

**California Jobs First
Los Angeles Collaborative
SIC-CJF-01: Sector Investment Coordinators Request for Proposals**

I. Preface

California Senate Bill 162 (SB 162), approved September 23, 2021, established the Community Economic Resilience Fund Program (CERF), and later rebranded as California Jobs First (CJF). The purpose of the CJF funding is 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. The Los Angeles Jobs First Collaborative (LA County Collaborative) selected the California Community Foundation (CCF) as its Fiscal Agent, and the Los Angeles County Economic Development Corporation (LAEDC) as its Regional Convener. CCF is soliciting proposals in response to Request for Proposal (RFP) No. SIC-CJF-01 Sector Investment Coordinators (SICs) supporting the LA Collaborative, its leadership, the Convener, and their consultants implement the Regional Plan.

CJF was created to promote a sustainable and equitable recovery from the economic distress of COVID-19 by supporting strategies to diversify local economies and develop sustainable industries that create high-quality, broadly accessible jobs for all Californians.

CJF implements a four-phase grant structure that emphasizes inclusive planning to ensure equitable outcomes for each region's disinvested communities: the Pre-Planning Phase; the Planning Phase; the Catalyst Phase; and the Implementation Phase.

Pre-planning, and Planning, and Catalyst Phases: Throughout the Pre-Planning phase, LA County community partners consistently convened to develop the Los Angeles Region High Road Transition Collaborative (later rebranded to LA County Collaborative) proposal. The LA County Collaborative submitted its proposal for the Planning Phase to the State on July 25, 2022, and for the Catalyst Phase on November 30, 2023. Please visit the LA County CJF webpage at <https://lacerf.org> to read the complete LA County Collaborative Proposal narratives, review meeting notes, and learn more about the partners involved.

The Planning Phase award provided \$5 million in planning grants for each region (a total of 13 designated regions in the state) to inform regional investment opportunities based on actionable research in partnership and shared decision-making with communities and in consultation with expert institutions, with a focus on the CJF objectives of equity, sustainability, job quality, economic competitiveness, and resilience.

The Catalyst Phase award provides an additional \$14 million in Catalyst funding to each region, which includes funding of \$1.5 million for up to five (5) SICs to assist

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the LA County Collaborative with pre-development activities (see “Scope of Work”), technical assistance, and capacity building while cataloging assessing and evaluating potential projects for Catalyst funding consideration. Catalyst projects will be assessed, scored and designated as “exploratory”, “last mile”, or “non-viable,” and aligned with funding opportunities. The remaining nine (\$9) million of the Catalyst funds will be earmarked for the LA Collaborative to invest in developing exploratory and last-mile projects that can access local, state, federal, philanthropic, and private equity funding opportunities. All projects will ultimately have to be approved by the LA Collaborative Steering Committee after having the same or similar criteria as the Regional Investment Initiative (see “Project Description”).

Planning grant funds are being used to develop LA’s final Regional Plan, which reflects a wide range of planning activities, including capacity-building, community engagement, and research to identify Regional strategies to fulfill the CA Jobs First Objectives. Additionally, strategies included in the regional plan, will help to inform the steering committee on the types of projects needed across the region and potential prioritization and/or eligibility that might be considered for project funding during the Implementation Phase. Strategies developed during the Planning Phase will be outlined in the Regional Plan Part 2 and submitted to the State on August 30, 2024, or a date set by the State. Catalyst Phase projects should align with the strategies set forth in the Regional Plan Part 2 and will help to identify projects eligible for funding during the Implementation Phase of the program.

In the Implementation Phase, the State will fund implementation projects on a rolling basis consistent with the Planning Phase’s Regional Report based on criteria such as demonstrated community support, alignment with state climate goals, and demonstration of labor standards and job quality.

Participants interested in applying for Implementation grants must receive a letter of support from the Collaborative to be eligible for funding or other requirements set by the State.

The RFP is comprised of the following parts presented herein as Attachments:

- Attachment 1 – LA County Collaborative - Conflict of Interest Form
- Attachment 2 – Vendor Information (to be completed by the prime & all subs)
- Attachment 3 – Notice Regarding California Public Records Act
- Attachment 4 – CCF Contractor Check List

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II. Project Description

The purpose of CJF Catalyst Phase funding is to invest in projects in high growth industries that fulfill the CJF planning phase objectives and priorities identified during the Planning Phase, fund projects, advance equity, and prioritizes disinvested communities.

According to information provided by the State, projects may need to meet criteria like the criteria listed below. Applicants will be expected to successfully complete their duties reflective of these and other requirements that may be applied. In addition, the Steering Committee will adopt specific Catalyst Project criteria and evaluation requirements.

