

California Jobs First Sector Investment Coordinator Request for Proposal Bidders Conference Recap

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Meeting Summary:

The Bidders Conference for the California Jobs First Program Sector Investment Coordinator RFP was held on September 10, 2024, and aimed to inform potential applicants about the opportunity to serve as sector investment coordinators to foster an equitable economy across California. Led by Maria Garcia, Paul Morales, and Charles Johnson, with CCF and LAEDC, the meeting outlined the purpose of the program, which is divided into three phases: Planning, Catalyst, and Implementation, with total funding of up to \$1.5 million over 22 months for the SIC opportunity. Eligible applicants, including individuals, nonprofits, and private firms, must submit proposals electronically by September 30, 2024, while written questions are due by September 13, 2024. The scoring criteria focus on experience, technical innovation, and budget comprehensiveness. The conference wrapped up with a Q&A session and emphasized the importance of collaboration among selected consultants, reiterating key deadlines and submission guidelines. All related information will be available online, including a recording of the conference for further reference.


Introduction and Background (01:22 - 11:26)

- Presenters: Maria Garcia (Senior Program Officer - CCF), Paul Morales (Contract Manager - CCF), Charles Johnson (Program Director)
- California Jobs First Program is administered by California Community Foundation
- Purpose: Build an equitable and sustainable economy across California's diverse regions
- Fund split into three phases: Planning, Catalyst, and Implementation

Scope of Work and Deliverables (11:26 - 23:03)

- Seeking up to five sector investment coordinators
- Contract term: Through September 30, 2026 (22 months)
- Funding available: Up to \$1.5 million
- Eligible applicants: Individuals, nonprofits, and private firms
- Scope includes cataloging projects, finding funding opportunities, providing technical assistance

Deliverables: Attend meetings, submit reports, assist in project development

-  Timeline and Application Process (23:03 - 31:38)
- Proposal submission deadline: September 30, 2023, 5:00 PM (PST)
- All proposals must be submitted electronically to ccf-cerf@calfund.org
- Proposals in PDF format, budget in Excel format
- Recording of the conference to be posted online
- Deadline for written questions: September 13, 2023, 5 PM (PST)

Scoring Criteria and Budget (31:38 - 40:42)

- A total of 100 points is possible for evaluation
- Criteria include experience, expertise, technical innovation, project management skills
- The budget should be comprehensive for the entire 22-month period
- CCF will assess the fairness and reasonableness of the applicant's costs

Q&A Session (40:45 - 49:14)

- Clarifications on required forms, budget assumptions
- Discussion on sector investment coordinators' role in project oversight
- Explanation of cross-collaboration expectations among selected consultants

Final Clarifications and Conclusion (49:14 - 01:00:38)

- Further explanation of budget allocation and project funding
- Clarification on proposing multiple sectors
- Reiteration of key dates and submission process
- Conference concluded with thanks to attendees and presenters

Bidders Conference Q&A

- 1. My question is in terms of the required forms, I wasn't sure where we are to download or receive those forms to fill them out and send them along with the packet.**
 - All the required forms are attached to the solicitation.

- 2. Are there some assumptions we should make or how we should lay out a budget given that there might need to be some flexibility?**
 - Use the Scope of Work as a guide for creating your budget and assessing your expenditures.

- 3. Can you talk a little bit about how the sector investment coordinators' piece is going to sync up with the \$9 million pre-development piece the way it seems is that the sector investment coordinators will be doing a lot of the sort of work to tee up the \$9 million like the actual product pre-development investments? But what do you think about project oversight? Once we get past the sort of selection identification of a project and get the go-ahead from the steering committee, would we be handing it over to a firm or would the sector investment coordinator role be responsible for sort of managing the project implementation or managing the contract or managing the relationship with the firm implementing the project?**
 - The sector investment coordinator(s) will work with those awarded to manage the projects.

- 4. My question is, you're looking for references from individuals who may have been a part of one's presentation within the past three years. The past three years were dealing with a pandemic and so that would have made it kind of difficult to introduce innovations that result from the pandemic as a result of the pandemic. So how would you expect a proposal, what do you expect a proposal to present in that case?**
 - Relative to reference letters: A minimum of three reference letters are required. Letters must include the name(s), email(s), and phone number(s) of contact persons within the firms. Work references should be for services conducted within the past 5 years.

5. In the scope of work, you mentioned implementing pre-development activities, this ties back to my earlier question, but for some of those pre-development activities, my understanding is that those would be covered by the 9 million. And so making a connection between LAEDC and CCF and a firm that could potentially, say, provide engineering services, or if there was a type of pre-development activity that a firm could actually implement, like doing a feasibility or something, is that something that we would incorporate into this application?

- The steering committee wanted to make sure that the \$9 million was not touched for anything other than projects. And so for things like technical assistance or capacity building, or like you said, contracting with an engineering firm is part of how you see executing the scope of work and meeting deliverables that should also be included in your budget under a subcontractor lineup.

6. Are engineering services included as part of the 1.5 million or the 9 million? Like, when does something cross over into the \$9 million bucket?

- Only incorporate expenditures associated with meeting the Scope of Work and deliverables into your budget. The \$9 million bucket will go through a separate process of approval than this SIC solicitation.

7. Are there expectations for cross-collaboration with the multiple consultants that may be selected? Can you just elaborate on that a little bit?

