High tech – Semiconductors		
		Life sciences – <u>Medtech</u>		
Education services	Education & knowledge creation	Finance and professional services	141,909	1.3
Tourism	Tourism & outdoor recreation	Tourism	69,311	1.9
<ul style="list-style-type: none"> <li>Accommodation</li> <li>Food services and drinking establishments</li> </ul>		Distribution and Ecommerce	68,400	1.0
		High Tech - Software and services	32,999	0.8
		Life Sciences-Medtech	25,104	5.5
		Manufacturing-Precision	18,788	2.6
		Life Sciences-Pharma + Biotech	10,435	0.8
		Manufacturing -Machinery	7,599	0.7
		Manufacturing-Food and beverage	7,110	0.5
		Transport & logistics	6,412	0.3
		<b>Top non-tradable sector by regional employment<sup>5</sup></b>		
		Healthcare	181,624	0.9

1. As identified in Regional Plan Part 2 | 2. Preliminary Jobs First sector categorization as of 9/16 | 3. Identified as top 10 tradable sectors as aligned to preliminary Jobs First sectors; tradable sectors are those that produce goods and services that can be exported beyond regional borders. | 4. LQ = location quotient; specialization is measured as the ratio of a sector's share of employment in a given area to that occupation's share of employment in the U.S. as a whole and reflects a region's potential competitive advantage. | 5. Identified as the top non-tradable sector by regional employment; non-tradable sectors are those that produce goods and services that are primarily consumed locally

Source: Orange County Regional Plan Part 2, Lightcast, NAICS

# Activation Plans

- No more than 5
- Tourism & Outdoor due 1/31/25
- Remainder are due 6/30/25
- Drafts presented to Collaborative before submission
- Project Management Tool

# Activation Plans

- Target Sector Strategy
  - What is it, Why it matters, and what are we going to do about it (tactics)
- Operating Structure to Organize and Execute
  - Whose doing what to execute tactics and outcomes
- Resourcing Across the Strategy
  - What's it going to cost and how can we pay for it
- Goals and Metrics
  - Outcomes over 5-10 years and shorter-term benchmarks
- Dependencies and Challenges
  - What might get in the way, and what is our response to it.

# Activation Plan-Tactical Workplan

An aerial, high-angle photograph of a cityscape, showing a mix of modern and older buildings, streets, and greenery. The image is faded and serves as a background for the text.

- Strategy
  - Tactic
    - Purpose, Program Design, Team, Costs, Potential Metrics
    - Task, Who does what, Deadline



An aerial photograph of a city at dusk, featuring a prominent white building with a grid-like facade. The image is framed by a thick blue border, with two vertical red bars on the left and right sides. The word "Questions" is centered in a large, bold, black font.