1. Equity:
 - a. At least 40% of funds provide direct, meaningful, and assured benefits to disinvested communities
 - b. Include an applicant or co-applicant located in or serving a disinvested community
 - c. Align with Executive Order N-16-22 (Embedding Racial Equity)
 - d. Include equity impact assessment
 - e. Include displacement analysis (and avoidance strategy if necessary)
 - f. Include a community engagement strategy with feedback mechanisms
2. Climate:
 - a. Align with major state climate goals and policies, such as:
 - i. CARB Scoping Plan
 - ii. EO N-82-20 (Land and Water Protection)
 - iii. EO N-19-19 (Climate Agenda)
 - iv. Sustainable Groundwater Management Act (SGMA)
 - b. Projects may not fund new fossil fuel extraction or activities, or expand fossil fuel production
3. Job Quality and Access:
 - a. Promote the creation of family-sustaining jobs with healthcare and retirement benefits, upward mobility, access to training, consistent scheduling, safe working conditions, and opportunities for collective worker input
 - b. Ensure equitable access to quality jobs for communities throughout the region
 - c. Receive approval of regional Jobs First Collaborative
 - d. Align with criteria for the identified stage of readiness

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The target outcomes for Catalyst projects include but are not limited to:

1. Economic Competitiveness that addresses inequities and strengthens the region overall to improve economic competitiveness and deliver prosperity for across our region. This includes leveraging a region's comparative advantage, diversifying its economy, and training its workforce to prepare for jobs in each region's r emerging industries. Activities to help achieve economic competitiveness include, but not limited to:
 - a. Expanding access to capital
 - b. Expanding capacity for innovation and entrepreneurship
 - c. Retaining or expanding existing businesses or promote new business development
 - d. Building the region's skilled workforce
2. Economic Resilience that improves the region's ability to avoid, withstand, and recover from economic shocks. This includes foreseeing, adapting to, and leveraging changing conditions to a region's economic advantage. Activities to help achieve economic resilience include, but not limited to:
 - a. Building capacity of organizations serving disinvested communities to compete for and administer federal and state grants
 - b. Building wealth in disinvested communities
 - c. Diversifying regional economy

The LA County Collaborative is seeking to obtain services of up to five (5) consultants, known as Sector Investment Coordinators (SICs), to support the Los Angeles Jobs First Collaborative in execution of the Catalyst grant awarded to the region. The Collaborative seeks to engage SICs, with the description of services listed in the Scope of Work (SoW), to advise it on how to fund \$9 million in pre-development activities (included in SoW). Experience in Los Angeles County, and especially with LA County's historically disinvested communities, is preferred.

Submitted proposals must describe the qualifications and proposed approach specific to the desired work assignments. The Collaborative will select up to 5 consultants. The awarded consultant(s) will receive a contract term through September 30, 2026. The Collaborative may request on-call services for any of the elements listed in the description of services.

III. Funding Available

Up to \$1.5 million of funding will be available through September 30, 2026. Awarded Applicant(s) may receive up to a 25% advance of funds. The funding source for this RFP is the State of California via Employment Development Department (EDD).

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IV. Eligible Applicants

Eligible applicants include individuals, nonprofits, and private firms.

All awarded private and not-for-profit organizations must not be suspended or debarred from receiving federal, state, or local funding. CCF will not award contracts to or consent to subcontractors 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.

Eligible applicants must also comply with all Conflict-of-Interest requirements (Conflict-of-Interest forms must be fully completed by all parties identified in the proposal). Please see Attachment 1 – LA Collaborative – Conflict-of-Interest Form.

Applicants must be able to adhere and provide all items on CCF Contractor Checklist (Please see Attachment 4 – CCF Contractor Check List)

V. Contract Term

The contract term for contracts awarded through this RFP will be from contract start date TBD, no later than **November 22, 2024**. The estimated period of performance for this contract is twenty-two months. All expenses must be included in the budget approved by CCF.

VI. Scope of Work

The awarded entity shall execute the following activities on behalf of the Jobs First Collaborative:

- Work within the Jobs First Collaborative on industries prioritized in the Planning Phase (see below);
- 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.
- Work with the Governor’s Office of Business and Economic Development (GO-Biz) and regional partners to find and apply for state, federal, and private grants;

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- Align Jobs First Collaborative -identified projects with federal funding opportunities;
- Liaise with workforce and economic development partners, High Road Training Partnerships, community-based organizations, and others capable of contributing to the success of the project to build an ecosystem around identified industries, sectors, and strategies in the Regional Plan;
- Provide or procure technical assistance for Catalyst or Implementation grant applications and administration;
- Refer and assist others in using data, research, and the LA County Regional Plan, Parts 1 and 2 from the Planning Phase for guidance and in applying for public and private funding that advances projects and strategies that align with the Regional Plan. This includes reports from Affinity Hub, Subregional Table, and (sector) Table meetings, as well as summary reports from ethnic and environmental forums;
- Support outreach, engagement, and capacity-building activities to ensure individuals and groups from disinvested communities have the ability to apply for Catalyst project funding and participate in ongoing activities related to the implementation of the regional plan; and
- 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.

