

File No. 240842

Committee Item No. 3

Board Item No. 7

## COMMITTEE/BOARD OF SUPERVISORS

### AGENDA PACKET CONTENTS LIST

Committee: Budget and Finance Committee Date September 25, 2024

Board of Supervisors Meeting Date October 1, 2024

#### Cmte Board

- |                                     |                                     |  |
|-------------------------------------|-------------------------------------|--|
| <input type="checkbox"/>            | <input type="checkbox"/>            | Motion                                       |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Resolution                                   |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Ordinance                                    |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Legislative Digest                           |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Budget and Legislative Analyst Report        |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Youth Commission Report                      |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Introduction Form                            |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Department/Agency Cover Letter and/or Report |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | MOU  |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Grant Information Form                       |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Grant Budget                                 |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Subcontract Budget                           |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Contract/Agreement                           |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Form 126 – Ethics Commission (8)             |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Award Letter                                 |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Application                                  |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Public Correspondence                        |

#### OTHER (Use back side if additional space is needed)

- |                                     |                                     |   |
|-------------------------------------|-------------------------------------|---|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <u>OEWD Statement on Retroactivity 9/18/2024</u>                |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <u>Presidential Action Memo – 30-Day Waiver 9/17/2024</u>       |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <u>Draft BAJFC Catalyst Application Submission Notification</u> |
| <input type="checkbox"/>            | <input type="checkbox"/>            | _____   |
| <input type="checkbox"/>            | <input type="checkbox"/>            | _____   |
| <input type="checkbox"/>            | <input type="checkbox"/>            | _____   |
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| <input type="checkbox"/>            | <input type="checkbox"/>            | _____   |

Completed by: Brent Jalipa Date September 19, 2024

Completed by: Brent Jalipa Date September 26, 2024

1 [Accept and Expend Grant - Retroactive - California Jobs First Catalyst Program -  
2 \$14,000,000]

3 **Ordinance retroactively authorizing the Office of Economic and Workforce**  
4 **Development to retroactively accept and expend a grant in the amount of \$14,000,000**  
5 **from the California Economic Development Department for the California Jobs First**  
6 **Catalyst Program, for the grant period of May 1, 2024, through September 30, 2026; and**  
7 **exempting the California Jobs First Catalyst Program subgrants from the grantmaking**  
8 **requirements under Administrative Code, Chapter 21G, and all other provisions in the**  
9 **Administrative, Environment, and Labor and Employment Codes imposing obligations**  
10 **or restrictions on subgrantees related to the program.**

11  
12 Be it ordained by the People of the City and County of San Francisco:

13  
14 Section 1. Background and Findings.

15 (a) The California Governor’s Office provided the California Employment  
16 Development Department (EDD) with California Jobs First Catalyst Program monies to bridge  
17 the gap between California Community Economic Resilience Fund (CERF) Phase I planning  
18 and regional economic development strategies and implementation projects designed to  
19 achieve outcomes that align with those strategies. The California Jobs First Catalyst Program  
20 is formerly known as the California Community Economic Resilience Fund (CERF).

21 (b) EDD required the nine-county Bay Area Jobs First Collaborative (BAJFC) Fiscal  
22 Agent to submit a California Jobs First Catalyst Program application on behalf of the nine-  
23 county Bay Area region to support a regional workforce development plan by identifying and  
24 implementing pre-development activities of exploratory or last-mile projects that align with  
25

1 existing regional investment priorities of equity, sustainability, job quality and access,  
2 economic competitiveness, and economic resilience.

3 (c) The Office of Economic and Workforce Development (OEWD) serves as the  
4 Fiscal Lead on behalf of BAGJPE, an unincorporated association of Bay Area workforce  
5 development boards, including the California Workforce Association, Alameda County  
6 Workforce Development Board (WDB), WDB of Contra Costa County, NOVAworks of Santa  
7 Clara County and City of Sunnyvale, Oakland WDB, OEWD, Richmond WDB, WDB of Solano  
8 County, Sonoma WDB, work2future of Santa Clara County and City of San Jose, and  
9 Workforce Alliance of the North Bay (Marin and Sonoma).

10 (d) BAGJPE, on behalf of BAJFC, applied for and was awarded a grant in the  
11 amount of \$14,000,000 by EDD to continue its work as the Fiscal Agent for the Bay Area Jobs  
12 First Catalyst Grant with All Home, Inc. as the Regional Convener.

13 (e) BAGJPE and All Home, Inc. proposed a regional community development  
14 strategy to coordinate workforce stakeholders and services across the San Francisco Bay  
15 Area region with critical partnership from BAJFC, which includes: All Home, Inc., Tides  
16 Center, BAGJPE, Bay Area Council, Alameda County Labor Council, Contra Costa Labor  
17 Council, San Mateo County Central Labor Council, Napa-Solano Central Labor Council, North  
18 Bay Labor Council, San Francisco Labor Council, San Francisco CLOUT, South Bay AFL-CIO  
19 Labor Council, Arts Contra Costa County, Asian Pacific Environmental Network, the  
20 Association of Bay Area Governments, Metropolitan Transportation Commission, Bay Area  
21 Community College Consortium, Bay Area Regional Health Inequities Initiative, Bloom  
22 Energy, BlueGreen Alliance, Building Skills Partnership, California Forward, California Green  
23 New Deal Coalition, Canal Alliance, Center for Sustainable Neighborhoods, Centro Legal de  
24 la Raza, Chinese Progressive Association, Construction Trades Workforce Initiative, Contra  
25 Costa Economic Partnership, East Bay Economic Development Alliance, Emerald Cities

1 Collaborative, Fair Housing Napa Valley, Greenbank Associates, Greenbelt Alliance, Jobs  
2 with Justice San Francisco, North Bay Jobs with Justice, North Bay Leadership Council,  
3 University of California at Berkeley Othering and Belonging Institute, Port of Oakland,  
4 Prospera, ReWork the Bay, Rural County Representatives of California, San Francisco  
5 Building and Construction Trades Council, San Francisco Foundation, ReWork the Bay/a  
6 project of San Francisco Foundation, San Mateo County Economic Development Association,  
7 Services Immigrant Rights and Education Network, Sierra Club San Francisco Bay Chapter,  
8 Silicon Valley Creates, Silicon Valley Leadership Group, Solano Economic Development  
9 Corporation, SOMOS Mayfair, Transition US, University of California at Berkeley Labor  
10 Center, United Way Bay Area, UpValley Family Centers of Napa Valley, and Working  
11 Partnerships.

12 (f) BAJFC created a Steering Committee during the CERF Phase I Planning grant  
13 composed of 21 members with balanced representation from Bay Area workforce, community,  
14 labor, business, government, economic development, education, philanthropy, and indigenous  
15 communities.

16 (g) EDD required BAJFC to continue its work and the Steering Committee structure  
17 through the Bay Area Jobs First Catalyst program.

18 (h) The BAJFC Steering Committee will develop an application process to disburse  
19 Bay Area Jobs First Catalyst funds for special project initiatives that build regional economic  
20 development infrastructure in the Bay Area, and the Steering Committee will review  
21 applications and determine entities to fund, that meet BAJFC's vision and principles.

22 (i) OEWD is not part of the Steering Committee, or involved in the selection  
23 process of the funded entities, and OEWD's involvement is limited to redistributing Bay Area  
24 Jobs First Catalyst funds as directed by the Steering Committee.

25 (j) The program period is from May 1, 2024 to September 30, 2026.

1 (k) The redistribution of the award of \$14,000,000 from EDD to partners selected by  
2 the Steering Committee could be construed as a “grant” under Administrative Code  
3 Chapter 21G (“Chapter 21G”).

4 (l) The California Jobs First Catalyst Program is structured differently than most  
5 other City grant programs in the following ways that make compliance with Chapter 21G  
6 impractical: (1) The California Jobs First Catalyst Program does not expend any general funds  
7 of the City; (2) OEWD’s role is to redistribute state monies to entities selected by BAJFC  
8 through an open application and selection process for the California Jobs First Catalyst  
9 Program; and (3) the entities named by EDD are mostly from neighboring Bay Area regions  
10 that do not conduct business within the City.

11 (n) A request for retroactive approval is being sought because OEWD received the  
12 award on January 25, 2024 for a project start date of May 1, 2024.

13 (o) OEWD received a set-aside of \$1,500,000 by EDD for its Fiscal Lead services.  
14

15 Section 2. Authorization to Accept and Expend Grant Funds.

16 (a) The Board of Supervisors hereby authorizes the Office of Economic and  
17 Workforce Development (OEWD) to retroactively accept and expend, as Fiscal Lead on  
18 behalf of BAGJPE, All Home, and BAJFC, a grant from the California Employment  
19 Development Department (EDD) in the amount of \$14,000,000 pursuant to its CA Jobs First  
20 Catalyst Program for work related to identifying and implementing pre-development activities  
21 of exploratory or last-mile projects that align with existing regional investment priorities and  
22 coordination of workforce stakeholders and services across the San Francisco Bay Area  
23 region, for a grant period of May 1, 2024 through September 30, 2026.

24 (b) The Board of Supervisors hereby authorizes the Executive Director of OEWD, or the  
25 Executive Director’s designee, to furnish additional information or assurances EDD may

1 request in connection with the California Jobs First Catalyst grant, as allowed by law, and to  
2 take any other steps necessary to accept, distribute, and expend the grant funds.

3 (c) The BAJFC nonprofit and government partners may receive California Jobs First  
4 Catalyst funds under this award from OEWD as the passthrough entity without going through  
5 a competitive solicitation process.

6

7 Section 3. Exemption from Standard Grant Requirements.

8 The Board of Supervisors hereby authorizes the exemption of any agreement under the  
9 California Jobs First Catalyst Program from the grantmaking requirements under  
10 Administrative Code Chapter 21G and all other provisions in the Administrative, Environment,  
11 and Labor and Employment Codes that would otherwise impose obligations or restrictions on  
12 the program, including but not limited to the competitive solicitation and written grant  
13 agreement requirements, because the subgrant recipients are chosen at the direction of the  
14 Bay Area Jobs First Collaborative (“BAJFC”) Steering Committee, and will not be City  
15 contractors or grantees in the ordinary sense of those terms.

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4 APPROVED AS TO FORM:

5

6 By: /s/ Mary Kamikihara

7 MARY KAMIHARA

8 Deputy City Attorney

9

10 APPROVED: \_\_\_\_\_ /s/

11 Mayor

12

13 APPROVED: \_\_\_\_\_ /s/

14 Controller, Grant Division

15

16 Recommended:

17

18 \_\_\_\_\_ /s/

19 SARAH DENNIS PHILIPS

20 Executive Director

21

22

23

24

25

**LEGISLATIVE DIGEST**

[Accept and Expend Grant - Retroactive - California Jobs First Catalyst Program - \$14,000,000]

**Ordinance authorizing the Office of Economic and Workforce Development to retroactively accept and expend a grant in the amount of \$14,000,000 from the California Economic Development Department for the California Jobs First Catalyst Program, for the grant period of May 1, 2024, through September 30, 2026; and exempting the California Jobs First Catalyst Program subgrants from the grantmaking requirements under Administrative Code, Chapter 21G, and all other provisions in the Administrative, Environment, and Labor and Employment Codes imposing obligations or restrictions on subgrantees related to the program.**

Amendments to Current Law

The proposed ordinance authorizes the Office of Economic and Workforce Development (OEWD) to accept and expend a \$14,000,000 grant from the California Jobs First Catalyst Program, formerly known as California Economic Development Department's Community Economic Resilience Fund (CERF).

OEWD serves as the Fiscal Lead on behalf of Bay Area Good Jobs Partnership for Equity (BAGJPE), an unincorporated association of Bay Area workforce development boards. BAGJPE, on behalf of Bay Area Jobs First Collaborative (BAJFC), applied for and was awarded a grant in the amount of \$14,000,000 by EDD to continue its work as the Fiscal Agent for the Bay Area Jobs First Catalyst Grant with All Home, Inc. as the Regional Convener. BAGJPE and All Home, Inc. proposed a regional community development strategy to coordinate workforce stakeholders and services across the San Francisco Bay Area region with critical partnership from BAJFC.

BAJFC created a Steering Committee during the Phase I Planning grant, composed of 21 members with balanced representation from Bay Area workforce, community, labor, business, government, economic development, education, philanthropy, and indigenous communities. EDD required BAJFC to continue its work and the Steering Committee structure through the Bay Area Jobs First Catalyst program. The BAJFC Steering Committee will develop an application process to disburse Bay Area Jobs First Catalyst funds for special project initiatives that build regional economic development infrastructure in the Bay Area, and the Steering Committee will review applications and determine entities to fund, that meet BAJFC's vision and principles. OEWD is not part of the Steering Committee or involved in the selection process of the funded entities.

The proposed ordinance would authorize OEWD to retroactively accept and expend, as fiscal lead on behalf of the BAGJPE, All Home and BAJFC, this grant for work related to identifying



and implementing pre-development activities of exploratory or last-mile projects that align with existing regional investment priorities and coordination of workforce stakeholders and services across the San Francisco Bay Area region, for a grant period of May 1, 2024 through September 30, 2026.

The ordinance would also exempt any agreement under the California Jobs First Catalyst Program from the grantmaking requirements under Administrative code Chapter 21G and all other provisions in the Administrative, Environment, and Labor and Employment Codes that would otherwise impose obligations or restrictions on the program.

### Background Information

The State of California created the California Jobs First Catalyst Program, formerly known as CERF, to promote a sustainable and equitable recovery from the economic distress of COVID-19 by supporting new plans and strategies to diversify local economies and develop sustainable industries that create high-quality, broadly accessible jobs for all Californians. The \$600 million fund is divided into a Phase I Planning Grant and Phase II Implementation Grant.

The Phase II Implementation Grant will fund projects in localities across the regions based on regional plans developed and criteria outlined in the Phase I Planning stage. Phase II ensures projects support economic recovery and transition for populations and/or industries disproportionately impacted by COVID-19, while promoting economic diversification, sustainability, and equity. Projects throughout the region will advance globally competitive and sustainable industries and high-quality jobs with clear employment pathways for underserved and incumbent workers, to align with state climate and health goals.

The State identified 13 regions in California, including the nine-county Bay Area region. The State required the Bay Area to identify a Regional Convener and a Fiscal Agent on behalf of the Bay Area and its regional economic and workforce development stakeholders. Through a proposal development process which included over 50 major economic and workforce development entities, Bay Area Jobs First Collaborative (BAJFC), formerly known as BA-HRTC, identified All-Home to be the Bay Area's Regional Convener and OEWD to be the Fiscal Lead.

On behalf of the Governor's Office of Business and Economic Development and the Governor's Office of Planning and Research, California Employment Development Division awarded OEWD the CERF grant (now known as California Jobs First Catalyst Program grant) for Phase I to develop unified regional economic and workforce development strategic plans; and execute a broad community engagement process for the Bay Area region.