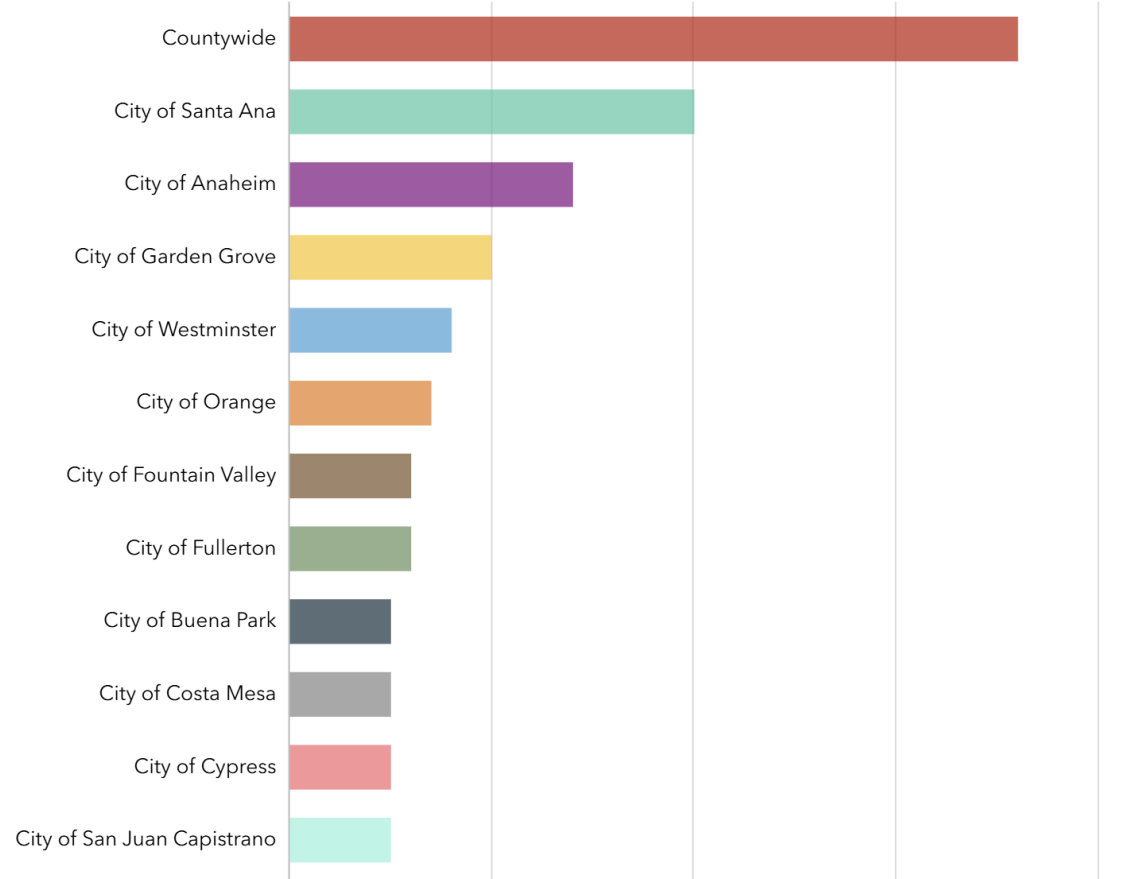
# Questions

An aerial photograph of a city at dusk, featuring a prominent white building with a grid-like facade on the right. The scene is framed by a blue border with two red vertical bars on the left and right sides. The text 'Catalyst Surveys' is centered in a white box.

# Catalyst Surveys

# Where in Orange County will this project provide benefits?

Where in Orange County will this project provide benefits? (Multiple Selections. List every city in Orange... \*Column Bar