The selected vendor will work closely with members of the LA County Collaborative throughout the nine Service Planning Areas (SPAs) in the Los Angeles region to foster the development of various projects that advance the mutual goals of increasing employment and quality of life within historically disinvested and disproportionately impacted by climate justice issues in high-growth and sustainable industries. The Steering Committee shall adopt the final Catalyst project selection criteria, which include the minimum concepts listed below: Where appropriate projects will:

- Include carbon emission reduction with regional economic development activities.
- Advance equity and build in worker and community ownership.
- Benefit and enable disinvested communities to gain equity participation in and provide ongoing project recommendations.
- Grow wealth through their involvement in the projects which could create a pathway to building generational wealth.
- Ensure that partners are provided the necessary capacity-building services and technical assistance to be successful.

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The SICs shall work with the LA County Collaborative to efficiently and effectively implement pre-development and capacity-building activities to advance strategic objectives including, but not limited to, problem-solving with project sponsors, and monitoring equity requirements of approved Catalyst projects.

Pre-development activities may include:

- a. Feasibility studies;
- b. market analysis;
- c. environmental assessments, surveys, and remediation;
- d. site acquisition; site and development plans;
- e. project designs;
- f. permitting;
- g. establishing a regional tax increment financing district (TIF);
- h. drafting and negotiating Community Benefits Agreements and Community Workforce Agreements;
- i. establishing public-private partnerships, Community Development Corporations and Community Development Financial Institutions;
- j. revolving loan funds;
- k. joint powers authorities;
- l. financial planning (e.g., preliminary budget and construction financing); to establish long-term funding opportunities for the implementation of Planning Phase regional strategies;
- m. Basic environmental infrastructure pre-development, construction, and development of long-term operations and maintenance plans for infrastructure such as:
 - a. clean water supply systems;
 - b. wastewater systems;
 - c. waste disposal systems;
 - d. pollution control services;
- n. Support costs for building and sustaining the capacity of project leads and partners, such as:
 - a. investments in partner and local staff development;
 - b. funding new and/or critical positions;
 - c. acquiring or utilizing tools and resources to increase partner capacity for project planning and implementation;
 - d. organizational capacity activities such as access to financial services or legal review;
 - e. developing new pilot or demonstration projects and programs;

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- f. participation and/or partnership with existing workforce programs;
- g. providing or securing technical assistance for partners.

The SICs shall work closely with the LA County Collaborative to prescribe the respective project scopes to advance equitable growth within each approved priority sector from the Planning Phase. The approved priority sectors for Los Angeles County are:

1. Clean/Renewable Energy
2. Aerospace Manufacturing
3. Transportation and Logistics
4. Bioscience
5. Video Production and Distribution
6. Construction
7. Healthcare

SICs will be responsible for working closely with the data, research and Collaborative Steering Committee to utilize, incorporate, and advance strategies set forth in the Regional Plan Part 2.

Additional scope of work activities shall include:

1. Ensure that pre-development activities for each Catalyst project prioritize and align with identified and approved goals and strategies that target economic development, meet the equity investment objectives designed by the LA County Collaborative, and advance the quality job creation, hiring, carbon neutral transition and/or high road job-career pathways goals outlined by the LA County Collaborative, California Jobs First Initiative, and the Catalyst Program, including those outlined in the Regional Plan.
2. Develop a transparent and equitable process for receiving and evaluating proposed projects for pre-development funding with timelines and metrics, based on Steering Committee-approved categories and evaluation criteria.
3. Create a draft scoring rubric that aligns with the evaluation criteria, a revised scoring rubric based on Steering Committee feedback, and is included in the project solicitation; assess and label proposed projects as “exploratory,” “last-mile” or non-viable; providing the Steering Committee with evaluation results and recommendations; and create an appeals process so that all partners have the opportunity for their projects to be reviewed using an equitable, fair and transparent lens.

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4. Attend standing and emergency meetings with Go-Biz, EDD, Office of Land Use and Climate Innovation (OLUCI), the fiscal agent, the Steering Committee, and Collaborative. This includes facilitating meetings relevant to each Coordinator's industry sector and working with the CJF team, fiscal agent, strategic writer, and designer to provide the narrative for any written deliverables.
5. Liaise with the LA County Collaborative, workforce and economic development entities and partners, High Road Training Partnerships, and community-based organizations to build an ecosystem for each project around the identified industry sectors. This includes working with potential employers to create apprenticeship programs in career pathways for sustainable and carbon reduction industries that train, upskill, and reskill underserved workers from disinvested communities of the region.
6. Implement community engagement and outreach strategies in concert with the CJF Outreach and Engagement Manager to share information about how to submit project applications and the evaluation criteria; sharing profiles on all proposed projects; gather and validate data related to the projects; and obtain stakeholder input to ensure community buy-in on the selected projects. Provide the LA Collaborative Steering Committee outreach and community engagement activity reports to ensure that ALL regions have equitable participation in engagement and outreach activities.
7. Work with Technical Assistance providers and the data gathered from activities conducted by the Financial Strategy Table Lead to helping partners build capacity in areas such as estimating project costs and timelines, assisting with procurement; identifying potential regional joint ventures; and identifying and applying for additional funding, including philanthropic, private equity, tax incentives, and other government funding opportunities.
8. Provide guidance to project partners on strategies to integrate worker ownership and community benefit components into projects to support disinvested community members' ability gain equity, participate as workers, suppliers and service providers, to receive economic benefit, which could create a pathway to building generational wealth.
9. Collaborate with the California Jobs First Outreach and Engagement Manager to host approximately 30 convenings across the County during the Catalyst project period. Convenings will bring together current and future partners, and