Now, on behalf of the Governor's Office of Business and Economic Development and the Governor's Office of Planning and Research, California Employment Development Division

awarded OEWD for Phase II, a \$14 million regional fund to implement projects identified in the planning stage of Phase I.

**File Number:** 240842  
(Provided by Clerk of Board of Supervisors)

**Grant Ordinance Information Form**  
(Effective July 2011)

Purpose: Accompanies proposed Board of Supervisors ordinances authorizing a Department to accept and expend grant funds.

The following describes the grant referred to in the accompanying resolution:

- 1. Grant Title: California Jobs First Catalyst Program
- 2. Department: Office of Economic & Workforce Development
- 3. Contact Person: Alesandra Lozano Telephone/Email: alesandra.lozano@sfgov.org
- 4. Grant Approval Status (check one):  
 Approved by funding agency                       Not yet approved

5. Amount of Grant Funding Approved or Applied for: \$14,000,000

- 6. a. Matching Funds Required: \$ 0
- b. Source(s) of matching funds (if applicable): N/A

- 7. a. Grant Source Agency: CA Employment Development Department
- b. Grant Pass-Through Agency (if applicable): N/A

8. Proposed Grant Project Summary:  
As core partners of the California Jobs First Catalyst Program (formerly the Community Economic Resilience Fund), OEWD, the Bay Area Good Jobs Partnership for Equity, and All Home will lead regional and economic planning, stakeholder engagement, program design, and the launch of and/or continued expansion of regional initiatives in service of opportunities for the regional workforce.

9. Grant Project Schedule, as allowed in approval documents, or as proposed:

Start-Date: May 1, 2024    End-Date: September 30, 2026

10. Number of new positions created and funded: 0

11. Explain the disposition of employees once the grant ends? n/a

- 12. a. Amount budgeted for contractual services: \$13,400,000
- b. Will contractual services be put out to bid? No
- c. If so, will contract services help to further the goals of the Department's Local Business Enterprise (LBE) requirements? N/A
- d. Is this likely to be a one-time or ongoing request for contracting out? One-time

- 13. a. Does the budget include indirect costs?  
 Yes                       No
- b. 1. If yes, how much? \$
- b. 2. How was the amount calculated?
- c. 1. If no, why are indirect costs not included?  
 Not allowed by granting agency                       To maximize use of grant funds on direct services

[X] Other (please explain): The Fiscal Agent was allocated set costs by the grantor, and its allocation went to fiscal project staffing.

c. 2. If no indirect costs are included, what would have been the indirect costs? \$150,000

14. Any other significant grant requirements or comments:

**\*\*Disability Access Checklist\*\***

15. This Grant is intended for activities at (check all that apply):

- |  |   |  |
|--|---|--|
| <input checked="" type="checkbox"/> Existing Site(s) | <input type="checkbox"/> Existing Structure(s)      | <input type="checkbox"/> Existing Program(s) or Service(s) |
| <input type="checkbox"/> Rehabilitated Site(s)       | <input type="checkbox"/> Rehabilitated Structure(s) | <input type="checkbox"/> New Program(s) or Service(s)      |
| <input type="checkbox"/> New Site(s)                 | <input type="checkbox"/> New Structure(s)           |  |

16. The Departmental ADA Coordinator or the Mayor's Office on Disability have reviewed the proposal and concluded that the project as proposed will be in compliance with the Americans with Disabilities Act and all other Federal, State and local access laws and regulations and will allow the full inclusion of persons with disabilities, or will require unreasonable hardship exceptions, as described in the comments section:

Comments:

Departmental ADA Coordinator or Mayor's Office of Disability Reviewer:

Armina Brown

(Name)

Office Manager

(Title)

Date Reviewed: 7/19/2024 | 5:25 PM PDT

DocuSigned by:  
Armina Brown  
958706D170304F1...

(Signature Required)

Overall Department Head or Designee Approval:

Sarah Dennis Phillips

(Name)

Executive Director, Office of Economic & Workforce Development

(Title)

Date Reviewed: 7/19/2024 | 12:41 PM PDT

DocuSigned by:  
Sarah Dennis Phillips  
CFD077DCF0E2478...

(Signature Required)

STATE OF CALIFORNIA - DEPARTMENT OF GENERAL SERVICES

**STANDARD AGREEMENT**

STD 213 (Rev. 04/2020)

AGREEMENT NUMBER <b>M101332-7100</b>	PURCHASING AUTHORITY NUMBER (If Applicable) <b>EDD-7100</b>
---	--

1. This Agreement is entered into between the Contracting Agency and the Contractor named below:

CONTRACTING AGENCY NAME

Employment Development Department

CONTRACTOR NAME

San Francisco Office of Economic & Workforce Development on behalf of the Bay Area Good Jobs Partnership for Equity

2. The term of this Agreement is:

START DATE

May 1, 2024, or upon final approval, whichever is later

THROUGH END DATE

September 30, 2026

3. The maximum amount of this Agreement is:

\$13,000,000.00 (Thirteen Million Dollars and Zero Cents)

4. The parties agree to comply with the terms and conditions of the following exhibits, which are by this reference made a part of the Agreement.

Exhibits	Title	Pages
Exhibit A	Scope of Work	7
Attachment A-1	Project Narrative	6
Attachment A-2	Fiscal and Program Requirements	3
+ - Exhibit B	Budget Detail and Payment Provisions	2
+ - Attachment B-1	Budget Summary	2
+ - Exhibit C*	General Terms and Conditions	GTC 04/2017
+ - Exhibit D	Special Terms and Conditions	7
+ - Exhibit E**	Contractor's Response to Solicitation for Proposal	
+ - Exhibit F**	California Jobs First Catalyst Program Solicitation for Proposal	
+ -	**Items shown with a double asterisk (**) are hereby incorporated by reference and made part of this Agreement as if attached hereto.	

*Items shown with an asterisk (\*), are hereby incorporated by reference and made part of this agreement as if attached hereto.*

*These documents can be viewed at <https://www.dgs.ca.gov/OLS/Resources>*

**IN WITNESS WHEREOF, THIS AGREEMENT HAS BEEN EXECUTED BY THE PARTIES HERETO.**

**CONTRACTOR**

CONTRACTOR NAME (if other than an individual, state whether a corporation, partnership, etc.)

San Francisco Office of Economic & Workforce Development on behalf of the Bay Area Good Jobs Partnership for Equity

CONTRACTOR BUSINESS ADDRESS

1 South Van Ness Ave, Fifth Floor

CITY

San Francisco

STATE

CA

ZIP

95103

PRINTED NAME OF PERSON SIGNING

Sarah Dennis Phillips

TITLE

Executive Director, OEWD

CONTRACTOR AUTHORIZED SIGNATURE

DATE SIGNED

STATE OF CALIFORNIA - DEPARTMENT OF GENERAL SERVICES

**STANDARD AGREEMENT**

STD 213 (Rev. 04/2020)

AGREEMENT NUMBER M101332-7100	PURCHASING AUTHORITY NUMBER (If Applicable) EDD-7100
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**STATE OF CALIFORNIA**

CONTRACTING AGENCY NAME

Employment Development Department

CONTRACTING AGENCY ADDRESS

722 Capitol Mall, MIC 62-C

CITY

Sacramento

STATE

CA

ZIP

95814

PRINTED NAME OF PERSON SIGNING

Lauren Prizmich

TITLE

Chief, Office of Procurement, Contracting & Admin

CONTRACTING AGENCY AUTHORIZED SIGNATURE

DATE SIGNED

CALIFORNIA DEPARTMENT OF GENERAL SERVICES APPROVAL

EXEMPTION (If Applicable)

SCM Vol. 1 Section 4.06

**EXHIBIT A  
SCOPE OF WORK  
(Standard Agreement)**

1. This Agreement is entered into by and between the Employment Development Department, hereinafter referred to as the EDD, and the: San Francisco Office of Economic & Workforce Development (SFOEWD) on behalf of the Bay Area Good Jobs Partnership for Equity (BAGJPE), hereinafter referred to as the Grantee, for the purposes of implementing the CA Jobs First, Catalyst Program. The purpose of the Catalyst funding is to support each region's Jobs First Collaboratives to invest in pre-development activities, enabling regions to develop projects and maximize investment opportunities.
2. The Grantee will comply with the terms and conditions set forward in this Agreement, guidance provided by the EDD and the Inter-Agency Leadership Team during the agreement period, the Solicitation for Proposal (SFP) for the Catalyst Program Year 2023-24, and the Grantee's response to the SFP, which, by this reference are both incorporated and made part of the Agreement.
3. The Project Representatives during the term of this Agreement will be:

State Agency

Employment Development Department  
Attn: Adriana Avalos  
722 Capitol Mall, MIC 50  
Sacramento, CA 95814  
Phone: 916-839-9958  
E-Mail: [adrianac.avalos@edd.ca.gov](mailto:adrianac.avalos@edd.ca.gov)

Fiscal Agent

San Francisco Office of Economic & Workforce Development on behalf of the Bay Area Good Jobs Partnership for Equity  
Attn: Chad Houston  
1 South Van Ness Ave, Fifth Floor  
San Francisco, CA 95103  
Phone: (415) 701-4843  
E-mail: [Chad.houston@sfgov.org](mailto:Chad.houston@sfgov.org)

Changes to the EDD contract representative will not require an amendment to the contract.

4. Responsibilities of the Fiscal Agent  
Responsibilities of the Fiscal Agent: The scope of services provided by the fiscal agent include, but are not limited to:

**Control of the Fund:** Establish, manage, and maintain an appropriate system of internal controls, accounting records, and documentation of the receipt and disbursement of the funds for review or reproduction upon written request by the EDD according to Generally Accepted Accounting Procedures, other state regulatory requirements, and the direction of the EDD.

**EXHIBIT A  
SCOPE OF WORK  
(Standard Agreement)**

The Recipient of Advance Payment must deposit any funds received as an advance payment into a federally insured, interest-bearing account that provides the ability to track interest earned and withdrawals. Any accumulated interest shall be deemed to be grant moneys, subject to federal laws and regulations, and the recipient shall report interest earned on the advanced payment to the administering state agency.

**Program Ledgers and Monthly Reporting:** Maintain a separate ledger for each program that shows the total amount of funds available for each program, and monthly program deductions (i.e., payments to subcontractors). At a minimum, each ledger entry must include the subcontractor agreement number, invoice date, payment date, and a description of the payment. Individual divisions may require additional ledger information. The Fiscal Agent will prepare and disseminate financial reports on a monthly basis, or as requested, in formats prescribed by the EDD.

**Sub-Contract/Sub-Awarding Administration and Disbursement of Funds:** Enter into agreements with vendors and other third parties to support the identified programs on behalf of the Collaborative. Disburse funds in satisfaction of payment obligations under each agreement. The Fiscal Agent shall disburse funds based upon invoices reviewed and approved by the personnel designated by the lead applicant when in support of the Catalyst grant. The Fiscal Agent must assist the EDD with the timely closing out of grants and programs with respect to the Jobs First Collaborative agreements. The Fiscal Agent must also ensure funding is encumbered and expended by timelines set by the EDD.

**Audits:** Cooperate with the EDD exercising lawful authority, or their respective agents, by providing all documentation promptly upon request.

**Public Records:** Cooperate with the EDD in responding to any requests under the Public Records Act for records related to the Fiscal Agent.

**Memorandum of Understandings (MOUs):** Fiscal Agent and Regional Convenor(s) MOU must include a mutual agreement of each entity's roles and responsibilities and a commitment to work together to achieve the goals, objectives, and deliverables of the Catalyst Program. MOUs must be submitted to the EDD upon request.

**Reporting:** Prepare and disseminate reports pursuant to State reporting requirements including, but not limited to the reporting requirements contained in California Unemployment Insurance Code, Section 14531(g).

**Accounts:** Maintain System for Award Management (SAM) account and have Unique Entity ID number

**Other Services:** Provide financial or contract management services on an as-needed basis (e.g., conducting competitive bidding) to ensure the smooth administration of the funds as required by funding requirements and direction by the EDD.



**EXHIBIT A  
SCOPE OF WORK  
(Standard Agreement)**

5. Catalyst Program Requirements

- A. Collaboration with the Inter-Agency Team:  
Project monitoring and oversight is essential to ensure the Project stays within scope and is completed on schedule and within budget in accordance with this Agreement. The Grantee is required to work with the Inter-Agency Team and participate in regularly scheduled reporting meetings. The Grantee may be required to participate in larger CA Jobs First convenings in person or virtually depending on the scope of the meeting.
- B. Collaboration with the Program Evaluator:  
The State will pursue a statewide developmental evaluation to explore the success of the Regional Investment Initiative and of the activities awarded through the Catalyst Program alongside other grant activities. The Grantee is required to participate in that evaluation by providing the requested data and information. Therefore, throughout the period of performance, the Grantee and its' subrecipients and subcontractors must document lessons learned and effective practices ascertained through this project. At designated points throughout the fiscal year, the Inter-Agency Leadership Team may set annual priorities, evaluate progress against goals and objectives, discuss new strategies to improve program outcomes and align available funding to maximize results for the State.
- C. Communities of Practice:  
Collaboration across regions will be required to create collectively a more resilient statewide economy that brings equal opportunities to every region. Awardees will be required to participate in Communities of Practice meetings. These convening's will ensure progress, share best practices and lessons learned across the regions, and provide technical assistance by the state.
- D. The established Jobs First Collaboratives, with the support of the Regional Convener, are expected to adhere to the following activities:
- i. Continue to expand regional outreach and engagement activities, ensuring inclusion of disinvested communities;
  - ii. Continuously update research to keep plans current for future funding opportunities and planning processes;
  - iii. Coordinate Implementation Phase application process;
  - iv. Collaborate with the GO-Biz Community & Place-Based Solutions team and the U.S. Economic Development Administration to develop Economic Development Districts where they do not currently exist;
  - v. Track the projects identified by the Jobs First Collaboratives, including applications and awards for additional funding from other sources;
  - vi. Identify projects in the exploratory, last mile, and ready-to-go categories.

