

OC Jobs First Collaborative

December 6, 2024

Ish Herrera

Orange County is working on a deliverable required by the State of California as part of the California Jobs First initiative. Recently, the state introduced a new task for all 13 regions: creating Priority Sector Activation Plans. These plans focus on tradable sectors and are based on priorities submitted in Regional Plan Part II. The state reviewed and categorized sector priorities into tradable (e.g., manufacturing, high tech, life sciences, education, tourism) and non-tradable (e.g., healthcare, housing). Activation plans are only required for tradable sectors. Orange County's collaborative will start with the tourism sector, with its plan due January 31, and the remaining four by June. Drafts will be shared for feedback before submission, ensuring opportunities for contributions. Maria has shared relevant templates and public comments for reference.

Jesse Ben-Ron (Clarification)

Following a recent call with the state, there's an update regarding the activation plans. They are not strictly limited to tradable sectors, regions may include non-tradable sectors if they strongly align with local priorities. However, the state recommends focusing on approximately five sectors in total. The first activation plan, due January 31, must focus on a tradable sector. This group has already decided to proceed with tourism and outdoor recreation for that plan before addressing others.

Linda DiMario

Thank you. I have to say, I feel completely disconnected from the process at this point. It feels like a bait and switch, plans are laid out, and then the rules change, and the goalposts keep moving. For those like Tony, who deal with grant language often, this might make sense, but for the rest of us, it's overwhelming. There's so much jargon, shifting requirements, and compliance details that I don't even know what we're supposed to do anymore. Could someone please step back and explain this clearly?

Jesse Ben-Ron

Those are all fair statements. Regarding stipends, that directive comes from the state, and there's nothing we can do. It's true the state has changed this program significantly and repeatedly. While frustrating, we need to stay flexible if we're committed to this work. I do believe the state now has a clearer vision: growing climate-forward industry clusters and focusing on disinvested communities. Orange County can still focus on its chosen priorities within this framework. An activation plan is essentially a project management tool, outlining steps to grow industry clusters in an equitable way. For example, if Octane is involved in med tech, the plan specifies their role, deliverables, and accountability over 18 months. This goes beyond strategy, identifying actionable steps, costs, and outcomes.

Maria Linares

Linda, I'd be happy to work with you to navigate this. I've had to do extensive research and one-on-ones with the state to understand it myself. I know it's overwhelming, and I try to condense information in my emails.

Linda DiMario

Thank you, Maria. I trust you and will follow up with you to ensure I'm well-informed, especially regarding Octane's role in this process.

Jesse Ben-Ron

Linda, I understand your frustration. Activation plans are useful but can feel like time-consuming additions. They focus on tactics, which might differ from what's in the regional plan. This collective's role is often to facilitate, not directly implement, and other groups may need to pursue their priorities independently if not covered in the activation plans. While these plans provide structure, they are not a complete activation of the regional plan.

Ish Herrera

Last meeting, staff issued a non-binding survey to gauge eligible projects for Catalyst funding. The focus was on projects requiring pre-development support as a key priority for eligibility. Maria, I'll hand it over to you to review the survey findings and your analysis of the 50+ projects submitted.

Maria Linares

Thank you. I've also posted the activation plan example in the chat for easy access, so you don't have to scroll through the agenda packet. I've uploaded the Catalyst Project Surveys to a shared folder, which includes 56 submissions, an excellent turnout. These surveys were not official applications but served as a way to gauge project ideas and funding needs. Along with the survey responses, the folder contains additional attachments, such as Word documents uploaded by some participants. I shared the folder via email on Tuesday evening for everyone's review.

The survey responses revealed some interesting findings. When asked where projects would provide benefits in Orange County, the top response was "countywide," followed by Santa Ana, which accounted for 41.7% of responses. Other prominent locations included Anaheim, Garden Grove, Costa Mesa, and several others. Regarding where projects would be located, Santa Ana again emerged as the top location at 41.7%, with countywide projects following closely behind at 39.29%. The next question, which focused on project definitions, showed that the majority of projects 73.21% focused on workforce development initiatives, such as training and supportive services for sustainable careers. Social infrastructure projects were the next highest category at 42.86%, followed by innovation ecosystem infrastructure, community facilities, and entrepreneurship projects.

In terms of industries, the survey highlighted alignment with the region's approved target sectors from the Regional Plan Part II, which are consistent with state strategy. The largest number of projects aimed to contribute to education services (48.21%) and social assistance (42.86%). Other industries included hospitals, construction of buildings, manufacturing, and food services. When asked about project components, the most frequent response, at 83.93%, was career pathways, emphasizing efforts to create sustainable career opportunities. Community engagement and cultural participation followed at 62.5%, alongside components such as quality of life, apprenticeships, green technologies, and housing. The survey also addressed equity-related questions, including whether projects would be located in Justice 40 disadvantage census tracts. Nearly three-fourths of the respondents (73.21%) confirmed alignment with these areas. Additionally, many projects aimed to ensure equitable access to quality

jobs for residents of disinvested communities and promote family-sustaining jobs with healthcare and retirement benefits. A question about technical assistance needs revealed a range of responses, from help with geofencing in Little Saigon to support in establishing community benefit districts and distributing surveys.