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the various stakeholder groups and organizations already engaged in the Collaborative from across LA County's nine SPAs. The purpose of the convenings will be to share information about the selected projects and describe how they can improve the region. The convenings will serve to build community interest in the selected projects and ensure that current and new members of disinvested communities are represented in the selected projects. They will also provide an opportunity for community members to collaborate and integrate projects in specific SPAs that may complement projects in other SPAs.

10. Working with the California Jobs First Research Analyst and any outsourced research firms to support implementation of the Catalyst Phase objectives documentation of progress toward the regional plan, including Catalyst project selection and procurement strategies.
11. Work with the California Jobs First Research Analyst and any outsourced research firms to track the progress of the implementation of the regional plan, including Catalyst and Implementation projects and implement adaptive measures as necessary.
12. Work with Labor Unions, groups, and other partnerships to work towards integrating their involvement into strategic projects.
13. Support outreach, engagement, and capacity-building activities to ensure individuals and groups from disinvested communities have the ability to apply for Catalyst project funding and participate in ongoing activities related to the implementation of the regional plan.

VII. Key Deliverables

Through the term of the contract, the chosen consultant(s) will be required to attend Steering Committee meetings and may be called upon to attend other stakeholder meetings to summarize discussions into reports for other groups to disaggregate data for their use to make informed decisions. At the end of the contracted term, consultant(s) will be required to submit a final report based on their findings in compliance with instructions from the state of California, the fiscal agent, and the regional convenor

The consultant(s) will assist the Collaborative in project identification and development for narrative reports that are due on January 15, 2025, and June 30, 2025. In addition to these narrative reports consultant(s) will provide the LA Collaborative Steering Committee with monthly status report of all projects

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submitted for consideration. For these reports, the SICs may be required to do any of the below activities (as defined in the section “Additional scope of work activities shall include”) to assist in creating lists of projects that are prepared to be submitted to the state and definitively cataloged as either “exploratory”, “last mile” and “ready-to-go”. Working with the California Jobs First Research Analyst & outsourced writers and researchers, the consultant(s) will provide the Steering Committee with a list of all potential projects submitted along with their scored evaluation results for exploratory and last mile projects for timely submission of the January 15, 2025 report and their list of exploratory, last mile and ready-to-go projects for timely submission of the June 30, 2025 report. The Collaborative’s goal is to capture a minimum of 5-10 projects in the January 15, 2025 report and 30-45 projects for the June 30, 2025 report.

Monthly Progress Status Reports are due to the Steering Committee, the state and fiscal agent on various challenges and successes. This may include a separate budget report that highlights expenditures.

Provide a preliminary project plan including planned activities, timeline with duties, and budget within six weeks of signing contract with fiscal agent. The plan should be updated monthly and submitted with the Monthly Progress Status Report.

VIII. RFP Timeline Overview

All complete proposals received by the submission deadline will be submitted for review. Proposals will be scored independently based on the criteria outlined in the Review section of this RFP. Final funding recommendations for this RFP will be based on the overall score of the proposal. Except that no award shall be made if the application scores less than 70% on the evaluation criteria related to prior experience in successfully completing project in disinvested communities and projects serving disinvested communities.

RFP Timeline	
ITEM	DATE
RFP Release	Friday, August 30, 2024
Proposal Conference	Tuesday, September 10, 2024; 10 AM
Written Questions Deadline	Friday, September 13, 2024; 5 PM (PT)
Responses to Written Questions posted online	Friday, September 20, 2024; 5 PM (PT)
Submission Deadline	Monday, September 30, 2024; 5 PM (PT)
Process Appeal Deadline	Wednesday, October 2, 2024; 5 PM (PT)

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Review/Approval Period	October 7-November 1, 2024
Notification of Award	November 5, 2024
Contract Start	TBD, no later than November 22, 2024

IX. Due Date – Submission

Proposals submitted in response to this RFP will be due in accordance with the following dates: All proposals must be received by electronic delivery no later than **5:00 PM (Pacific Time), September 30, 2024** at CCF-CERF@calfund.org with the subject line “SIC-CJF-01 Sector Investment Coordinators - Proposal”. Applications will not be accepted via facsimile or paper submission.

Proposal amendments and/or addendum submitted to CCF after the proposal deadline will be returned without review. However, CCF reserves the right to request clarification of unclear or ambiguous statements made in proposals.