**EXHIBIT A**  
**SCOPE OF WORK**  
**(Standard Agreement)**

- E. Sector Investment Coordinators: Ensure that the region identifies no more than five positions or sub-contracts, either as new staff at the Conveners or at another identified organization in the region. The positions will execute the following activities on behalf of the Jobs First Collaborative:
- i. Work within the Jobs First Collaborative on industries prioritized in the Planning Phase;
  - ii. Support the Jobs First Collaborative in cataloguing 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;
  - iii. Work with GO-Biz staff and regional partners to find and apply for state, federal, and private grants;
  - iv. Align Jobs First Collaborative -identified projects with federal funding;
  - v. 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 or sectors;
  - vi. Provide or procure Technical Assistance for Implementation grant applications and administration.
- F. The Jobs First Collaborative must identify projects labeled as “exploratory” or “last mile,” with the intent of identifying viable projects that could become “ready-to-go” or any projects that may be non-viable. These projects must align with existing Regional Investment Initiative priorities of equity, sustainability, job quality and access, economic competitiveness, and economic resilience. Projects must also adhere to federal, program specific Justice40 guidelines. The State, in partnership with Jobs First Collaborative, may provide additional guidance on project requirements, project selection criteria, and project readiness criteria. Pre-development activities include, but are not limited to:
- i. Feasibility studies; market analysis; environmental assessments, surveys, and remediation; site acquisition; site and development plans; project designs; permitting; establishing a regional tax increment financing district (TIF); drafting and negotiating Community Benefits Agreements and Community Workforce Agreements; establishing public-private partnerships, Community Development Corporations and Community Development Financial Institutions; revolving loan funds; joint powers authorities; financial planning (e.g., preliminary budget and construction financing); with the goal of establishing long-term funding opportunities for implementation of Planning Phase regional strategies;
  - ii. Basic environmental infrastructure pre-development, construction, and development of long-term operations and maintenance plans for infrastructure such as: clean water supply systems; wastewater systems; waste disposal systems; pollution control services;

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

After receiving Catalyst funds, ready-to-go projects may be eligible for additional funding from local, state, or federal governments, philanthropy, or private investors, or that align and complement state or federally funded projects. The Catalyst Program funds may also be identified in federal grant applications as matching funds.

6. Required Notices

The Grantee shall promptly notify the EDD, in writing, of the following items:

- A. Events or proposed changes that could affect the scope, budget or work performed under this Agreement. The Grantee agrees that no substantial change in the scope of the Project will be undertaken until written notice of the proposed change has been provided to the EDD and the EDD has given written approval for such change. Requested changes to scope of work and/or budget are subject to contracting processes and procedures which may take 2-4 months for approval.
- B. Any public or media event publicizing the accomplishments and/or results of this Agreement and provide the opportunity for attendance and participation by the Inter-Agency Team representatives. The Grantee shall make such notification at least 21 calendar days prior to the event.
- C. The initiation of any litigation or the threat of litigation against the Grantee regarding the Project or that may affect the Project in any way. Grantee shall notify the EDD within 10 calendar days.

7. Agreement Amendments

The Grantee will have the opportunity to submit modifications during the period of performance to accurately reflect necessary adjustments for the success of the Catalyst program. All modifications will require written approval from the EDD. Except as otherwise specified, the Grantee must request and obtain prior written approval before any modification (amendment) to this Agreement is valid.

- A. Request for amendments must:
  - i. Be prepared, in writing, on official letterhead and signed by the Authorized Signatory or designee on file with the Department.

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- ii. Include a detailed explanation of the proposed amendment, reason for the amendment, and the effect of not approving the request.
- iii. Include a copy of the document(s) requested for amendment that shows the requested changes.

**B. Funding Amendments:**

- i. The proposed funding is based on the anticipated availability of relevant funds. Should funding availability change, the EDD reserves the right to make any necessary amendments to the agreement amount. The EDD may add additional funds to this agreement based on the availability of funds under the Regional Investment Initiative Program.

**C. Period of Performance Amendments:**

- i. Failure to successfully meet Catalyst scope of work requirements may result in full or partial de-obligation of the funding and/or a shorter period of performance of this contract.
- ii. Amendment extensions beyond September 30, 2026, are subject to legislative changes, funding expenditure timeline extensions, and/or final approval from the Inter-Agency Leadership team. Catalyst Program may be extended to run parallel to the Implementation Phase under the Regional Investment Initiative Program, given the intent of the Catalyst program.

D. The EDD reserves the right to request project modifications and agreement amendments as necessary for the success of the project.

E. No oral understanding or change not incorporated in this Agreement is binding on any of the parties.

**8. Glossary of Terms**

**Regional Investment Initiative:** The Regional Investment Initiative is designed as a two-phase grant structure (Planning Phase and Implementation Phase) that supports bottom-up regional planning processes and invests in projects to advance regional economic and community development. The initiative focuses on five objectives: equity, sustainability, job quality and access, economic competitiveness, and economic resilience. During the Catalyst Program (2023-2024) each region must adhere to the two core goals: Strengthen Jobs First Collaboratives social infrastructure to allow for continued regional inclusive planning and will enable regions to build a pipeline of viable, ready-to-go aligned projects. In turn, this will maximize funding opportunities by capitalizing on federal, state, and private investments, as well as alleviating timeline constraints by enabling aligned projects to compete for funding beyond the lifetime of the program.

Pre-development funds will expand on the work of the Planning Phase and catalyze projects in disinvested communities across the state while giving regions the flexibility to design projects that meet their needs. These funds will enable communities across California to develop projects that

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align with the vision of the Jobs First Collaboratives and position them to access additional federal, state, and private funds.

**Jobs First Collaboratives:** The Jobs First Collaboratives will be composed of an administrative Fiscal Agent, a Regional Convener, and a wide range of diverse partners reflecting the diversity of each region. Catalyst grants will be administered jointly by the Fiscal Agent and Regional Convener.

**Inter-Agency Leadership Team:** The Inter-Agency Leadership Team, comprised of the Labor and Workforce Development Agency, the Governor's Office of Planning and Research, and the Governor's Office of Business and Economic Development, is responsible for planning, oversight, and decision-making for the Regional Investment Initiative

**Inter-Agency Team:**

- A. The Labor and Workforce Development Agency (LWDA): LWDA will provide oversight to ensure that Regional Investment Initiative and this project remain in alignment with labor and workforce development objectives.
- B. The EDD: EDD's Workforce Services Branch (WSB) will be responsible for the management and execution of this grant, including the administration of and accountability of this project.
- C. The Governor's Office of Planning and Research (OPR): OPR will manage the design and operations of the program. In addition, OPR will be responsible for providing technical assistance, intended to support and guide processes and deliverables for this project.
- D. The Governor's Office of Business and Economic Development (GO-Biz): GO-Biz will provide support with outreach, technical assistance, and capacity building.

**ATTACHMENT A-1  
PROJECT NARRATIVE  
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<b>Catalyst Program Applicant Information</b>	
Instructions: Please complete the table with the information requested.	
<b>Name of Applicant:</b> San Francisco Office of Economic & Workforce Development on behalf of the Bay Area Good Jobs Partnership for Equity	
<b>Applicant Point of Contact</b>	
Name: Jen Hand	Title: Workforce Impact Manager
Email: Jennifer.Hand@sfgov.org	Tel: (415) 701-4830
<b>California Jobs First Region:</b> Bay Area	

**Catalyst Program Narrative Questions**

Instructions: Answer each of the following questions regarding the regional High Road Transition Collaborative (HRTC)’s application for Catalyst Program funds. Refer to the Catalyst Framework and closed solicitation for required activities. Please limit responses to 500 words.

- 1. Explain how the HRTC may expend Catalyst Program funds to support pre-development of projects that prioritize equity, sustainability, job quality and access, economic competitiveness, and economic resilience.**

The vision of the Bay Area’s High Road Transition Collaborative (BA-HRTC), now known as the Bay Area Jobs First Collaborative, is to re-envision regional economic development planning, centered around the values of equity, high-road employment, sustainability, and climate resilience, and shaped by workers and impacted community members themselves. A central principle and priority for this initiative is deep and meaningful outreach and engagement with workers and communities. “Meaningful engagement” means engagement designed to build a durable and lasting structure for community planning that gives community members meaningful decision-making authority so that they are not passive participants, but rather active agents in shaping the vision for the future of their community and the region.

Outreach and engagement is built into the BA-HRTC governance structure, in particular through the seating of six subregional tables, which are designed to: (1) center grassroots leadership of workers and historically disinvested communities in the region’s economic development; (2) provide bottom-up direction to guide the BA-HRTC Steering Committee in the research process, policy decisions and metrics; and (3) identify and build consensus around potential regional projects. The BA-HRTC intends to work through the subregional tables to identify potential projects for Catalyst Program funds and determine what resources they need to move to implementation. The Steering Committee will make

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the final determination about what projects to fund.

The goal of the pre-development funding will be to respond to ideas coming from the community that advance equity, sustainability, job quality and access, economic competitiveness, and economic resilience. The six subregional tables have recently been seated and have begun meeting but have not yet identified specific projects for potential pre-development funding. The research team is in the process of developing the required Research Report to be submitted to the State at the end of December 2023. As part of this work, some preliminary themes have begun to emerge that may inform the identification and selection of projects. Labor market analyses show that despite more recent improvements, substantial challenges persist for workers, especially across gender, race, education, and occupation categories. For instance, women, Black, Latino and immigrant workers are disproportionately employed in precarious jobs. Housing, transportation, and childcare costs are significant barriers to accessing high road jobs. And on the demand side, there are not enough high road jobs available to meet the supply of workers, even if all barriers were removed; while jobs earning the lowest wages in the region, such as personal care aides, janitors, and truck drivers, often pay poverty-level wages yet provide essential services. Ensuring these essential workers are self-sufficient and can provide for their families is crucial to the future economic success of the Bay Area. In selecting projects for Catalyst Fund pre-development dollars, BA-HRTC will consider how they address these and other labor market conditions, for example, how they might remove or lower barriers to high road jobs.

**2. Explain how the proposed activities may advance the objectives of the California Jobs First Planning Phase and the goals of the HRTC.**

During the Planning Phase, the BA-HRTC identified five guiding principles and key goals:

1. Climate Resilience Led by Frontline Communities and Workers
2. Lift Up Job Quality, Grow High-Road Jobs, Elevate Racial Equity and Worker Voice
3. Honor Local Without Losing the Power of the Region
4. Inclusive, Democratic, Grassroots Governance
5. Take Action Towards Transformational Change

With these principles at the forefront, the BA-HRTC—led by All Home as the Regional Convenor and Bay Area Good Jobs Partnership for Equity (BAGJPE) as the Fiscal Agent—has established a Governance Structure that includes: a Steering Committee, composed of 21-members across essential planning sectors; a Research, Planning and Community Engagement Committee; and (6) Sub-Regional Tables organized by geography. These bodies are all now seated and have begun work to further refine the initiative’s goals and activities.

BA-HRTC has identified four primary goals and activities, all of which would benefit from Catalyst 2.0 funding:

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1. **Driving deep and meaningful community engagement** with a focus on equity. This work is primarily being accomplished through the six subregional tables and includes engagement with members affiliated with labor and/or community organizations as well as stakeholders unaffiliated with either sector or other formal institutions. This work has the potential to be supported through funding from the Catalyst 2.0 pre-development component, particularly using funding to build and sustain the capacity of project leads and partners.
2. **Identifying projects** to compete for California Jobs First funding as well as other funding sources. The goal is to identify pilot initiatives with potential regional impacts that are aligned with BA-HRTC goals and will be most competitive in the State grant-making process. This work is also primarily being undertaken by the subregional tables, through intensive community outreach and engagement to identify potential projects and determine what resources are needed to help them move from concept to implementation. This work will also be supported by the pre-development component of Catalyst 2.0.
3. **Building infrastructure for economic development.** The BA-HRTC set out to accomplish long term systemic change and build robust infrastructure for equitable, high-road economic development, while at the same time addressing shorter term community and worker needs. The goal is to create a long-lasting regional economic development infrastructure that will empower communities and workers across the Bay to lead equitable, high-road climate and economic development projects; and position the region to attract additional capital and resources beyond California Jobs First. All Home, the Regional Convenor for BA-HRTC, will tap into the Regional Convenor component of the Catalyst 2.0 opportunity to support project staffing, coordination of contracted research partners, and facilitation, technical assistance, and other consulting support.
4. **Identifying additional funding sources.** The State's California Jobs First funding, while substantial, is not sufficient to accomplish the ambitious goals set out by BA-HRTC. The Catalyst 2.0 Sector Investment Coordinators component will be used, in part, to support work to align with and leverage other major funding initiatives such as the Inflation Reduction Act, Infrastructure Investment and Jobs Act, CHIPS Act, private philanthropy and investment and other sources.

**3. As best as can be explained at this time, explain how existing HRTC governance structures and decision-making processes may be adapted to integrate Catalyst Program activities.**

The BA- HRTC has developed and approved a governance structure that is representative and inclusive of stakeholders across the region and has agreed upon a set of decision-making processes. This structure and process will be used for Catalyst 2.0 program activities, with some additional steps.

The BA-HRTC Governance Structure consists of:

- **A 21 Member Steering Committee** with proportional representation of stakeholder groups identified in the SFP: labor, business, grassroots organizations, community members, governmental agencies,



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economic development agencies, philanthropy, education and training providers, workforce entities, environmental and environmental justice organizations, worker centers, disinvested communities, and California Native American Tribes.

- **A Research, Planning and Community Engagement Committee** that acts as an implementation committee made up of the Convenor and Fiscal Agent, contracted organizations, and entities responsible for implementing the BA-HRTC's planning, research and community engagement work, and co-Convenors of the subregional tables.
- **Six Subregional Tables** that honor local without losing the power of the region; mirror the diversity and composition of the Steering Committee, and of the area each subregional table is representing; collaborate to develop and support community-based strategies in the respective subregions; identify the specific needs, opportunities, and challenges of the respective subregion; and surface promising projects and practices to be shared across the Bay Area.

In alignment with the principle of creating an inclusive, democratic, grassroots governance process, the BA-HRTC has approved a two-step process for decision-making that allows the group to not only make a decision but also move forward together. This process builds and strengthens the collaborative and creates solutions for as many people as possible. Step One is a Six-Scale Gradients of Agreement best practice tool used for decision-making in large group settings. We have applied the Gradients of Agreement tool to align with our needs and agreed on the scale of 1- 6. Step two is an up-down vote in which all members share their final vote on the proposal being discussed. Final decisions are made via an "up or down" vote. A motion will be approved if it receives a simple majority of "yes" votes. Abstentions will not count toward the total number of votes when calculating a simple majority.

While this existing structure and process will be used for making decisions regarding Catalyst 2.0 project selection, steps will need to be added. BA-HRTC will establish a group that will develop a set of evaluation criteria for projects and a process for developing and proposing potential projects or initiatives for pre-development funding. The group that will develop these tools will most likely include representatives from the Research, Planning and Community Engagement Committee and the subregional tables (co convenors of the tables already are members of the RPCE Committee). Once these criteria and process have been established and projects solicited, a group will be seated responsible for evaluating projects and making recommendations to the Steering Committee as the ultimate decision-maker. Decision-making for these groups will all follow the two-step process described above.

