

File No. 221267

Committee Item No. 4

Board Item No. 1

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee: Budget and Finance Committee

Date January 11, 2023

Board of Supervisors Meeting

Date January 31, 2023

Cmte Board

- Motion
- Resolution
- Ordinance
- Legislative Digest
- Budget and Legislative Analyst Report
- Youth Commission Report
- Introduction Form
- Department/Agency Cover Letter and/or Report
- MOU
- Grant Information Form
- Grant Budget
- Subcontract Budget
- Contract/Agreement
- Form 126 – Ethics Commission
- Award Letter
- Application
- Public Correspondence

OTHER (Use back side if additional space is needed)

- Solicitation for Proposals 6/21/2022
- Press Release
- Presidential Memo – 30-Day Waiver
- OEWD Presentation 1/11/2023
- _____
- _____
- _____
- _____
- _____

Completed by: Brent Jalipa

Date January 5, 2023

Completed by: Brent Jalipa

Date January 19, 2023

1 [Accept and Expend Grant and Amendment of Annual Salary Ordinance - Retroactive -
2 California Employment Development Department - Community Economic Resilience Fund
3 Planning Grant - \$5,000,000]

4 **Ordinance retroactively authorizing the Office of Economic and Workforce**
5 **Development to accept and expend a grant in the amount of \$5,000,000 from the**
6 **California Economic Development Department for the Community Economic Resilience**
7 **Fund Planning Grant for the grant period of October 1, 2022, through September 30,**
8 **2024; and amending Ordinance No. 162-22 (Annual Salary Ordinance, File No. 220670**
9 **for Fiscal Years 2022-2023 and 2023-2024) to provide for the creation of one grant-**
10 **funded full-time position, in Class 1823 Senior Administrative Analyst (1.0 FTE).**

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

13
14 **Section 1. Findings.**

15 (a) The California Governor’s Office provided the California Employment
16 Development Division (EDD) with Community Economic Resilience Fund (CERF) Planning
17 Grant monies to build regional workforce development plans in response to the economic
18 impact of the coronavirus pandemic; and

19 (b) EDD required one proposal from the nine-county Bay Area region, and for the
20 application to identify a Fiscal Agent and a Regional Convener to work in tandem to develop a
21 regional workforce development plan; and

22 (c) The Office of Economic and Workforce Development (OEWD) is a member of
23 the Bay Area Good Jobs Partnership for Equity (BAGJPE), an unincorporated association of
24 Bay Area workforce development boards, including the California Workforce Association,
25 Alameda County Workforce Development Board (WDB), WDB of Contra Costa County,

1 NOVAworks, Oakland WDB, OEWD, Richmond WDB, WDB of Solano County, Sonoma
2 WDB, work2future, and Workforce Alliance of the North Bay (Marin and Sonoma); and

3 (d) OEWD, on behalf of the BAGJPE, applied for and was awarded a grant in the
4 amount of \$5,000,000 by EDD to be Fiscal Agent for the Bay Area CERF Planning Grant with
5 All Home, Inc. as the Regional Convener; and

6 (e) OEWD and All Home, Inc. proposed a regional workforce development strategy
7 to coordinate workforce stakeholders and services across the San Francisco Bay Area region
8 with critical partnership from the Bay Area High Road Training Collaborative (BA-HRTC),
9 which includes All Home, Inc., Tides Center, the Bay Area Good Jobs Partnership for Equity,
10 Bay Area Council, Alameda County Labor Council, Contra Costa Labor Council, San Mateo
11 County Central Labor Council, Napa-Solano Central Labor Council, North Bay Labor Council,
12 San Francisco Labor Council, San Francisco CLOUT, South Bay AFL-CIO Labor Council, Arts
13 Contra Costa County, Asian Pacific Environmental Network, the Association of Bay Area
14 Governments and Metropolitan Transportation Commission, Bay Area Community College
15 Consortium, Bay Area Regional Health Inequities Initiative, Bloom Energy, BlueGreen
16 Alliance, Building Skills Partnership, California Forward, California Green New Deal Coalition,
17 Canal Alliance, Center for Sustainable Neighborhoods, Centro Legal de la Raza, Chinese
18 Progressive Association, Construction Trades Workforce Initiative, Contra Costa Economic
19 Partnership, East Bay Economic Development Alliance, Emerald Cities Collaborative,
20 Greenbank Associates, Greenbelt Alliance, Jobs with Justice San Francisco, North Bay Jobs
21 with Justice, North Bay Leadership Council, University of California at Berkeley Othering and
22 Belonging Institute, Port of Oakland, Prospera, ReWork the Bay, Rural County
23 Representatives of California, San Francisco Building and Construction Trades Council, San
24 Francisco Foundation, ReWork the Bay a project of San Francisco Foundation, San Mateo
25 County Economic Development Association, Services Immigrant Rights and Education

1 Network, Sierra Club San Francisco Bay Chapter, Silicon Valley Creates, Silicon Valley
2 Leadership Group, Solano Economic Development Corporation, Transition US, University of
3 California at Berkeley Labor Center, United Way Bay Area, and UpValley Family Centers of
4 Napa Valley; and

5 (f) The program period is from October 1, 2022 to September 30, 2024; and

6 (g) A request for retroactive approval is being sought because OEWD received the
7 award on October 19, 2022 for a project start date of October 1, 2022; and

8 (h) The OEWD budget includes a provision for indirect costs in the amount of
9 \$60,000.

10

11 **Section 2. Authorization to accept and expend grant funds.**

12 (a) The Board of Supervisors hereby authorizes OEWD to retroactively accept and
13 expend, as fiscal agent on behalf of the BAGJPE, All Home and the BA-HRTC, a grant from
14 the California Economic Development Department in the amount of \$5,000,000 pursuant to its
15 CERF Planning Grant program for work related to regional workforce development strategy
16 and coordination of workforce stakeholders and services across the San Francisco Bay Area
17 region, for a grant period of October 1, 2022 through September 30, 2024.

18 (b) The Board of Supervisors hereby authorizes the Executive Director of OEWD, or the
19 Executive Director's designee, to furnish additional information or assurances EDD may
20 request in connection with the CERF grant, as allowed by law, to execute any and all
21 agreements or other documents, and to take any other steps necessary to accept, distribute,
22 and expend the grant funds.

23 (c) The BA-HRTC nonprofit and government partners may receive CERF funds under
24 this award from OEWD as the passthrough entity without going through a competitive
25 solicitation process.

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Section 3. Grant funded positions: Amendment to Fiscal Years 2022-2023 and 2023-24 Annual Salary Ordinance.

Ordinance No. 162-22 (Annual Salary Ordinance File No. 220670) for FYs 2022-2023 and 2023-2024) is hereby amended to add one full-time position (1.0 FTE in FY 22-23, 1.0 FTE in FY 23-24) in OEWD as follows:

Department: ECN (Office of Economic and Workforce Development)
Program: Community Economic Resilience Fund
Fund: 10680 SR Neighborhood Dev-Grants Sta
Project: 10039623 EDD CERF 2022-24

Amendment	No. of Positions	Class	Compensation Schedule	Department
Add in FY 22-23	1.0 FTE	1823 Senior Administrative Analyst	\$5,171 Biweekly	ECN

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Add in FY 23-24	1.0 FTE	1823 Senior Administrative Analyst	\$5,300 Biweekly (July 1, 2023 – January 5, 2024) \$5,419 Biweekly (January 6, 2024 – June 30, 2024)	ECN
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1 APPROVED AS TO FORM:

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By: /s/ Victoria Wong
VICTORIA WONG
Deputy City Attorney

APPROVED AS TO CLASSIFICATION
DEPARTMENT OF HUMAN RESOURCES

By: /s/
CAROL ISEN
Human Resources Director

APPROVED: /s/
Mayor

APPROVED: /s/
Controller, Grant Division

Recommended:
/s/
KATE SOFIS
Executive Director

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LEGISLATIVE DIGEST

[Accept and Expend Grant and Amendment of Annual Salary Ordinance - Retroactive - California Employment Development Department - Community Economic Resilience Fund Planning Grant - \$5,000,000]

Ordinance retroactively authorizing the Office of Economic and Workforce Development to accept and expend a grant in the amount of \$5,000,000 from the California Economic Development Department for the Community Economic Resilience Fund Planning Grant for the grant period of October 1, 2022, through September 30, 2024; and amending Ordinance No. 162-22 (Annual Salary Ordinance, File No. 220670 for Fiscal Years 2022-2023 and 2023-2024) to provide for the creation of one grant-funded full-time position, in Class 1823 Senior Administrative Analyst (1.0 FTE).

Amendments to Current Law

The proposed ordinance authorizes the Office of Economic and Workforce Development (OEWD) to accept and expend a \$5,000,000 grant from the California Economic Development Department's Community Economic Resilience Fund (CERF).

OEWD is a member of the Bay Area Good Jobs Partnership for Equity (BAGJPE), an unincorporated association of Bay Area workforce development boards. OEWD, on behalf of the BAGJPE, applied for and was awarded this grant to be Fiscal Agent for the Bay Area CERF Planning Grant with All Home, Inc. as the Regional Convener. OEWD and All Home, Inc. proposed a regional workforce development strategy to coordinate workforce stakeholders and services across the San Francisco Bay Area region with critical partnership from the Bay Area High Road Training Collaborative (BA-HRTC), which includes All Home, Inc., Tides Center, the Bay Area Good Jobs Partnership for Equity, Bay Area Council, Alameda County Labor Council, Contra Costa Labor Council, San Mateo County Central Labor Council, Napa-Solano Central Labor Council, North Bay Labor Council, San Francisco Labor Council, San Francisco CLOUT, South Bay AFL-CIO Labor Council, Arts Contra Costa County, Asian Pacific Environmental Network, the Association of Bay Area Governments and Metropolitan Transportation Commission, Bay Area Community College Consortium, Bay Area Regional Health Inequities Initiative, Bloom Energy, BlueGreen Alliance, Building Skills Partnership, California Forward, California Green New Deal Coalition, Canal Alliance, Center for Sustainable Neighborhoods, Centro Legal de la Raza, Chinese Progressive Association, Construction Trades Workforce Initiative, Contra Costa Economic Partnership, East Bay Economic Development Alliance, Emerald Cities Collaborative, Greenbank Associates, Greenbelt Alliance, Jobs with Justice San Francisco, North Bay Jobs with Justice, North Bay Leadership Council, University of California at Berkeley Othering and Belonging Institute, Port of Oakland, Prospera, ReWork the Bay, Rural County Representatives of California, San Francisco Building and Construction Trades Council, San Francisco Foundation, ReWork the Bay a project of San Francisco Foundation, San Mateo County Economic Development Association, Services Immigrant Rights and Education Network, Sierra Club San Francisco

Bay Chapter, Silicon Valley Creates, Silicon Valley Leadership Group, Solano Economic Development Corporation, Transition US, University of California at Berkeley Labor Center, United Way Bay Area, and UpValley Family Centers of Napa Valley.

The proposed ordinance would authorize OEWD to retroactively accept and expend, as fiscal agent on behalf of the BAGJPE, All Home and the BA-HRTC, this grant for work related to regional workforce development strategy and coordination of workforce stakeholders and services across the San Francisco Bay Area region, for a grant period of October 1, 2022 through September 30, 2024.

The ordinance would also amend the Annual Salary Ordinance for FY 2022-23 and 2023-24 to provide for the creation of one grant-funded full-time position, in Class 1823 Senior Administrative Analyst (1.0 FTE).

Background Information

The State of California created the 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.

CERF's Phase I Planning Grant will establish a regional, inclusive planning table to develop blueprints and align resources for each region's economy future. These regional tables will result in recommended investments throughout the region that will build economic resilience, bolster equity outcomes, and facilitate the transition to carbon neutrality. Phase I will establish inclusive, diverse, transparent, and accountable regional planning that results in a holistic strategy and recommended series of investments to grow sustainable industries, diversify regional economies, and increase access to high quality jobs.

The State identified 13 regions in California, including the Bay Area region. The State required the Bay Area to identify a Regional Convener and a Fiscal Agent on behalf of the nine-county 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, 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 State grant, a \$5 million regional fund to establish a regional stakeholder table, BA-HRTC; develop unified regional economic and workforce development strategic plans; and execute a broad community engagement process for the nine-county Bay Area region.

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Community Economic Resilience Fund (CERF) Accept & Expend Ordinance

Prepared for San Francisco Board
of Supervisors
Budget & Finance Committee
January 11, 2023



January 11, 2023

Agenda

- 1. Community Economic Resilience Fund Overview**
- 2. Bay Area High Road Training Collaborative**
- 3. Fiscal Agent Responsibility, Budget, and Timeline**

CERF PURPOSE

The Community Economic Resilience Fund (CERF) will create regional, **high-road economic development plans to create equitable access to quality jobs**. High-road economic development supports environmentally sustainable businesses that pay living wages and create opportunities for career growth. As California recovers from the economic distress of COVID-19, CERF aims to ensure that the state's economy works for all California residents, particularly those who have historically been marginalized.



CERF FUNDING PHASES

Phase I Planning Grant (\$5 million):

- Form Bay Area High Road Transition Collaborative (BA-HRTC).
- Conduct research on best practices and regional needs.
- Create regional economic and workforce development plan.
- Program Period: October 1, 2022 – September 30, 2024

Phase II Implementation Grants (up to \$500 million):

- Implement regional economic and workforce development plan.
- Identify regional economic diversification pilot projects and apply.
- Identify regional workforce development program projects and apply.
- Rolling Applications: January 1, 2023 – September 30, 2026

BA-HRTC GOVERNANCE STRUCTURE

Regional Convener (All Home) & Fiscal Agent (BAGJPE) - *Day-to-day decision-making, compliance, and reporting.*

Steering Committee (21 Members) - *Includes community, labor, business, environmental, government, workforce, and educational representatives to provide strategic direction and oversight.*

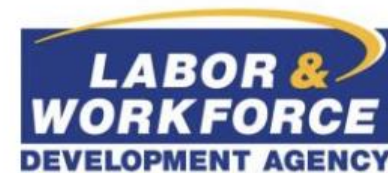
Research Planning and Outreach Committee - *Oversees data gathering, analysis, and engagement strategy.*

Sub-Regional Tables - *Identifies regional needs and recommends pilot projects.*



CERF FISCAL LEAD RESPONSIBILITIES (SFOEWD)

- Oversee day-to-day operations of the grant.
- Liaison to CA EDD, OPR, LWDA, and GO-Biz.
- Manage reporting and performance requirements.
- Distribute funds and manage procurements.
- Oversee compliance, including reporting, accounting, disclosures.