- Yes, there will be some cross-collaboration, at the very least, in terms of comparing notes and possibly attending similar meetings to provide updates. So, yes there may be, once awarded, collaboration across SICs.

8. If there are multiple consultants selected, will we be responsible for consulting on a fraction of the 9 million budget, or is there a way that the budget might be divvied up amongst the partners?

- We have \$1.5 million available for the entire SIC line item. So depending on how many SICs are awarded, it could be up to five

awards/contracts. So that would determine how the funds are allocated. Relative to the \$9 million budget, that will be a separate process.

9. Could you talk about the scoring process a little bit? Will this be scored by CCF with LAEDC involved, or is it who will be on the scoring team?

- We haven't identified the review committee, but it will be a review committee of up to five individuals who will be reviewing applications, and they will have some expertise in the priority areas outlined during the planning phase.

10. Is a Sam.gov registration required for an applicant?

- These are not federal dollars, and so sam.gov registration is not a requirement. But we will be looking at various lists again to ensure eligibility and that the organizations or the applicants are not on suspended or debarred lists.

11. So if you end up selecting up to five SICs, if one applicant applies for more than one sector, or to cover the scope for more than one sector, and then you decide to kind of break that up or select different SICs and have them collaborate, does that negatively impact the scoring for an applicant's proposal and their budget, which I know is 30 points of the criteria? So if you end up sort of, will you accept like a partial scope of work from one applicant? If you decide to go with more than one for a certain sector.

- No, that wouldn't negatively impact your application.
 - **If you were to hire up to five sics, what are the different sectors that they would be covering?**
 - The priority sectors that were identified during the planning phase include Clean/Renewable Energy, Aerospace Manufacturing, Transportation and Logistics, Bioscience, Video Production, and Distribution, Construction, and Healthcare.
 - **If we think we can cover more than one sector, should we propose on it? Even if ultimately you end up selecting multiple consultants, sounds like it's okay to propose as many as we think we can cover.**

- Yes

12. You are potentially going to select up to five SIC coordinators. That would be about \$7 million. So if that's the case, the \$2 million is going to be utilized. Remaining of the nine will be utilized to fund some of those programs, those last mile programs. Is that what you all are anticipating?

- No, we've designated up to \$1.5 million for sector investment coordinators. So the \$1.5 million would be distributed amongst the up to five sector investment coordinators. \$9 million has been set aside to fund exploratory or last-mile projects. So they're separate line items in our \$14 million budget.

13. Then the coordinator is writing a budget for 1.5 million or 200,000?

- The coordinator is writing a budget for the work that they believe it'll take to execute the scope of work and deliverables that are outlined in the solicitation for the area that they are interested in filling the role.

14. How will SICs be expected to work with LAEDC staff on aspects of the Catalyst Predevelopment grant not funded under the SIC bucket?

- SICs will be working with LAEDC, the Steering Committee, and stakeholders during the Catalyst Process. Please refer back to SOW
 - Work within the Jobs First Collaborative on industries prioritized in the Planning Phase. Support the Jobs First Collaborative in cataloging projects that will support the proliferation of the prioritized industries and enhance high-quality job creation; label these projects as “exploratory” (agreed-upon ideas that are at the very initial phases) and “last-mile” (agreed-upon projects that need the final piece of the puzzle to begin development), or identify projects as non-viable; share the list with the Steering Committee for regular review and update.
 - Support LAEDC in maintaining a catalog of potential projects that have been submitted for the Catalyst funding consideration and submit the list to the Steering Committee

for regular review and advice.

15. Page 7 of the RFP states that the SICs will help the Collaborative implement pre-development activities. How does the Collaborative/Steering Committee/LAEDC/CCF expect to evaluate potential conflicts in which the SIC firm is highly qualified to perform pre-development activities for a specific project (e.g. conducting a feasibility study) and interested in applying for the role? Will these be addressed on a case-by-case basis?

- Entities who are selected as SICs should not be applying for catalyst funding, as they will be advising on proposed projects and this is considered a direct conflict of interest.

16. Once a project is identified and approved for funding by the Steering Committee, will the SICs be responsible for tracking and/or evaluating progress on the project, or will that be left to a project manager at CCF/LAEDC?

- SICs will be responsible for both tracking and evaluating progress. The regional convenor will follow up with any potential revisions before submitting to the fiscal agent.

17. Are there existing working groups for each of the seven prioritized sectors?

- The 7 Table Leads representing the industry sectors in the Planning Phase may be available for additional consultation voluntarily during the Catalyst Phase.

18. Are there preferences or requirements for how the line item budget is presented? Can we present an even monthly fee spanning the 22 month project?

- Bidders are highly encouraged to submit budgets that reflect a projected account of expenditures that the bidder expects to expend during the course of the contract (based on the Scope of Work) in order to meet the scope of work and deliverables. Items

could include, but are not limited to, labor costs, direct expenses, subcontracts, etc.

19. Is there an estimate for how many projects one SIC is expected to process in a given month or over the project lifecycle?

- While the actual number of projects identified during the course of this project is unknown, our goal is for the SICs to process and identify 5-10 projects by Jan 15, 2025 and by June 30, 30-45 selected projects. We will work with the Steering Committee to set milestones prior to deadlines.

Bidders Conference Transcript

01:22

Speaker 1

Good morning, Ariel.