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**4. Explain how the HRTC may use Catalyst funds to expand outreach, engagement, and shared decision-making with the region’s disinvested communities.**

Deep and meaningful community engagement is central to the BA-HRTC’s work. The Planning Phase Plan identifies four key principles of engagement: (1) engage community members directly; (2) be intentional about including marginalized communities and groups; (3) meet community members where they are, physically and with respect to their knowledge about regional issues, and (4) address accessibility needs and design engagement to remove barriers to participation.

As the Steering Committee and the subregional tables are now seated and beginning to meet regularly, the BA-HRTC has begun developing processes for its outreach and engagement plans, focusing on engaging members directly; applying intentional strategies such as focus groups, surveys, and educational materials; and building inclusive practices for participation. As our collective partnerships continue to grow, we will apply new strategies and collaborations to continue building inclusive processes. Catalyst 2.0 funding will be used to strengthen and deepen the durable structure for community participation that BA-HRTC has started to build.

Many outreach activities are being coordinated through the six subregional tables, which have broad and diverse representation of all stakeholder groups in their respective regions. A key principle shaping outreach is to ensure project initiation and design is driven by impacted workers and communities. The subregional tables will be engaging grassroots stakeholders in generative collaborations and processes using shared decision-making. Catalyst Fund pre-development funding might be used to conduct more intensive outreach to groups working in disinvested and marginalized communities and/or for mini-grants to support their participation and capacity building.

**5. Explain how the HRTC will prioritize Catalyst funds reaching disinvested communities in procurement and project selection.**

To surface the needs of disinvested communities and ensure that California Jobs First funded projects meet those needs, the subregional table co-Convenors will work with CBOs, community organizers, canvassers and other groups within the subregion to conduct outreach to communities representative of the subregion, potentially through methods like surveys, deep canvassing, focus groups, and other strategies. The goal of this outreach work is that Catalyst 2.0 pre-development projects prioritize disinvested community needs and that residents of disinvested communities who are hard-to-reach are participating in California Jobs First -funded projects.

As the BA-HRTC and subregional tables move towards developing potential pilot initiatives, a core principle of that process is that the design and goals of each pilot be driven by impacted workers and community members themselves. To achieve this, we will undertake deep engagement of workers and community members in specific industries and/or constituencies where pilots are being developed. This may be done through workshops, meetings, interviews, surveys, etc., all with the goal of bringing together workers and community members who

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PROJECT NARRATIVE  
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are directly involved in or impacted by a specific issue area proposed as a potential pilot (for example, this could include childcare workers & low-income parents who need childcare, or immigrant micro-entrepreneurs & community members needing access to goods and services) to discuss and identify needs and challenges they currently face, learn about potential models, policies and resources that we are working to develop, and provide generative input to help guide project development.

Project evaluation and selection criteria for Catalyst 2.0 predevelopment funding will be developed with a strong equity lens, to ensure that criteria are reflective of the challenge facing organizations working in disinvested communities and do not privilege larger and better resourced organizations.

Additional strategies for engagement with disinvested communities explored by the Community Engagement Working Group in the planning phase that may be expanded upon using Catalyst 2.0 funding include reviewing the *IAP2: Advancing the practice of public participation* framework and how it overlaps and contributes to some of the ideas the group has put forth. There is also a strong interest in integrating aspects of the Community Health Worker model (Promotores model) into how we can advise and guide the Sub-Regional Tables to engage community members and also learn from existing CBOs engagement efforts.

**ATTACHMENT A-2  
FISCAL AND PROGRAM REQUIREMENTS  
(Standard Agreement)**

1. Fiscal Reporting Requirements

The Catalyst Program is a reimbursable grant. Grantees are required to submit invoices and supporting documentation to receive reimbursement for expenditures incurred. Grantees must maintain a separate ledger for each program that shows the total amount of funds available for each program, and monthly program deductions (i.e., payments to subcontractors). At a minimum, each ledger entry must include the subcontractor/subrecipient agreement number, invoice date, payment date, and a description of the payment. Individual divisions may require additional ledger information.

Additionally, the grantee will prepare and submit quarterly expenditure reports, or as requested, in formats prescribed by the EDD. Grantees must establish, manage, and maintain an appropriate system of internal controls, accounting records, and documentation of the receipt and disbursement of the funds for review or reproduction upon written request by the EDD according to Generally Accepted Accounting Procedures, other state regulatory requirements, and the direction of the EDD.

- A. All invoices shall be sent monthly, 30 days after the end of the month, with the corresponding supporting documentation and Progress Status Report with activities performed during the invoiced month to the EDD contact below for review and approval:

Employment Development Department  
Central Office Workforce Division  
Special Initiatives Support Unit 1  
722 Capitol Mall, MIC 50  
Sacramento, CA 95814  
Email: CERFAdmin@edd.ca.gov

Invoice and Progress Status Reporting template will be provided by the EDD upon the signing of this agreement.

- B. Projected Budget Expenditures
- Fiscal Agent will be required to submit a quarterly summary of projected budget expenditures plan.

2. Performance Reporting Requirements

Grantees must have the capability to report projected activities, participant, and outcome data to the state, in a manner that is timely, thorough, and accurate. When applicable, grantees will be required to use the state's system for reporting participant data collected. If applicable, the grantee will be required to have access to the state's CalJOBS<sup>SM</sup> reporting system. The state will provide training on how to use the CalJOBS reporting system. Additionally, grantees will be required to submit monthly progress status reports which include narrative on the status of the projects.

- A. A team of program support will be assigned after the signing of this contract, at which time the EDD will provide all contact information.

- B. Schedule monthly calls with EDD, OPR, and GO-Biz to discuss:

**ATTACHMENT A-2  
FISCAL AND PROGRAM REQUIREMENTS  
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- Project updates: status and goals
  - Sustainable goals for the organization
  - Evaluating and assessing the programs' strengths and weaknesses.
- C. Project Readiness Checklist: This checklist requires the awardees to provide detailed information and documentation about the project, which should demonstrate that project is ready to get implemented. The checklist is due to the EDD within one month of the contract execution.
- D. Grantee will be required to submit monthly Progress Status Reports (PSR) along with all invoices.
- Reports are due 30 days after the end of the month.
  - PSR: Summarizes the project key activities, what the next steps are, any relevant lessons learned, any challenges, and/or course corrections. A template will be provided upon the signing of this contract.
  - PSR should be one to five pages.
- E. Submit a narrative report outlining 5-10 projects proposed total across the exploratory and last mile categories to the EDD by December 31, 2024. The narrative must include a description for each proposed project and outline the regional process for the selection of the preliminary projects. A final list of selected projects, which should include an estimated 10-15 projects in each of the exploratory, last mile, and ready-to-go categories, must be submitted by June 30, 2025.

Additional criteria and guidance may be provided by the EDD upon the execution of the agreement.

- F. Subcontract and Subaward List: The grantee is required to submit a detailed list of all subcontracts and subawards on an Excel spreadsheet to the EDD via email at [CERFADMIN@edd.ca.gov](mailto:CERFADMIN@edd.ca.gov). The subcontract and subaward list should include:
- Name of organization.
  - Purpose of the subcontract and/or subaward.
  - Amount of the subcontract and/or subaward.
  
  - Time period (beginning and end date).
  - If the contract will be offering services or serving participants.
  - Type of procurement process used to obtain subcontract and/or subaward.

All subcontracts and subawards must be added to the Excel form. The form must be updated any time a new subcontract and/or subaward is made. The EDD will provide the template upon the signing of this agreement.

Note – The EDD may request copies of any partner agreement, subcontract and/or subaward. Changes to established agreements must be reported to the EDD.

**ATTACHMENT A-2  
FISCAL AND PROGRAM REQUIREMENTS  
(Standard Agreement)**

G. The Grantee shall submit Quarterly Progress Reports on a consistent basis using the EDD template provided to meet the EDD's requirement for disbursement of funds. Quarterly Progress Report shall be submitted no later than 30 days after the end of the corresponding quarter. The Quarterly Progress Report should describe the work performed during the reporting period. The 4th quarter report shall contain a summary of the overall progress for the year.

Quarterly Progress Reports shall, in part, provide a brief description of the work performed, the Grantee's activities, milestones achieved, any accomplishments and any problems encountered in the performance of the work under this Agreement during the reporting period.

**Project Status**

Describe the work performed during the time period covered by the report, including but not limited to:

- Project information, including an estimate of the percentage of completion for the overall project;
- Legal matters;
- Additions or changes to project partners, subcontracts or subrecipients;
- Major accomplishments during the quarter (i.e., tasks completed, milestones met, meetings held or attended, press releases, etc.);
- Identify key issues/concerns that need to be resolved, including those that have, will, or could affect the schedule or budget, with a recommendation on how to correct the matter.

**Budget Details**

Provide a list showing all project costs incurred during the quarter covered by the report by the Grantee and each contractor working on the project and which of these costs are Eligible Project Costs.

3. **Reporting Clause:**

- Reporting requirements are subject to change based on program legislative requirements.
- The EDD reserves the right to change, modify or update reporting requirements as necessary for the successful implementation of this program.
- Evaluation report details will be provided upon the selection of an evaluator.
- All reports submitted are subject to review before considered finalized.
- All reporting requirements must be submitted to [CERFAdmin@edd.ca.gov](mailto:CERFAdmin@edd.ca.gov)
- All reporting requirements must be submitted in the reporting templates as provided by the EDD.

**EXHIBIT B**  
**BUDGET DETAIL AND PAYMENT PROVISIONS**  
**(Standard Agreement)**

1. Invoicing and Payment

- A. The total amount of this contract shall not exceed **Thirteen Million Dollars and Zero Cents (\$13,000,000.00)**. The EDD will closely monitor the Contract expenditures through the end of September 30, 2026.
- B. All invoices must be submitted on a monthly basis, 30 days after the end of the month. If invoices are not received timely, written justification must be provided within 15 days of the due date.
- C. All final invoices must be submitted by November 20, 2026. Any remaining unspent funds will be disencumbered after November 30, 2026, unless preauthorized by the EDD.
- D. No more than \$1.5 million for compliance and grant administration (e.g., fiscal oversight) is allowed.
- E. All invoices must be submitted using the invoice template provided after the signing of this contract and include:
- Progress Status Report
  - Supporting documentation (i.e., ledgers, receipts, subcontracting receipts) for each charge.

Submit all invoiced and reporting requirements to the email listed below:

**Employment Development Department**  
**Central Office Workforce Division**  
**Special Initiatives Support Unit 1**  
**722 Capitol Mall, MIC 50**  
**Sacramento, CA 95814**  
**Email: [CERFAdmin@edd.ca.gov](mailto:CERFAdmin@edd.ca.gov)**

- F. Invoices must be submitted even if there are \$0 expenditures for the reporting month. If \$0 expenditures a detail description must be provided in the progress status monthly report.
- G. Quarterly projected expenditures must be submitted to the EDD by the end of each quarter using the template provided after signing this contract.
- H. Contract amendments to the budget summary are not required for shifts between line items that cumulatively remain under 10% of the total award as last approved. All requests for budget shifts must be submitted to and approved by the EDD.

**EXHIBIT B**  
**BUDGET DETAIL AND PAYMENT PROVISIONS**  
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2. Withholding of Grant Disbursements

- A. The EDD may withhold all or any portion of the grant funds provided for by this contract in the event that the Grantee has materially and substantially breached the terms and conditions of this Grant Agreement, including submission of required reports and data.
- B. The EDD will not reimburse Grantee for costs identified as ineligible for grant funding. If grant funds have been provided for costs subsequently discovered to be ineligible, the EDD may either withhold an equal amount from subsequent payments to the Grantee or require repayment of an equal amount to the state by the Grantee.
- C. In the event that grant funds are withheld from the Grantee, the EDD designee shall notify the Grantee of the reasons for withholding and advise the Grantee of the time within which the Grantee may remedy the situation leading to the withholding.

3. Budget Contingency Clause

- A. It is mutually understood between the parties that this Agreement may have been written before ascertaining the availability of congressional and legislative appropriation of funds, for the mutual benefit of both parties, in order to avoid program and fiscal delays which would occur if the Agreement were executed after that determination was made.

This Agreement is valid and enforceable only if (1) sufficient funds are made available by the State Budget Act of the appropriate State Fiscal Year(s) covered by this Agreement for the purposes of this program; and (2) sufficient funds are made available to the State by the United States Government or by the State of California for the Fiscal Year(s) covered by this Agreement for the purposes of this program. In addition, this Agreement is subject to any additional restrictions, limitations or conditions established by the United States Government and/or the State of California, or any statute enacted by the Congress and Legislature, which may affect the provisions, terms, or funding of the Agreement in any manner.

The parties mutually agree that if the Congress and/or Legislature does not appropriate sufficient funds for the program, this agreement shall be amended to reflect any reduction in funds.

The EDD has the option to terminate the agreement under the 30-day termination clause or to amend the Agreement to reflect any reduction of funds.



**ATTACHMENT B-1  
 BUDGET SUMMARY  
 (Standard Agreement)**

<b>Name of Applicant:</b> San Francisco Office of Economic & Workforce Development on behalf of the Bay Area Good Jobs Partnership for Equity
<b>Project Name:</b> Bay Area Jobs First Collaborative

Advanced Payment*	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Advanced Payment (percent)	%
Advanced Payment (amount)	\$

Line Item	Expense Item	Administrative Cost	Program Cost	Sub-Contract/Sub-Award Amount (If Applicable)	Total Project Budget	Advanced Payment*
A.	Staff Salaries	\$431,655	\$	\$	\$ 431,655	<input type="checkbox"/>
1.	Number of full-time equivalents ( <b>1.33</b> )					<input type="checkbox"/>
B.	Staff Benefit Cost	\$168,345	\$	\$	\$ 168,345	<input type="checkbox"/>
1.	Staff Benefit Rate (percent) ( 39% )					<input type="checkbox"/>
C.	Staff Travel	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
D.	Operating Expenses	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
E.	Research	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
F.	Data, Planning and Communication Tools	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
G.	Sector Investment Coordinator(s)	\$	\$1,500,000	\$1,500,000	\$1,500,000	<input type="checkbox"/>
H.	Participant Compensation	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
I.	Community Outreach and Engagement	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
J.	<b>Furniture and Equipment</b>					

**ATTACHMENT B-1  
 BUDGET SUMMARY  
 (Standard Agreement)**

Line Item	Expense Item	Administrative Cost	Program Cost	Sub-Contract/Sub-Award Amount (If Applicable)	Total Project Budget	Advanced Payment*
1.	Small Purchase (unit cost of under \$5,000)	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
2.	Large Purchase (unit cost of over \$5,000)	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
3.	Equipment Lease	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
K.	Sub-Contract(s)/Sub-Award(s)		\$	\$		<input type="checkbox"/>
	BAGJPE Workforce Boards	\$900,000		\$900,000	\$900,000	<input type="checkbox"/>
	Regional Convenor		\$1,000,000	\$1,000,000	\$1,000,000	<input type="checkbox"/>
	Pre-Development Activities		\$9,000,000	\$9,000,000	\$9,000,000	<input type="checkbox"/>
L.	Other (describe):	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
	<b>TOTAL FUNDING**</b>	\$ 1,500,000	\$ 11,500,000	\$ 12,400,000	\$ 13,000,000	
			<b>Total Award</b>		\$ 13,000,000	

Please note:

- A maximum of \$1,500,000 will be allowed for the **Fiscal Agent Administrative Costs**.
- A maximum of \$2,000,000 will be allowed for the **Regional Convenor(s)**.