BA-HRTC BUDGET

Budget Item	Total
1823 Contracts Analyst Salary & Fringe	\$357,666
Fiscal Agent Admin	\$60,000
<u>Total OEWD:</u>	<u>\$417,666</u>
Research	\$500,000
Data, Planning, and Communication Tools	\$100,000
Community Engagement	\$2,465,000
Participant Compensation	\$304,934
Program Coordination (All Home)	\$1,212,400
<u>Total Contractual:</u>	<u>\$4,582,334</u>

TIMELINE & MAJOR MILESTONES

Milestones	Timeline
Phase I Program Start	October 1, 2022
Phase I Program End	September 30, 2024
BA-HRTC Recommends Regional CERF Applications	<u>October 2022 - 2026</u>
CERF Phase I & II Funds Encumbrance Deadline	October 2026

File Number: 221265
(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: Community Economic Resilience Fund Planning Grant
2. Department: Office of Economic and Workforce Development
3. Contact Person: Crezia Tano Telephone/Email: crezia.tano@sfgov.org
4. Grant Approval Status (check one):
 Approved by funding agency Not yet approved
5. Amount of Grant Funding Approved or Applied for: \$5,000,000
6. a. Matching Funds Required: \$0
b. Source(s) of matching funds (if applicable): N/A
7. a. Grant Source Agency: California Economic Development Department
b. Grant Pass-Through Agency (if applicable): N/A
8. Proposed Grant Project Summary:
As core partners of Community Economic Resilience Fund Planning Grant, OEWD, the Bay Area Good Jobs Partnership for Equity, and All Home will lead regional economic and workforce development planning, stakeholder engagement, program design, staff and workforce system training, and 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: 10/1/2022 End-Date: 9/30/2024
10. Number of new positions created and funded: 1
11. Explain the disposition of employees once the grant ends? The Department will seek additional Community Economic Resilience Fund Phase II funding for project sustainability.
12. a. Amount budgeted for contractual services: \$4,582,334
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? \$60,000
b. 2. How was the amount calculated? 10% based on Federal Modified Direct Costs

c. 1. If no, why are indirect costs not included?

Not allowed by granting agency

To maximize use of grant funds on direct services

Other (please explain):

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

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 checked="" type="checkbox"/> Existing Structure(s) | <input checked="" 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:

Mark Hogains
(Name)

Operations Manager
(Title)

Date Reviewed: 11/28/2022 | 10:11 AM PST

DocuSigned by:
Mark Hogains
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(Signature Required)

Overall Department Head or Designee Approval:

Kate Sofis
(Name)

Executive Director, Office of Economic and Workforce Development
(Title)

Date Reviewed: 11/28/2022 | 9:18 AM PST

DocuSigned by:
Kate Sofis
F98E00C52682407...

(Signature Required)

EDD Use Only	
Proposal No. _____	
<input type="checkbox"/> Local Area	<input type="checkbox"/> Non-Local Area

[Community Economic Resilience Fund Program]

Funding	
Requested Funding \$ 5,000,000	Total Project Amount \$ 5,000,000
Requested Advance Pay % 0	Total Advance Pay Amount \$ 0

Organization (applicant) Name	San Francisco Office of Economic and Workforce Development on behalf of Bay Area Good Jobs Partnership for Equity		
Address	One South Van Ness, Fifth Floor		
City & Zip Code	San Francisco, CA 94103		
County	San Francisco		
Designated Contact Person	Joshua Arce		

Telephone	(415) 701-4848	Fax	(415) 701-4897	E-mail	Joshua.Arce@sfgov.org
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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
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Unique ID Number	788656416
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Proposal Title	Bay Area High Road Transition Collaborative (BA-HRTC)
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Counties Served	San Francisco, Alameda, San Mateo, Santa Clara, Contra Costa, Napa, Solano, Marin, Sonoma
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Approval of Authorized Representative (Submit two original signature copies)

Name: Merrick Pascual	Telephone: (415) 701-4848 Email: Merrick.Pascual@sfgov.org	
Title: Chief Financial Officer	Signature 	Date 7/21/22



Community Economic Resilience Fund Program
 CERF 2022-24
 Cover/Signature Page and Executive Summary

EDD Use Only	
Proposal No. _____	
<input type="checkbox"/> Local Area	<input type="checkbox"/> Non-Local Area

[Community Economic Resilience Fund Program]					
Funding					
Requested Funding \$ 5,000,000			Total Project Amount \$ 5,000,000		
Requested Advance Pay % 0			Total Advance Pay Amount \$ 0		
Organization (applicant) Name		San Francisco Office of Economic and Workforce Development on behalf of Bay Area Good Jobs Partnership for Equity			
Address		One South Van Ness, Fifth Floor			
City & Zip Code		San Francisco, CA 94103			
County		San Francisco			
Designated Contact Person		Joshua Arce			
Telephone	(415) 701-4848	Fax	(415) 701-4897	E-mail	Joshua.Arce@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				
Proposal Title	Bay Area High Road Transition Collaborative (BA-HRTC)				
Counties Served	San Francisco, Alameda, San Mateo, Santa Clara, Contra Costa, Napa, Solano, Marin, Sonoma				
Approval of Authorized Representative (Submit two original signature copies)					
Name: Merrick Pascual			Telephone: (415) 701-4848 Email: Merrick.Pascual@sfgov.org		

Title: Chief Financial Officer	Signature	Date
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The Executive Summary is limited to two pages. All sections must be completed. The Executive Summary will be publicly posted online and must be written in complete sentences (unless otherwise indicated) with proper grammar. Acronyms must be spelled out the first time they are used. Summaries that do not meet these requirements will be returned to the applicant to be rewritten.

Applicant Name	San Francisco Office of Economic and Workforce Development on behalf of Bay Area Good Jobs Partnership for Equity (BAGJPE)
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Collective Partnership Agreement Partners:

All Home is the BA-HRTC’s Regional Convener. All Home advances regional solutions that disrupt cycles of poverty and homelessness, redress racial disparities, and create more economic mobility opportunities for people with extremely low incomes. As convener of BA-HRTC, All Home will provide staffing support to BA-HRTC and coordinate contracted research partners and facilitation, technical assistance, and other consulting support. The Bay Area Good Jobs Partnership for Equity (BAGJPE), an association of ten workforce development boards (WDBs) and regional workforce planning units across the nine-county Bay Area region, will be the Fiscal Agent for BA-HRTC, with the San Francisco Office of Economic and Workforce Development (SFOEWD) as the Fiscal Lead. BAGJPE – an association with one hundred percent of boundaries overlapping the Bay Area CERF region – includes Alameda County WDB, WDB of Contra Costa County, NOVAworks, Oakland WDB, Richmond WDB, WDB of Solano County, work2future, SFOEWD and Workforce Alliance of the North Bay (Marin and Sonoma). BAGJPE/SFOEWD will provide contracts administration staffing and infrastructure to BA-HRTC. Over the past several months, All Home, as the Regional Convenor, has facilitated a process bringing together a diverse group of stakeholders from across the region and representing a variety of groups and sectors. There are 49 signatories to the Partnership Agreement letter.

Collective Partnership Agreement Partners:

All Home is the BA-HRTC’s Regional Convener. All Home advances regional solutions that disrupt cycles of poverty and homelessness, redress racial disparities, and create more economic mobility opportunities for people with extremely low incomes. As convener of BA-HRTC, All Home will provide staffing support to BA-HRTC and coordinate contracted research partners and facilitation, technical assistance, and other consulting support. The Bay Area Good Jobs Partnership for Equity (BAGJPE), an association of ten workforce development boards (WDBs) and regional workforce planning units across the nine-county Bay Area region, will be the Fiscal Agent for BA-HRTC, with the San Francisco Office of Economic and Workforce Development (SFOEWD) as the Fiscal Lead. BAGJPE – an association with one hundred percent of boundaries overlapping the Bay Area CERF region – includes Alameda County WDB, WDB of Contra Costa County, NOVAworks, Oakland WDB, Richmond WDB, WDB of Solano County, work2future, SFOEWD and Workforce Alliance of the North Bay (Marin and Sonoma). BAGJPE/SFOEWD will provide contracts administration staffing and infrastructure to BA-HRTC. Over the past several months, All Home, as the Regional Convenor, has facilitated a process bringing together a diverse group of stakeholders from across the region and representing a variety of groups and sectors. There are 49 signatories to the Partnership Agreement letter.

Project Description:

Over the course of the 24-month planning process, the BA-HRTC will: Stand up project staffing and infrastructure (by end of month 1); Finalize the HRTC governance structure and complete the Planning Phase Plan (by end of month 2); Conduct research and analysis in alignment with HRTC vision and values (by end of Q2); Conduct a public input process (Q2 through 6); Convene inclusive tables and community visioning processes (ongoing); and Complete the Regional Plan (Economic Development and Transition Road Map) (by end of the grant period). In addition to producing required Planning Phase deliverables, the BA-HRTC will hold itself accountable using measurable metrics of success or Planning Phase outcomes:

1. BA-HRTC will create a governance structure that is representative of and accountable to all stakeholders and disinvested communities.
2. BA-HRTC will ensure that participation and decision making by disinvested communities is built into the governance structure and is ongoing throughout the CERF process.
3. BA-HRTC will ensure that planning resources are allocated equitably across the subregions of the Bay Area.
4. BA-HRTC will create multiple accessible opportunities for the general public to learn about and participate in the CERF process, including in-person and virtual events and surveys.

BA-HRTC will ensure that investment recommendations coming out of the planning phase include measurable, actionable goals and strategies related to climate resilience, carbon emissions reduction, creation of quality high-road jobs and expanding access to quality jobs.

Outreach and Engagement Plan:

The Bay Area High Road Transition Collaborative (BA-HRTC) has developed a statement of purpose that includes a new vision for regional economic development planning shaped by workers and impacted community members. The group's adopted principles emphasize meaningful outreach and engagement. "Meaningful engagement" means engagement designed to build a durable and lasting structure for community planning. The Regional Plan and associated investment strategies will be co-developed with community- and worker-led organizations. Engagement is essential to the success of the CERF planning process and will be critical for the success of the implementation phase as well. The goal of the community engagement process will be not only to solicit input, but also to build the capacity, leadership, and knowledge of community members as they develop their own recommendations. Community members will have 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.

Applicant Name: San Francisco Office of Economic and Workforce Development on behalf of Bay Area Good Jobs Partnership for Equity (BAGJPE)

Project Name: Bay Area High Road Transition Collaborative (BA-HRTC)

Section I: Project Planning

I.1. Concept Proposal (Score Range 0-35 points)

Vision and Goals for the Bay Area High Road Transition Collaborative (BA-HRTC)

The collective vision of the Bay Area High Road Transition Collaborative (BA-HRTC) in the planning phase of CERF 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**.

Goals in the planning phase include the following:

1. Create a long-lasting and sustainable regional economic development infrastructure that will empower communities across the Bay to participate in and lead equitable, high-road climate and economic development projects.
2. Build worker-industry partnerships that elevate worker voices and identify demand-side strategies to set industry standards that improve job quality, racial and gender equity, and climate resilience.
3. Invest in a sub-regional planning model, identifying distinct geographic clusters for economic development planning within the Bay Area where stakeholders seek to collaborate with each other.
4. Emphasize grassroots leadership of workers, people of color, immigrants, and historically disinvested communities to shape the collaborative structure, decision-making processes, and outcomes of the program.
5. Ensure authentic and meaningful community engagement throughout the CERF process – co-developed with the public, community members and workers from start to finish, not just demonstrating support at the end of the process.
6. Design pilot projects that embody racial, economic and environmental justice, reflect community priorities, address racialized wealth inequality, and promote access to clean air, clean water, outdoor space and nutritious food.
7. Leverage existing economic and workforce development efforts, such as existing High Road Training Partnerships focused on, or with a presence in, the Bay Area.

BA-HRTC Fiscal Agent and Regional Convener

All Home is the BA-HRTC's Regional Convener. All Home advances regional solutions that disrupt cycles of poverty and homelessness, redress racial disparities, and create more economic mobility opportunities for people with extremely low incomes. All Home convenes policymakers and community stakeholders supporting these objectives to align goals, initiatives, outcomes and measurements across jurisdictions. All Home is well suited to represent the CERF Region because of its track record of leading cross-sector planning efforts and its proven ability to center issues of equity and economic

opportunity in policy and systems change work. All Home is known throughout the Bay Area and can leverage its previous work and reputation to build inclusive tables. As convener of BA-HRTC, All Home will provide staffing support to BA-HRTC and coordinate contracted research partners and facilitation, technical assistance, and other consulting support.

The Bay Area Good Jobs Partnership for Equity (BAGJPE), an association of ten workforce development boards (WDBs) and regional workforce planning units across the nine-county Bay Area region, will be the Fiscal Agent for BA-HRTC, with the San Francisco Office of Economic and Workforce Development (SFOEWD) as the Fiscal Lead. BAGJPE – an association with one hundred percent of boundaries overlapping the Bay Area CERF region – includes Alameda County WDB, Sonoma County WDB, WDB of Contra Costa County, NOVAworks, Oakland WDB, Richmond WDB, WDB of Solano County, work2future, SFOEWD and Workforce Alliance of the North Bay (Marin and Sonoma). BAGJPE/SFOEWD will provide contracts administration staffing and infrastructure to BA-HRTC.

To meet post-award CERF planning phase requirements, the Convener and Fiscal Agent will work closely with a democratic governance structure that shares decision-making and balances the interests of all represented groups. The structure is based on a “hub and spokes” model in which a set of sub-regional geographical planning tables develop recommendations that feed up to an inclusive, representative Research Planning and Outreach Committee, and ultimately to the Steering Committee. The BA-HRTC is also exploring including a set of “affinity” or “sectoral” tables in which stakeholders of similar types or that represent industry sectors would be convened across the region. Whether and how to set up these tables, and the extent to which they would be organized by affinity group or industry clusters will be determined at the beginning of the Planning Phase as part of the process of finalizing and standing up the governance structure.