01:27

Speaker 2

Hi, Maria. Can you see the screen? Right?

01:33

Speaker 1

Yeah, yeah, I sure can.

01:37

Speaker 2

Let me make sure. I remember Charles said that we needed to change his. I think it's fine now. Right. Program director for California. Just first remember he said, I think before said surf. Right. You're on mute.

01:59

Speaker 1

Correct? Yeah, it used to say surf.

02:02

Speaker 2

Okay. So, yeah, it's okay. Should we go?

02:12

Speaker 1

I'm going to go off camera until we start.

02:17

Speaker 2

Okay. Charles. Hype call. Do you guys see the screen okay?

06:42

Speaker 3

Yep, I see it just fine.

06:44

Speaker 4

Hello.

06:47

Speaker 2

I'm noticing that maybe because this. You have to, like, register. I don't really need to admit people. I will keep an eye on that anyway. But all. All of you were just in automatically, so hopefully. That's good.

07:04

Speaker 3

I just wanted to make sure.

07:06

Speaker 2

Yeah.

07:12

Speaker 4

Hey, guys. Good morning.

07:16

Speaker 3

Good morning, Paul. So, Ariel, are you going to advance the slides?

07:32

Speaker 2

Yes.

07:33

Speaker 3

Okay. I'm going to be doing my notes off of my. Off of my own computer, so I'll just let you know. I started slide nine. I'll just let you know in advance.

08:45

Speaker 1

Hi, everyone.

08:49

Speaker 3

Hello, Maria. How are you?

08:51

Speaker 1

Good, thank you. Ariel, do we know how many people are in the waiting room?

08:57

Speaker 2

There's no waiting room. That's what I was telling Charles, that everyone has been joining automatically. Right now, it's just us all. You, Scarlett, Charles and me for now. You guys had to register two to get in, right?

09:24

Speaker 1

Yes.

09:25

Speaker 2

Yeah. So if you did that, it should be the same for everyone. There's no one. No one has shown yet.

09:33

Speaker 1

I see we have one person.

09:35

Speaker 2

Jacobs.

09:36

Speaker 1

Yes. All right, well, let's go ahead and get started. Ariel, are we recording?

10:37

Speaker 2

Yes.

10:38

Speaker 1

Great. Welcome, everybody, to the sector investment coordinator's request for proposals bidders conference. Today is September 10. My name is Maria Garcia. I'm a senior program officer of public policy and strategic partnerships with California Community foundation. Presenting with me today are two of my colleagues. I'll have them introduce themselves at this time.

11:04

Speaker 4

Hi, folks. My name is Paul Morales. I'm the contract manager serving California jobs first on behalf of the California Community foundation. So I work pretty closely with Maria Garcia. I'll pass it over to Charles.

11:17

Speaker 3

Thank you, Paul. Charles Johnson. I'm the program director of California Jobs

first at La EDC. We're the regional convener and CCF. Paul and Maria are. We're equal partners in this venture as our fiscal agent.

11:33

Speaker 1

Ariel, if you can please advance the slide. And before I begin today's presentation, I just wanted to ask folks to please save your questions to the end of the presentation where there will be a question and answer period. If you have questions that you'd like to ask for a specific slide, you can also drop them the question into the chat so you have those two options. Next slide, please. Ariel and so the sector investments coordinator request for proposal is tied with our California Jobs first fund. Community foundation administers this fund as its fiscal agent. The purpose of the CJF funding is really designed to build an equitable and sustainable economy across California's diverse regions and foster long term economic resilience in the overall transition to a carbon neutral economy.

12:31

Speaker 1

This is a state funded program that began in 2022 and along with California Community foundation, the Los Angeles Economic Development Corporation serves as its regional convener. And next slide, please. The California Jobs first fund is really split into three phases. The first phase, which we are just wrapping up, is the planning phase. The state allocated \$5 million to each of the 13 regions throughout the state to develop regional economic blueprints with diverse input from diverse communities. And this is all kind of looking into the future so that we can identify projects and programs by the time implementation phase comes to invest in. So in between the planning and implementation phase is the catalyst phase, which is the phase that we are currently entering into.

13:34

Speaker 1

The state allocated \$14 million for the catalyst phase, and the purpose of this space is really designed to develop a portfolio of projects and programs that are positioned for state, federal and private investments. And we're gonna aim to do this by one hiring up to five sector investment coordinators. And we'll talk

a little bit more about what sector investment coordinators will be responsible for doing later on in the presentation, and also by setting aside \$9 million to invest in exploratory or last mile projects. Again, the big goal here is to get to a point where we can identify projects and programs for the implementation phase to draw down state funding for those projects. Next slide, please.

14:29

Speaker 1

And so the LA County Collaborative, which is the region's governing body for the La county region under the California Jobs First Fund, is seeking to obtain services, up to five consultants, known as sector investment coordinators, to support the Los Angeles first collaborative in execution of the catalyst grant awarded to the region. The awarded consultants will receive a contract term through September 30, 2026. That's a period of about 22 months. Next slide, please. We do have up to \$1.5 million of funding available through September 30, 2026 to invest in sector investment coordinators. The awarded applicants may receive up to 25% advance of funds and our funding partner for California jobs first planning phase catalyst implementation is the state of California via the Employee development department, so they are our funding partner. Next slide, please. Eligible applicants include individuals, nonprofits, and private firms. All awarded.