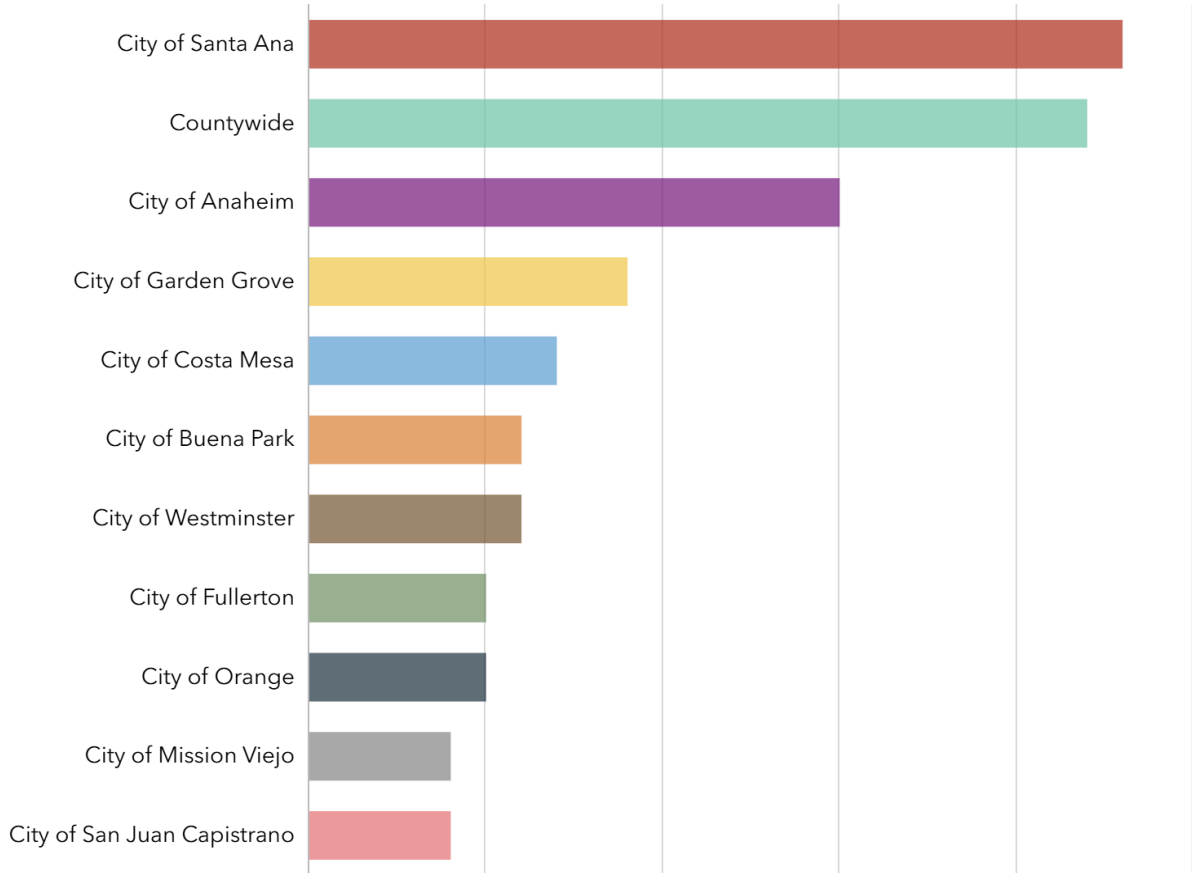


- City of Huntington Beach
- City of Laguna Niguel
- City of Laguna Woods
- City of Mission Viejo
- City of Rancho Santa Margarita
- City of San Clemente
- City of Tustin
- City of Aliso Viejo
- City of Dana Point
- City of Irvine
- City of Laguna Hills
- City of Lake Forest
- City of Los Alamitos
- City of La Habra
- City of La Palma
- City of Laguna Beach
- City of Newport Beach
- City of Seal Beach
- City of Stanton
- City of Brea
- City of Placentia
- City of Villa Park
- City of Yorba Linda

Countywide	36	64.29%
City of Santa Ana	20	35.71%
City of Anaheim	14	25%
City of Garden Grove	10	17.86%
City of Westminster	8	14.29%
City of Orange	7	12.5%
City of Fountain Valley	6	10.71%
City of Fullerton	6	10.71%
City of Buena Park	5	8.93%
City of Costa Mesa	5	8.93%
City of Cypress	5	8.93%

# If applicable where in Orange County will this project be located?

If applicable, where in Orange County will this project be located? (Multiple Selections. List every city in... \*Column Bar



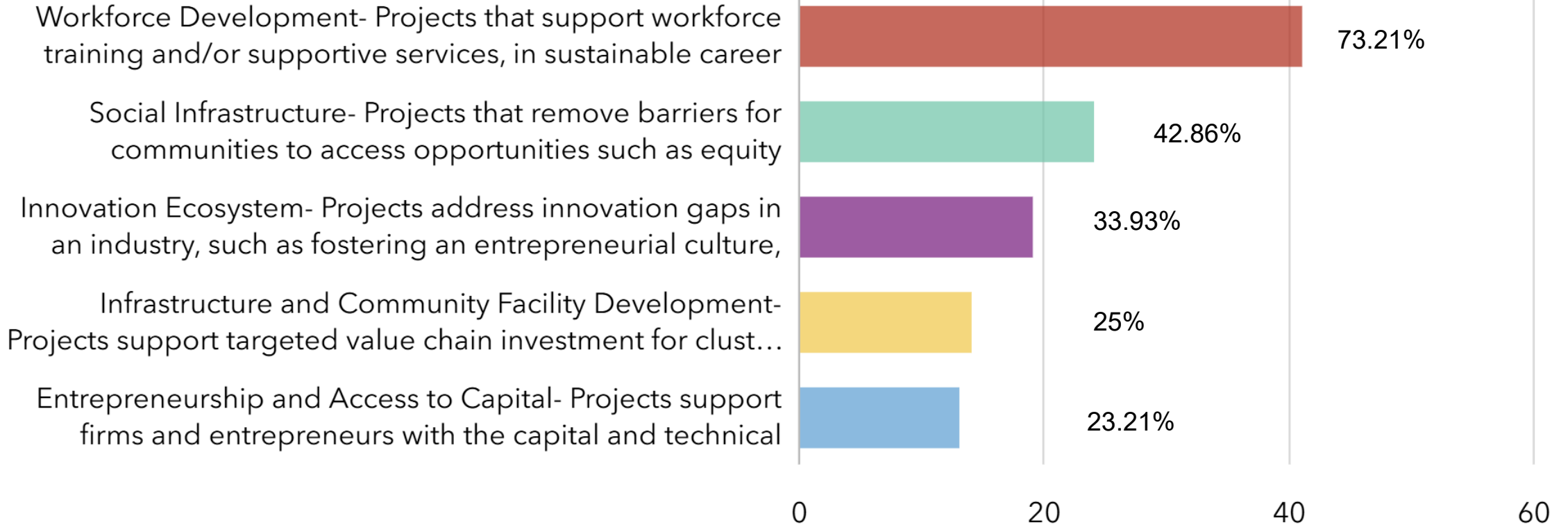
- City of Santa Ana
- Countywide
- City of Anaheim
- City of Garden Grove
- City of Costa Mesa
- City of Buena Park
- City of Westminster
- City of Fullerton
- City of Orange
- City of Mission Viejo
- City of San Juan Capistrano
  