The Research Planning and Outreach Committee will focus on developing and implementing the research, analysis and community engagement strategies. The Steering Committee will have proportional representation of important stakeholder groups and provide governance and overall guidance and direction to ensure the work is in alignment as to values and community priorities. The Steering Committee will have voting power on all major decisions and the ultimate strategic direction of economic development advanced by BA-HRTC. A core group of subcontracted stakeholder organizations representing disinvested communities will provide outreach, technical assistance and compensation to their members serving on the Steering Committee, subregional tables and potential sectoral/affinity tables. Please see the Collective Partnership Agreement Letter for a detailed description of the proposed BA-HRTC governance structure.

Experience and Ability to Convene BA-HRTC

All Home has a professional staff of 17, an Advisory Council of five, and a Community Advisory Council of seven. Community Advisory Council members help shape the All Home strategic and programmatic agenda and evaluate All Home’s investment

strategies and grant making. Each member of the Council has had first-hand life experience either as an extremely low income individual or had been system involved at a point in time. All Home is the convener of the Regional Impact Council (RIC), a roundtable of stakeholders from all nine Bay Area counties addressing housing insecurity and homelessness around our region. The Council is composed of more than 100 policymakers; affordable housing, social equity and economic mobility stakeholders; housing and homelessness service providers; and business and philanthropic partners from across the Bay Area's nine counties. The group consists of a Technical Committee, Steering Committee, and Co-Chairs who support development, strategic thinking, and action to advance regional solutions. All Home's experience and learnings from convening the RIC will inform its approach to the BA-HRTC.

Formed in 2021, BAGJPE aims to align each sub-region's economic and workforce development sector strategy in service of workers and economically vulnerable populations and better coordinate workforce development services and partnerships. Collectively, BAGJPE administers over \$42 million in federal Workforce Innovation and Opportunity Act (WIOA) funding and contracts with over 80 community-based organizations to deliver services that are tailored for and deeply embedded in economically vulnerable communities. BAGJPE holds industry relationships with employers, labor, business associations, and training organizations across the region's main economic sectors.

Economic Development Dynamics of the Bay Area

Major Industries¹

Two heavily concentrated industries in the Bay Area – the information sector and professional and business services – reflect the region's leading role in the tech industry. Service sectors have grown significantly since 1990, reflecting increased demand for education, healthcare, child and elder care, and hospitality. Other regional industries such as manufacturing and construction have seen significant growth in the past decade.

Beyond region-wide economic dynamics, there are also subregional industry concentrations in the Bay Area economy. For example, the information and professional and business services sectors are most heavily concentrated in San Francisco, San Mateo, and Santa Clara. Agriculture is an important sector in the region, particularly in Sonoma and Napa. Logistics is a key East Bay industry, centered on the Port of Oakland. Contra Costa and Solano Counties have high industrial concentrations that are expected to undergo significant changes as part of the State's clean energy transition.

Major Economic Development Projects or Initiatives with Impact on Communities and Industries in the Region

Housing Production: The California Department of Housing and Community Development has required the Bay Area to plan for 441,176 new housing units during

¹ Vital Signs, Jobs By Industry.

the 2023-2031 period. The Bay Area's Regional Housing Needs Allocation (RHNA) Plan, approved in January of 2022, distributes this requirement across the region's nine counties and 101 cities and towns. Local governments will update their Housing Elements by January 31, 2023.

Transportation Infrastructure: The California State Transportation Agency (CalSTA) has approved a \$5 billion transportation infrastructure plan (Climate Action Plan for Transportation Infrastructure, or CAPTI) consistent with the State's goals for addressing climate change, including zero-emission vehicle charging infrastructure, improving and connecting transit systems, and funding for walking and cycling projects. There is a MegaRegion Working Group made up of staff and board members from Sacramento Area Council of Governments (SACOG), San Joaquin Council of Governments (SJCOG) and the Metropolitan Transportation Commission (MTC)/Association of Bay Area Governments (ABAG) that is working to coordinate and prioritize transportation investments. The group has identified 12 key transportation projects to improve the movement of people and goods across regional boundaries and continue Northern California's economic prosperity.

Refinery Transitions: The Bay Area is home to one third of California's oil refineries (four located in Contra Costa County and one in Solano County). As the State transitions to a clean energy economy, the refining sector is undergoing significant change, with deep impacts on the workforce and economies of those two counties, impacting tens of thousands of jobs, billions of dollars of economic output and hundreds of millions of dollars in tax revenue for local communities. Two refineries (Marathon Martinez and Phillips 66-Rodeo) have already announced transitions to alternative fuels, resulting in the layoffs of hundreds of workers. The State has invested in a High Road Training Partnership (Contra Costa Refinery Transition Partnership) to work on this issue and prepare a high-road strategy to navigate the significant change expected for this sector. This issue is a priority for numerous governmental, community and labor organizations.

Challenges and Opportunities Related to Shared Economic Growth and Prosperity²

Opportunities:

- Employment and GDP growth in the Bay Area have historically outpaced the nation, though recovery from COVID-19 has lagged the nation and is uneven throughout the region.
- Innovative culture and venture capital spur new industries.
- Natural and built environment and quality of life attract talent and investment.
- While the Bay Area is one of 13 CERF regions, it is home to one out of every five people of color in California,³ making it a critical locus for building equity and leadership of workers and communities of color.

² Sources for this section unless otherwise noted: Plan Bay Area 2050 (2021) and Comprehensive Economic Development Strategy (CEDS) (2019)

³ National Equity Atlas and Bay Area Equity Atlas (2019 data), PolicyLink

Challenges:

- The region's economic prosperity has not been shared by all communities. Every county has neighborhoods where unemployment far exceeds the regional, state and U.S. average. COVID-19 has further exacerbated these issues.⁴ Over the last decade, income grew much more quickly for the top earners than it did for the lowest earners. Hispanic/Latinx residents experience poverty at double the rate of white residents, and Black residents experience poverty at triple the rate.⁵ For economic prosperity to reach all communities, the region must provide better pathways to high-road jobs and adopt strategies to improve the quality of low-wage occupations.
- The Bay Area continues to experience a housing crisis, with record numbers of people experiencing homelessness and even most middle-wage earners priced out of homeownership. Housing is concentrated away from areas where jobs are concentrated and vice-versa.
- While the region is known for its high wage, high skilled occupations, low-wage occupations account for a larger share of regional employment. Of the five fastest growing occupations in the Bay Area, only one of them paid more than \$20 per hour.⁶
- While the Bay Area has a well-educated population, there is a significant population that has limited English language proficiency.
- Transportation, goods movement, water systems, broadband, and other infrastructure investments are needed to improve climate resilience in the face of climate change, climate disasters, and economic downturn. Currently, disinvested communities and workers experience disproportionately high levels of air pollution, with parts of the Bay Area having some of the worst air pollution in the state and the country. The threat of sea level rise coupled with the history of industry in the Bay Area means that more communities will experience toxic intrusions, including in local groundwater, making more urgent the need for nature-based solutions and equitable responses. Access to clean air, clean water, outdoor space, and nourishing food must be centered in all infrastructure improvements.

Management of Subregional/Interregional Efforts and Connection to Regional Strategy

BA-HRTC understands that it is crucially important for there to be significant attention to subregional dynamics and needs, as well as region-wide and inter-regional issues. It is for this reason that the Steering Committee will establish subregional inclusive tables as part of the governance structure for BA-HRTC. The subregions will be determined based not only on geographic adjacency but also shared community interest and organizing, shared industry concentration and other similarities. The subregional tables

⁴ Anderson, Alissa. "Women and People of Color Take Biggest Hits in California's Job Losses." California Budget and Policy Center, June 2020.

⁵ ACS 2019 5-Year Estimates. Analysis: Bay Area Council Economic Institute.

⁶ J.K. Dineen, "Janitors vs. Coders: SF Created Nearly as Many Low-Wage Jobs as High-Paying Tech Gigs," San Francisco Chronicle, October 17, 2019.

will integrate existing subregional planning processes and projects while inviting newer voices to participate, especially disinvested communities. The subregional tables will be an important originator of projects and partnerships among local economic development entities, employers, educational institutions and training organizations, unions and worker organizations, environmental and community-based organizations.

Complementary Economic Development and Planning Processes in the Bay Area and Relationship To CERF

The Bay Area is fortunate to have a single regional planning and Council of Governments agency, the Association of Bay Area Governments (ABAG), and a single transportation planning agency, the Metropolitan Transportation Commission (MTC), that coordinate planning processes and projects in the Bay Area CERF region. ABAG convened the process leading to an eight-county regional Economic Development District (Bay Area EDD) and Comprehensive Economic Development Strategy (CEDS), which were approved in 2019 by the US Economic Development Administration (USEDA). In October 2021, ABAG and MTC jointly adopted *Plan Bay Area 2050* as the official regional long-range plan for the Bay Area that meets all state and federal requirements for a Regional Transportation Plan and Sustainable Communities Strategy. Plan Bay Area recommends 35 strategies across housing, the economy, transportation, and the environment. Plan Bay Area research identified *Equity Priority Communities* as geographic areas that have a concentration of both residents of color and residents with low incomes, or that have a concentration of residents with low incomes and other factors such as limited English proficiency, seniors, or people with disabilities. Plan Bay Area emphasized the importance of economic mobility and creation of high road career opportunities to support the Plan's ambitious housing and infrastructure goals, with an emphasis on recruiting women, veterans, formerly incarcerated people, people of color, and residents of Equity Priority Communities.

The Bay Area has significant representation in the California Workforce Development Board's sector-based High Road Training Partnership (HRTTP) Initiative. Four of the original eight demonstration partnerships – California Transit Works! (CTW) (Industry: Public Transit), Jewish Vocational Services (Industry: Water and Wastewater), Shirley Ware Education Center (SWEC) (Industry: Healthcare), and West Oakland Job Resource Center (WOJRC) (Industry: Transportation, distribution, and logistics) are focused on the Bay Area and led by Bay Area employers, labor organizations and workforce development organizations. There is also an existing Regional Workforce Strategies HRTTP in Contra Costa (Contra Costa Refinery Transition Partnership) and a High Road to Building Decarbonization in the San Francisco Bay Area, as well as three High Road Construction Careers (HRCC) partnerships, the East Bay Regional Trades Program, the North Bay Trades Introduction Program and the Apprenticeship Readiness Partnership, covering the East Bay, North Bay and the South Bay/Peninsula subregions respectively. The emerging High Road to Safe Reopening and High Road to Janitorial initiatives, led by Building Skills Partnership, also plan to grow successful models in subregions of the Bay Area.

The Bay Area is also home to the Bay Area Good Jobs Partnership for Equity (BAGJPE), a consortium of ten Workforce Development Boards working together

toward a goal of creating 250,000 jobs in five sectors: tech, healthcare, life sciences, advance manufacturing, transportation and logistics. BAGJPE has submitted a U.S. USED A Good Jobs Challenge proposal for \$35 million in support of these efforts. Working with BAGJPE will be one way in which the CERF process will link to local and regional WIOA planning.

The CERF planning process will complement and build on, not duplicate, these efforts by focusing on the creation of and equitable access to additional high-quality jobs in the Bay Area and adding specificity and strategic implementation detail focused on new and expanded High Road Partnerships. It will center communities and lived experience by increasing engagement with stakeholder organizations that already work successfully within these communities. The process will also draw on other existing planning processes, such as *Putting California on the High Road: A Jobs and Climate Action Plan for 2030* (June 2020). This plan was produced by the UC Berkeley Center for Labor Research and Education for the California Workforce Development Board pursuant to Assembly Bill 398, which focused on high quality jobs creation and access in the context of job opportunities generated from the growth of the carbon-neutral economy.

Preliminary Metrics of Success

In addition to producing required Planning Phase deliverables, the BA-HRTC will hold itself accountable using measurable metrics of success or Planning Phase outcomes:

1. BA-HRTC will create a governance structure that is representative of and accountable to all stakeholders and disinvested communities.
2. BA-HRTC will ensure that participation and decision making by disinvested communities is built into the governance structure and is ongoing throughout the CERF process.
3. BA-HRTC will ensure that planning resources are allocated equitably across the subregions of the Bay Area.
4. BA-HRTC will create multiple accessible opportunities for the general public to learn about and participate in the CERF process, including in-person and virtual events and surveys.
5. BA-HRTC will ensure that investment recommendations coming out of the planning phase include measurable, actionable goals and strategies related to climate resilience, carbon emissions reduction, creation of quality high-road jobs and expanding access to quality jobs.

Sustainability Strategy: Planning Phase to Implementation Phase

The following are several of the strategies BA-HRTC will use to ensure sustainability from the planning phase to the implementation phase.

1. BA-HRTC will have a professionally staffed project management function to create timelines, agendas, and minutes as well as a bank or repository of all project documents and a dashboard to track goal achievement.

2. The planning phase will create communication channels with stakeholders that will bridge the planning phase and implementation phase.
3. The variety of tables and convenings will ensure that stakeholders are involved in issues that are vitally important to them and that no voices are marginalized.
4. To the extent practicable and feasible, BA-HRTC will formalize the partnerships forged during the planning phase in Memoranda of Understanding so that roles and responsibilities in the implementation phase are timebound, clear, and actionable.

Addressing Geographic Equity and Participation and Decision Making by Disinvested Communities

BA-HRTC is deeply committed to ensuring the full, equal, and ongoing participation of disinvested communities in the CERF Planning process, including in the governance structure and in formal decision making. To this end, BA-HRTC will create a panel of subcontracted stakeholder organizations that are long-standing and trusted organizations representing disinvested communities. These organizations will recruit and support members to serve on the Steering Committee and in subregional and potential sectoral/affinity tables so as to have significant and ongoing feedback in the strategic direction and decision making of BA-HRTC. The organizations will be embedded in and accountable to disinvested communities and will have constituencies made up of at least a majority of people directly impacted by racial and social inequities. Technical assistance provided through the stakeholder organizations will build the capacity, leadership, and knowledge of community members as they develop their own recommendations. Research and data gathering will include participatory research, mixed methods data analysis, and other best practice research methodology to critically examine the reasons why existing support for historically disinvested communities has not been effective in lifting communities out of poverty.