X. Proposal Conference

The purpose of the conference is to provide new or updated solicitation information, provide clarification regarding the RFP package, and answer general questions regarding proposal preparation. All Prospective applicants are encouraged to attend the Proposal Conference. However, attendance is not mandatory.

The proposal conference will be held on **September 10, 2024 at 10 AM**. Interested individuals can register to attend the conference via this link:

https://us02web.zoom.us/meeting/register/tZMpcOCrrzstE9wCvbW7hqrU1S9ge_Mwivlz

XI. Application Questions

Applicants are encouraged, but not required, to submit questions in writing no later than 5:00 PM (Pacific Time), September 13, 2024. You may direct your questions regarding this RFP to CCF-CERF@calfund.org with the subject line “**SIC-CJF-01 Sector Investment Coordinators RFP – Question(s)**” Please include your name and title, the name of your organization and the best telephone number to reach you, if a CCF representative needs to speak with you for further clarification. CCF will post written responses to all received questions on the CCF website no later than (5) business days from the Written Questions deadline (i.e., no later than September 20, 2024, 5 PM (PT)). Applicants are responsible for checking the <https://pages.lacerf.org/catalystrfp> website to obtain current information and responses.

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XII. Review – Scoring Criteria

1. Proposals will be ranked in accordance with the Evaluation Criteria described below.
2. Applicants may or may not be invited for an interview.
3. The Collaborative does not reimburse applicants for any cost of proposal preparation (including but not limited to parking, printing, postage, travel, etc.), even in the event of RFP cancellation.
4. Communication between the applicant and any member of the Proposal Review Committee involved in the selection process is prohibited, except when and in the manner expressly authorized in this RFP. Violation of this restriction is grounds for disqualification.
5. The Collaborative shall award the contract for this RFP to the firm that it deems to have provided the best value to the Collaborative or the firm the Collaborative deems to be the best qualified for contract award (or both).

Evaluation Criteria	Max Points Possible
<p>THRESHOLD REQUIREMENTS</p> <ul style="list-style-type: none"> ● Evidence of demonstrated experience in successfully delivering projects in disinvested communities and that serve members of disinvested communities. Applications must score at least 70% of the available points in this category to be scored in the other categories. 	10 points
<p>SATISFIES REQUIREMENTS</p> <ul style="list-style-type: none"> ● Identified required expertise and qualifications necessary to perform task, including resumes or similar statement of qualifications of all key personnels assigned to the project. ● Project intent has been met and all stated scope of work is fulfilled. ● Provide evidence of commitment to equitable partnership and/or subcontractors from minority or disinvested communities. ● Evidence of demonstrated experience within the past 5 years - Provide a minimum of 3 project references that demonstrate expertise in delivering similar work. Include the contracting agency, term of contract or services agreement, contact person at contracting agency and a description of services rendered and contract amount. This can be demonstrated through a reference letter that documents the type and scope of previous engagements. ● References - Provide name, email address and phone number for 3 references. Confirm that everyone can be reached. 	30 points

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TECHNICAL INNOVATION	
<ul style="list-style-type: none"> ● Demonstrated expertise in conducting relevant work in Los Angeles County county-specific economic analysis activities related to all tasks and to the specific tasks related to evaluating equity criteria and community benefits. ● Appropriateness and effectiveness of the proposed methodology to address all tasks. ● Expertise in additional areas listed in RFP. ● Creative/innovative approach. 	20 points
PROJECT MANAGEMENT	
<ul style="list-style-type: none"> ● Organizational capacity for accomplishing all tasks specified in the Scope of Work (e.g., proposed management structure, organization of proposed team, etc.). ● Project milestones and benchmarks for completing the project. ● Capability to reallocate resources as needed to meet project schedule. ● Ability to be 'on call' with reasonable notice. 	10 points
PROJECT COST	
<ul style="list-style-type: none"> ● Realistic rate for services to be performed. 	30 points
Reference Letters	
<ul style="list-style-type: none"> ● 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. 	Yes/No
TOTAL	100 points

XIII. No Commitment to Award

Issuance of this RFP and receipt of proposals is not a commitment to award a contract. CCF expressly reserves the right to postpone proposal opening or award for its own convenience, to accept or reject any or all proposals received in response to this RFP, to negotiate with more than one Applicant concurrently, or to cancel all or part of this RFP.

XIV. Proposal Submittal – Application

Email (1) PDF copy of your Technical Proposal to CCF-CERF@calfund.org. Upload your proposed line-item budget as a separate Excel workbook file. This

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budget should include any planned subawards anticipated throughout the duration of this project.

You **MUST** submit your proposal to CCF-CERF@calfund.org. No other means of submission shall be accepted by the Collaborative. Again, allow sufficient time before the due Date/Time.