- City of Tustin
- City of Fountain Valley
- City of La Habra
- City of Laguna Beach
- City of Lake Forest
- City of Los Alamitos
- City of Placentia
- City of Seal Beach
- City of Yorba Linda
- City of Brea
- City of La Palma
- City of Newport Beach
- City of Villa Park

Answers	Count	Percentage
City of Santa Ana	23	41.07%
Countywide	22	39.29%
City of Anaheim	15	26.79%
City of Garden Grove	9	16.07%
City of Costa Mesa	7	12.5%
City of Buena Park	6	10.71%
City of Westminster	6	10.71%
City of Fullerton	5	8.93%
City of Orange	5	8.93%
City of Mission Viejo	4	7.14%
City of San Juan Capistrano	4	7.14%

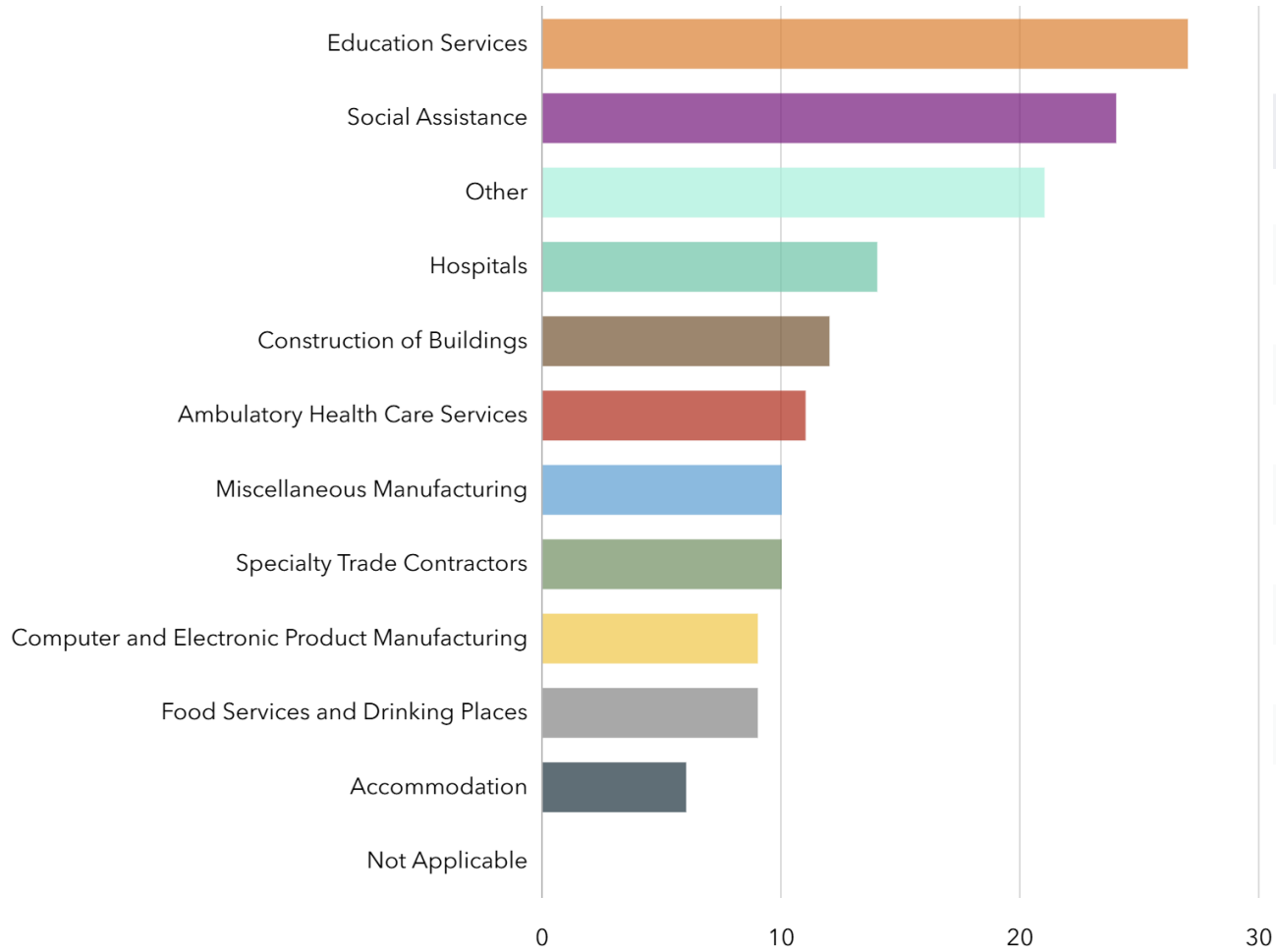
# Which option best defines your project?