15:42

Speaker 1

Private and nonprofit organizations must not be suspended or debarred from receiving federal, state, or local funding. CCF will not award contracts to or consent to subcontract with bidders, contractors, or affiliates that appear on any disqualified, suspended or debarment list issued by any agency of the federal, state, or local government. Applicants cannot be covered by a prohibition or restriction or excluded from doing business with the government, and all eligible applicants must comply with all conflict of interest requirements. We do have a conflict of interest form that must be completed by all applicants. That's part of the solicitation. That's attachment one of the solicitation, so please be sure to fill that out and turn that in with your application. And applicants must also be able to adhere and provide all items on CCF contractors checklist. That's attachment four, and it's titled Contractor Checklist.

16:51

Speaker 1

It includes providing documentation or copy of your business license or tax registration specific to where your business location is, and we'll talk a little bit more about that later on in the presentation. The contract term for this award through this RFP. The start date will be no later than November 22, 2024, and the estimated period of performance for this contract is about 22 months. All expenses must be included in the budget approved by CCF. And now I'll hand it over to my colleague Charles to go over the scope of work.

17:37

Speaker 3

Thank you, Maria. Appreciate it. The scope of work is pretty lengthy, and rather than bore you all like I did my colleagues last week, when we're doing the run through, I'm going to summarize each page and of course, encourage you all to read them in its entirety on your own. So if you're the awarded entity, you'll have work with jobs first collaborative. That's our stakeholders in cataloging projects as exploratory. That's kind of the beginning phase, last mile projects that need to be, you know, final piece, few pieces, or as non viable. You'll work with the governor's office or Gobiz and regional partners to find and apply for various funding opportunities.

18:22

Speaker 5

Next slide, please.

18:26

Speaker 3

You'll also be providing or procuring technical assistance for grant applications, leveraging existing data and research for guidance to advance projects and strategies from collaborative convenings and reports. Your support, outreach, engagement, and capacity building activities. Your support LAEDC, that's us, the regional convener and maintaining a catalog of potential projects while working with the steering committee for regular review and advice.

18:57

Speaker 5
Next slide please.

19:02

Speaker 3

You'll work with the LA collaborative throughout the nine service planning areas where we're calling spas to develop various projects around climate justice issues in high growth in sustainable industries. This includes carbon emission reduction and regional economic development activities that's working towards community ownership and creating a pathway to building generational wealth.

19:27

Speaker 5

Next slide please.

19:31

Speaker 3

You'll be implementing pre development and capacity building activities such as feasibility studies, site acquisition and development plans, establishing public private partnerships, CDCs and CDFIs.

19:47

Speaker 5

Next slide please.

19:51

Speaker 3

You'll be developing basic environmental infrastructure and maintenance plans for things like wastewater systems, supporting costs for building and sustaining project leads and partners, acquiring or utilizing tools and resources and developing new pilot projects.

20:08

Speaker 5

Next slide please.

20:12

Speaker 3

You'll work with the La county collaborative to advance equitable growth within each of the approved priority sectors from the planning phase, which are clean, renewable energy, aerospace, manufacturing, transportation and logistics, bioscience, video production, distribution, construction and healthcare.

20:31

Speaker 5

Next slide please.

20:34

Speaker 3

You'll also be responsible for working closely with the data that's set forth in the regional plan part two, which we're finalizing right now. You'll ensure that pre development activities for each catalyst project meet the equity investment objectives designed by the LA Collaborative. You'll develop or abide by transfer, I'm sorry, develop or abide by transparent and equitable process for receiving and evaluating proposed projects. And you also will create or abide by a draft scoring rubric that aligns with the evaluation criteria.

21:11

Speaker 5

Next slide please.

21:14

Speaker 3

You'll attend and facilitate standing meetings with Gobiz, Edd, the Office of Land Use and Climate Innovation, the fiscal agent, the steering committee and the collaborative. You'll work with potential employers to create apprenticeship programs and career pathways for sustainable and carbon reduction industries. You will implement community engagement and outreach strategies in concert with the California Jasper's outreach and engagement manager to ensure that all regions have equitable participation in engagement and outreach activities.

21:50

Speaker 5

Next slide please.

21:53

Speaker 3

You work with technical assistance providers in areas such as estimating project costs and timelines, assisting with procurement identifying potential regional joint ventures you collaborate with California Jobs first outreach and engagement manager to host approximately 30 convenings across the county. The purpose of these convenings will be to share information about the selected projects and describe how they can improve the region.

22:25

Speaker 5

Next slide please.

22:27

Speaker 3

And you'll be working with the California Jobs first research analysts for project selection and procurement strategies. You'll be tracking the progress of implementation projects work with labor unions to integrate their involvement into strategic projects. You'll support outreach, engagement and capacity building activities and ongoing activities related to the implementation of the regional plan, and that concludes the statement of work.

22:57

Speaker 5

Next slide, please.

23:00

Speaker 3

Now for the actual deliverables. These are as follows. You'll be required to attend steering committee meetings and may be called upon to attend other stakeholding meetings to summarize discussions into reports. At the end of the contracted term, you'll be required to submit a final report based on the findings.

23:23

Speaker 5
Next slide, please.