BA-HRTC understands that many participants in the governance structure will be paid for their participation by virtue of their paid positions with stakeholder organizations. BA-HRTC believes strongly that members of disinvested communities should also be compensated for their roles in the planning phase and assisted in being able to attend convenings with transportation, meals and childcare reimbursement. BA-HRTC’s subcontracted stakeholder organizations will be resourced to provide compensation and reimbursements for community members accordingly. Many prospective subcontractor organizations have experience with the Promotora (Community Health Worker) model in which trusted and trained community members are hired to do culturally and linguistically appropriate outreach to underserved communities. BA-HRTC will contract with stakeholder organizations with clear expectations and quantifiable goals for hiring and outreach.

I.2. Proposed Work Plan (Score Range 0-15 points)

Detailed Descriptions and Justification of Proposed Activities that Reflect CERF Objectives with Target Timelines

Activity: Stand up project staffing and infrastructure.

- Scope and hire Convener staff and consultants.
- Scope and hire Fiscal Agent staff.

Milestone: Infrastructure positions filled.

Target Date for Completion: End of Month 1 of grant period.

Justification: These activities will yield staffing infrastructure “scaffolding” for the CERF Planning Phase.

Activity: Finalize HRTC governance structure and complete the Planning Phase Plan.

- Finalize composition of Steering Committee and fill all seats.
- Finalize number and configuration of subregions for subregional tables.
 - Identify and integrate existing subregional planning processes and projects.
 - Finalize subregional tables design and fill all seats.
- Determine whether and how to move forward with sectoral/affinity tables.
 - Identify and integrate existing sectoral/affinity planning processes and projects.
 - Finalize sectoral/affinity tables design and fill all seats, if moving forward.
- Organize Research Planning and Outreach Committee responsible for overseeing data gathering and analysis and outreach strategy framework development based on recommendations of subregional and sectoral/affinity tables (if applicable).
- Identify and contract with research entities as needed for data gathering phase.
- Identify and contract with stakeholder organizations for engagement and technical assistance activities.
- Complete and submit required Planning Phase Plan, including governance structure, plans and estimated expenses for convenings and planning process, and plan and timeline for conducting the analyses and developing the roadmap in alignment with overall vision and values of the HRTC.

Milestone: High Road Transition Collaborative governance structure finalized and Planning Phase Plan completed.

Target Date for Completion: End of month 2 of grant period.

Justification: These activities will finalize the governance structure and plan for completing Planning Phase requirements. The governance model will ensure that the HRTC is accountable to a diverse group of subregional, sectoral/affinity and disinvested community stakeholders. The HRTC governance structure will have a Steering Committee, a Research Planning and Outreach Committee, and subregional tables and possibly also sectoral/affinity tables. The subregional tables and sectoral/affinity tables will feed recommendations up to the Research Planning and Outreach Committee for incorporation into data gathering and analysis, and outreach strategy framework development.

While the general public will have opportunities for participation through the Public Input Process below, disinvested communities will have formal representation in the governance structure coordinated by trusted stakeholder organizations with compensation for participants. These will be grassroots, community-based organizations that have existing relationships with community members and can be trusted messengers and sources of information. Each organization will coordinate the efforts of additional community-based organizations and recruit, train and support community members to serve on the HRTC Steering Committee, Research Planning and Outreach Committee, and subregional and potential sectoral/affinity tables. These organizations will receive technical assistance to enable full participation in decision making.

It is understood that the configuration and membership/participation in tables is not static and will likely evolve over the life of the Planning Phase.

Activity: Public Input Process

- Establish communication plan and tools: online platform/framework website with project timeline, explanation of community input process, descriptions of opportunities to get involved, newsletter emails, social media.
- Plan, schedule, and publicize in-person and virtual community visioning processes, regional meetings, and surveys.
- Ensure physical/virtual accessibility for people with non-English language needs and people with disabilities.

Milestone(s): Communication Plan finalized and tools selected and implemented.

Target Date for Completion: End of Q2 of grant period (Plan); Q2-6 of grant period (Workstream).

Justification: The Planning Phase will include numerous opportunities for the general public to learn more about the CERF process and provide input during both the Data Gathering/Analysis phase and the Transition Roadmap (Strategy) phase. These efforts are understood to be in addition to, not instead of, formal inclusion of disinvested communities in the HRTC governance structure facilitated by subcontracted stakeholder organizations.

Activity: Data Gathering and Analysis

- Finalize plan for data gathering and analysis.
- Identify and procure additional needed Consulting/Technical Expertise.
- Complete data gathering and analysis.

Milestone: Regional Plan Part 1 completed: Stakeholder Mapping, Regional Summary, Labor Market Analysis, Industry Cluster Analysis, SWOT Analysis

Target Date for Completion: By end of Q2 of grant period.

Justification: The Bay Area has a wealth of existing relevant studies and statistics from which to draw. This process, coordinated by the Research Planning and Outreach Committee, will involve gathering and aggregating these studies and filling

in any research gaps to fulfill CERF Planning Phase requirements and align the analysis with HRTC vision and values.

Activity: Economic Development and Transition Roadmap

- Hold partnership convenings based on recommendations of subregional and possible sectoral/affinity tables.
- Convene equity and community leaders and community-based partners to share community visions for future systems and projects, including those that are generated through the subregional and possibly sectoral/affinity tables.
- Develop and approve strategy framework through formal decision-making process.
- Draft Regional Plan Part 2.
- Release draft plan for public input.
- Release final plan.

Milestone: Regional Plan Part 2 completed:

1. Vision and Goals
2. Strategies for growth of targeted industries
 - a. Industrial Cluster Development
 - b. Workforce Development
3. Strategies for increasing economic diversification
4. Strategies for responding effectively to economic shocks
5. Strategies for increasing economic equity, including pathways into quality jobs and family-sustaining careers and improve job quality and wages in sectors that do not offer quality jobs.
6. Strategies for increasing health and environmental equity.
7. Strategies for aligning with State strategies.
8. Strategic Investments and Projects Plan: 2-5 Strategic investments or projects to enact recovery and transition to be funded in Phase II (Implementation)

Target Date for Completion: Q8 of grant period (final Regional Plan); Q3-8 of grant period (Workstream)

Justification: This phase is the culmination of all work to date and is the key formal deliverable of the CERF Planning Phase.

Descriptions of potential challenges and proposed solutions to developing the HRTC

There are many potential challenges in developing the HRTC and ensuring its success. One of the key issues will be achieving meaningful participation by community members who are not typically included in economic development planning activities. The challenges range from complex issues of trust (e.g., immigrant communities who may not trust government agencies) to making the process accessible and welcoming. We believe that by relying on stakeholder organizations with a track record of deep engagement with, accountability to, and leadership from various communities, we will be able to overcome these obstacles. We must resource these organizations

adequately to provide overhead support, training, technical assistance, participant compensation, and language access to meet community members where they are at.

The other challenges have to do with ensuring that participants in subregional tables have a meaningful role in decision-making. To address this, we will have to have carefully delineated decision-making process, including what types of decisions are for consideration by which stakeholders (i.e., who has decision making authority) and how they are handled logistically. We will develop this decision-making framework as part of our Governance design but will require consistent monitoring and adjustment by our Convenor and Steering Committee to ensure we are holding ourselves accountable.

Section II: Community Engagement and Governance Structure

II.1. Outreach and Engagement Plan (Score range 0-20 points)

1. Introduction

The CERF program articulates a goal that the HRTCs will “*inform, engage and empower residents and key stakeholders throughout the planning process*” and will “*build on partnerships demonstrated in the Collective Partnership Agreement.*” The Bay Area High Road Transition Collaborative (BA-HRTC) has developed a statement of purpose that includes a new vision for regional economic development planning shaped by workers and impacted community members. The group’s adopted principles emphasize meaningful outreach and engagement.

“Meaningful engagement” means engagement designed to build a durable and lasting structure for community planning – not just “box checking,” asking for “one off” input from the community or asking for input at the end of the process to get sign off on the final plan. Plans and investment strategies must be co-developed with community- and worker-led organizations. Engagement is essential to the success of the CERF planning process and will be critical for the success of the implementation phase as well.

The goal of community engagement should be not only to solicit input, but also to build the capacity, leadership, and knowledge of community members as they develop their own recommendations. Part of this requires giving 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.

The outreach and engagement plan for the BA-HRTC is informed by the following key principles:

- **Engage community members directly.** Offer opportunities to engage with residents, working with CBOs to engage with their members.
- **Be intentional about including marginalized communities and groups.** Take proactive measures to reach out to marginalized communities that have been historically left out of these planning processes, and in many cases, actively harmed by their outcomes.

- **Meet community members where they are, physically and with respect to their knowledge about regional issues.** It is crucial that outreach include activities in local communities with in-person events (safety conditions permitting). Recognize that many community members will likely need to learn more about this planning process, regional issues, and ongoing economic development processes.
- **Address accessibility needs and design engagement to remove barriers to participation.** This includes scheduling events for times when people are most likely to be available (nights and weekends), offering translation and language accessibility, providing food and childcare, and otherwise removing barriers whenever possible.

2. Stakeholder Groups to Be Engaged

The goal of the BA-HRTC is to build an enduring infrastructure for regional economic development planning in ways that are inclusive and equitable. To achieve this goal will require proactive and thoughtful outreach and engagement to:

- Stakeholders that have historically not been included in these types of processes, particularly those from disinvested communities, immigrant workers, people with limited English proficiency, older adults, youth, people with disabilities, communities of color, and CA Native American Tribes.
- Stakeholders representative of the entire geography of the region, including the smaller and less populous counties of the Bay Area, and places where there is limited CBO capacity.
- Organizations working with disinvested communities, including grassroots and small CBOs, worker centers, unions, small business associations, public schools, community development corporations, worker co-ops and others.

The initial BA-HRTC has begun the process of reaching out and engaging groups around the Bay Area during the CERF proposal development process. As part of the data gathering and analysis process conducted during Phase One, the HRTC will use data to identify communities that are not benefiting from current economic development efforts and making a plan to engage with those specific communities.

3. Outreach and Engagement Strategies, Models, and Activities

The BA-HRTC will draw upon known strategies and approaches that have proven effective in engaging with stakeholders that have historically been excluded from economic development planning and other types of regional planning processes.

a. Using Inclusive Governance Structure and Decision-Making to Drive Engagement

The most important element of the outreach and engagement process will be to create an environment that people want to participate in. The BA-HRTC will communicate to stakeholders that this initiative is going to re-center economic development planning around workers. The partners recognize that many community members have had negative experiences with similar processes in the past and will be skeptical that their

participation will matter, so it will be critical to communicate how this process will be different.

The outreach and engagement work will clearly outline what decisions community members can influence, and the purpose of each interaction. The partners will clearly define for community participants the scope and scale of the BA-HRTC and what can realistically be done with the CERF funding, while also encouraging ideas that push the boundaries. The goal will be to give the planning tables the latitude to dig into what they want to work on. To keep people engaged, it will be important to avoid loading the tables down with busy work and let them define what they want to work on and are excited about.

The outreach and engagement effort will prioritize work with grassroots, community-based organizations that have existing relationships with community members and can be trusted messengers and sources of information. The Governance Structure will have significant representation from community members, workers, grassroots CBOs, disinvested communities at all levels.

b. Using Proven Engagement Models

The outreach and engagement strategy will use approaches and models that create sustained, in-depth participation beyond the usual community input or listening sessions. Examples of approaches the BA-HRTC may use include:

- Implementing community visioning processes for community members to articulate future scenarios that can orient research scoping and goals.
- Utilizing a Participatory Action Research (PAR) / Community Engagement Research (CEnR) framework to inform the research and analysis sections of the regional plan.
- Developing a role for community members to share in decision-making over final strategies and projects recommended to receive funding. This could involve Participatory Budgeting or processes that deepen democratic participation in funding decisions.
- Using “degrees of agreement” decision-making process at the Steering Committee and in the subregional and potential affinity/sectoral planning tables.
- Providing funding for groups to lead community engagement activities, including hiring community engagement managers. Core community members that are more deeply involved should also be eligible to receive stipends and/or compensation for their time.
- Using the Promotores/Community Health Worker model to pay community members to conduct outreach with peers.
- Employing leadership development and “train the trainer” models.
- Working through trusted community organizations, particularly those with cultural and linguistic expertise.

c. Building Capacity of Organizations and Groups for Ongoing Participation

Smaller, grassroots stakeholder organizations that work in disinvested communities may lack capacity for ongoing participation in a 24-month regional planning process.

The BA-HRTC will offer subgrants to these groups so that they can add position(s) and or otherwise build up capacity for participation. These groups may also need training and orientation that can be provided through the CERF initiative.

d. Removing Barriers to Participation

To secure meaningful and ongoing participation from traditionally excluded groups and individuals requires taking steps to remove barriers. Approaches the BA-HRTC will use include:

- Scheduling meetings at times when people are available (weekends, evenings)
- Providing Chromebooks and digital literacy training for virtual meetings
- Providing food and childcare at in-person meetings
- Providing compensation to individuals for attendance at meetings
- Providing simultaneous translation and materials in relevant languages
- Providing accommodations for people with disabilities; including ensuring meetings are held in accessible locations
- Meeting in person as much as possible within the constraints imposed by COVID
- Identifying existing meetings and processes and adding on to them, rather than creating BA-HRTC meetings; striving to meet community members "where they're at."
- Advertising through local, ethnic media outlets.

4. Timeline and Budget

The table below provides a high-level timeline of outreach and engagement activities that aligns to the overall work plan in Section B.

Timeline	Outreach and Engagement Activities
End of second month of grant period	<ul style="list-style-type: none"> • Organize Research Planning and Outreach Committee • Identify and contract with stakeholder organizations for outreach, engagement and technical assistance activities
Q2 to Q6 of grant period	<ul style="list-style-type: none"> • Outreach and engagement to support participation in governance structure (including TA as needed) • Outreach and engagement to support public input process, including in-person and virtual community visioning processes, regional meetings and surveys.
End of Q8 of grant period	<ul style="list-style-type: none"> • Outreach and engagement to support development of Economic Development and Transition Roadmap, including convening of equity and community leaders and community-based partners to share community visions for future systems and projects, including those that are generated through the subregional participatory action research processes, subregional and potential sectoral/affinity tables.