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

1. Title Page

Provide the following on the Title Page:

- RFP Name: (SIC-CJF-01 Sector Investment Coordinators) Request for Proposal
- Title of the Project
- Name and Address of Firm
- Phone Number of Firm - Do not include non-business (personal) phone numbers or address in as this information may become public under the California Public Records Act (Please see Attachment 4 – Notice Regarding California Public Records Act)
- Prime Contact Person
- Email Address of the Prime Contact Person
- Signature of the Individual Authorized/Obligated to Commit the Firm to this Project Cover letter should be addressed to the attention of the Contract Administrator

2. Table of Contents

- A clear identification of the materials by section and page numbers.

3. Technical Approach

- A statement and discussion of the project objectives, concerns, and key issues.
- The technical approach for performing the tasks must include a detailed Scope of Work along with the process for executing the requirements and objectives of the project.
- A discussion of the difficulties expected or anticipated in performing the tasks, along with a discussion of how the consultant proposes to overcome or mitigate against those difficulties.

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- A detailed schedule for completion of the work, including performance and delivery schedules indicating phases or segments of the project, milestones, and significant events.
- A discussion of how activities and progress will be tracked and reported to the Steering Committee and Collaborative Partners. This is in addition to any reporting requirements determined as needs by the Fiscal Agent.
- A statement of the extent to which the consultant's proposed approach and Scope of Work will meet or exceed the stated objectives discussed in this RFP. Furthermore, a discussion of how the consultant would modify the project, and/or schedule to better meet these objectives.

4. Line -Item Budget (Cost Proposal)

- Proposals must include a Line-Item budget not to exceed the \$1.5 million allocation. Each subcontractor is also required to submit a detailed budget. Budgets should be developed by the contractor and submitted as a separate excel workbook file.

5. Profile Form

- A statement indicating if the firm is local or national and a summary of representative experience relevant to the work described in the Scope of Work for this RFP.
- The location and telephone number of the office from which the work is to be done.
- Identification of the individuals who will perform the work, including officers, project manager and key staff. State the time commitment and include resumes for key individuals. Do not include social security numbers, non-business (personal) phone numbers or address in a resume as this information may become public under the California Public Records Act.

6. Reference Letters

- **Provide a minimum of three** project references. References must demonstrate expertise in delivering same or similar work. Letters must include the contracting agency name, term of contract or services agreement, contact person at contracting agency, a description of services rendered, contract amount, and the name(s), email(s) and phone number(s) of contact persons within the firms. References should not include any Collaborative staff.

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7. Required Forms

- The Conflict-of-Interest Form (Attachment 1 – LA County Collaborative - Conflict-of-Interest Form) must be fully completed by all parties to the proposal (prime and all sub-contractors).
- All applicants must ensure that they have fully completed a Vendor Information Form (Attachment 2 – Vendor Information) to be completed by the prime consultant and all sub- sub-contractors).
- All applicants must fully complete the Notice Regarding California Public Records Act (Attachment 3 – Notice Regarding California Public Records Act) regardless of whether applicant is requesting to exempt proposal from disclosure under the California Public Records Act.

The selected consultant will be required to complete a Federal Form W-9 (for payment purposes) and must be able to provide all items as detailed in Attachment 4 – CCF Contractor Checklist

XV. Budget

Applicants are required to create and submit a comprehensive budget for the term of the contract, ensuring optimal performance. The budget must cover the total cost of the proposed project. The awarded contractor(s) will work the necessary hours to complete the work. The estimated period of performance is twenty-two (22) months. All expenses must be included in the approved budget by CCF.

CCF uses the Line-Item Budget to assess the fairness and reasonableness of an applicant's costs. Once CCF awards a contract, the negotiated Line-Item Budget serves as the basis for managing approved contract expenditures.

Upload your Line-item budget as a separate Excel workbook file (apart from the rest of your Technical Proposal).

Disclaimer – Each applicant is responsible for all mathematical calculations and information provided on the Line-Item Budget template.

XVI. Timeliness Standards

The Applicant is expected to demonstrate the ability to begin project operations by the contract start date TBD, no later than November 22, 2024 and to fully utilize grant funds within the proposed contract term. Proposals must demonstrate a plan for rapid implementation. The Applicant is expected to initiate the approved

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project(s) promptly under the requirements of this RFP and the state and local regulations governing the awarded funding.

XVII. Proposed Contract

The Applicant, if selected through this RFP and subsequently selected for the award, shall be required to enter a written agreement with CCF. The proposed contract may include, but is not limited to, all pertinent terms and conditions outlined in this RFP, including those added by addendum, and to reflect the Applicant's offer or the outcome of the contract negotiations, if any, conducted with the Applicant. Applicants unable or unwilling to comply with CCF policies and procedures will not be considered for funding under this RFP.

Corrective actions may be imposed on a provider for non-compliance with regulations, contract requirements, and other applicable professional standards. Should a provider fail for any reason to comply with the contractual obligations of their contract, CCF reserves the right to take remedial action at its discretion. CCF, at its sole discretion, may impose remedial actions for cause including but not limited to the following: Notice of Noncompliance, Withholding of Payment, and/or Termination.