\*Advanced Payment column is only necessary if requesting up to 25% of the total grant request. Note that all funds under Advance Payment must be spent prior to transitioning into reimbursables.

*Contract amendments to the budget summary are not required for shifts between line items that cumulatively remain under 10% of the total award as last approved.*

**EXHIBIT D**  
**SPECIAL TERMS AND CONDITIONS**  
**(Standard Agreement)**

1. Compliance with Laws and Regulations

By signing this Agreement, Grantee certifies that it shall comply fully with all applicable federal, state, and local laws, ordinances, and regulations by authorities that have jurisdiction over the projects selected by the Jobs First Collaborative.

2. Subcontractors or Subgrantees

Nothing contained in this Agreement or otherwise, shall create any contractual relationship between the State and any subcontractors or subgrantees, and no subcontract or subgrant shall relieve the Grantee of their responsibilities and obligations hereunder. The Grantee agrees to be as fully responsible to the State for the acts and omissions of its subcontractors or subgrantees and of persons either directly or indirectly employed by the Grantee. The Grantee shall manage, monitor, and accept responsibility for the performance of its own staff, partners, and subcontractors, and will conduct project activities and services consistent with professional standards for the industry and type of work being performed under this Agreement. The Grantee's obligation to pay its subcontractors or subgrantees is an independent obligation from the State's obligation to make payments to the Grantee.

The State shall have no obligation to pay or to enforce the payment of any monies to any subcontractor or subgrantee.

3. Consultant–Staff Expenses

The Grantee represents that it has or shall secure at its own expense, all staff required to perform the services described in this Agreement. Such personnel shall not be employees of or have contractual relationships with any governmental entity.

4. Independent Capacity

The Grantee, and the agents and employees of the Grantee, in the performance of the Grant Agreement, shall act in an independent capacity and not as officers, employees, or agents of the State.

5. Public Contract Code (Consultant Services)

The Grantee is advised that they have certain duties, obligations, and rights under the Public Contract Code Sections 10335 – 10381 and 10410 - 10412, with which the Grantee should be familiar. These Public Contract Code sections can be viewed at:

[https://leginfo.legislature.ca.gov/faces/codes\\_displayText.xhtml?lawCode=PCC&division=2.&title=&part=2.&chapter=2.&article=4](https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?lawCode=PCC&division=2.&title=&part=2.&chapter=2.&article=4)

[https://leginfo.legislature.ca.gov/faces/codes\\_displayText.xhtml?lawCode=PCC&division=2.&title=&part=2.&chapter=2.&article=8](https://leginfo.legislature.ca.gov/faces/codes_displayText.xhtml?lawCode=PCC&division=2.&title=&part=2.&chapter=2.&article=8)

**EXHIBIT D**  
**SPECIAL TERMS AND CONDITIONS**  
**(Standard Agreement)**

6. Labor Code Compliance

The Grantee agrees to be bound by all the provisions of the Labor Code regarding prevailing wages and shall monitor all contracts subject to reimbursement from this Agreement to assure that the prevailing wage provisions of the Labor Code are being met.

The Grantee affirms that it is aware of the provisions of Section 3700 of the Labor Code, which requires every employer to be insured against liability for workers' compensation or to undertake self-insurance, and the Grantee affirms that it will comply with such provisions before commencing the performance of the work under this Agreement and will make its contractors and subcontractors aware of this provision.

7. Competitive Bidding and Procurements

The Grantee's contracts with other entities for the acquisition of goods and services and construction of public works with funds provided by the State under this Agreement must be in writing and shall comply with all applicable laws and regulations regarding the securing of competitive bids and undertaking competitive negotiations. If the Grantee does not have a written policy to award contracts through a competitive bidding or sole source process, the Department of General Services' State Contracting Manual rules must be followed and are available at:

<https://www.dgs.ca.gov/OLS/Resources/Page-Content/Office-of-Legal-Services-Resources-List-Folder/State-Contracting>.

8. Contractor Evaluation

Within sixty (60) days after the completion of this Agreement, the Special Initiatives Support Unit 1 shall complete a written evaluation of the Grantee's performance under this Agreement. If the Grantee did not satisfactorily perform the work, a copy of the evaluation will be sent to the State Department of General Services (DGS), Office of Legal Services, within five working days of the completion of the evaluation, and to the Grantee within 15 working days of the filing of the evaluation with DGS.

9. Termination Clause

This Agreement may be terminated by the EDD by giving written notice 30 days prior to the effective date of such termination. The EDD reserves the right to take any action that it deems necessary to protect its interests.

10. Advance Work

Should the Grantee begin work before receiving a copy of the approved Agreement, any work performed before approval shall be considered as having been done at the Grantee's own risk and as a volunteer.

**EXHIBIT D**  
**SPECIAL TERMS AND CONDITIONS**  
**(Standard Agreement)**

**11. Force Majeure**

Neither party shall be liable to the other for any delay in or failure of performance, nor shall any such delay in or failure of performance constitute default, if such delay or failure is caused by "Force Majeure." As used in this section, "Force Majeure" is defined as follows: Acts of war and acts of God such as earthquakes, floods, and other natural disasters such that performance is impossible.

**12. Change in Staffing**

All replacements are subject to EDD approval. Switching staff that were identified in the proposal with alternates without prior approval, after execution of this Agreement, are grounds for termination of this contract. The EDD has the right to request removal and/or replacement of staffing resources.

**13. Avoidance of Conflicts of Interest by the Grantee**

- A. Consultants are advised that that Political Reform Act prohibits public officials, which include consultants, from making, participating in making, or in any way attempting to use his official position to influence a governmental decision in which he knows or has reason to know he has a financial interest. (Government Code Section 87100; see Government Code Section 81000 and Government Code Section 1090 et seq.). For purposes of this contract, consultants are defined as any individual performing work under this contract.
- B. The Grantee shall make all reasonable efforts to ensure that no conflict of interest exists between its officers, agents, employees, consultants, or members of its governing body.
- C. The Grantee shall prevent its officers, agents, employees, consultants, or members of its governing body from using their positions for purposes that are, or give the appearance of being, motivated by a desire for private gain for themselves or others such as those with whom they have family, business, or other ties.
- D. During the performance of this contract, should the Grantee become aware of a financial conflict of interest that may foreseeably allow an individual or organization involved in this Contract to materially benefit from the State's adoption of an action(s) recommended because of this contract, the Grantee must inform the State in writing within 10 working days.
- E. Failure to disclose a relevant financial interest on the part of the consultant will be deemed grounds for termination of the Contract with all associated costs to be borne by the Grantee.

**EXHIBIT D**  
**SPECIAL TERMS AND CONDITIONS**  
**(Standard Agreement)**

- F. The EDD may request additional information regarding a consultant's economic interests. If the additional information is not provided to the satisfaction of the EDD, then the Grantee must provide a substitute consultant with similar credentials to resolve the potential conflict as provided in paragraph (d).
- G. Consultants are advised that the Fair Political Practices Commission has jurisdiction to enforce the Political Reform Act and may seek civil and criminal prosecution for violations of the act, including failure to disclose financial interests. Other penalties for violating the Political Reform Act could include fines, conviction of a misdemeanor, disqualification from serving in public office or as a lobbyist, and being responsible for the costs of the litigation, including attorney's fees.
- H. Consultants are advised that they may amend their Form 700 at any time and that amending an incorrect or incomplete report may be considered evidence of good faith by the Fair Political Practices Commission.
- I. All consultants providing work under this agreement shall include a completed Statement of Economic Interests, Form 700 (<http://www.fppc.ca.gov/Form700.html>) at the time of award. For purposes of this contract, consultants are defined as any individual performing work under this Contract. In addition, consultants shall file a Form 700 annually by April 1, thereafter during the life of the contract. Each new and/or substitute consultant shall file a Form 700 prior to performing any work on the contract.

**14. Travel Clause**

The travel and per diem shall be set in accordance with the Grantee's organizational policy. A copy of the policy must be provided to the EDD upon the execution of this agreement. If the Grantee does not have an existing travel policy, they must follow the CalHR Travel Policy.

**15. Disputes**

If the Grantee is disputing an action of the EDD in the administration of this contract, the Grantee may appeal to the Inter-Agency Leadership Team and Designee. Such appeals shall be filed within 30 calendar days of the notification from Grantee of such dispute. The appeal shall be in writing and 1) state the basis for the appeal, 2) state the action being requested of the Inter-Agency Leadership Team, and 3) include any documentation relating to the dispute.

The Inter-Agency Leadership Team and Designee will review the correspondence and related documentation and render a decision of the appeal within 30 calendar days, except in those cases where the Grantee withdraws or abandons the appeal. The procedural time requirement may be waived with the mutual consent of the EDD on behalf of the Inter-Agency Leadership Team and Grantee.

**EXHIBIT D**  
**SPECIAL TERMS AND CONDITIONS**  
**(Standard Agreement)**

**16. Monitoring and Audits**

The EDD reserves the right to conduct an audit at any time between the execution of this Agreement and the completion of the Project, with the costs of such audit borne by the State. After completion of the Project, the State may require the Grantee to conduct a final audit to the State's specifications, at the Grantee's expense, such audit to be conducted by and a report prepared by an independent Certified Public Accountant. Failure or refusal by the Grantee to comply with this provision shall be considered a breach of this Agreement, and the State may elect to take any action it deems necessary to protect its interests.

The Grantee agrees it shall return any audit disallowances to the State. Pursuant to Government Code Section 8546.7, the Grantee shall be subject to the examination and audit by the State for a period of three (3) years after final payment under this Agreement with respect of all matters connected with this Agreement, including but not limited to, the cost of administering this Agreement. All records of the Grantee or its contractor or subcontractors shall be preserved for this purpose for at least three (3) years after receipt of the final disbursement under this Agreement. If an audit reveals any impropriety, the California State Auditor or the State Controller's Office may conduct a full audit of any or all the Grantee's activities.

The Grantee shall cooperate with the EDD, Labor and Workforce Development Agency (LWDA), Governor's Office of Research and Planning (OPR), and Governor's Office of Business and Economic Development (GO-Biz) regarding the performance of this agreement within the response time requested by the agencies.

The Grantee shall cooperate with EDD, LWDA, OPR, and GO-Biz to provide timely responses to any requests for data and/or reports the EDD, LWDA, OPR, and GO-Biz deem necessary for the oversight of the Catalyst program. The Grantee further understands and agrees that this data will be shared with the EDD, LWDA, OPR, and GO-Biz and any other stakeholders.

17. The Grantee is responsible for the activities identified in the original grant proposal submitted to the EDD, which is incorporated by reference and made a part of this Agreement as if attached hereto.

18. The Grantee shall fulfill all assurances, declarations, representations, and statements made by the Grantee in the Grant Proposal, documents, amendments, approved modifications, and communications filed in support of its request for grant funds.

**19. Insurance Requirements**

The Grantee agrees to obtain and maintain for the term of this Agreement the following insurance policies that cover any acts or omissions of Grantee, its subcontractors, or its employees engaged in the provision of services specified in this Agreement:

**EXHIBIT D**  
**SPECIAL TERMS AND CONDITIONS**  
**(Standard Agreement)**

- A. Workers' Compensation Insurance in an amount of not less than \$1,000,000 in accordance with the statutory requirement of the State of California (California Labor Code Section 3700 et seq.).
- B. Commercial general liability insurance in an amount of not less than \$1,000,000 per occurrence for bodily injury and property damage combined.
- C. Motor vehicle liability with limits not less than the amounts below for combined single limit per accident. Such insurance shall cover liability arising out of a motor vehicle including owned or hired, and non-owned motor vehicles.
  - i. 7 or fewer passengers: \$1,000,000
  - ii. 8-15 passengers: \$1,500,000
  - iii. 16+ passengers: \$5,000,000
- D. The State of California, its officers, agents, and employees are included as additional insured, for activities undertaken pursuant to this Grant Agreement. The additional insured endorsement must accompany the certificate of insurance.
- E. Grantee shall submit proof of insurance documents referencing this Agreement number to the EDD electronically.
- F. Grantee shall notify the EDD in writing within five (5) working days of any cancellation, non-renewal, or material change that affects required insurance coverage.
- G. Grantee shall submit proof of new or updated policy based on insurance requirements within thirty (30) days of policy cancellation or substantial policy change. Failure to provide proof of insurance may result in termination of this Grant Agreement.

20. Indemnification

The Grantee shall indemnify and hold and save the State, its officers, agents, and employees, free and harmless from all liabilities for any claims and damages (including inverse condemnation) that may arise out of the Project and this Agreement. The Grantee shall require its contractors or subcontractors to name the State, its officers, agents, and employees as additional insureds on their liability insurance for activities undertaken pursuant to this Agreement.




**EXHIBIT D**  
**SPECIAL TERMS AND CONDITIONS**  
**(Standard Agreement)**

**21. Executive Order N-6-22 – Russia Sanctions**

On March 4, 2022, Governor Gavin Newsom issued Executive Order N-6-22 (the EO) regarding Economic Sanctions against Russia and Russian entities and individuals. “Economic Sanctions” refers to sanctions imposed by the U.S. government in response to Russia’s actions in Ukraine, as well as any sanctions imposed under state law. The EO directs state agencies to terminate contracts with, and to refrain from entering any new contracts with, individuals or entities that are determined to be a target of Economic Sanctions. Accordingly, should the State determine Grantee is a target of Economic Sanctions or is conducting prohibited transactions with sanctioned individuals or entities, that shall be grounds for termination of this agreement. The State shall provide Grantee advance written notice of such termination, allowing Grantee at least 30 calendar days to provide a written response. Termination shall be at the sole discretion of the State.