23:26

Speaker 3

You will assist the collaborative in developing the narrative for reports that are due on January 15 of next year and June 30 of next year. You'll also deliver monthly status report of all projects submitted for consideration. You'll assist in creating list of projects cataloged as either exploratory, last mile and ready to go, which deals with the implementation phase. You'll provide the steering committee with a list of potential projects submitted along with their scored evaluation results. This includes the collaborative's goal of five to ten projects in that January 15 report and 30 to 45 projects for that June 30 report.

24:08

Speaker 5

Next slide, please.

24:11

Speaker 3

Your monthly progress status reports may include a separate budget report that highlights expenditures. You have to provide a preliminary project plan within six weeks of signing your contract with the fiscal agent, and that should be updated monthly and submitted with the monthly progress status report. And I'll turn it back over to you, Paul and Maria.

24:37

Speaker 4

Thanks Charles. So as you guys see here, this is going to be the timeline of events for this RFP. So I advise you guys take a screenshot or jot some of the main dates down here. Some of the upcoming dates that I want to point out are the deadline for written questions. That's coming up quite quickly. That'll be Friday the 13th, and we will be posting the answers to those questions or responses to those questions on the following Friday, September 20. We're going to spend most of the month of September having you guys submit, with October being our review period and appeal period for the most part, with November being the notification of award and hopefully the start date shortly

thereafter. Slide please. So the due date as I just stated, all proposals must be submitted electronically no later than 05:00 p.m. September 30.

25:42

Speaker 4

And please again note this email ccf surfalfund.org all communications for this proposal should be going through this email, whether that be questions, submittal of the proposal, or anything else that may come up. I'd also like to point out if you look at the emboldened subject line just to the right of that, virtually all the communications that are going through this email box should be listed this way. Sic CJFdev zero one sector investment coordinator Hyphen proposal so you'll be using that same header, but depending on what the content of the email is, it'll be proposal question, so on. So we'll look at that a few more times later through these slides. So the proposals should be submitted in PDF format and the budget will be submitted in excel format. We won't be accepting anything else.

26:39

Speaker 4

We won't be accepting faxes, physical proposals, no drop off, no mail, nothing like that. So we won't be accepting anything after this deadline either. So I advise that you guys get these in as early as possible. So if there need to be any addendums or any questions come back. We have time to discuss those items. Please note, we may reach out to you after the deadline. If there is ambiguous information, something's unclear to us, we may reach out your way, but you won't be reaching out our way after that deadline. Please slide as for the proposal conference, welcome. You guys are here right now. If you're unaware of that's quite concerning. Please note this link below will be posting a recording of this. We won't be sharing the slides, but you'll be able to review this presentation at this link here.

27:38

Speaker 4

And that's at the laserf.org website. So for the application questions, obviously we encourage you guys to shoot as many of these over as possible, but this is not a requirement. The submission deadline, as I stated earlier, is going to be the 13th, and that's this Friday. Virtually all these deadlines as well. It's going to be

close of business, so make sure those are in by 05:00 p.m. Whenever one of these deadlines comes up, you're going to be submitting those questions to that same email address that I indicated earlier. That's CCF surfalfund.org.org. And again, similarly, you'll be using that same subject line header. Sic CJF Zero one sector investment coordinators RFP questions. Please include your name and title. The name of your best way to contact you. We deal with hundreds of agencies. Sometimes they reach out quite ambiguously.

28:42

Speaker 4

So if you don't follow these two formatting instructions, it could be very hard for us to circle back to you in some cases. So we'll be posting the responses to those questions the following week. So following Friday at September 20, no later than 05:00 p.m. So again, the link is going to be at that la surf.org website and it'll be a catalyst RFP slide please. And Charles, I'll kick it back to you here.

29:19

Speaker 3

Forgot I was on mute. Thanks, Paul. So, yeah, so the scoring criteria, you'll be evaluated out of 100 points possible, there'd be threshold requirements. The first part of is there be threshold requirements. Up to ten points you have to demonstrate your experience in successfully delivering projects in disinvested communities. The other requirements, you also have to show your expertise, level and history, as well as provide your references, and that'll be up to 30 points. That includes providing evidence of partnership and or subcontractors from minority or disinvested communities. Demonstrate your experience within the past five years within a minimum of three project references.

30:08

Speaker 5

Again, next slide please.

30:15

Speaker 3

There be 20 points for technical innovation in terms of your creative approach. If your project management skills would be up to ten points and a project cost will be up to 30 points. And as I mentioned earlier, reference letters which fall under

that 30 point requirement, bucket earlier is required and that will be judged on a yes or no. Either you provided them or you didn't, and that's a summary of the scoring criteria. I'll turn it back over to you, Paul.

30:49

Speaker 4

Thanks, Charles. So please note, issuance of this RFP and receipt of proposals is not a commitment to award this contract. We here at CCF reserve the right to postpone proposals opening our award. We can accept or reject any or all proposals. We maintain the right to negotiate with more than one applicant. Cancel all or part of this RFP slide, please. So, as I stated earlier, the proposal submission will be done through the CCF serv email, and you should be submitting one copy of your technical proposal by a PDF. And there should be a budget sent separately in excel format. So the budget should include any plan sub awards anticipated throughout the duration of the project. And again, those must be submitted to CCF surfalfund.org dot those shouldn't be going to Charles, shouldn't be going to Maria, shouldn't be going to me.