XVIII. RFP Addendum/Clarifications

If it becomes necessary to revise any part of this RFP after the RFP is released, a written addendum will be posted on the <https://pages.lacerf.org/catalystrfp> website. It is the responsibility of the Applicant to review any publicly available addendum or information on the website prior to submission of the proposal.

XIX. Appeals Process

After the Quality Review Evaluation is completed, CCF will notify all applicants of its Quality Review Results. Within two business days of written notification of the Quality Review Results, applicants may file a Process Appeal, which is an appeal based upon CCF's failure to abide by its established procedures in making funding recommendations. Process Appeals contesting the outcome of an RFP and/or a disagreement with, or objection to, the points awarded is not a sufficient basis for a Process Appeal.

The Process Appeal must be in writing and shall be limited to two (2) typed pages. The appeal must clearly state the factual grounds on which the appeal is based. All Process Appeal requests must be on an organization's letterhead and entitled "SIC-

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CJF-01 Sector Investment Coordinators – Process Appeal” Please do not include cover letters with the appeal request.

Process Appeals will be presented to the President/CEO or her/his designee. A Process Appeal must meet all the following criteria to be considered:

1. The request for the appeal must be submitted by the date and time specified by the RFP.
2. The person or entity requesting the appeal must assert in appropriate detail with factual reasons that CCF materially failed to follow procedures specified in its RFP document.
3. 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.
4. All Process Appeals must be in writing and emailed, within two (2) days of receiving a decision, to at CCF-CERF@calfund.org. On subject line of email submission please write “SIC-CJF-01 Sector Investment Coordinators – Process Appeal”
5. Appeals will not be accepted via facsimile or paper submission.

APPLICATION CONDITIONS AND RESERVATIONS

- A. All costs of responding to this RFP shall be borne solely by the Applicant. CCF shall not be liable for any expenses incurred by the Applicant in the preparation and/or submission of the information requested in this RFP. The Applicant shall not include any such expenses as part of their itemized budget in their RFP.
- B. During this RFP, Applicants may revise and re-submit their responses before the submission deadline.
- C. Responses may be withdrawn by written request of the authorized signatory on Applicant’s organization letterhead at any time.
- D. CCF reserves the right to verify information provided in each response. If an insufficient number of responses are received, CCF reserves the right to re-issue an RFP, execute a sole- source contract, or take any other action deemed appropriate by CCF.

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- E. CCF reserves the sole right to decline any submission in response to this RFP, if it is deemed inappropriate or incomplete, it fails to comply with any instruction contained in this RFP or is not in the best interest of CCF.
- F. CCF reserves the right to withdraw this Request for Proposal at any time without prior notice. Further, CCF makes no representation that any contract will be awarded to any applicant responding to this RFP. CCF reserves the right to reject any or all submissions.
- G. It is improper for any CCF employee to solicit consideration, in any form, from an Applicant with the implication, suggestion or statement that the Applicant will obtain any type of favorable treatment arising out of this RFP or that the Applicant's failure to provide such consideration may negatively affect the Applicant. An Applicant shall not offer or give, either directly or through an intermediary, consideration, in any form, to a CCF employee for the purpose of securing any type of favorable treatment that may arise from the RFP. An Applicant shall immediately report any attempt by a CCF employee to solicit such improper consideration for any reason whatsoever. The report shall be made to the President and CEO of CCF. Among other items, such improper consideration may take the form of cash, discounts, and service, the provision of travel or entertainment, or tangible gifts.
- H. Please be advised that, CCF may only consider minor modifications that clarify clauses in its existing contract template, and shall not entertain making major/substantive changes to or removing any clause, specifically:
- Invoicing for Payment
 - Invoicing Format and Content
 - Penalty
 - Work Products and Related Work Materials
 - Ownership, Confidentiality, and Use of Work Products
 - Indemnity
 - Insurance
- I. Negotiate with any, all or none of the applicants. If CCF is unable to negotiate final contract terms and conditions that are acceptable to CCF, CCF reserves the right to award the contract to another applicant.
- J. Award a contract to other than the lowest priced proposal.

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- K. Award a contract without interviews, discussions, or negotiations.

- L. Only award a contract or any portion thereof to a firm that possesses a valid business license. Firms must possess the license from any city or state by the RFP due date. CCF must be provided with a copy of this license, if requested; and

- M. Only award a contract or any portion thereof to a firm that passes any references checks.

**CALIFORNIA JOBS FIRST
LA COLLABORATIVE - CONFLICT OF INTEREST FORM**

SECTION I: INSTRUCTIONS

All persons or firms seeking contracts must complete and submit a California Jobs First LA Collaborative Conflict of Interest Form along with the proposal. This requirement also applies to any proposed subconsultant(s). Failure to comply with this requirement may cause your proposal to be declared non-responsive.

Any questions regarding the information required to be disclosed in this form should be directed to California Community Foundation (CCF), especially if you answer “yes” to any question in this form, as doing so **MAY** also disqualify your firm from submitting an offer on this proposal.