**California Jobs First Catalyst Program Grant (May 1, 2024 - September 30, 2026)**

<b>Budget Item</b>	<b>Total</b>
<b>OEWD:</b>	
1.33 Staff Salary - 1823 Contracts Analyst	\$431,655
1.33 Staff Fringe - 1823 Contracts Analyst	\$168,345
Indirect Costs (FMDC @ 10%)	\$0
<b>Total OEWD Costs</b>	<b>\$600,000</b>
<b>Contractual:</b>	
Fiscal Coordination	\$900,000
Sector Investment Coordination	\$1,500,000
Regional Convener	\$2,000,000
Pre-Development Activities	\$9,000,000
<b>Total Contractual:</b>	<b>\$13,400,000</b>
<b>Total Budget</b>	<b>\$14,000,000</b>

<b>[Catalyst Program]</b>					
<b>Funding</b>					
Requested Funding \$ 14,000,000			Total Project Amount \$14,000,000		
Requested Advanced Payment % 0			Total Advanced Payment Amount \$ 0		
Organization (applicant) Name		San Francisco Office of Economic & Workforce Development on behalf of the Bay Area Good Jobs Partnership for Equity			
Address		1 South Van Ness Avenue, Fifth Floor			
City & Zip Code		San Francisco 94103			
County		San Francisco			
Designated Point of Contact		Janan Howell			
Telephone	4157014848	Fax	4157014897	E-mail	Janan.Howell@sfgov.org
Type of Organization (Check One)	<input type="checkbox"/> Comm. Based Org		<input checked="" type="checkbox"/> Local Government Agency		<input type="checkbox"/> Non- Profit
	<input type="checkbox"/> Metro Planning Org		<input type="checkbox"/> CA Native American Tribes or Consortium		
	<input type="checkbox"/> Education Agency		<input type="checkbox"/> District Org. / EDA / Designated Economic Dev. Dist.		
	<input type="checkbox"/> Other (Describe)				
IRS Tax ID Number	94-6000417	California Tax ID Number	CA-93200814		
Unique ID Number	788656416				
<b>Proposal Title</b>	Bay Area Jobs First Collaborative				
<b>CERF Region</b>	San Francisco Bay Area				
<b>Approval of Authorized Representative</b> (Submit with original signature)					
Name: Sarah Dennis Phillips		Telephone: 415-554-7103			
		Email: sarah.dennis-phillips@sfgov.org			
Title: Executive Director, Office of Economic & Workforce Development		Signature 			Date 8/28/23

**CERF Catalyst Program Applicant Information**

Instructions: Please complete the table with the information requested.

**Name of Applicant:** San Francisco Office of Economic & Workforce Development on behalf of the Bay Area Good Jobs Partnership for Equity

**Applicant Point of Contact**

Name: Janan Howell	Title: Deputy Director of Workforce Development
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Email: Janan.Howell@sfgov.org	Tel: (415) 701-4848
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**CERF Region:** Bay Area

**CERF Catalyst Program Narrative Questions**

Instructions: Answer each of the following questions regarding the regional High Road Transition Collaborative (HRTC)’s application for CERF Catalyst Program funds. Refer to the CERF Catalyst Framework and closed solicitation for required activities. Please limit responses to 500 words.

**1. Explain how the HRTC may expend Catalyst Program funds to support pre-development of projects that prioritize equity, sustainability, job quality and access, economic competitiveness, and economic resilience.**

The vision of the Bay Area’s High Road Transition Collaborative (BA-HRTC), now known as the Bay Area Jobs First Collaborative, is to re-envision regional economic development planning, centered around the values of equity, high-road employment, sustainability, and climate resilience, and shaped by workers and impacted community members themselves. A central principle and priority for this initiative is deep and meaningful outreach and engagement with workers and communities. “Meaningful engagement” means engagement designed to build a durable and lasting structure for community planning that gives community members meaningful decision-making authority so that they are not passive participants, but rather active agents in shaping the vision for the future of their community and the region.

Outreach and engagement is built into the BA-HRTC governance structure, in particular through the seating of six subregional tables, which are designed to: (1) center grassroots leadership of workers and historically disinvested communities in the region’s economic development; (2) provide bottom-up direction to guide the BA-HRTC Steering Committee in the research process, policy decisions and metrics; and (3) identify and build consensus around potential regional projects. The BA-HRTC intends to work through the subregional tables to identify potential projects for Catalyst Program funds and determine what resources they need to move to implementation. The Steering Committee will make the final determination about what projects to fund.

The goal of the pre-development funding will be to respond to ideas coming from the community that advance equity, sustainability, job quality and access, economic competitiveness, and economic

resilience. The six subregional tables have recently been seated and have begun meeting but have not yet identified specific projects for potential pre-development funding. The research team is in the process of developing the required Research Report to be submitted to the State at the end of December 2023. As part of this work, some preliminary themes have begun to emerge that may inform the identification and selection of projects. Labor market analyses show that despite more recent improvements, substantial challenges persist for workers, especially across gender, race, education, and occupation categories. For instance, women, Black, Latino and immigrant workers are disproportionately employed in precarious jobs. Housing, transportation and childcare costs are significant barriers to accessing high road jobs. And on the demand side, there are not enough high road jobs available to meet the supply of workers, even if all barriers were removed; while jobs earning the lowest wages in the region, such as personal care aides, janitors, and truck drivers, often pay poverty-level wages yet provide essential services. Ensuring these essential workers are self-sufficient and can provide for their families is crucial to the future economic success of the Bay Area. In selecting projects for Catalyst Fund pre-development dollars, BA-HRTC will consider how they address these and other labor market conditions, for example, how they might remove or lower barriers to high road jobs.

**2. Explain how the proposed activities may advance the objectives of the CERF Planning Phase and the goals of the HRTC.**

During the Planning Phase, the BA-HRTC identified five guiding principles and key goals:

1. Climate Resilience Led by Frontline Communities and Workers
2. Lift Up Job Quality, Grow High-Road Jobs, Elevate Racial Equity and Worker Voice
3. Honor Local Without Losing the Power of the Region
4. Inclusive, Democratic, Grassroots Governance
5. Take Action Towards Transformational Change

With these principles at the forefront, the BA-HRTC—led by All Home as the Regional Convenor and Bay Area Good Jobs Partnership for Equity (BAGJPE) as the Fiscal Agent—has established a Governance Structure that includes: a Steering Committee, composed of 21-members across essential planning sectors; a Research, Planning and Community Engagement Committee; and (6) Sub-Regional Tables organized by geography. These bodies are all now seated and have begun work to further refine the initiative’s goals and activities.

BA-HRTC has identified four primary goals and activities, all of which would benefit from Catalyst 2.0 funding:

1. **Driving deep and meaningful community engagement** with a focus on equity. This work is primarily being accomplished through the six subregional tables and includes engagement with members affiliated with labor and/or community organizations as well as stakeholders unaffiliated with either sector or other formal institutions. This work has the potential to be supported through funding from

the Catalyst 2.0 pre-development component, particularly using funding to build and sustain the capacity of project leads and partners.

2. **Identifying projects** to compete for CERF funding as well as other funding sources. The goal is to identify pilot initiatives with potential regional impacts that are aligned with BA-HRTC goals and will be most competitive in the State grant-making process. This work is also primarily being undertaken by the subregional tables, through intensive community outreach and engagement to identify potential projects and determine what resources are needed to help them move from concept to implementation. This work will also be supported by the pre-development component of Catalyst 2.0.
3. **Building infrastructure for economic development.** The BA-HRTC set out to accomplish long term systemic change and build robust infrastructure for equitable, high-road economic development, while at the same time addressing shorter term community and worker needs. The goal is to create a long-lasting regional economic development infrastructure that will empower communities and workers across the Bay to lead equitable, high-road climate and economic development projects; and position the region to attract additional capital and resources beyond CERF. All Home, the Regional Convenor for BA-HRTC, will tap into the Regional Convenor component of the Catalyst 2.0 opportunity to support project staffing, coordination of contracted research partners, and facilitation, technical assistance, and other consulting support.
4. **Identifying additional funding sources.** The State’s CERF funding, while substantial, is not sufficient to accomplish the ambitious goals set out by BA-HRTC. The Catalyst 2.0 Sector Investment Coordinators component will be used, in part, to support work to align with and leverage other major funding initiatives such as the Inflation Reduction Act, Infrastructure Investment and Jobs Act, CHIPS Act, private philanthropy and investment and other sources.

**3. As best as can be explained at this time, explain how existing HRTC governance structures and decision-making processes may be adapted to integrate Catalyst Program activities.**

The BA- HRTC has developed and approved a governance structure that is representative and inclusive of stakeholders across the region and has agreed upon a set of decision-making processes. This structure and process will be used for Catalyst 2.0 program activities, with some additional steps.

The BA-HRTC Governance Structure consists of:

- **A 21 Member Steering Committee** with proportional representation of stakeholder groups identified in the SFP: labor, business, grassroots organizations, community members, governmental agencies, economic development agencies, philanthropy, education and training providers, workforce entities, environmental and environmental justice organizations, worker centers, disinvested communities and California Native American Tribes.
- **A Research, Planning and Community Engagement Committee** that acts as an implementation committee made up of the Convenor and Fiscal Agent, contracted organizations and entities

responsible for implementing the BA-HRTC’s planning, research and community engagement work, and co-Convenors of the subregional tables.

- **Six Subregional Tables** that honor local without losing the power of the region; mirror the diversity and composition of the Steering Committee, and of the area each subregional table is representing; collaborate to develop and support community-based strategies in the respective subregions; identify the specific needs, opportunities and challenges of the respective subregion; and surface promising projects and practices to be shared across the Bay Area.

In alignment with the principle of creating an inclusive, democratic, grassroots governance process, the BA-HRTC has approved a two-step process for decision-making that allows the group to not only make a decision but also move forward together. This process builds and strengthens the collaborative and creates solutions for as many people as possible. Step One is a Six-Scale Gradients of Agreement best practice tool used for decision-making in large group settings. We have applied the Gradients of Agreement tool to align with our needs and agreed on the scale of 1- 6. Step two is an up-down vote in which all members share their final vote on the proposal being discussed. Final decisions are made via an “up or down” vote. A motion will be approved if it receives a simple majority of “yes” votes. Abstentions will not count toward the total number of votes when calculating a simple majority.

While this existing structure and process will be used for making decisions regarding Catalyst 2.0 project selection, steps will need to be added. BA-HRTC will establish a group that will develop a set of evaluation criteria for projects and a process for developing and proposing potential projects or initiatives for pre-development funding. The group that will develop these tools will most likely include representatives from the Research, Planning and Community Engagement Committee and the subregional tables (co convenors of the tables already are members of the RPCE Committee). Once these criteria and process have been established and projects solicited, a group will be seated responsible for evaluating projects and making recommendations to the Steering Committee as the ultimate decision-maker. Decision-making for these groups will all follow the two-step process described above.

**4. Explain how the HRTC may use Catalyst funds to expand outreach, engagement, and shared decision-making with the region’s disinvested communities.**

Deep and meaningful community engagement is central to the BA-HRTC’s work. The Planning Phase Plan identifies four key principles of engagement: (1) engage community members directly; (2) be intentional about including marginalized communities and groups; (3) meet community members where they are, physically and with respect to their knowledge about regional issues, and (4) address accessibility needs and design engagement to remove barriers to participation.

As the Steering Committee and the subregional tables are now seated and beginning to meet regularly, the BA-HRTC has begun developing processes for its outreach and engagement plans, focusing on engaging members directly; applying intentional strategies such as focus groups, surveys and educational materials; and building inclusive practices for participation. As our collective partnerships continue to grow, we will apply new

strategies and collaborations to continue building inclusive processes. Catalyst 2.0 funding will be used to strengthen and deepen the durable structure for community participation that BA-HRTC has started to build.

Many outreach activities are being coordinated through the six subregional tables, which have broad and diverse representation of all stakeholder groups in their respective regions. A key principle shaping outreach is to ensure project initiation and design is driven by impacted workers and communities. The subregional tables will be engaging grassroots stakeholders in generative collaborations and processes using shared decision-making. Catalyst Fund pre-development funding might be used to conduct more intensive outreach to groups working in disinvested and marginalized communities and/or for mini-grants to support their participation and capacity building.

**5. Explain how the HRTC will prioritize Catalyst funds reaching disinvested communities in procurement and project selection.**

To surface the needs of disinvested communities and ensure that CERF funded projects meet those needs, the subregional table co-Convenors will work with CBOs, community organizers, canvassers and other groups within the subregion to conduct outreach to communities representative of the subregion, potentially through methods like surveys, deep canvassing, focus groups, and other strategies. The goal of this outreach work is that Catalyst 2.0 pre-development projects prioritize disinvested community needs and that residents of disinvested communities who are hard-to-reach are participating in CERF-funded projects.

As the BA-HRTC and subregional tables move towards developing potential pilot initiatives, a core principle of that process is that the design and goals of each pilot be driven by impacted workers and community members themselves. To achieve this, we will undertake deep engagement of workers and community members in specific industries and/or constituencies where pilots are being developed. This may be done through workshops, meetings, interviews, surveys, etc., all with the goal of bringing together workers and community members who are directly involved in or impacted by a specific issue area proposed as a potential pilot (for example, this could include childcare workers & low-income parents who need childcare, or immigrant micro-entrepreneurs & community members needing access to goods and services) to discuss and identify needs and challenges they currently face, learn about potential models, policies and resources that we are working to develop, and provide generative input to help guide project development.

Project evaluation and selection criteria for Catalyst 2.0 predevelopment funding will be developed with a strong equity lens, to ensure that criteria are reflective of the challenge facing organizations working in disinvested communities and do not privilege larger and better resourced organizations.

Additional strategies for engagement with disinvested communities explored by the Community Engagement Working Group in the planning phase that may be expanded upon using Catalyst 2.0 funding include reviewing the *IAP2: Advancing the practice of public participation* framework and how it overlaps and contributes to some of the ideas the group has put forth. There is also a strong interest in integrating aspects of the Community Health Worker model (Promotores model) into how we can advise and guide the Sub-Regional Tables to engage community members and also learn from existing CBOs engagement efforts.





**CERF Catalyst Program PY 23-24  
Budget Summary**

**Name of Applicant:** San Francisco Office of Economic & Workforce Development on behalf of the Bay Area Good Jobs Partnership for Equity  
**Project Name:** Bay Area Jobs First Collaborative

Advanced Payment*	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Advanced Payment (percent)	%
Advanced Payment (amount)	\$

Line Item	Expense Item	Administrative Cost	Program Cost	Sub-Contract/Sub-Award Amount (If Applicable)	Total Project Budget	Advanced Payment*
A.	Staff Salaries	\$431,655	\$	\$	\$ 431,655	<input type="checkbox"/>
1.	Number of full-time equivalents ( <b>1.33</b> )					<input type="checkbox"/>
B.	Staff Benefit Cost	\$168,345	\$	\$	\$ 168,345	<input type="checkbox"/>
1.	Staff Benefit Rate (percent) ( 39% )					<input type="checkbox"/>
C.	Staff Travel	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
D.	Operating Expenses	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
E.	Research	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
F.	Data, Planning and Communication Tools	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
G.	Sector Investment Coordinator(s)	\$	\$1,500,000	\$	\$1,500,000	<input type="checkbox"/>
H.	Participant Compensation	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
I.	Community Outreach and Engagement	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
J.	<b>Furniture and Equipment</b>					
1.	Small Purchase (unit cost of under \$5,000)	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
2.	Large Purchase (unit cost of over \$5,000)	\$	\$	\$	\$ 0.00	<input type="checkbox"/>

Line Item	Expense Item	Administrative Cost	Program Cost	Sub-Contract/Sub-Award Amount (If Applicable)	Total Project Budget	Advanced Payment*
3.	Equipment Lease	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
K.	Sub-Contract(s)/Sub-Award(s)		\$	\$		<input type="checkbox"/>
	BAGJPE Workforce Boards	\$900,000			\$900,000	<input type="checkbox"/>
	Regional Convenor			\$2,000,000	\$2,000,000	<input type="checkbox"/>
	Pre-Development Activities			\$9,000,000	\$9,000,000	<input type="checkbox"/>
L.	Other (describe):	\$	\$	\$	\$ 0.00	<input type="checkbox"/>
	<b>TOTAL FUNDING**</b>	\$ 1,500,000	\$ 1,500,000	\$ 11,000,000	\$ 14,000,000	
			<b>Total Award</b>		\$ 14,000,000	

Please note:

- A maximum of \$1,500,000 will be allowed for the **Fiscal Agent Administrative Costs**.
- A maximum of \$2,000,000 will be allowed for the **Regional Convenor(s)**.