31:53

Speaker 4

It should be going straight to this email address. So at a minimum. Oh, can you go back once? So, as you can see on the right, we're requiring that all of these items be included in your proposal. So that's a title page table of contents to help us sift through all the information in there. Technical approach line item budget is listed here, but please be aware that's going to be, again, a separate excel file. Feel free to include a additional form of it in the proposal, but we will require those two separate documents when submitting a profile form, reference letter and some required forms which I'll be running through in just a few slides here. Slide please. So, the applicants are required to create and submit a comprehensive budget for the term of the contract ensuring optimal performance.

32:48

Speaker 4

So this budget should be all encompassing for essentially any spending that's going to be done within this 22 month period. All expenses should be included in the budget that you submit. There shouldn't be any items left out, any sub

awards, anything that's going to come up and be a snap later. So we here at CCF are going to be using this line item budget to assess fairness and reasonableness of the applicant's costs. Once CCF awards a contract, the negotiated line item budget serves as the basis for managing approved contract expenditures. So we'll be referencing this budget through the life of the period of performance for this contract. So it's very important that what you provide is precise. So a last note here is each applicant is responsible for all mathematical calculations and information provided on the line item budget template.

33:41

Speaker 4

So if you guys submit something and it's way out of whack, that's not on us. So please make sure your formulas are set up. Make sure your math is double checked there. Slide please so, in regards to timeliness standards, the applicant is expected to demonstrate the ability to begin the project operations by the contract start date. So obviously the notification award is going to go out in early November and we're giving a no later than date for the 22 November. So if we can get you started prior to that date, that'd be great. But when submitting this proposal, you should be fully aware and prepared that there shouldn't be any reasons that we're starting after this date listed. So, moving on to proposed contract. This one's pretty straightforward.

34:32

Speaker 4

The applicant, if selected through this RFP and subsequently selected for the award, shall be required to enter into a written agreement with CCF. That's us then. Regarding the RFP addendum and clarifications, if it becomes necessary to revise any part of this RFP after the RFP is released, written addendum will be posted on again that laserf.org website catalyst RFP. So just again, please note, please highlight this link. This is where most of the information will be getting posted through the life of this RFP process. Slide please so, for the appeals process, appeals must be submitted no later than October 2, 2024 for close of business. So 05:00 p.m. Appeals will be presented to the by the President or CEO or their designee. Process appeal must meet all of the following criteria to be considered.

35:35

Speaker 4

So item one, the request for the appeal must be submitted by the date and time specified by the RFP. So again, no later than the 2 October, the person or entity requesting the appeal must assert an appropriate detail with factual reasons that CCFD materially failed to follow procedures specified in its RFP document. The request for the appeal must set forth sufficient detail to demonstrate that but for CCF's alleged failure, the applicant would have been a successful applicant. All process appeals must be in writing and emailed within two days of receiving a decision to that same CCF surfalfund.org email address on the subject line. It's going to be the same one that we've been discussing sic CGF zero one sector and investment coordinator excuse me. Process appeals will not be accepted by a FASA meal paper submission.

36:34

Speaker 4

So everything should be submitted digitally again throughout the life of this RFP. Just please note, you know, this appeals process is not because you want to make a change to the proposal you submitted or you heard something about someone else's proposal and you want to make edits to yours. This is going to be solely for if you feel something came up and you can directly point a finger to somewhere that CCF didn't carry out the RFP process as stated here in these instructions. Slide, please. So application conditions and reservations are going to be found in section a through m for your reference. Moving on, we're going to go through a couple of those required forms that I had mentioned earlier. Conflict of interest form. This is going to be pretty straightforward.

37:30

Speaker 4

You're going to fill this out, the name of your form firm, the preparer, and then just some organizational information. There'll be spaces below to indicate if you do feel that there are any relevant conflicts of interest. Moving on. Contractor and vendor form. Again, this is going to be very straightforward. This is going to be mostly your organizational information w nine things like tax id, the location of your brick and mortar business. This will be required regardless if you've done contracts with us in the past or if you're a new vendor that we're working with.

Slide, please. So this is the notice regarding the California Public Records act. So this is just annotating that these proposals, when they come in, will be subject to public record unless they fall under one of the protected categories, those being trade secret, confidential, proprietary.

38:30

Speaker 4

So this may not be relevant to most folks, but if it is, this will be in the RFP and you can review the language there. Slide, please. And this is just a list of some of the contractor qualifications that we require you to enter into contract with us here at CCF. So one being copies of any required business license or tax registration specific to your business location. So documentation should be recent, that being within one year validated. So some of those items are state of California business registration, Los Angeles county business licenses, or City of Los Angeles business tax registration certification. The second required item will be documentation of contracts with other entities to provide the same or similar services. So some of the options would be a client's list of references, items along those lines.

39:27

Speaker 4

And again, documentation should be relatively recent, so anywhere from one to three years. Item number three, documentation of the same or similar services being publicly advertised. So those items would be along the lines of websites, email blasts and additional media. The rest of these items are standard and these will be in the RFP. So the w nine, contact information, physical address, phone, email, scope of work, term of services and pricing for services. That all be pretty standard when these are proposals come in. That's about it. I'll pass it back to Maria here.

40:14

Speaker 1

Thank you, Paul. Thank you, Charles. And so if there are any questions at this time, you can raise up your hand or drop a question in the chat. Jolly Glover, I see your hand is up. Yes, hi. My question is in terms of the required forms, I wasn't sure where we actually are to download or receive those forms in order to fill

them out and send them along with the packet. All the required forms are attached to the solicitation. Okay, thank you. You're welcome.