Which option below best defines your project? \*

Column Bar



# Which Industry(s), if any, would your project contribute to?



Answers	Count	Percentage
Education Services	27	48.21%
Social Assistance	24	42.86%
Other	21	37.5%
Hospitals	14	25%
Construction of Buildings	12	21.43%
Ambulatory Health Care Services	11	19.64%
Miscellaneous Manufacturing	10	17.86%
Specialty Trade Contractors	10	17.86%
Computer and Electronic Product Manufacturing	9	16.07%
Food Services and Drinking Places	9	16.07%
Accommodation	6	10.71%

# Which components, if any, does your project include?



Answers	Count	Percentage
Career Pathways: Improve education and workforce training opportunities that support career pathways to high-quality jobs, particularly in priority industry sectors	47	83.93%
Uplift Community Voices through Respectful Cultural Engagement: Improve community participation in the creation of strategies and projects to ensure the highest benefit to disinvested communities. Cultural humility and respectful cultural engagement are essential to the implementation of the plan, including respecting workers, residents, and business owners by following their community norms and customs when engaging with them.	35	62.5%
Enhance Quality of Life: Increase wrap-around services to ensure the health and well-being of all families and neighborhoods, particularly in disinvested communities, foster a sense of inclusivity and support, and improve climate resilience and quality of life.	33	58.93%
Apprenticeships: Increase access to apprenticeship opportunities that lead to high quality jobs particularly in priority industry sectors in the region	29	51.79%
Climate Resilient Environment: Taking actions to support a sustainable environment, including preparing for and mitigating climate change, which includes, but is not limited to, making, planning, development, infrastructure and quality of life decisions that provides a net environmental benefit.	23	41.07%
Small Business, Worker Ownership and Entrepreneurship: Provide capital, technical assistance, and other resources for small businesses, worker ownership and entrepreneurs	20	35.71%
Green and Emerging Technology and Innovation: Invest in innovation, research, and industry cluster development in green and emerging technologies, including energy, transportation, infrastructure, nature-based solutions and climate adaptation	20	35.71%
Housing: Increase the availability and accessibility of affordable and workforce housing to workers in the region, that promotes infill low impact development and sustainability, including rental and ownership	10	17.86%

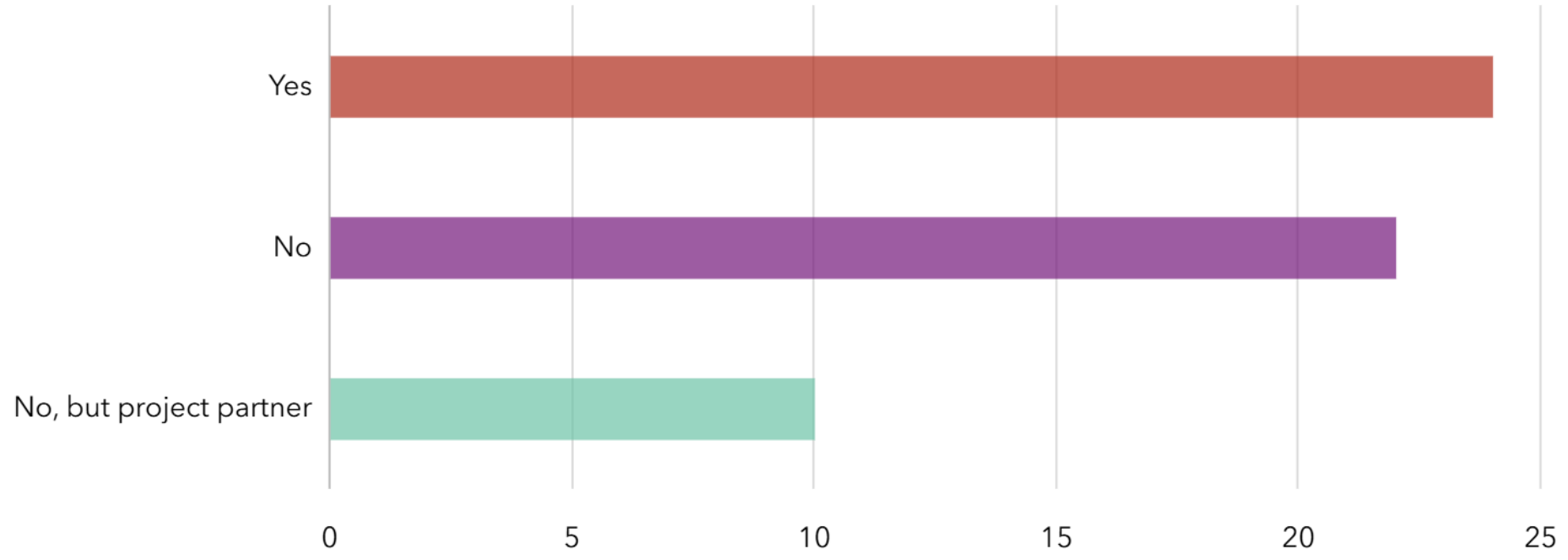
# Will your project...