\*Advanced Payment column is only necessary if requesting up to 25% of the total grant request. Note that all funds under Advance Payment must be spent prior to transitioning into reimbursables. Advance Payment Budget (Exhibit B3) and Advanced Payment Narrative and Timeline (Exhibit B4) must be completed if applicable.



**CERF Catalyst Program PY 23-24  
Budget Narrative**

**Name of Applicant:** San Francisco Office of Economic & Workforce Development on behalf of the Bay Area Good Jobs Partnership for Equity

**Project Name:** Bay Area Jobs First Collaborative

*Please provide a narrative detail for all grant-funded budget line items listed on Exhibit B - Budget Summary. See each section below for additional detail requirements. Budget Narrative does not have a page limit.*

Please note:

- A maximum of \$1,500,000 will be allowed for the **Fiscal Agent Administrative Costs**.
- A maximum of \$2,000,000 will be allowed for the **Regional Convenor(s)**.

**A. (A-B) Staff Salaries:** Total Salaries Paid + Benefits \$600,000

***Applicant must complete the table below and include a narrative that clearly describes the role and responsibility of each proposed staff.***

<b>Administrative Cost/Regional Convenor(s)Cost</b>	<b>Position</b>	<b>FTE x Monthly Salary x Time</b>	<b>Benefits</b>	<b>Total (FTE X Salary X Time) + Benefits</b>
Administrative	Contracts Analyst	308,340	120,253	428,593
Administrative	Program Analyst	123,314	48,093	171,407
Choose an item.				
Choose an item.				
Choose an item.				
Choose an item.				
Choose an item.				
Choose an item.				
<b>TOTALS</b>		<b>\$ 431,654</b>	<b>\$ 168,346</b>	<b>\$ 600,000</b>

**C. Staff Travel \$**

*Applicant must provide a narrative with details of the proposed travel under each category.*

- **Administrative Cost:**
- **Program Cost:**

**D. Operating Expenses \$**

Expense	Cost	Administrative/Program Cost
Rent	\$	Choose an item.
Insurance	\$	Choose an item.
Accounting (payroll services) and Audits	\$	Choose an item.
Consumable office supplies	\$	Choose an item.
Printing	\$	Choose an item.
Communications (phones, web services, etc.)	\$	Choose an item.
Mailing and Delivery	\$	Choose an item.
Dues and Memberships	\$	Choose an item.
Outreach	\$	Choose an item.

**E. Research \$**

*Applicant must describe and explain funding set aside for research as applicable to each category below.*

- **Administrative Cost:**
- **Program Cost:**

**F. Data, Planning and Communication Tools \$**

*Describe details and explain purpose and planned use.*

- **Administrative Cost:**
- **Program Cost:**

**G. Sector Investment Coordinator(s) - Total Salaries Paid + Benefits \$1,500,000**

*Applicant must complete the table below and include a narrative that clearly describes the role and responsibility of each proposed staff. If the staff will be hired through a different organization, narrative must indicate the name of the other organization or an outline of the plan for subcontracting.*

\*These funds will support no more than five positions or sub-contracts, either as new staff at the Convenors or at another identified organization in the region.

Regional Convenor/Other Organization*	Position	FTE x Monthly Salary x Time	Benefits	Total (FTE X Salary X Time) + Benefits
Other Organization	TBD	TBD	TBD	\$300,000
Other Organization	TBD	TBD	TBD	\$300,000
Other Organization	TBD	TBD	TBD	\$300,000
Other Organization	TBD	TBD	TBD	\$300,000
Other Organization	TBD	TBD	TBD	\$300,000
Totals		\$ 0.00	\$ 0.00	\$ 1,500,000.00

*\*BA-HRTC is still determining where positions will be housed, their roles and their salary levels. For now, we are tentatively assigning these positions to the Fiscal Agent (Other Organization).*

**H. Participant Compensation §**

Participant compensation that is an exchange of payment for services rendered in the development of community work products and appropriately documented with deliverables such as sign in sheets or written surveys. Compensation up to \$100 per day is allowed to attend CERF-related meetings or participate in CERF related activities. Participant compensation cannot be used in lieu of subcontracts with individuals/organizations providing direct services to the HRTC. Participant compensation does not include travel.

*Describe details and explain purpose and planned use.*

**I. Community Outreach and Engagement §**

Marketing, facilitation fees, mediation/conflict management, interpretation services, translation of documents, transportation and transportation stipends, rental costs of equipment and facilities, childcare, food and refreshments when a meal is consumed as part of the event and replaces a meal otherwise missed by attending the event.

*Describe details and explain purpose and planned use.*

**J. Furniture and Equipment\* \$**

*Describe the calculation.*

*Pooled items less than \$5,000 per unit, lease, or purchase, include a cost allocation - List name of item, cost, and quantity.*

1. Small Amount of Equipment and Furniture Total \$

Small Amount of Equipment and Furniture	Cost	Administrative/Program Cost
	\$	Choose an item.
	\$	Choose an item.

*Greater than \$5,000: List name of item, cost, and quantity to be purchased - prior approval required.*

2. Large Amount of Equipment and Furniture Total \$

Large Amount of Equipment and Furniture	Cost	Administrative/Program Cost
	\$	Choose an item.
	\$	Choose an item.

3. Equipment Lease \$

Equipment Lease	Cost	Administrative/Program Cost
	\$	Choose an item.
	\$	Choose an item.

**K. Sub-Contracts/Sub-Awards \$11,900,000**

***Describe proposed sub-contracts and/or sub-awards. Description should include specific details regarding sub-contracts/sub-awards with identified/selected partners. Planned sub-contracts and/or sub-awards only require a summary of the intended number of sub-contracts and/or sub-awards, brief description and proposed procurement process.***

*Sub-Contractual Services. If it is in another line item notate here where it is summarized. (Example: Biocom Institute - \$20,000. Summarized on Line Item H. Research).*

*(Example: Biocom Institute will seek a contractor to provide web development and salesforce integration support to build the Veterans in Life Science Virtual Network (VLSVN). The contract amount will not exceed \$20,000. Biocom Institute will contract with Karmin Noar to serve as*

*Interim Executive Director and Project Manager for the Gateway to Life Science Careers for Veterans project with a monthly bill rate of \$10,833.)*

Sub-Contracted Services: Regional Convenor (All Home) 27 months

- CERF Program Staff – \$1,235,000 (covers salaries for 27 months for part or all of the following positions: Chief Economic Mobility Officer, Director of Housing & Economic Strategy, CERF Project Manager, CERF Project Coordinator, Project/Admin. Assistance and Communications Manager).
- Benefits @ 20% - \$247,000
- Professional Services (facilitation, communications, analysis and/or research support) - \$135,000
- Materials and Supplies - \$9,000
- Travel, Conferences, Communications - \$14,000
- Events and Other Operating Expenses - \$27,000 (CERF-hosted activities, space rental and food)
- Indirect Expenses @20% - \$333,000 (Tides fee @ 15% plus program's share of All Home's non-personnel Administrative costs, e.g. rent, insurance, IT, accounting, finance.)

Total Regional Convenor Budget: \$2,000,000

Sub-Contracted Services: Pre-Development

Subcontracts to BA-HRTC partners and funded pre-development projects:

- Feasibility studies, market analysis, environmental assessments, site acquisition; site development plans; permitting; drafting CBAs and CWAs, etc.
- Basic environmental infrastructure predevelopment, construction and development short-term operations and maintenance plans
- Support costs for building and sustaining the capacity of project leads and partners

Specific amounts for each activity type are TBD. Total Pre-Development Budget = \$9,000,000

Sub-Contracted Services: Oversight and Monitoring

Subcontracts to Bay Area Good Jobs Partnership for Equity partners

- Oversight and monitoring responsibilities related to administrative functions
- Coordination and alignment with ten Bay Area Workforce Development Boards
- Build partnerships and align economic and workforce development planning and coordination of programs and services for the larger Bay Area.

Partners include:

- Alameda Workforce Development Board
- County of Contra Costa Workforce Development Board
- North Valley Workforce Development Board
- Oakland Workforce Development Board
- Richmond Workforce Development Board
- Silicon Valley San Jose Workforce Investment Network
- Solano Workforce Development Board
- Sonoma County Workforce Investment Board
- Workforce Alliance of the North Bay

Total of BAGJJPE subcontracts \$900,000 noted on Line Item K of Administrative Costs

**L. Other \$**

*Clearly explain these costs, which do not fit into the specific categories above.*

- **Administrative Cost:**
- **Program Cost:**



**Memorandum of Understanding for Workforce Development Services  
Between  
All Home, a project of Tides Center  
And  
Office of Economic and Workforce Development  
(on behalf of the Bay Area Good Jobs Partnership for Equity)**

This MEMORANDUM OF UNDERSTANDING (“MOU”) is entered into on this 22nd day of JULY, 2022 (the “Effective Date”) by and between **All Home**, a project of Tides Center (“All Home”), a non-profit corporation, and the City and County of San Francisco, a municipal corporation (the “City”) acting through its Office of Economic and Workforce Development (“OEWD”).

**RECITALS**

- A. Whereas, the State of California established the Community Economic Resilience Fund (“CERF”) to build an equitable and sustainable economy across California in response to the economic distress of COVID-19, and foster long-term economic resilience by supporting new plans and strategies to diversify local economies and develop sustainable industries that create high-quality, broadly accessible jobs for all Californians.
- B. Whereas, Bay Area Good Jobs Partnership for Equity (“BAGJPE”) is an inclusive, worker-centric collaboration of ten workforce development boards from across the San Francisco Bay Area with representation from Alameda Workforce Development Board, County of Contra Costa Workforce Development Board, North Valley Workforce Development Board, Oakland Workforce Development Board, Richmond Workforce Development Board, San Francisco Office of Economic and Workforce Development, Silicon Valley San Jose Workforce Investment Network, Solano Workforce Development Board, Sonoma County Workforce Investment Board, and Workforce Alliance of the North Bay. BAGJPE builds partnerships to align economic and workforce development planning and coordinate programs and services for the larger Bay Area, and has pursued competitive funding with OEWD as its Fiscal Lead.
- C. Whereas, the Parties on behalf of the BAGJPE, intend to apply for a CERF Phase I Planning Grant, with a shared commitment to prioritize workers through regional economic and workforce development planning, stakeholder engagement, program design, staff and workforce system training, and expansion of regional initiatives.
- D. The purpose of this MOU is to summarize the parties’ roles and responsibilities and to memorialize their commitment to work together to achieve the goals, objectives, and deliverables of CERF.
- E. NOW THEREFORE, THE PARTIES AGREE AS FOLLOWS:

1. **Recitals.** The aforementioned Recitals are true and correct and incorporated herein by this reference.
2. **Responsibilities of Regional Convener.** As BAGJPE's approved Regional Convener, All Home shall be responsible for organizing an inclusive group of regional stakeholders to implement the planning grant in its region. All Home will establish a Steering Committee with community, labor unions, government, nonprofit, employer, workforce development, and advocate representation to form strategic plans for the CERF and with BAGJPE will oversee its membership.
3. **Responsibility of Fiscal Lead.** As BAGJPE's approved Fiscal Lead, OEWD will submit a grant application package, and if awarded, will oversee the day-to-day operations of the grant. Responsibilities will include: (1) act as liaison with the funding agency; (2) communicate expectations; (3) manage reporting and performance requirements; and (4) distribute funds. OEWD shall also be responsible for overseeing compliance with all terms and conditions of the applicable grant and any amendments thereto, including but not limited to, any and all applicable reporting, accounting, and financial disclosure requirements.
4. **Compliance with Program Requirements.** The Parties shall manage and expend the grant funds in accordance with the terms and conditions of the Solicitation for Proposals (dated June 21, 2022, hereafter "the SFP"), the grant and any amendments thereto, and all applicable federal and state and local laws.
5. **Service Agreements.** The Parties will disburse funds under Service Agreements for each grant and/or subgrant; grants may be awarded by the Fiscal Lead or through the Regional Convener, as the parties jointly deem appropriate. The Parties will develop and approve template Service Agreements; changes must be approved by the Parties' legal counsels in accordance with each Party's authorized approval process.
6. **Payments.** OEWD will be responsible for disbursing grant funds to All Home for regional convening services as set forth in this MOU. All expenditures shall be consistent with the budget submitted as part of the CERF Phase 1 Planning Grant application, as such budget may be amended from time to time and approved by the parties in writing. OEWD will provide payment to All Home only for actual costs as supported by documentation specified below, not for budgeted costs. Payments will be made after reviewing and approving that documentation and confirming its accuracy.
7. **Invoicing.** All Home shall provide OEWD invoices in a form agreed to between the parties. The invoices shall include appropriate documentation describing the services rendered and the costs and fees associated with those services, including outside vendor costs where appropriate. All Home and OEWD shall agree on the form and contents of the documentation and reports; at a minimum however, the information provided by All Home must enable BAGJPE and its Fiscal Lead OEWD to verify that the services have been provided and that the costs are billing appropriately.

All Home shall provide monthly invoices no later than the 15<sup>th</sup> day after the end of the month. Invoices should be submitted with a summary of monthly activities to OEWD and the OEWD project manager for approval, and then submitted via email to [OEWD.ap@sfgov.org](mailto:OEWD.ap@sfgov.org).

If All Home requests reimbursements for services other than the services described in this MOU, it shall do so in advance of performing the services. OEWD shall not be obligated to reimburse All Home for services that are not described in this MOU or otherwise pre-approved in writing.