Name of Firm: _____

Name of Preparer: _____

Project Title: _____

RFP Name/Number: _____ **Date Submitted:** _____

SECTION II: QUESTIONS

1. Have you or any members of your firm been an employee of California Community Foundation (CCF) or Los Angeles County Economic Development Corporation (LAEDC) within the last twelve (12) months?

YES NO

If “yes,” please list name, position, and dates of service:

Name	Position	Dates of Service
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

2. Are you or any managers, partners, or officers of your firm related by blood or marriage/domestic partnership to California Community Foundation (CCF) or Los Angeles County Economic Development Corporation (LAEDC)?

YES NO

If “yes,” please list name and the nature of the relationship:

Name	Relationship
_____	_____

SECTION III: VALIDATION STATEMENT

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

DECLARATION

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

Signature of Person Certifying for Proposer
(original signature required)

Date

NOTICE

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

CONTRACTOR/VENDOR FORM

- New Contractor/Vendor
- Update Contractor/Vendor Record

NEW VENDOR INFORMATION

Vendor Name (as it appears on the W-9): _____

Vendor doing Business As (DBA): _____

Vendor EIN/Tax ID/SS#: _____

Mailing Address: _____

City/State/Zip: _____

Telephone: _____

EFT Notification Email: _____

EFT Contact Name: _____

Purchase Order Notification Email: _____ **Vendor requires 1099?**

Yes **No**

Purchase Order Contact Name: _____

UPDATING VENDOR INFORMATION

Previous Vendor Information		New Vendor Information	
<i>Vendor Name:</i>		<i>Vendor Name:</i>	
<i>Vendor DBA:</i>		<i>Vendor DBA:</i>	
<i>Street Address:</i>		<i>Street Address:</i>	
<i>City/State/Zip:</i>		<i>City/State/Zip:</i>	
<i>Telephone:</i>		<i>Telephone:</i>	
<i>EFT Email:</i>		<i>EFT Email:</i>	
<i>EFT Contact Name:</i>		<i>EFT Contact Name:</i>	
<i>PO Email:</i>		<i>PO Email:</i>	
<i>PO Contact Name:</i>		<i>PO Contact Name:</i>	

Requested By: _____ *Signature:* _____ *Date* _____

For Internal Use

Completed By: _____ *Date:* _____

Notice Regarding California Public Records Act

Section 1 - Summary

A proposal submitted in response to this RFP will be subject to public disclosure pursuant to the California Public Records Act, Cal. Gov. Code section 6250 et. seq., (the "Act"). The Act provides generally that all records relating to a public agency's business are open to public inspection and copying, unless specifically exempt from public disclosure under one of several exemptions set forth in the Act. If you believe that any portion of your proposal is exempt from disclosure under the California Public Records Act, **you must: 1). Mark such portion "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY," within your proposal; 2). Complete Section 2 below, and 3). Include this Attachment 9 in your submittal**, or your proposal will be subject to public disclosure under the Act. Proposals marked "TRADE SECRET," "CONFIDENTIAL," OR "PROPRIETARY" in their entirety will not be honored, and CCF will not deny public disclosure of proposals so marked. By submitting a proposal with specific material marked "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY," you represent you have a good faith belief that the material is exempt from disclosure under the Act; however, such designations will not necessarily be conclusive. You may be required to further justify in writing why such material should not, upon request, be disclosed by CCF under the Act. Fee and pricing proposals are not considered "TRADE SECRETS", "CONFIDENTIAL", or "PROPRIETARY".

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

Section 2 - Exemption Request

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

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

Attach additional pages as necessary.

Check here if proposer claims no exemption.

Name and Title: _____

Signature: _____ Date: _____

**California Community Foundation
Contractor Check List**

Required Contractor Qualifications

The following documentation is required for any entity the Foundation will be paying for services, whether classified as an Individual/Sole Proprietor, LLC, or Corporation.

- 1) Copies of any required business license or tax registrations specific to your business location. Documentation should be recent (1 year).
 - Guidance re: State of California [business registrations](#)
 - Guidance re: Los Angeles County [business licenses](#)
 - Guidance re: City of Los Angeles [Business Tax Registration Certification](#)
- 2) Documentation of contracts with other entities to provide the same or similar services
 - Options include but are not limited to: client list, list of references, etc.
 - Documentation should be recent (1-3 years)
- 3) Documentation of the same or similar services being publicly advertised and available
 - Options include but are not limited to: website, email blast, other media
- 4) W-9 (<https://www.irs.gov/pub/irs-pdf/fw9.pdf>)
- 5) Contact information, including physical address, phone, and email
- 6) Proposed scope of work
- 7) Term for services
- 8) Pricing for services

Please submit the above documentation to your Foundation contact or to grantsmanager@calfund.org.

Please initial to confirm you have read and acknowledge the above items must be

received prior to the Foundation issuing payment: _____