Jesse Ben-Ron

The total funding requested across all submissions exceeded \$30 million. However, this number likely includes implementation projects, which were not the primary focus of the Catalyst phase. The actual amount for pre-development projects may be slightly lower, but it is clear that demand far exceeds the \$9 million Catalyst funding available. This is unsurprising and reflects the significant need for funding in these areas. It's also worth noting that this was a relatively easy survey to complete, which could lead to some attrition during the formal application process. Conversely, new participants may enter at that stage, seeking funds and proposing new projects.

Linda DiMario

This is, this is interesting in retrospect, because what's coming up highest is not in the state's recommended focus areas. Am I interpreting that incorrectly?

Jesse Ben-Ron

As we move forward, we'll need to balance the state's direction with our regional priorities. Deciding on that mix will be a collaborative effort.

Linda DiMario

While reviewing the packet, I noticed several projects seemed to fall outside the state's newly declared focus areas. This raised the question: of the 56 projects submitted, what percentage align with California's goals versus what we've been working on locally?

Jesse Ben-Ron

We don't have that specific analysis yet. Importantly, Catalyst funding isn't limited to the state's priorities, and we don't need to abandon our own. However, aligning with the state's goals could help multiply funding opportunities through other grants. We'll need to strike a balance between leveraging the state's direction and staying true to the priorities we've already identified with our \$9 million.

Iosefa Alofaituli

Maria, you may have mentioned this earlier, but I'm trying to understand how this data will be leveraged. It sounds like there will be an RFP process, but I'm curious about the implications of these results. Will they shape the evaluation matrix, or is the data serving another purpose for the Catalyst RFP?

Maria Linares

The survey was intended to gauge interest and understand what projects people in Orange County are considering for funding. It wasn't an official call for proposals or applications, but rather an idea generated in an earlier meeting, possibly in August, to get a sense of the landscape. However, this survey was conducted before the state's recent updates, so we'll need to pivot accordingly. In the next

part of the agenda, Jesse will gather feedback on the NOFO to help shape how the RFP process will move forward. Jesse, do you want to add anything before we move on?

Jesse Ben-Ron

No, except to note that Iosefa's question aligns with what we're about to discuss. Before drafting anything for your review, we'll pose some fundamental questions to get your input.

Maria Linares

The survey has already closed, so I'm sharing the data collected. I've also received private messages requesting one-on-one meetings to go over things, and I'm happy to set those up. You all have my email and cell phone number, so please don't hesitate to reach out. Your voice is important in this collaborative, not just for you but for representing your community. This is your chance to ask questions and ensure everyone has a voice, especially for those outside the collaborative who might feel unheard.

Toni Symonds

When reviewing the survey questions, I noticed they helped highlight areas where we need to be more specific in offering technical assistance. For example, we could standardize outreach to disinvested communities by sharing best practices, perhaps through fact sheets for future applicants. These could guide applicants to consider important elements, such as offering workforce training during non-traditional hours. Another area where we seemed low was transitioning to a clean economy. We could encourage applicants to think about factors like access to public transit, biking opportunities, and other wraparound elements when designing programs, services, or facilities. These considerations, while not always emphasized in the survey, could be included in the application process to strengthen proposals without overwhelming applicants. For me, this was a helpful takeaway using the survey to guide sector investment coordinators in focusing their technical assistance.

Jesse Ben-Ron

This is a chance to provide input on how we should structure the NOFO. Surveys are helpful for collecting data, but they don't allow for meaningful discussions, so this is your opportunity to share your reasoning and perspectives. We need to consider several factors as we move forward. Should we focus on supporting a small number of projects and help them progress significantly along the talent pipeline, or should we open it up and support a larger number of projects with smaller amounts of funding? Alternatively, should we adopt a hybrid approach? Another consideration is whether we should divide the available \$9 million into multiple rounds of funding, perhaps \$3 million per round or allocate the full amount at once. Additionally, we need to determine if we should set funding ceilings or floors, and if we should prioritize economic and sectoral distribution, or simply fund the strongest projects. Including clear conditions and parameters in the NOFO can help streamline the selection process. Please share your thoughts, either now or in the survey we'll send out later, and use this opportunity to convince your colleagues about the best approach.

Linda DiMario

When embarking on any strategic initiative, it's essential to define the objectives and outcomes we hope to achieve. These should take precedence over all other considerations. We need to ensure that

every dollar is utilized in a way that maximizes its impact and delivers the greatest possible community benefit. This requires us to decide whether we want to achieve long-term, sustainable impacts in disinvested communities or pursue smaller, localized impacts. While I understand the appeal of spreading resources broadly, I believe we are at a critical juncture. We must prioritize projects that promise transformative, enduring outcomes rather than dilute our efforts across less impactful endeavors.