- 8. Term.** The term of this MOU shall commence at the date of notice of the CERF Phase I Planning award, and shall continue until October 31, 2026.
- 9. Termination.** This MOU may be terminated by either party by giving 30 days prior written notice to the other party, except that in the event of a breach, the non-breaching party may terminate the agreement if it provides written notice of breach to the other party and the other party fails to cure the breach within 10 business days.
- 10. Indemnification.** During and after the term of this Agreement, each Party will indemnify, hold harmless and, at the other Party's request, defend such other Party, its subsidiaries, affiliates, directors, officers and employees, past or present, from and against all losses, claims, demands, actions, causes of action, suits, liabilities, damages, expenses, and fees (including but not limited to attorney fees) arising from or related to any actual or alleged: (i) misrepresentation, fraud or breach by the indemnifying Party of any representation, warranty or covenant in the Agreement (or made in anticipation of the Agreement), or (ii) wrongful, unlawful or negligent act or omission by the indemnifying Party in connection with the Agreement or the Services.
- 11. Amendment.** Any party to this MOU may propose written amendments to it at any time. If mutually agreed to and properly executed, amendments shall become effective upon the effective date of the amendment.
- 12. Entire Agreement.** This MOU constitutes the entire agreement of the parties related to the subject matter addressed in this MOU, and supersedes all prior communications, contracts, or agreements between the parties with respect to the subject matter addressed in this MOU, whether oral or written.
- 13. Governing Law.** This MOU shall be interpreted and applied consistent with the laws of the State of California.
- 14. Severability.** The invalidity or unenforceability of a particular provision of this MOU shall not affect the other provisions hereof.
- 15. Discretion.** Each party, including their respective employees, officials and boards, shall exercise its sole discretion over all matters relating to the work performed under this

MOU and over each contract or decision over which it has jurisdiction consistent with legal requirements.

**16. No Joint Venture.** Nothing in this MOU shall be construed as creating the right or ability of one party to bind the other and nothing in this MOU shall be construed to create any joint liability with regard to, or as a result of, the activities undertaken by either party, their employees, officers and/or agents, to implement this MOU. All employees, officers and/or agents of each party shall remain employees, officers and/or agents of that party and shall be subject to the laws, procedures, rules and policies governing that party's employees, officers and/or agents. Nothing in this MOU shall be construed as creating a partnership, joint venture, employment or agency relationship between All Home, BAGJPE, or SFOEWD. Each party shall conduct its activities under this MOU in accordance with all applicable laws and regulations. Each party shall be responsible for its own acts.

**17. Sunshine Ordinance.** The parties acknowledge and agree that this MOU, as well as communications and documents exchanged between All Home and OEWD, are subject to San Francisco Administrative Code Chapter 67 (the "Sunshine Ordinance").

**18. Notices.** All written communications sent by Parties under this MOU may be by email or U.S. mail or overnight courier, and shall be addressed as follows:

**All Home:**           **All Home**  
                              **220 Montgomery Street, Suite 850**  
                              **San Francisco, CA 94104**  
                              **ATTN: Jeff Hobson**

**OEWD:**               **San Francisco Office of Economic and Workforce Development**  
                              **On Behalf of the Bay Area Good Jobs Partnership for Equity**  
                              **C/O Joshua Arce, Director of Workforce Development**  
                              **1 South Van Ness Avenue, Fifth Floor**  
                              **San Francisco, CA 94103**

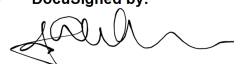
**19. Dispute Resolution.** All Home shall have the right to contest the amount, validity or applicability of any quarterly invoice, or request further information, in the case of an incomplete invoice, or any other matter related to this MOU, by notifying OEWD in writing within 10 days of receipt of that invoice ("Notice of Contest"). Any such Notice of Contest shall describe in detail the amount(s) being contested or the other matter(s) in dispute and the reasons for such contest. Upon receipt of the Notice of Contest from the All Home, the appropriate project managers from OEWD, or other designated staff, shall in good faith meet with each other to resolve the contested issues. If the project managers from All Home and OEWD are unable to resolve the dispute, the matter shall be forwarded to the Executive Directors of All Home and OEWD, whose decision shall be final and binding on both parties.

**20. No Third-Party Beneficiaries.** There are no third-party beneficiaries of this MOU. The parties acknowledge and agree and this MOU is entered into for their mutual benefit and not for the benefit of any other party.

**21. Nondiscrimination.** In performing this MOU, each party agrees not to discriminate against any person on the basis of the fact or perception of a person's race, color, creed, religion, national origin, ancestry, age, height, weight, sex, sexual orientation, gender identity, domestic partner status, marital status, disability or Acquired Immune Deficiency Syndrome or HIV status (AIDS/HIV status), or association with members of such protected classes, or in retaliation for opposition to discrimination against such classes, in accordance with San Francisco Administrative Code Chapter 12B, and the All Home agree to incorporate Chapter 12B into any contracts for work funded under this MOU.

IN WITNESS WHEREOF, the parties have caused this agreement to be executed as of the date first written above.

SAN FRANCISCO OFFICE OF ECONOMIC AND WORKFORCE DEVELOPMENT  
(On behalf of the Bay Area Good Jobs Partnership for Equity)

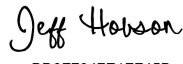
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7491AC26DC24414...

7/22/2022 | 2:01 PM PDT

JOSHUA ARCE  
DIRECTOR OF WORKFORCE

Date

ALL HOME, A PROJECT OF TIDES CENTER

DocuSigned by:  
  
BD8F7947E1FF45B...

7/22/2022 | 1:31 PM PDT

JEFF HOBSON  
CHIEF OPERATING OFFICER

Date

TIDES CENTER

DocuSigned by:  
  
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7/22/2022 | 1:40 PM PDT

MEGHAN HERBERT  
ASSOCIATE

Date

## RE: VENDOR'S QUESTIONS: EDD Contract No. M101332-7100 Grant - Request for Signature-San Francisco

Calderon, Karen@EDD <Karen.Calderon@edd.ca.gov>

Fri 3/1/2024 2:11 PM

To:Hand, Jennifer (ECN) <jennifer.hand@sfgov.org>

Cc:Houston, Chad (ECN) <chad.houston@sfgov.org>;Eagleson, Glenn (ECN) <glenn.eagleson@sfgov.org>;Avalos, Adriana C@EDD <AdrianaC.Avalos@edd.ca.gov>

Hi Jennifer,

Thank you for your time this afternoon, below is a recap of the information we discussed during our call. Derick will follow-up next week with an updated contract for review and signatures.

1. **Attachment B-1** does not reflect the sheet we sent in or our understanding of our total award of \$14 million. We had requested \$2,000,000 for the Regional Convener sub-contract (Line Item K. Regional Convener). Attachment B-1 outlines an award of \$13 million, with \$1,000,000 assigned to the Regional Convener. Would you kindly clarify if our reward was reduced and where the revision came from?

**Given the proposed budget changes for the Regional Investment Initiative, the EDD will need to fund the Catalyst Program in allotments. The first allotment is reflected in this initial contract and a second allotment of \$1,000,000 will be processed through a contract amendment after the budget is approved in July 2024. Please note that all Regions will be funded in two allotments (First Allotment: \$13M; Second Allotment: \$1M), pending budget approval. In analyzing the potential impact to the program, the interagency team made the determination to adjust the budget for the Regional Convener as Regions should not be using the funds until after Planning Phase concludes on September 30, 2024. Your assigned project manager will be reaching out in early July to discuss the amendment for the second allotment and assist with any budget modifications, if necessary.**

**We will be sending award letters in the next couple of weeks, which will also include your final award amount and allotment amounts.**

### 2. OEWD Contacts:

- a. If it is not too onerous, please feel free to change to me as I am the Fiscal Agent Lead, and here is my contact information.
  - i. Jennifer Hand, Workforce Impact Manager, (415) 701-4830, [jennifer.hand@sfgov.org](mailto:jennifer.hand@sfgov.org)
- b. Please also remove Janan Howell ([janan.howell@sfgov.org](mailto:janan.howell@sfgov.org)) from all communications as she is no longer with our organization.

**We will revise the contract to update Attachment A-1 with your information. The project managers will update our contact sheets right away to reflect this update.**

3. **IP Clause:** When we met with the State partners at the California Jobs First summit last week, we requested that the EDD contracts include an IP clause where the State retains IP so we can pass through the terms to our sub-recipients. Is it possible to include this?

**Unfortunately, we are unable to include an IP clause.**

Please let me know if you have any questions.

**Best Regards,**  
**Karen Calderon**  
(She/Her)

**Special Initiatives Support Group Manager**

Workforce Services Branch  
916-937-5229 Cell

# BAY AREA JOBS FIRST COLLABORATIVE

Hello,

Thank you for applying for Catalyst Pre-development funding through the Bay Area Jobs First Collaborative. We appreciate the time and effort it took to submit your application.

Our Scoring Committee will carefully review all eligible applications. We aim to have this process completed and award notifications shared by October 18, 2024.

We appreciate your patience and will contact you as soon as we reach a decision on your application.

Thank you,  
Laura Maldonado on behalf of the Bay Area Jobs First Collaborative Steering Committee



September 18, 2024

## STATEMENT ON RETROACTIVITY

File No 240842

*Accept and Expend and Exempt Subgrants from 21G City Requirements  
Retroactive - CA Jobs First Catalyst Program Grant - \$14,000,000*

This request is retroactive because OEWD's Workforce Division received this contract on April 19, 2024 for a May 1, 2024 start date. The Workforce Division initiated the accept and expend process in advance of receiving the final contract; however, OEWD secured accept and expend approvals from all required City departments on August 23, 2024.

This legislation will waive City requirements for a community-led procurement, which is a required activity from the State Governor's Office of Business and Economic Development and California Employment Development Department. The community procurement team aims to make final decisions on awards by 10/12 and provide final funding notices to community stakeholders by no later than 10/18.

OEWD has not accrued any costs against this contract as we await allowance to accept and expend from the Board of Supervisors before taking further action.



President, District 3  
BOARD of SUPERVISORS



City Hall  
1 Dr. Carlton B. Goodlett Place, Room 244  
San Francisco, CA 94102-4689

Tel. No. 554-7450  
Fax No. 554-7454  
TDD/TTY No. 544-6546

**Aaron Peskin**

**PRESIDENTIAL ACTION**

Date: 9/17/24

To: Angela Calvillo, Clerk of the Board of Supervisors

Madam Clerk,

Pursuant to Board Rules, I am hereby:

Waiving 30-Day Rule (Board Rule No. 3.23)

File No. 240842 Mayor  
(Primary Sponsor)

Title. Accept and Expend Grant - Retroactive - California Jobs First Catalyst Program - \$14,000,000

Transferring (Board Rule No 3.3)

File No. \_\_\_\_\_ (Primary Sponsor)

Title. \_\_\_\_\_

From: \_\_\_\_\_ Committee

To: \_\_\_\_\_ Committee

Assigning Temporary Committee Appointment (Board Rule No. 3.1)

Supervisor: \_\_\_\_\_ Replacing Supervisor: \_\_\_\_\_

For: \_\_\_\_\_ Meeting  
(Date) (Committee)

Start Time: \_\_\_\_\_ End Time: \_\_\_\_\_

Temporary Assignment:  Partial  Full Meeting

\_\_\_\_\_  
Aaron Peskin, President  
Board of Supervisors

**TO:** Angela Calvillo, Clerk of the Board of Supervisors  
**FROM:** Alesandra Lozano, Government Affairs Manager  
Office of Economic and Workforce Development  
**DATE:** May 20, 2024  
**SUBJECT:** Accept and Expend Ordinance  
**GRANT TITLE:** California Jobs First Catalyst Program Grant

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Attached please find the original\* and one copy of each of the following:

X Proposed grant ordinance; original\* signed by Department, Mayor, Controller

X Grant information form, including disability checklist

X Grant budget

X Grant application

X Letter of Intent or grant award letter from funding agency

N/A Ethics Form 126 (if applicable)

X Contracts, Leases/Agreements (if applicable)

N/A Other (Explain):

**Special Timeline Requirements:**

Program start May 1, 2024

**Departmental representative to receive a copy of the adopted ordinance:**

Name: Alesandra Lozano

Phone/Email: [alesandra.lozano@sfgov.org](mailto:alesandra.lozano@sfgov.org)

Interoffice Mail Address: 1 Dr. Carlton B. Goodlett Pl., City Hall, Room 448, San Francisco, CA 94102

Certified copy required Yes

No

(Note: certified copies have the seal of the City/County affixed and are occasionally required by funding agencies. In most cases ordinary copies without the seal are sufficient).

**From:** [Trejo, Sara \(MYR\)](#)  
**To:** [BOS Legislation, \(BOS\)](#)  
**Cc:** [Paulino, Tom \(MYR\)](#); [Lozano, Alesandra \(ECN\)](#); [Hand, Jennifer \(ECN\)](#); [KAMIKIHARA, MARY \(CAT\)](#)  
**Subject:** Mayor -- Ordinance -- California Jobs First Catalyst Program A&E  
**Date:** Tuesday, September 3, 2024 2:22:32 PM  
**Attachments:** [1. Ordinance Cover Memo & Checklist\\_CJF.doc](#)  
[2. 2024-06-13 Ordinance OEWD CERF Grant Phase 2\\_FINAL.DOCX](#)  
[2. 2024-06-13 Ordinance OEWD CERF Grant Phase 2\\_Signed.pdf](#)  
[2024 CERF Phase II legislative digest\\_FINAL\\_mk\\_title.docx](#)  
[3. Ordinance Information Form\\_CJF SIGNED.pdf](#)  
[5. CJF Catalyst Budget.pdf](#)  
[6. Notice of full award - email.pdf](#)  
[7. Cover Sheet Bay Area HRTC Catalyst Grant.pdf](#)  
[8. Ex. A - Bay Area HRTC Catalyst Fund Application.docx](#)  
[9. Ex. B1 - Bay Area HRTC Catalyst Fund Budget Summary.docx](#)  
[10. Ex. B2 - Bay Area HRTC Catalyst Fund Budget Narrative.docx](#)  
[11. Grant Agreement M101332-7100.pdf](#)  
[12. BAGJPE CERF PY 22-24 MOU.pdf](#)  
[MBO Approval.pdf](#)  
[Statement on Retroactivity.pdf](#)

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Hello Clerks,

Attached is an Ordinance authorizing the Office of Economic and Workforce Development to retroactively accept and expend a grant in the amount of \$14,000,000 from the California Economic Development Department for the California Jobs First Catalyst Program Grant for the grant period of May 1, 2024 through September 30, 2026 and exempting the California Jobs First Catalyst Program subgrants from the grantmaking requirements under Administrative Code Chapter 21G and all other provisions in the Administrative, Environment, and Labor and Employment Codes imposing obligations or restrictions on subgrantees related to the program.

Best regards,

**Sara Trejo**

Legislative Aide

Office of the Mayor

City and County of San Francisco