The BA-HRTC is prioritizing almost \$2.8 million of the \$5 million available to fund community outreach and engagement, including the following costs:

- Subgrants to CBOs and resource-limited organizations for capacity building so that they can meaningfully participate in the planning tables
- Resources to fund convenors for subregional tables
- Subgrants to CBOs to conduct community outreach
- Translation and interpretation services
- Outreach materials, design and videography
- Compensation to individuals to participate in the planning process
- Food and childcare for meetings

However, realistically, there will not be enough money to fully resource all the organizations and individuals who need it, given the size of the region. A critical strategy that the Steering Committee will employ is to identify and leverage other resources and funds that are coming into the region (e.g., funding for infrastructure, climate action, resilience, etc.) that can help support outreach and engagement.

5. Reporting and Communication with Community

The goal of the outreach and engagement process is to create a durable structure for ongoing participation in both local and regional economic development planning that brings in individuals and groups that have traditionally not participated in these efforts. In this regard, the primary methods for reporting out and informing the community will be the same as those used to bring in and engage the community – by building inclusive planning tables that are empowered to make meaningful decisions and recommendations on processes and projects that they have identified as priorities.

Traditional forms of input gathering, reporting and communication are not as likely to be effective in engaging and informing these stakeholders but will still be used as a framework for gathering information and providing updates on the overall CERF initiative. These would include:

- Creating online surveys that interested community members can complete (in multiple languages)
- Hosting community input and listening sessions throughout the region
- Drafting and distributing regular progress reports highlighting what the BA-HRTC has accomplished and next steps (via website, email, social media), including reporting out on the agreed upon planning metrics.

Preliminary estimates are that approximately 750 participants will have in-depth and ongoing engagement in the process, at least 2,500 will have lighter-touch engagement (one-time meeting attendance, survey response), and that more than 10,000 people will be aware of the CERF process through membership briefings by stakeholder organizations, emailed updates, and social media.

II.2. Collective Partnership Agreement Letter (Score range 0-30 points)

1. Overview – Purpose and Scope of this Letter

This Agreement Letter sets forth the agreements made among the initial set of partners in the Bay Area’s High Road Transition Collaborative (HRTC) submitting an application in response to the SFP from the Community Economic Resilience Fund (CERF). This document sets out the framework our partnership will follow as we move forward into the Planning Phase of the CERF process. It is a fundamental component for building trust, partnership and a commitment to power-sharing among the partners. All signatories recognize and acknowledge that this is an initial set of guiding principles, structure and processes which will evolve and change over time as the work advances.

2. Purpose and Principles of the Partnership

The BA-HRTC has adopted the following statement of purpose and guiding principles.

Purpose: Our collective goal in the planning phase of CERF 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.

Principles:

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

3. Description of Partners in the Initial HRTC

The Regional Convenor of the BA-HRTC is All Home. All Home advances regional solutions that disrupt cycles of poverty and homelessness, redress racial disparities, and create more economic mobility opportunities for people with extremely low incomes. The role of All Home is to convene the collaborative partners; staff the governance structure; execute and manage contracts and subgrants with consultants, community groups and others that will be funded to undertake CERF activities; and generally hold responsibility for overall coordination of the work of the BA-HRTC. The Fiscal Agent for the BA-HRTC is the Bay Area Good Jobs Partnership for Equity (BAGJPE). The role of the fiscal agent is to provide financial management of the CERF funds.

Over the past several months, All Home, as the Regional Convenor, has facilitated a process bringing together a diverse group of stakeholders from across the region and representing a variety of groups and sectors. Signatories to this letter are listed in Appendix 7, along with a signature letter from each organization.

4. Proposed Governance Structure of the BA-HRTC

In keeping with Principle #4 (Inclusive, Democratic, Grassroots Governance), the initial BA-HRTC members, in partnership with All Home, have developed a proposed democratic governance structure that shares decision-making and balances the interests of all represented groups. The structure is based on a “hub and spokes” model in which a set of sub-regional geographical planning tables (and, potentially, affinity/sectoral planning tables) develop recommendations that feed up to an inclusive, representative Research Planning and Outreach Committee, and ultimately to the Steering Committee. In all levels of the structure, the tables will proactively seek to center and prioritize grassroots leadership of workers and historically disinvested communities. Below are brief descriptions of proposed roles, decision-making authority and representation on these different groups.

a. Steering Committee

The Steering Committee will work closely with All Home (the Convenor) and the Fiscal Agent to provide governance and overall guidance and direction to ensure the work of the BA-HRTC is in alignment with the adopted purpose and principles. The Steering Committee will have the power to make major decisions and will guide the ultimate strategic direction of economic development advanced by the Collaborative.

The proposed composition of the Steering Committee is twenty-one (21) representatives; one from each of the following stakeholder groups (includes all stakeholder groups from the CERF SRF plus additional seats to promote an inclusive and equitable process). Through affinity tables or another approach, each Steering Committee member will commit to represent not just their own organization, but to engage and lift up the viewpoints of stakeholder organizations in their sector throughout the Bay Area. The Steering Committee will include equitable representation from across the nine-county region.

1. Central Labor Councils
2. Building and Construction Trades Councils
3. Public education labor organization
4. Employers, businesses, and business associations
5. Economic development organizations
6. Small businesses and small business associations
7. Worker centers
8. Workforce development agencies
9. Housing and homelessness organizations
10. Philanthropic organizations
11. Community based organization (serving disinvested communities)
12. Community-based organizations (racial justice)
13. Community-based organizations (immigrant rights)
14. Community-based organization (youth)
15. Tribal organizations
16. Public health
17. Post-secondary education (research)

18. Post-secondary education (instruction)
19. Regional governmental agencies
20. Environmental
21. Environmental Justice

The Steering Committee will have two (2) co-chairs. All Home will convene and staff the Steering Committee.

b. Planning Research and Engagement Committee

The Research Planning and Outreach Committee will focus on developing and implementing the research, analysis and community engagement activities undertaken during the Phase One Planning Process. Membership of this group will include:

- Ten (10) co-chairs from the subregional tables (2 from each subregion)
- Representatives from organizations contracted through CERF to conduct research and analysis or outreach and engagement.

All Home will convene and staff this Committee.

c. Subregional Tables

In keeping with Principle #3 (Honor Local Without Losing the Power of the Regional), the initial governance structure will include 5 subregional tables. The initial proposed configuration of subregions is based on geographic proximity as well as similarities in the prevalent types of industries and employment opportunities. The partners acknowledge that as the work evolves, there may be further refinement and adjustment to this initial geographic division, and that stakeholders may desire to select which subregional table(s) to participate in. Each subregional table will be tasked with convening a diverse and inclusive group of stakeholders and would be led by two co-chairs, one of which must be a grassroots Community-Based Organization or organization focused on working with disinvested communities within that region.

Initial proposed tables (subject to change):

1. San Francisco
2. Alameda County
3. Contra Costa and Solano Counties
4. San Mateo and Santa Clara Counties
5. Marin, Sonoma and Napa Counties

d. Possible Overlay of Affinity Tables or Sectoral Tables

The BA-HRTC is also exploring including a set of affinity tables or sectoral tables to enable greater participation by stakeholders. Whether and how to set up these tables will be determined at the beginning of the Planning Phase as part of the process of finalizing and standing up the governance structure.

e. Relationship of Governance Structure to Outreach/Engagement Work

It will be the responsibility of all the tables (Steering Committee, Research Planning and Outreach Committee, Subregional Tables and potential Affinity or Sectoral Tables) to conduct ongoing and proactive outreach to ensure there is sustained and meaningful participation from groups and individuals that have historically not been represented in economic development planning processes. Stakeholders that work with marginalized groups and disinvested communities will play a crucial role in conducting effective outreach to these groups, providing technical assistance, capacity building and leadership development, and helping to remove barriers to participation. These organizations will be embedded throughout the governance structure of the BA-HRTC.

5. Decision-Making Processes

The initial BA-HRTC members affirm a commitment to implementing decision-making processes that are democratic, transparent, equitable, and centered around disinvested communities. Features of the decision-making process that the group has agreed upon are:

- “Hub and spokes” governance structure, in which there is strong representation at all levels (Steering Committee, subregional tables and possible affinity/sectoral tables) from the community, workers, disinvested communities and others who have not traditionally been at the table in economic development planning.
- Subcontracted stakeholder groups embedded throughout the governance structure.
- All groups will use a “levels of agreement” process for decision-making, in which members use a 1 to 5 scale for degrees of agreement to come to decisions. If there are any “4s,” or “5s,” discussion will continue in an attempt to reach consensus.
- If the group cannot reach consensus, there will be a vote on the outstanding proposal with a 2/3 supermajority needed for approval.

6. Agreements

By signing this Collective Partnership Agreement Letter, the BA-HRTC members are agreeing to (within their capacity and subject to available resources):

- Align to the purpose and principles set forth in Section 2
- Support the overall concept, outreach and engagement plan, and work plan mapped out in the CERF Phase One proposal
- Participate in the implementation of the initial Governance Structure
- Work in partnership to achieve the goals set out in the program and collectively share the weight of responsibility in creating a more inclusive, equitable, and competitive regional economy
- Recognize that this letter sets out an initial structure and process that will further evolve.



Community Economic Resilience Fund Program (CERF) PY 22-24
Proposed Budget Summary

Applicant: San Francisco Office of Economic and Workforce Development on behalf of Bay Area Good Jobs Partnership for Equity (BAGJPE)

Project Name: Bay Area High Road Transition Collaborative (BA-HRTC)

Line Item	Expense Item	CERF Funds	Advance Pay*** (If Applicable)	Total Project Budget
A.	Staff Salaries	\$255,476		\$255,476
B.	Number of full-time equivalents	1.0		1.0
C.	Staff Benefit Cost	\$102,190		\$102,190
D.	Staff Benefit Rate (percent)	40%		40%
E.	Staff Travel	\$0		\$0.00
F.	Operating Expenses	\$0		\$0.00
G.	Events/Conferences	\$0		\$0.00
H.	Research	\$500,000		\$500,000
I.	Data, Planning and Communication Tools	\$100,000		\$100,000
J.	Community Engagement	\$2,465,000		\$2,465,000
K.	Participant Compensation	\$304,934		\$304,934
L.	Furniture and Equipment			
1.	Small Purchase (unit cost of under \$5,000)	\$0		\$0.00
2.	Large Purchase (unit cost of over \$5,000)	\$0		\$0.00
3.	Equipment Lease	\$0		\$0.00
M.	Consumable Testing and Instructional Materials	\$0		\$0.00

Line Item	Expense Item	CERF Funds	Advance Pay*** (If Applicable)	Total Project Budget
N.	Contractual Services (Exhibit C, complete if applicable) – Costs for contract with convenor. Exhibit C is not applicable.	\$1,212,400		\$1,212,400
O.	Indirect Costs*(complete items 1 and 2 below)	\$60,000		\$60,000
P.	Other (describe):	\$0		\$0.00
Q.	TOTAL FUNDING**	\$5,000,000	\$ 0.00	\$ 5,000,000
			Total Award	\$5,000,000
			Administrative Costs **	\$417,666
			Program Costs	\$4,582,334

1. Indirect Cost Rate (percent): 10%
2. Name of Cognizant Agency: N/A - de minimis

** A maximum of 10% of the total project budget will be allowed for administrative costs.

The definition of administrative costs is provided in Appendix F of the SFP.

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

STATE USE ONLY	EXHIBIT B
Subgrant Number	
Grant Code	
Initial Plan	
Modification Date	
Subrecipient Code	

Applicant: San Francisco Office of Economic and Workforce Development on behalf of Bay Area Good Jobs Partnership for Equity (BAGJPE)
Project Name: Bay Area High Road Transition Collaborative (BA-HRTC)

Please provide a narrative detail for all grant-funded budget line items listed on Exhibit B - Budget Summary. Budget Summary must include details for Advance Pay if applicable.

A. (A-D) Staff Salaries: Total Salaries Paid + Benefits (CERF) \$357,666

Position	FTE x Monthly Salary x Time	Benefits	Total (FTE X Salary X Time) + Benefits
SF OEWD Contracts Analyst	1.0 FTE x \$10,644.83 x 24 months	40%	\$357,666

E. Staff Travel \$

F. Operating Expenses \$

The following are some of the major line items included:

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

*(based on FTE for program staff)

G. Events/Conferences \$ _____

Explain purpose and planned use.

H. Research \$500,000

Contracts with consultants/TA firms for data gathering and analysis required for the snapshot of socio economic conditions to be included in the Regional Plan.

I. Data, Planning and Communication Tools \$100,000

Contracts with consultants/TA firms to provide website development, web-based communications, and software for gathering input from the community and reporting out to the community during the planning process.

J. Community Engagement \$2,465,000

Includes:

- Subgrants to CBOs and resource-limited organizations for capacity building and participation (estimated at 15 organizations receiving grants of between \$20K and \$50K per year) = \$1,150,000
- Resources to fund convenors for subregional tables (\$20K per year for 2 years for 5 subregions, 2 convenors per subregion) = \$400,000
- Subgrants to CBOs for community outreach (5 Participatory Action Research (PAR) projects @ \$150K each, public events, and community outreach) = \$825,000
- Translation and interpretation services (contracted services for translation and interpretation for all outreach and community engagement events, virtual and in-person) = \$60,000
- Outreach materials, design and videography = \$30,000

K. Participant Compensation \$304,934

Includes:

- Stipends to individuals to attend meetings = \$200,000
- Food for meetings = \$54,934
- Childcare for meetings = \$50,000

L. Furniture and Equipment \$ _____

1. Small Amount of Equipment and Furniture	\$ _____
--	----------

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

2. Large Amount of Equipment and Furniture	\$ _____
--	----------

Greater than \$5,000: List name of item, cost, and quantity to be purchased - prior approval required and added to Exhibit G, Supplemental Budget

3. Equipment Lease	\$ _____
--------------------	----------

Describe the calculation.

M. Consumable Testing and Instructional Materials \$ _____

Explain purpose and planned use.

N. Contractual Services \$1,212,400

BAGJPE will subcontract with All Home as the regional convenor. All Home’s Costs are detailed below:

- CERF Program Staff Salaries (2.25 FTE, including 75% time for Chief Economic Mobility Officer, 100% for CERF Program Manager, 50% of CERF Program/Admin Assistant) – \$734,500
- All Home Staff Support (0.20 FTE including Director of Communications, Chief Executive, Executive Assistant) - \$77,500
- Benefits @ 20% - \$162,400
- Professional services (contracts for facilitation, communications, analysis, and/or research support) - \$100,000
- Materials and supplies - \$2,000
- Travel, conferences, communications - \$1,800
- Other operating expenses - \$24,000
- Indirect expenses (10% - Tides Fee plus program’s share of non-personnel administrative costs) - \$110,200

O. Indirect Costs \$60,000

BAGJEP/SF OEWD @10%, based on estimated \$600,000 in Federal Modified Direct Costs.