Melanie Schlotterbeck

Based on my extensive grant application experience, I suggest avoiding a funding floor, as smaller nonprofits can achieve significant impact with limited resources. Setting a ceiling, however, helps manage expectations. Applications should align with the initiative's three priorities, with additional consideration for matching funds or in-kind contributions. Geographic distribution and measurable benefits to disinvested communities, such as reducing pollution or improving transit access, are also key. I recommend funding a mix of projects, balancing a few large, high-impact initiatives with several smaller ones to ensure broad, diverse impacts.

Iosefa Alofaituli

Building on Jesse's comment about having one funding round versus multiple rounds, I think a phased approach could be beneficial. Starting with one round would allow us to learn and improve implementation for subsequent rounds. However, this comes with risks, such as losing funding or missing time-sensitive projects. It's something to weigh carefully.

Luis Sarmiento

I want to echo Jesse's earlier point about balancing regional priorities with the state's new requirements and processes. It's crucial to put in the effort to prioritize our regional needs while aligning with the broader framework. As Melanie and Linda pointed out, we need to prioritize projects that promise the greatest impact, particularly those that shift resources toward disinvested communities. The initial language of this initiative was about addressing inequities and directing resources to disinvested areas. We should stay true to that vision. Designing a clear and transparent selection process within the NOFO will be critical, as it will guide decisions and ensure the collaborative's priorities are upheld.

Ana Urzua

Good morning, everyone. It's taken me a moment to process everything, but I want to echo Linda and Luis' comments about defining clear objectives and ensuring our focus remains on addressing the needs of disinvested communities. Supporting enablers like housing and childcare is essential to removing barriers and creating tangible improvements in people's lives. Even if these enablers aren't pre-development specific, they are critical for achieving our goals. I also support Iosefa's suggestion of multiple funding rounds if it's feasible and doesn't risk losing the allocated funds. This approach would allow us to learn and refine the process over time. Overall, I think it's important to create more opportunities for collective thinking and discussion as we move forward.

Jesse Ben-Ron

We'll send out these questions in the form of a survey to give everyone more time to process. While

surveys don't allow for dialogue, we want to make sure you've had this opportunity to discuss with your colleagues. There's no pressure to have all the answers right now.

Ana Charco

Several organizations in this collaborative have done invaluable work engaging nearly 150 community members through forums and study groups. It's crucial that their voices and insights are prioritized in regional and local economic development plans. Community participation must go beyond research, extending to consultation, project selection, and implementation to ensure these plans truly serve disadvantaged communities. I hope the public comments receive the attention they deserve.

Ish Herrera

I'm pleased to introduce a friend and colleague, formerly part of the state team for this initiative, who is now supporting OCBC and all of you. His work focuses on identifying federal funding sources to help advance equitable, environmental, and sustainable priorities. Now in his role, Matt is identifying additional funding sources beyond state funding to support the priorities you've surfaced.

Matt Phillips

Thank you, Ish, and good to see you all. I'll share a brief presentation on federal grant opportunities aligned with California Jobs First, which may also benefit nonprofit and CBO partners in this collaborative. The Catalyst program aims to support inclusive regional planning, build a portfolio of ready-to-go projects, and connect them to federal, state, and private investments. My research has focused on federal opportunities, primarily from the Inflation Reduction Act. Key grants include EPA's Community Change Grants, Environmental Justice Block Grants, and the Greenhouse Gas Reduction Fund (GGRF). The GGRF comprises programs like Solar for All, which supports residential solar affordability and job training, and the Clean Communities Investment Accelerator and National Clean Investment Fund, both focused on clean energy and environmental justice financing. These programs provide opportunities for small and large community lenders. The Environmental Justice Thriving Communities Program is especially relevant, offering sub-grants for environmental justice projects. For Region 9, including California, Hawaii, and Guam, the EPA awarded funding to Social and Environmental Entrepreneurs, with sub-grants expected in early 2025. I'll share slides with Jesse, which include resources and grantee details. While these programs aren't exclusive to California, I focused on those with significant California involvement. Region 9 Thriving Communities Sub-Grants primarily focus on California as the largest entity in the region.

Ish Herrera

Before we adjourn, a few quick notes: To keep meetings efficient, we've moved non-urgent but relevant updates to the informational section of the agenda packet. Please review that section for updates, such as recent visits by Governor Newsom to California Jobs First regions, showcasing his continued commitment to this program. Jesse, Maria, others, have offered to stay on online for a few extra minutes for those of you who are interested in discussing a little bit further the state's new parameters around compensation of your time for these efforts moving forward. For everyone else, you're welcome to sign off. On behalf of OCBC and California Forward, we wish you a happy, festive, and safe holiday season. Thank you for your commitment to this important work. We'll see you all at upcoming meetings. Thank you again!