41:21

Speaker 4

We had one in chat as well. I can read that back to you, Maria. So Jane Carlson asks, are there common assumptions we should make when determining a reasonable budget? Happy to clarify if needed.

41:37

Speaker 6

Yeah, and hi, it's Jane. I think I'm just reacting to the scope, including a lot of possible efforts and tasks. And, you know, it sounds like it could be a bit flexible as the project or as the 22 months gets underway. So I guess just curious if there's some assumptions we should make or how we should lay out a budget given that there might need to be some flexibility.

42:15

Speaker 1

Well, in terms of assumptions, I don't know that you can make any assumptions other than what is written in the scope of work to use that as a guide for assessing what you believe your expenditures will be in order to meet the scope of work and the deliverables under that. I see Matt Phillips and Bruce Wheatley.

42:49

Speaker 7

Hi Maria, thanks for calling me. Can you talk a little bit about how the sector investment coordinators piece is going to sync up with the \$9 million pre development piece, because the way it seems is that the sector investment coordinators will be doing a lot of the sort of work to tee up the \$9 million like the actual product pre development investments. But how are you thinking in terms of project oversight? Once we get past the sort of selection identification of a project and get the go ahead from the steering committee, would we be handing it over to a firm or would the sector investment coordinator role be responsible for sort of managing the project implementation or managing the contract or managing the relationship with the firm implementing the project?

43:45

Speaker 1

I think it's the latter. So, or this, the last piece you mentioned, which is the sector investment coordinator after the selections have been made, would work with those awarded to manage the projects. Does that make sense?

44:10

Speaker 4

Yes. Thanks.

44:12

Speaker 1

Bruce Wheatley.

44:15

Speaker 8

Thank you. Good morning. Great presentation. My question is, you're looking for references from individuals who may have been a part of one's presentation within the past three years. The past three years were dealing with a pandemic and so that would have made it kind of difficult to introduce innovations that result from the pandemic as a result of the pandemic. So how would you expect a proposal, what do you expect a proposal to present in that case?

44:54

Speaker 1

That's a good question. I don't know that I have answer for you at this moment in time. We can take your question and we'll provide answer on the 20th.

45:07

Speaker 8

I appreciate you. Thank you all.

45:08

Speaker 4

Bye.

45:10

Speaker 1

Kevin Harbour.

45:12

Speaker 9

Good morning, Maria.

45:14

Speaker 4

Good morning.

45:15

Speaker 9

So we don't intend on applying for the RFP, but we are available in case any of these sector investment coordinator RFP awardees would like to use our services. So would that constitute a conflict of interest in any way if we also wanted to apply for the catalyst or implementation rfps?

45:46

Speaker 1

Let me understand your question. Would there be a conflict of interest if you provided support?

45:54

Speaker 9

Right. As a subcontractor, for example?

45:56

Speaker 1

Subcontractor to the, to an sic and yourself? It depends, I think, on what the service is that you are providing.

46:06

Speaker 9

Outreach and engagement. Outreach and engagement.

46:10

Speaker 1

I'm not, I'm not too sure. Why don't you give us some time to take a look at that and then we can provide a response on the 20th.

46:21

Speaker 9

Yeah, we're just interested in providing whatever services we can to add value, but we also want to have the option of applying for the other rfps. So we don't want to be a part of the cataloging or selection or any of those areas just in terms of getting the word out and putting together something similar to what we did last year as an organization.

46:44

Speaker 1

Got it. Okay, thank you. That's helpful. We'll provide a response.

46:48

Speaker 9

Okay, thank you.

46:50

Speaker 1

Okay, Bruce, I think you already had your hand up before. So, Jamie Lippmann.

46:58

Speaker 10

Hi there. Just a quick question. So, are there expectations for cross collaboration with the multiple consultants that may be selected? Can you just elaborate on that a little bit?

47:11

Speaker 1

Cross collaboration amongst the sector investment coordinators?

47:16

Speaker 10

Yes.

47:17

Speaker 1

Yeah, I think there will be some cross collaboration, at the very least, in terms of comparing notes and possibly attending similar meetings to provide updates. And so, yeah, there may be, once awarded, collaboration across sic.

47:38

Speaker 10

Okay, thank you very much. A colleague of mine wanted me to ask that if there are multiple consultants selected, will we be responsible for consulting on a fraction of the 9 million budget, or is there a way that the budget might be divvied up amongst the partners?

47:57

Speaker 1

We have \$1.5 million available for the entire SIC line item. So depending on how many sics are awarded, it could be up to five. So that would determine how the funds are. Matt, do you have another question?

48:22

Speaker 7

Yeah, I was wondering if you could talk about the scoring process a little bit. Will this be scored by CCF with LEDC involved, or is it who will be on the scoring team?

48:32

Speaker 4

That kind of thing?

48:34

Speaker 1

We haven't identified the review committee, but it will be a review committee of up to five individuals that will be reviewing applications, and they will have some expertise in the priority areas outlined in during the planning phase. Any

other questions? Oh, I see. Another one in the chat is up to date. Sam dot gov registration required for an applicant. Sam dot gov registration, these are not federal dollars, and so Sam dot gov registration is not a requirement. But we will be looking at various lists again to ensure eligibility and that the organizations or the applicants are not on suspended or debarred lists. Okay, I'll give folks another minute or so.