Be in a Justice40 Disadvantaged Census Tracts (link to the map can be found above).	41	73.21%
Ensure equitable access to quality jobs for residents of disinvested communities.	37	66.07%
Promote the creation of 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.	33	58.93%
Target training and support services to workers with employment barriers (link to the list can be found above).	33	58.93%
Has/had community input or approval and will continue to have opportunities for community input.	33	58.93%
Leverage assets, investments, or other funding sources.	30	53.57%
Include an applicant or co-applicant located in or serving a disinvested community. A disinvested community is one located Justice40 Census Tracts, a Household income under \$95,280, or a member of a Tribal community.	27	48.21%
Create assets or programs owned or controlled by members of disinvested communities	25	44.64%
Provide direct, meaningful, and assured benefits to at least 40 percent of residents who live in a Justice40 Disadvantaged Census Tracts, have a Household income under \$95,280, or part of a Tribal community.	23	41.07%
Align with Major State Climate Goals and Policies	21	37.5%
Be applying for or interested in applying for Federal Funds that is a Justice40 Covered Program. (The link to a full list of those programs can be found above).	16	28.57%
Fund alternative models of ownership for land, businesses, or other assets, such as worker-owned cooperatives, community land trusts, co	12	21.43%
Include local or targeted hire provisions, a Project Labor Agreement (PLA), Community Workforce Agreement (CWA), a Community Benefits Agreement (CBA), or a labor peace and neutrality agreements.	10	17.86%



# Is the primary applicant a member of the Jobs First Collaborative?



Answers	Count	Percentage
Yes	24	42.86%
No	22	39.29%
No, but project partner	10	17.86%

# Discussion on the Notice of Funding Opportunity (NOFO)

- What is the balance between pre-development activities for a handful of projects or help all strong projects a little bit?
- Multiple Rounds (3) or One Round?
- Ceilings and floors based on:
  - Geographic distribution
  - Project Definition (More Implementation Focused)
  - Priority Sector distribution
  - Regional Strategies
  - Project Benefits (More Implementation Focused)
  - Strict funding caps based on types of projects
- Other?

An aerial photograph of a city at dusk, featuring a prominent white building with a grid-like facade and a curved road with traffic. The image is framed by a thick blue border, with two vertical red bars on the left and right sides. The word "Questions" is centered in a large, bold, black font on a white rectangular background.

# Questions

An aerial photograph of a city at dusk, featuring a prominent white building with a grid-like facade on the right. The scene is framed by a blue border with two red vertical bars on either side. The text 'Federal Grants Update' is centered in a white box.