P. Other \$ _____

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

STATE USE ONLY	EXHIBIT B2
Subgrant Number:	
Grant Code:	
Initial Plan:	
Modification Date:	
Subrecipient Code:	

Applicant: San Francisco Office of Economic and Workforce Development on behalf of Bay Area Good Jobs Partnership for Equity (BAGJPE)

Project Name: Bay Area High Road Transition Collaborative (BA-HRTC)

I. Equipment

Item Description*	Quantity	Cost Per Item	Total Cost	Percent Charged to Project	Total Cost Charged to Project
			\$ 0.00	%	\$ 0.00
			\$ 0.00	%	\$ 0.00
			\$ 0.00	%	\$ 0.00
			\$ 0.00	%	\$ 0.00
			\$ 0.00	%	\$ 0.00
			\$ 0.00	%	\$ 0.00
			\$ 0.00	%	\$ 0.00
			\$ 0.00	%	\$ 0.00
			\$ 0.00	%	\$ 0.00
			\$ 0.00	%	\$ 0.00
TOTAL	0		\$ 0.00		\$ 0.00

*List equipment items with a useful life of more than one year with a unit acquisition cost of \$5,000 or more charged to the project. The approval of the budget plan contained in this subgrant does not constitute approval of the equipment request. **A separate request to purchase equipment must be submitted for prior approval by the State.**

II. Contractual Services Note: these are costs for the Regional Convenor, All Home, which will be a subcontractor to the Fiscal Agent.**

Description - Type of Service	Cost	Service Provider If Known
CERF Program Staff Salaries (2.25 FTE, including 75% time for Chief Economic Mobility Officer, 100% for CERF Program Manager, 50% of CERF Program/Admin Assistant)	\$734,500	All Home
All Home Staff Support (0.20 FTE including Director of Communications, Chief Executive, Executive Assistant)	\$77,500	All Home
Benefits @ 20%	\$162,400	All Home
Professional services (contracts for facilitation, communications, analysis, and/or research support)	\$100,000	All Home
Materials and supplies	\$2,000	All Home
Travel, conferences, communications	\$1,800	All Home
Other operating expenses	\$24,000	All Home
Indirect expenses (10% - Tides Fee plus program's share of non-personnel administrative costs)	\$110,200	All Home
Total***	\$1,212,400	

** All contractual services must be competitively procured in accordance with state and local procurement regulations and policies.

STATE USE ONLY	EXHIBIT C
Subgrant Number	
Grant Code	
Initial Plan	
Modification Date	
Subrecipient Code	



Community Economic Resilience Fund Program (CERF) PY 22-24
Statement of Willingness

The CERF PY 22-24 will provide \$5 million dollars for planning to support one High Road Transition Collaborative (HRTC) per region. The respective HRTC will engage in strategic planning for economic resilience and organize an inclusive group of regional stakeholders. To this end and given that only one applicant will be awarded per region all applicants are strongly encouraged to sign a *Statement of Willingness*, which should be signed by the Fiscal Agent on behalf of all the HRTC members (including the Regional Convener) that have signed on to the Collective Partnership Agreement Letter.

Signing this statement demonstrates a commitment to participate in the full length of the planning process and governance of the collaborative, as well as to bring partner organizations and institutions to the collaborative in order to build a robust and inclusive HRTC.

Applicant Name: San Francisco Office of Economic and Workforce Development, on behalf of the Bay Area Good Jobs Partnership for Equity and All-Home
Project Name: Bay Area High Road Transition Collaborative

If awarded:

The applicant Fiscal Agent, on behalf of all the HRTC Members (including the Regional Convener), commits to working with other applicants in their region that did not obtain funding with the goal of increasing regional collaboration and representation.


If not awarded:

The applicant Fiscal Agent, on behalf of all the HRTC Members (including the Regional Convener), commit to working with the lead Fiscal Agent and Regional Convener in their region with the goal of increasing regional collaboration and representation.

Name of Representative:

Joshua Arce, Director of Workforce, San Francisco Office of Economic and Workforce Development, on behalf of the Bay Area Good Jobs Partnership for Equity

Signature:

DocuSigned by:

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STATE USE ONLY	EXHIBIT E
Subgrant Number:	
Grant Code:	
Initial Plan:	
Modification Date:	
Subrecipient Code:	

Applicant Name: San Francisco Office of Economic and Workforce Development on behalf of Bay Area Good Jobs Partnership for Equity (BAGJPE)
Project Name: Bay Area High Road Transition Collaborative (BA-HRTC)

Use: To facilitate the contracting process, applicants must describe activities and dates at a high level below. Activities and dates should correspond to the more detailed descriptions in the Section B of Proposal Narrative: Proposed Workplan. Examples of activities include outreach and engagement, research, and consultant fees.

Objectives/Activities	Estimated Dates
Quarter 1	
Scope and hire Convener staff and consultants.	October 1- 31, 2022
Scope and hire Fiscal Agent staff.	October 1- 31, 2022
Finalize governance structure and fill all seats.	October 1- 31, 2022
Identify and contract with research entities as needed for data gathering phase.	October 1- 31, 2022
Identify and contract with stakeholder organizations for engagement and technical assistance activities.	November 1 -30, 2022
Complete Planning Phase Plan.	November 1-30, 2022
Finalize plan for data gathering and analysis.	December 1-30, 2022
Quarter 2	
Data gathering and analysis.	January 2, 2023 - March 31, 2023
Establish communication plan and tools for public input process.	January 2, 2023 - March 31, 2023
Plan and schedule public input outreach events.	January 2, 2023 – March 31, 2023
Public input process begins.	March 31, 2023
Regional Plan Part 1 completed.	March 31, 2023
Quarter 3	
Public input process continues.	Ongoing through March 31, 2024

Objectives/Activities	Estimated Dates
Subregional table convenings begin.	April 3, 2023
Sectoral/affinity table convenings (if applicable) begin.	April 3, 2023
Community visioning process begins.	April 3, 2023
Regional Plan Part 2 development begins.	Ongoing through September 30, 2024
Quarter 4	
Public input process continues.	Ongoing through September 30, 2024
Subregional table convenings continue.	Ongoing through September 30, 2024
Sectoral/affinity table convenings (if applicable) continue.	Ongoing through September 30, 2024
Community visioning process continues.	Ongoing through September 30, 2024
Regional Plan Part 2 development continues.	Ongoing through September 30, 2024
Quarter 5	
Public input process continues.	Ongoing through March 31, 2024
Subregional table convenings continue.	Ongoing through September 30, 2024
Sectoral/affinity table convenings (if applicable) continue.	Ongoing through September 30, 2024
Community visioning process continues.	Ongoing through September 30, 2024
Regional Plan Part 2 development continues.	Ongoing through September 30, 2024
Quarter 6	
Public input process continues.	Ongoing through March 31, 2024
Subregional table convenings continue.	Ongoing through September 30, 2024
Sectoral/affinity table convenings (if applicable) continue.	Ongoing through September 30, 2024

Objectives/Activities	Estimated Dates
Community visioning process continues.	Ongoing through September 30, 2024
Regional Plan Part 2 development continues.	Ongoing through September 30, 2024
Quarter 7	
Subregional table convenings continue.	Ongoing through September 30, 2024
Sectoral/affinity table convenings (if applicable) continue.	Ongoing through September 30, 2024
Community visioning process continues.	Ongoing through September 30, 2024
Regional Plan Part 2 development continues.	Ongoing through September 30, 2024
Quarter 8	
Strategy framework finalized.	July 1, 2024
Strategic investments/projects finalized.	July 1, 2024
Regional Plan Part 2 complete.	No later than September 30, 2024

STATE USE ONLY	EXHIBIT D
Subgrant Number	
Grant Code	
Initial Plan	
Modification Date	
Subrecipient Code	

Appendix 1: Fiscal Agent Resume

Identify the applicant's past or present accomplishments in regional economic development, planning, or recovery projects, if applicable.

The Bay Area Good Jobs Partnership for Equity (BAGJPE), an association of ten workforce development boards (WDBs) and regional workforce planning units across the nine-county Bay Area region, will be the Fiscal Agent for this opportunity, with San Francisco Office of Economic and Workforce Development (SFOEWD) as the Fiscal Lead. BAGJPE--an association with one hundred percent of boundaries overlapping the CERF region--includes Alameda County WDB, Sonoma WDB, WDB of Contra Costa County, NOVAworks, Oakland WDB, Richmond WDB, WDB of Solano County, work2future, SFOEWD, and Workforce Alliance of the North Bay (Marin and Sonoma). Formed in 2021, BAGJPE aims to align each sub-region's economic and workforce development sector strategy in service of workers and economically vulnerable populations and better coordinate workforce development services and partnerships. BAGJPE holds industry relationships with employers, labor, business associations, and training organizations across the region's main economic sectors. As a founding member of BAGJPE with experience as the Fiscal Lead for the association, SFOEWD – a City and County of San Francisco government agency with one hundred percent of boundaries within the CERF region and the operational arm of the San Francisco Workforce Investment Board (WISF) — will be the Fiscal Lead for this opportunity on behalf of the BAGJPE. SFOEWD, as the Fiscal Lead for BAGJPE, has expertise in community engagement and equity-based grant making and holds existing infrastructure and partnerships to quickly deploy funds to impacted communities. As a designated WIOA High-Performing Board and the coordinator of the San Francisco Workforce Development System – a \$140 million ecosystem with 300 community-based organizations serving over 50,000 participants in FY 2020-21 – SFOEWD has been responsible for leading regional workforce initiatives in tech, healthcare, and advanced manufacturing.

Demonstrate the applicant's experience managing grant awards and financial capability to administer and manage funds.

Collectively, BAGJPE administers over \$42 million in federal Workforce Innovation and Opportunity Act (WIOA) funding and contracts with over 80 community-based organizations to deliver services that are tailored for and deeply embedded in economically vulnerable communities. SFOEWD's annual organization budget exceeds \$150 million, with the Workforce Division administering over \$50 million in funding to community-based training partners and institutes of higher education annually. To support project sustainability and Phase II initiatives, SFOEWD has a regular process for pursuing competitive funding and extensive experience with managing multi-year federal DOL, CDBG, and EDA grants, as well as federal, state, and philanthropic disaster relief and economic recovery funds associated with the COVID-19 pandemic. SFOEWD's strong fundraising capacity enables it to leverage multiple funding streams that provide full-service coverage to economically vulnerable populations.

Demonstrate the applicant's capacity and experience in collecting and reporting financial data.

In order to best support this project, SFOEWD requests 1.0 FTE Senior Contracts Analyst who will be responsible for fiscal management and technical assistance to partner organizations, as well as serving as the primary liaison to the State grantor.

SFOEWD maintains established systems and procedures for meeting all funder requirements and federal, state, and local regulations, and has a strong grants administration track record. SFOEWD maintains frequent communication with and strict financial oversight over organizations that receive grants, contracts, and sub-award funds. SFOEWD maintains fiscal controls in line with OMB Circular A-123 recommendations and Generally Accepted Accounting Principles (GAAP), and SFOEWD is subject to the federal Single Audit threshold.

SFOEWD will deposit the designated funds into a single, interest-bearing account in trust for the benefit of the regional collaborative at intervals after the annual Budget Acts are enacted. SFOEWD maintains separate ledgers using the City and County of San Francisco's Financial System Platform (F\$P) web-based accounting platform, and requires all service providers to submit monthly program and fiscal reports and to document thoroughly all expenses for reimbursement. OEWD monitors all programs annually to ensure that policies and procedures meet federal, state, and local requirements. SFOEWD possesses SAM registration and updates registration annually. As a local government agency responsible for sub-granting and sub-contracting funds, SFOEWD has a responsibility to maintain accurate public records to support procurement. As a local government entity, SFOEWD is obligated to maintain and make available all communication and documentation in compliance with the California Public Records Act and San Francisco's Sunshine Ordinance.

The BA-HRTC has sought clarification from the State about eligibility requirements of the Fiscal Agent, and the fiscal agent was chosen because it represents all worker voices in the Bay Area region. If the San Francisco Office of Economic and Workforce Development (a local government agency with one hundred percent of jurisdiction within Bay Area CERF), on behalf of the Bay Area Good Jobs Partnership for Equity (an association representing one hundred percent of Bay Area CERF area), is deemed ineligible to serve as Fiscal Agent, then Metropolitan Transportation Commission (a Metropolitan Planning Organization) has agreed to serve as Fiscal Agent.

Appendix 2: Regional Convener Resume

Previous Related Accomplishments

All Home works with policymakers and community stakeholders across the Bay Area to align goals, initiatives, outcomes and measurements across jurisdictions in support of the extremely low-income population. All Home acts as a convener, policy advocate, grant maker and strategic partner to catalyze change.

All Home is the convener of the Regional Impact Council (RIC), a roundtable that brings together stakeholders from all nine Bay Area counties to address housing insecurity and homelessness around our region. The RIC carries out its work through:

- **Technical Committee:** 50-60 subject matter experts in affordable housing, service provision, and economic mobility, who meet monthly to develop and implement recommendations.
- **Steering Committee:** 40 high-profile policymakers and business, equity, labor and philanthropic leaders who meet monthly to shape and endorse recommendations from the Technical Committee.
- **Co-Chairs** who support development, strategic thinking, and action to advance regional solutions. The Co-Chairs hold final decision-making authority for all individual and overall policy recommendations of the RIC.

In April 2021, the RIC produced the Regional Action Plan (RAP), a roadmap to reduce unsheltered homelessness in the Bay Area by 75% in three years. RIC's Phase 2 work, the Platform for Change, will focus on the structural and systemic changes necessary to disrupt homelessness permanently and provide economic and social mobility for Bay Area residents with extremely low incomes.

Experience Working on Regional Economic Development, Planning, or Recovery Projects with Communities in the CERF Region.