50:20

Speaker 6

This is Jane Carlson. I have one more question. Thank you for taking the time to answer all these. So if you end up selecting up to five sics, if one applicant applies for more than one sector, or to cover the scope for more than one sector, and then you decide to kind of break that up or select different sics and have them collaborate, does that negatively impact the scoring for an applicant's proposal and their budget, which I know is 30 points of the criteria? So if you end up sort of, will you accept like a partial scope of work from one applicant? If you decide to go with more than one for a certain sector.

51:29

Speaker 1

Does.

51:30

Speaker 6

That have like a negative impact on the scoring for the proposal.

51:34

Speaker 1

Is your question referring to splitting up one project area?

51:40

Speaker 6

Well, I guess. How would you know? If you were to hire up to five sics, what are the different sectors that they would be covering?

51:51

Speaker 1

So the priority sectors that were identified during the planning phase. And maybe we can go to that slide, Ariel, that shows. So. So the sector investment coordinators will be working on the different priorities that were identified during the planning phase. Another slide, Ariel.

52:22

Speaker 6

The clean, renewable energy, aerospace, manufacturing. So, for example, if one applicant proposed on construction and healthcare, for example, and then you chose to hire two different consultants for those two different fields, is there a negative impact if you propose on more than one sector and are not ultimately selected to cover that sector?

52:52

Speaker 1

No, that wouldn't negatively impact your application.

52:56

Speaker 4

Okay.

52:58

Speaker 6

Sorry, that was so complicated. Yeah, I think it's just, you know, if we think we can cover more than one sector, should we propose on it? Even if ultimately you end up selecting multiple consultants, sounds like it's okay to propose on as many as we think we can cover.

53:20

Speaker 1

Yes, exactly.

53:26

Speaker 8

I have a quick thought question. You are potentially going to select up to five SI coordinators. That would be about \$7 million. So if that's the case, the \$2 million

are going to be utilized. Remaining of the nine will be utilized to fund some of those programs, those last mile programs. Is that what you all are anticipating?

53:53

Speaker 1

No, we've designated up to \$1.5 million for sector investment coordinators. So the \$1.5 million would be distributed amongst the up to five sector investment coordinators. The \$9 million of the 14 million that has been designated has been set aside to funds exploratory or last mile projects. So they're separate line items in our \$14 million budget.

54:25

Speaker 8

So let me correct me if I'm wrong, then the coordinator is writing a budget for 1.5 million or 200,000.

54:36

Speaker 1

The coordinator is writing a budget for the work that they believe it'll take to execute, the scope of work and deliverables that are outlined in the solicitation for the area that they are interested in filling the role for.

54:54

Speaker 8

So with that being said, is there a particular maximum that you all are considering, or how you think? How do you figure that out?

55:02

Speaker 1

We don't. We want to see which. What kinds of applications come in.

55:07

Speaker 8

Sounds good. Thank you.

55:12

Speaker 1

It. Any other questions? We'll give folks another minute or so.

56:07

Speaker 7

Sorry, I have one other question. Maria, this is Matt. In the scope of work, you mentioned implementing pre development activities, this sort of ties back to my earlier question, but some of those pre development activities, my understanding is that those would be covered by the 9 million. And so does implementing, in your mind or this role mean, like making a connection between LAEDC and CCF and a firm that could potentially, say, provide engineering services, or if there was a, you know, plan, if there was a type of pre development activity that a firm could actually implement, like doing a feasibility or something, is that something that we would incorporate into this application?

57:00

Speaker 1

Yes. The steering committee wanted to make sure that the \$9 million were not touched for anything other than projects. And so for things like technical assistance or capacity building, or like you said, contracting with an engineering firm, for example, are part of how they see executing the scope of work and meeting deliverables that should also be included into their budget under a subcontractor lineup.

57:41

Speaker 6

That question, though, are engineering services included as part of the 1.5 million or the 9 million? Like, when does something cross over into the \$9 million bucket?

57:53

Speaker 1

The \$9 million bucket would need to be approved by the steering committee, so I wouldn't recommend including it in your budget because the \$9 million will go through a separate process of approval than this solicitation.

58:27

Speaker 8

So it sounds like there's definitely a maximum available of 1.5. And based on the quality of products project that you receive, you'll determine what dollar amount they will ultimately receive.

58:43

Speaker 1

Correct.

58:44

Speaker 8

Okay.

59:19

Speaker 1

Any other questions? I'll take one more scan on the chat. I think we are. We answered the two questions on there. All right. If there are no other questions, this will conclude our sector investment coordinators bidders conference. As Paul mentioned earlier, this recording will be uploaded to our website. And the question. The deadline to submit the written questions to us is this Friday at 05:00 p.m. We will be posting responses to the questions asked at this bidders conference and those submitted in writing by Friday, September 20, no later than 05:00 p.m. I want to thank everybody for attending today's conference for my fellow presenters, Charles Johnson and Paul Morales, and thank you, everyone. This concludes the conference.

01:00:29

Speaker 4

Thanks, folks.

01:00:31

Speaker 2

Thank you, everyone.

01:00:34

Speaker 3

Thank you, Paul, Maria, and everyone else.

01:00:36

Speaker 1

Thank you. Bye.