# Federal Grants Update

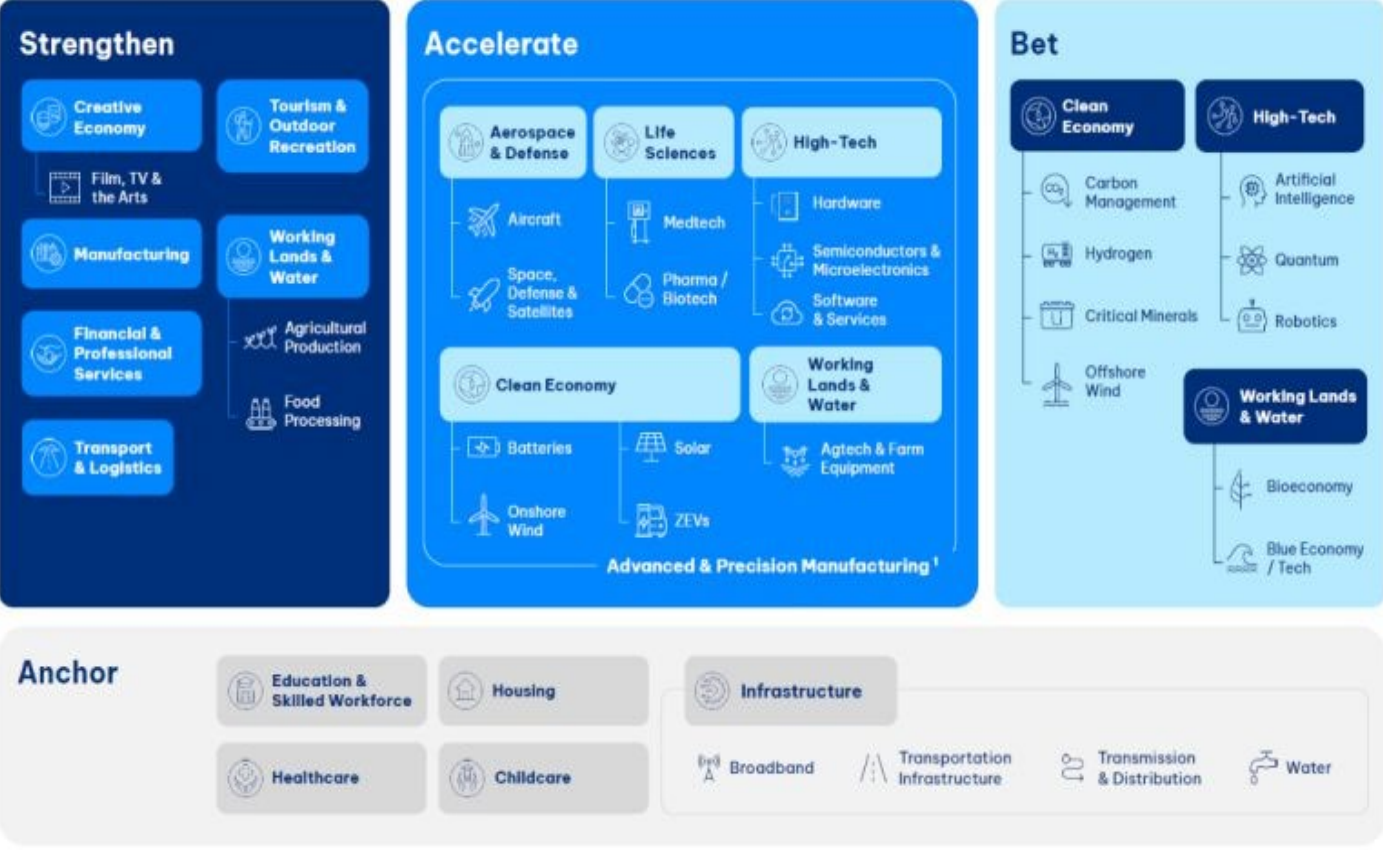
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# Questions

An aerial photograph of a city at dusk, featuring a prominent white building with a grid-like facade. The image is overlaid with a blue rectangular frame and two vertical red bars on either side of the text.

# **Non-Agenda Information**

# California's Diverse and Dynamic Economy is Reflected in its Strategic Sectors



# Definitions

- **Strengthen:** California has an established competitive position and/or significant employment, but leveling growth or wages
  - **Accelerate:** Moderate to high projected growth that are ready for expansion
  - **Bet:** Significant investment or high strategic importance to the innovation ecosystem
  - **Anchor:** Foundational local sectors that are critical for attracting and supporting industry and community activities
- \* High chance that Implementation RFP will only apply to Accelerate and Bet



## FOUNDATIONAL ENABLERS



### Housing

Construction



### Infrastructure

Construction



### Education & Skilled Workforce



### Healthcare

## REGIONAL SECTORS



### Manufacturing



### Life Sciences

Medtech



### High Tech

Hardware  
Semiconductors



### Tourism & Outdoors



### Education

Good morning,

My name is Miriam Zuniga, and I have lived in the city of San Juan Capistrano for 32 years. I work with Unidos South OC and the Community Leader Coalition (CLC) to support and uplift families in under-resourced neighborhoods. I've been participating in community forums because I care deeply about the future of my community and want to make sure this initiative truly helps the people who need it most— my neighbors.