All Home advances regional solutions that disrupt cycles of poverty and homelessness, redress racial disparities, and create more economic mobility opportunities for people with extremely low incomes. All Home is well suited to represent the CERF Region because of its track record leading cross-sector planning efforts and its proven ability to center issues of equity and economic opportunity in policy and systems change work.

For example, through All Home's work as the co-creator of the California Small Enterprise Task Force, we helped create the California Rebuilding Fund (CRF) for small businesses affected by the pandemic. This public-private partnership leverages State of California loan guarantees through the California Infrastructure and Economic Development Bank (IBank) to provide nearly \$200 million in small business loans to help ensure an equitable recovery post-COVID. The loans are administered by Community Development Financial Institutions (CDFIs). All Home also leads a "Housing Jobs Connection" partnership to foster closer connection between employment and workforce development programs with homelessness prevention service providers. The partnership recognizes that employment systems do not effectively serve people

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experiencing homelessness, extremely low-income individuals, and people with multiple barriers to employment. All Home also has significant experience with grantmaking and philanthropic ecosystems, as it guides the Regional Homelessness Prevention fund (a \$10 million Donor-Advised Fund) and has raised over \$35 million in less than three years. All Home has developed strong relationships and credibility with the wide range of stakeholders who will be involved in CERF and will leverage its previous work and reputation to build inclusive tables. As convener of the Bay Area-High Road Transition Collaborative (BA-HRTC), All Home will provide staffing infrastructure and coordinate contracted research partners as well as facilitation, technical assistance, and other consulting support.

Full- and Part-time Staff That Will Be Dedicated to CERF

Tomiquia Moss, Chief Executive/Founder (.05 FTE dedicated to CERF): Ms. Moss has more than 20 years of leadership and management experience in the public and nonprofit sectors. In addition to leading All Home, Ms. Moss is an appointed member of the California Interagency Council on Homelessness, serves as Board Chair of the San Francisco Bay Area Planning and Urban Research Association (SPUR), and also is on the Boards of the Nonprofit Housing Association of Northern California and Oakland Promise. For CERF, Ms. Moss will provide strategic direction, resource development, and strategic partnership development support.

Jay Banfield, Chief Economic Mobility Officer (.75 FTE dedicated to CERF): Mr. Banfield leads All Home's work to develop regional policies and initiatives designed to provide economic stability, drive economic mobility, and create wealth for those with extremely low incomes and those with multiple barriers to employment in the Bay Area. Mr. Banfield previously served as Chief Officer of Innovation and Managing Director for Year Up, a nationally recognized workforce development training program for youth. For CERF, Mr. Banfield will provide day-to-day leadership and management, including supervising full-time staff and contracted parties and services in the completion of Phase I deliverables.

Edie Irons, Director of Communications (.10 FTE dedicated to CERF): Ms. Irons has more than 15 years of experience in nonprofit communications. Ms. Irons was previously Communications Director for TransForm, another regional Bay Area advocacy organization, and has run communications on a wide range of issues for nonprofits, small businesses, political campaigns, a government agency, and as a consultant. For CERF, Ms. Irons will provide guidance and implementation on communications efforts.

CERF Program Manager (to be hired upon award; 1.0 FTE dedicated to CERF): This position will be the full-time dedicated manager of day-to-day activities in the CERF project, including coordination of convenings/forums and maintaining lines of communication to foster stakeholder connectivity and between the HRTC and the Fiscal Agent to accelerate collaboration and support.

CERF Administrative Coordinator (to be hired upon award; .50 FTE dedicated to CERF): This position will support project staff with scheduling, convening logistics, meeting agendas and minutes, and other tasks as assigned.

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**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 15th 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.

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)

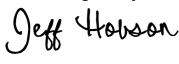
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JOSHUA ARCE
DIRECTOR OF WORKFORCE

Date

ALL HOME, A PROJECT OF TIDES CENTER

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7/22/2022 | 1:31 PM PDT

JEFF HOBSON
CHIEF OPERATING OFFICER

Date

TIDES CENTER

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7/22/2022 | 1:40 PM PDT

MEGHAN HERBERT
ASSOCIATE

Date

Appendix 4: Documentation of Meaningful Engagement

Due to health and safety concerns related to COVID-19, all meetings during the development process of the Concept Proposal, Collective Partnership and Agreement Letter, Outreach and Engagement Plan, and Proposed Budget and Proposed Budget Narrative were held virtually. The following is a list of all meetings held with date of meeting, purpose of meeting, attendees and affiliations (with CERF stakeholder category), meeting link, and key issues discussed.

As shown below, all CERF stakeholder categories are represented with the exception of Native American Tribes. Our Proposal Development Working Group reached out to several organizations and individuals associated with Native American Tribes, but they were at capacity or focusing on ceremonies happening in June and July. Outreach to Native American Tribes will continue, as will coordination with any efforts funded under the BIA Tribal Climate Resilience grants.

Meeting Name	CERF Proposal Planning Kick-Off Meeting
Meeting Date	June 13, 2022
Purpose of Meeting	Introduce stakeholders to CERF proposal planning process and determine how best to work together
Attendees, Affiliations, Stakeholder Category	Jay Banfield, All Home (Convener) Claire Lau, Chinese Progressive Association (Worker Center) Addison Peterson, CAMEO (CBO/Community Organizer) Alma Trejo, Cal Labor Fed (Workforce Entity) Brenda Munoz, UC Berkeley Labor Center (Other Regional Stakeholder) Bianca Bloomquist, Small Business Majority (Employer/Business Association) Chris Rico, Solano Economic Development Association (Economic Development Agency) Glenn Eagleson, San Francisco Office of Economic and Workforce Development (Government Agency) Jennifer Hand, San Francisco Office of Economic and Workforce Development (Government Agency) Kara Gross, Joint Venture Silicon Valley (Economic Development Agency) Jacob Denney, SPUR (Economic Development Agency) Julie Lind, San Mateo Labor Council (Labor Organization) Katherine Ramos, Richmond Our Power Coalition (Disinvested Communities) Louise Auerhahn, Working Partnerships USA (Disinvested Communities)

	<p>Rob Hope, Rework the Bay (Other Regional Stakeholder)</p> <p>Richard Marcantonio, Public Advocates (CBO/Community Organizer)</p> <p>Zach Lou, CA Green New Deal Coalition (Environmental Justice Organization)</p> <p>Tim Frank, Building Trades Councils (Labor Organizations)</p>
Meeting Link	https://us02web.zoom.us/j/85744293300?pwd=b1ovM1o1LzR1VldqT3B0VjVjWINIZz09
Key Issues Discussed	<ul style="list-style-type: none"> Stakeholders discussed what they hoped will be achieved through CERF. Themes included a desire for bottom-up, community and worker driven planning, the desire to work on a sub-regional level as well as the regional level, the desire for an actionable plan with an emphasis on planning, convening and collaboration. Need for a fiscal agent Next steps: putting together a Proposal Development Committee with different levels of participation.

Meeting Name	CERF Proposal Development Working Group
Meeting Date	June 24, 2022
Purpose of Meeting	Convene interim CERF proposal working group and develop plan for writing the grant application
Attendees, Affiliations, Stakeholder Category	<p>Brenda Munoz, UC Berkeley Labor Center (Other Regional Stakeholder)</p> <p>Tracey Brieger, Jobs with Justice SF (Worker Center)</p> <p>Christa Brown, San Francisco Foundation (Philanthropic Organizations)</p> <p>Brad Paul, Metropolitan Transportation Commission, Association of Bay Area Governments (Government Agency)</p> <p>Josh Sonnenfeld, BlueGreen Alliance (Environmental Justice Organization)</p> <p>Sara Matson, Canal Alliance (CBO/Community Organizer)</p> <p>Louise Auerhahn Working Partnerships USA (Disinvested Communities)</p> <p>Jay Banfield, All Home (Convener)</p>

	<p>Zoe Siegel, Greenbelt Alliance (Environmental organization)</p> <p>Rob Hope, Rework the Bay (Other Regional Stakeholder)</p> <p>Max Bell Alper, Jobs With Justice North Bay (Worker Center)</p> <p>Jeff Bellisario, Bay Area Council (Employer/Business Association)</p> <p>Enrique Lopezlira, UC Berkeley Labor Center (Other Regional Stakeholder)</p> <p>Leslie Alfaro, Bay Area Council (Employer/Business Association)</p> <p>Tamia Brown, Workforce Development Board of Contra Costa County (Workforce Entities)</p> <p>Joshua Arce, Good Jobs Partnership for Equity (Workforce Entities)</p> <p>Josh Anijar, Contra Costa Labor Council (Labor Organization)</p> <p>Laura Escobar, United Way of the Bay Area (Philanthropic Organization)</p>
Meeting Link	https://us02web.zoom.us/j/81440932841?pwd=XJFE G0V-qT3L5EDo_b_8K4wKwiHRAB.1
Key Issues Discussed	<ul style="list-style-type: none"> • Overview of work so far and initial planning group • Review values and principles document • Discuss timeline and work plan for next 4 weeks • Discuss decision-making structure and working groups

Meeting Name	Bay Area CERF community / equity meeting
Meeting Date	June 28, 2022
Purpose of Meeting	Standing meeting for community, equity, labor groups to discuss Bay Area CERF
Attendees, Affiliations, Stakeholder Category	<p>Louise Auerhahn, Working Partnerships USA (Disinvested Communities)</p> <p>Josh Sonnenfeld, BlueGreen Alliance (Environmental Justice Organization)</p> <p>Jacob Klein, Sierra Club SF Chapter (Environmental Justice Organization)</p> <p>Carli Yoro, Emerald Cities Collaborative (Environmental Justice Organization)</p> <p>Eli Moore, Othering & Belonging Institute (Other regional stakeholders)</p> <p>Zach Lou, California GND Coalition (Environmental Justice Organization)</p>

	<p>Chiara Arellano, Rising Sun Center for Opportunity (Workforce entities)</p> <p>Faraz Rizvi, APEN (Environmental Justice Organization)</p> <p>Michelle Pariset, Public Advocates (CBO/Community Organizer)</p> <p>Enrique Lopezlira, UC Berkeley Labor Center (Other Regional Stakeholder)</p> <p>Saul Ramos, SOMOS Mayfair (CBO/Community Organizer)</p>
Meeting Link	https://us02web.zoom.us/j/84407332919?pwd=Sw8gFGMOX69sZ3rdEWYK90ZNjP-Mbt.1
Key Issues Discussed	<ul style="list-style-type: none"> • Values and Principles document • Research and community engagement components

Meeting Name	CERF Proposal Development Working Group
Meeting Date	July 1, 2022
Purpose of Meeting	Proposal development planning
Attendees, Affiliations, Stakeholder Category	<p>Jay Banfield, All Home (Convener)</p> <p>Brad Paul, Metropolitan Transportation Commission, Association of Bay Area Governments (Government Agency)</p> <p>Enrique Lopezlira, UC Berkeley Labor Center (Other Regional Stakeholder)</p> <p>Josh Sonnenfeld, BlueGreen Alliance (Environmental Justice Organization)</p> <p>Kim Tavaglione, SF Labor Council (Labor Organization)</p> <p>Louise Auerhahn Working Partnerships USA (Disinvested communities)</p> <p>Maria Medua, Canal Alliance (CBO/Community Organizer)</p> <p>Max Bell Alper, Jobs With Justice North Bay (Worker Center)</p> <p>Rock Pfothenauer, Bay Area Community College Consortium (Education and Training Providers)</p> <p>Zach Lou, CA Green New Deal Coalition (Environmental Justice Organization)</p>
Meeting Link	https://us02web.zoom.us/j/81440932841?pwd=XJFE G0V-qT3L5EDo_b_8K4wKwiHRAB.1

Key Issues Discussed	<ul style="list-style-type: none"> • Proposal components and deadlines • Decisions that need to be made during the proposal process versus during the Planning Phase • Key considerations in designing the governance structure
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Meeting Name	Subject Matter Expert Interviews Day 1: Concept Proposal and Work Plan
Meeting Date	July 5, 2022
Purpose of Meeting	Interview subject matter experts on key issues to inform the Concept Proposal and Work Plan
Attendees, Affiliations, Stakeholder Category	<p>Jay Banfield, All Home (Convener)</p> <p>Brad Paul, Metropolitan Transportation Commission, Association of Bay Area Governments (Government Agency)</p> <p>Enrique Lopezlira, UC Berkeley Labor Center (Other Regional Stakeholder)</p> <p>Kim Tavaglione, SF Labor Council (Labor Organization)</p> <p>Louise Auerhahn Working Partnerships USA (Disinvested Communities)</p> <p>Maria Medua, Canal Alliance (CBO/Community Organizer)</p> <p>Max Bell Alper, Jobs With Justice North Bay (Worker Center)</p> <p>Zoe Siegel, Greenbelt Alliance (Environmental Organization)</p>
Meeting Link	https://us02web.zoom.us/j/88091749935?pwd=6zblzGLg9U6HoREh0yy0h_4w1h3G_.1
Key Issues Discussed	<ul style="list-style-type: none"> • Existing regional and subregional planning processes and how they fit with BA-HRTC • Accountability measures during the planning phase • Sustainability between planning and implementation phases • Geographic equity and participation in decision-making by disinvested communities • Compensation for participation by community members • Anticipated challenges and addressing them proactively

Meeting Name	Subject Matter Expert Interviews Day 2: Outreach and Engagement Plan, Collective Partnership Agreement Letter, Budget
Meeting Date	July 6, 2022
Purpose of Meeting	Interview subject matter experts on key issues to inform the Outreach and Engagement Plan, Collective Partnership Agreement Letter, Budget
Attendees, Affiliations, Stakeholder Category	Jay Banfield, All Home (Convener) Brad Paul, Metropolitan Transportation Commission, Association of Bay Area Governments (Government Agency) Joshua Arce, Good Jobs Partnership for Equity (Workforce Entities) Kim Tavaglione, SF Labor Council (Labor Organization) Louise Auerhahn Working Partnerships USA (Disinvested Communities) Rob Hope, Rework the Bay (Other Regional Stakeholder) Zach Lou, CA Green New Deal Coalition (Environmental Justice Organization) Zoe Siegel, Greenbelt Alliance (Environmental Organization) Jeff Bellisario, Bay Area Council (Employer/Business Association) Carolina Martinez, Cameo (CBO/Community Organizer)
Meeting Link	https://us02web.zoom.us/j/89496536364?pwd=97MENlMk7Jeo3bnwMtwNwFk1V_RRit.1
Key Issues Discussed	<ul style="list-style-type: none"> • Important stakeholders yet to be engaged in the process • Strategies to ensure engagement is inclusive • Strategies to ensure engagement reaches all nine counties and disinvested communities • Specific community outreach versus general public outreach • Leadership opportunities for members of disinvested communities • Meeting community members where they're at: successful outreach models • Inclusion of Values and Principles in Collective Partnership Agreement • Governance Structure: How subregional tables and sectoral tables will feed up to Steering Committee