As a community, we came together to review the Regional Plan. While we appreciate the effort being made, I want to highlight some vital areas that need to be addressed for this plan to really work for us:

- **Affordable and Stable Housing:** The housing crisis is pushing too many families out of our neighborhoods. We need investments in affordable housing for low-income families, models like housing first, and policies like rent stabilization. Housing is a basic need, not a privilege, and it should be a priority. We want to create an orange county where everyone has a safe and affordable place to call home and where everyone has the opportunity to thrive.
- **Support for Civic Participation and Leadership Development:** In my work, I've seen how powerful it is when residents are empowered to lead. But this only happens when the process is intentional. We need transparency and training in how decisions are made and more opportunities for historically excluded communities to be at the table—not just consulted but leading the work.
- **Equitable Access to Economic Opportunities:** Many families in our neighborhoods work hard, but wages just don't match the cost of living. This plan needs to focus on creating better-paying jobs, making job training available in multiple languages, and supporting community-based businesses like micro-enterprises and cooperatives. These are real solutions that help people not just survive but thrive.

I've seen the strength and resilience of my community, but I've also seen how much harder it's getting for families to stay here. This initiative has the chance to make a real difference, but only if it truly centers the needs and voices of neighborhoods like mine.

Thank you for listening to us and for considering these priorities as part of the Regional Plan.

Sincerely,

Miriam Zuniga

Good morning,

My name is Silvia Hernandez, I have lived in Santa Ana, CA for 30 years, and I am a worker training organizer so that everyone knows their labor rights, and their rights as tenants among other aspects that we address as a community to implement solutions to our needs.

I have participated in the community forums, and I have kept up to date with this initiative because I understand that it is intended to benefit our community.

We met as community members to study the “Regional Plan Part 2.” From which I would like to highlight some important things that are missing, in accordance with the objectives of this initiative.

As community members, we ask that these requests be incorporated into the Regional Plan, and into the processes used for the distribution of regional and state funds.

- Better paying jobs. Training, certification and educational opportunities in Spanish and in / more languages. Streamline and simplify licensing and permitting processes for greater accessibility
- Higher wages for low-wage workers. In this report, “skilled labor” refers to a sector that requires workers to have specialized skills, many of which have traditionally been considered “unskilled” (a term that can be offensive and inaccurate). [Reframing the Value of Work and Workers] Currently, these are low-wage jobs, such as food handling, child care, auto mechanics/repair, landscaping, and many other types of work. Many responses indicated a desire for these types of jobs to be higher-wage, and an increase in paid training to attract more workers to these skilled jobs.
- Safer working conditions in industries such as manufacturing and construction. Ending the exclusion of domestic workers from these protections. Domestic workers (homemakers and professional caregivers) and homemakers overwhelmingly shared that their work is undervalued, unpaid, or poorly paid. [recognize the value of their work, fair wages, safety/protection against wage theft] Recommendation: Implement policies and programs to provide adequate protections, wages, and economic support for these important sectors in Orange County.

Silvia Hernandez

Good evening, my name is Teodora Mendez, I have lived in Santa Ana for more than 12 years. I am the mother of two little girls. I am a housewife. I am part of Esperanza Unión de Inquilinos. I have been participating in a series of community forums and have kept up to date with this initiative because I understand that it is intended to benefit the community. We met as members of the community to study the regional plan part 2. We ask that these requests be incorporated into the regional plan and into the processes used to distribute regional and state funds. Create a source of income for housewives, fair wages for work, facilitate other sources of income, make permits more accessible for home businesses, street vendors and other micro-enterprises, jobs for disabled people and compensation for students to attend school, expand community-based economic initiatives, promote cooperatives, micro-enterprises and organizations that improve wealth creation, decision-making and access to resources for everyone. For example, food, low-cost child care, because the cost of living in Santa Ana is very high in every sense, medical care, decent housing and workers' rights within units without investment, ....

Good morning,

My name is Cithlalli Ramirez, I was born and raised in a predominantly low income, minority and immigrant community in Santa Ana. I am an advocate for communities like mine throughout Orange County. I have been participating in a number of community forums, and have kept up to date because I understand that this initiative is intended to benefit our community. We also gathered as community members to study the Regional Plan Part 2. I would like to highlight a few things that are missing, in line with the objectives of this Initiative. As community members, we ask that you incorporate these requests into Regional Plan 2 and into the processes you will use for the distribution of regional and state funds. We think you should highlight the importance of increasing affordable and accessible housing especially for large families, people with disabilities, and our senior community. This can be achieved with the development of affordable housing and the creation of partnerships for cooperative and workforce housing, as well as housing stipends for renters. Additionally we should have flexible qualifications and applications for affordable housing to ensure there is accessible to those in need of an affordable, stable home.

Thank you for your time,

Cithlalli Ramirez