	<ul style="list-style-type: none"> • Budget priorities
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Meeting Name	CERF Proposal Development Workgroup
Meeting Date	July 8, 2022
Purpose of Meeting	Proposal development planning
Attendees, Affiliations, Stakeholder Category	<p>Jay Banfield, All Home (Convener)</p> <p>Brad Paul, Metropolitan Transportation Commission, Association of Bay Area Governments (Government Agency)</p> <p>Kim Tavaglione, SF Labor Council (Labor Organization)</p> <p>Louise Auerhahn Working Partnerships USA (Disinvested Communities)</p> <p>Zach Lou, CA Green New Deal Coalition (Environmental Justice Organization)</p> <p>Zoe Siegel, Greenbelt Alliance (Environmental Organization)</p> <p>Josh Sonnenfeld, BlueGreen Alliance (Environmental Justice Organization)</p> <p>Maria Medua, Canal Alliance (CBO/Community Organizer)</p> <p>Max Bell Alper, Jobs With Justice North Bay (Worker Center)</p> <p>Enrique Lopezlira, UC Berkeley Labor Center (Other Regional Stakeholder)</p>
Meeting Link	https://us02web.zoom.us/j/81440932841?pwd=XJFEG0V-gT3L5EDo_b_8K4wKwiHRAB.1
Key Issues Discussed	<ul style="list-style-type: none"> • Upcoming public listening sessions • Proposal development status/updates • Getting signatures for partnership letter • Fiscal Agent • Governance Structure

Meeting Name	CERF Drivers Stand-Up Meeting
Meeting Date	July 11, 2022
Purpose of Meeting	Weekly check-in
Attendees, Affiliations, Stakeholder Category	<p>Jay Banfield, All Home (Convener)</p> <p>Jeff Bellisario, Bay Area Council (Employer/Business Association)</p> <p>Josh Sonnenfeld, BlueGreen Alliance (Environmental Justice Organization)</p> <p>Louise Auerhahn Working Partnerships USA (Disinvested Communities)</p>

	Natasha Hicks, Insight Center (CBO/Community Organizer) Zach Lou, CA Green New Deal Coalition (Environmental Justice Organization) Rob Hope, Rework the Bay (Other Regional Stakeholder)
Meeting Link	https://us02web.zoom.us/j/89184814637?pwd=aHI6WU1qaE0waHVVT2ROYVBsdFJTZz09
Key Issues Discussed	<ul style="list-style-type: none"> • Upcoming public listening session • Upcoming Budget meeting • Fiscal Agent Status • Outreach on partnership letters

Meeting Name	CERF Proposal Budget Meeting
Meeting Date	July 11, 2022
Purpose of Meeting	Collaborate on drafting the budget
Attendees, Affiliations, Stakeholder Category	Jay Banfield, All Home (Convener) Jeff Hobson, All Home (Convener) Rob Hope, Rework the Bay (Other Regional Stakeholder) Joshua Arce, Good Jobs Partnership for Equity (Workforce Entities) Natasha Hicks, Insight Center (CBO/Community Organizer)
Meeting Link	https://us02web.zoom.us/j/88224792176?pwd=ZEdrbEZ6bVlma3E0RDItYk1EdzRkdz09
Key Issues Discussed	<ul style="list-style-type: none"> • Maximizing funds available for outreach and engagement • Fiscal agent costs • Convener costs

Meeting Name	Bay Area CERF community / equity meeting
Meeting Date	July 12, 2022
Purpose of Meeting	Standing meeting for community, equity, labor groups to discuss Bay Area CERF
Attendees, Affiliations, Stakeholder Category	Louise Auerhahn, Working Partnerships USA (Disinvested Communities) Josh Sonnenfeld, BlueGreen Alliance (Environmental Justice Organization) Jacob Klein, Sierra Club SF Chapter (Environmental Justice Organization) Carli Yoro, Emerald Cities Collaborative (Environmental Justice Organization)

	Eli Moore, Othering & Belonging Institute (Other Regional Stakeholder) Zach Lou, California GND Coalition (Environmental Justice Organization) Chiara Arellano, Rising Sun Center for Opportunity (Workforce Entity) Michelle Pariset, Public Advocates (CBO/Community Organizer) Katt Ramos, Richmond Our Power Coalition (Disinvested Communities)
Meeting Link	https://us02web.zoom.us/j/84407332919?pwd=Sw8qFGMOX69sZ3rdEWYK90ZNjP-Mbt.1
Key Issues Discussed	<ul style="list-style-type: none"> • Application concept proposal • Outreach and Engagement Plan

Meeting Name	CERF Public Listening Session
Meeting Date	July 13, 2022
Purpose of Meeting	Provide a CERF briefing and proposal update to a larger group of stakeholders
Attendees, Affiliations, Stakeholder Category	Jay Banfield, All Home (Convener) Enrique Lopezlira, UC Berkeley Labor Center (Other Regional Stakeholder) Brad Paul, Metropolitan Transportation Commission, Association of Bay Area Governments (Government Agency) Chris Rico, Solano Economic Development Association (Economic Development Agency) Christa Brown, San Francisco Foundation (Philanthropic Organizations) Kara Gross, Joint Venture Silicon Valley (Economic Development Agency) Jennifer Hand, San Francisco Office of Economic and Workforce Development (Government Agency) Julie Lind, San Mateo Labor Council (Labor Organization) Katherine Ramos, Richmond Our Power Coalition (Disinvested Communities) Louise Auerhahn, Working Partnerships USA (Disinvested Communities) Kim Tavaglione, SF Labor Council (Labor Organization)

	<p>Leslie Alfaro, Bay Area Council (Employer/Business Association)</p> <p>Max Bell Alper, Jobs With Justice North Bay (Worker Center)</p> <p>Zach Lou, CA Green New Deal Coalition (Environmental Justice Organization)</p> <p>Glenn Eagleson, San Francisco Office of Economic and Workforce Development (Government Agency)</p> <p>Jacob Denney, SPUR (Economic Development Agency)</p> <p>Bob Burris, Rural County Representatives of CA (Other Regional Stakeholders)</p> <p>Brenda Orellana, Centro Legal de la Raza (CBO/Community Organizer)</p> <p>Cayce Hill, Veggielution (CBO/Community Organizer)</p> <p>Chander Florence, NOVA (Workforce Organization)</p> <p>Cynthia Murray, North Bay Leadership Council (Employer/Business Association)</p> <p>David Palter, Silicon Valley Leadership Group (Employer/Business Association)</p> <p>Henry Bartholomay, Bay Area Council (Employer/Business Association)</p> <p>Jenny Balisle, ARTSCCC (CBO/Community Organizer)</p> <p>Lauren Cartwright, Sonoma County Economic Development Board (Economic Development Agencies)</p> <p>Lawrence Thoo, Work2Future (Workforce Entities)</p> <p>Maite Gascó Juscafresa, Prospera (CBO/Community Organizer)</p> <p>Malaika Parker, Black Organizing Project (Disinvested Communities)</p> <p>Maricela Gutierrez, Services, Immigrant Rights & Education Network (Disinvested Communities)</p> <p>Monique Berlenga, Centro Legal de la Raza (CBO/Community Organizer)</p> <p>Max Vargas, Latino Community Foundation (Philanthropic Organizations)</p> <p>Sal Bednarz, PortLabs (Economic Development Agencies)</p> <p>Stephen Baiter, East Bay Economic Development Agency (Economic Development Agency)</p> <p>Usha Srinivasan, Mosaic America (CBO/Community Organizer)</p> <p>Alice Sung, Architect (Other Community Stakeholders)</p>
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Meeting Link	https://us02web.zoom.us/j/81440932841?pwd=XJFEG0V-gT3L5EDo_b_8K4wKwiHRAB.1
Key Issues Discussed	<ul style="list-style-type: none"> • Preparing for next Public Listening session • Governance Structure • Budget • Status of fiscal agent • Process for accepting final comments on draft proposal materials

Meeting Name	CERF Drivers Stand-Up Meeting
Meeting Date	July 18, 2022
Purpose of Meeting	Weekly check-in
Attendees, Affiliations, Stakeholder Category	<p>Jay Banfield, All Home (Convener)</p> <p>Josh Sonnenfeld, BlueGreen Alliance (Environmental Justice Organization)</p> <p>Louise Auerhahn Working Partnerships USA (Disinvested Communities)</p> <p>Zach Lou, CA Green New Deal Coalition (Environmental Justice Organization)</p> <p>Brad Paul, Metropolitan Transportation Commission, Association of Bay Area Governments (Government Agency)</p> <p>Enrique Lopezlira, UC Berkeley Labor Center (Other Regional Stakeholder)</p> <p>Jennifer Hand, San Francisco Office of Economic and Workforce Development (Government Agency)</p> <p>Kim Tavaglione, SF Labor Council (Labor Organization)</p> <p>Maria Medua, Canal Alliance (CBO/Community Organizer)</p>
Meeting Link	https://us02web.zoom.us/j/89184814637?pwd%3DaHl6WU1qaE0waHVVT2ROYVBsdFJTZz09
Key Issues Discussed	<ul style="list-style-type: none"> • Upcoming public listening session • Upcoming Budget meeting • Fiscal Agent Status • Outreach on partnership letters

Meeting Name	Bay Area CERF community / equity meeting
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Meeting Date	July 19, 2022
Purpose of Meeting	Standing meeting for community, equity, labor groups to discuss Bay Area CERF
Attendees, Affiliations, Stakeholder Category	Louise Auerhahn, Working Partnerships USA (Disinvested Communities) Josh Sonnenfeld, BlueGreen Alliance (Environmental Justice Organization) Jacob Klein, Sierra Club SF Chapter (Environmental Justice Organization) Neha Bazai, Emerald Cities Collaborative (Environmental Justice Organization) Eli Moore, Othering & Belonging Institute (Other regional stakeholders) Zach Lou, California GND Coalition (Environmental Justice Organization) Chiara Arellano, Rising Sun Center for Opportunity (Workforce entities) Faraz Rizvi, APEN (Environmental Justice Organization) Enrique Lopezlira, UC Berkeley Labor Center (Other Regional Stakeholder) Brenda Munoz, UC Berkeley Labor Center (Other Regional Stakeholder) Katt Ramos, Richmond Our Power Coalition (Disinvested Communities) Claire Lau, Chinese Progressive Association (Worker Center) Jay Banfield, All Home (Convener) Kate Bristol, Grant Writer
Meeting Link	https://us02web.zoom.us/j/84407332919?pwd=Sw8gFGMOX69sZ3rdEWYK90ZNjP-Mbt.1
Key Issues Discussed	<ul style="list-style-type: none"> • Outreach and Engagement Plan budget • Partnership letters of support

Meeting Name	CERF Public Listening Session
Meeting Date	July 20, 2022
Purpose of Meeting	Provide a CERF briefing and proposal update to a larger group of stakeholders
Attendees, Affiliations, Stakeholder Category	Jay Banfield, All Home (Convener) Mussett McBride, All Home (Convener) Solomon Belette, East Contra Costa Community Alliance

	<p>Louise Auerhahn, Working Partnerships USA (Disinvested Communities)</p> <p>Jordan Ackerman, CTWI (Disinvested Communities)</p> <p>Jenny Balisle, ARTSCCC (CBO/Community Organizer)</p> <p>Katherine Tuidar, The Botanical Bus (CBO/Community Organizer)</p> <p>Jimmy Apffel, Bloom Energy (Employer)</p> <p>Jenifer Lomeli, Emerald Cities Collaborative (Environmental Justice)</p> <p>Rosanne Foust, SAMCEDA (Economic Development Agencies)</p> <p>Leslie Alfaro, Bay Area Council (Employer/Business Association)</p> <p>Alexandra Urbanowski, SV Creates (CBO/Community Organizer)</p> <p>Jacob Klein, Sierra Club (Environmental Organization)</p> <p>Stephen Baiter East Bay Economic Development Agency (Economic Development Agency)</p> <p>Devon Miner, Jobs for the Future (Other regional stakeholders)</p> <p>Karie Crisp, Loteva Group (Other regional stakeholders)</p> <p>Kendal Asuncion, Bloom Energy (Employer)</p> <p>Lawrence Thoo, Work2Future (Workforce Entities)</p> <p>Sasha Werblin, LISC (Philanthropic Organizations)</p> <p>Christian Valdez, Building Skills</p> <p>Zach Lou, CA Green New Deal Coalition (Environmental Justice Organization)</p> <p>Ayako Nagano, Transition US / Common Vision</p> <p>Addison Peterson, CAMEO (CBO/Community Organizer)</p> <p>Chris Rico, Solano EDC (Economic Development Agency)</p> <p>Kimberly Tavaglione SF Labor Council (Labor Organization)</p> <p>Mahvash Hassan, Consultant (Other regional stakeholders)</p> <p>Aleka Seville, Consultant (Other regional stakeholders)</p> <p>Bianca Blomquist, Small Business Majority (Employer/Business Association)</p> <p>Beli Acharya, Construction Trades Workforce Initiative (Workforce Development Organization)</p> <p>Jennifer Berger</p>
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Purpose of Meeting	Proposal development planning
Attendees, Affiliations, Stakeholder Category	<p>Jay Banfield, All Home (Convener)</p> <p>Louise Auerhahn, Working Partnerships USA (Disinvested Communities)</p> <p>Kim Tavaglione, SF Labor Council (Labor Organization)</p> <p>Josh Sonnenfeld, BlueGreen Alliance (Environmental Justice Organization)</p> <p>Zach Lou, CA Green New Deal Coalition (Environmental Justice Organization)</p> <p>Brad Paul, Metropolitan Transportation Commission, Association of Bay Area Governments (Government Agency)</p> <p>Tracey Brieger, Jobs with Justice SF (Worker Center)</p> <p>Jennifer Hand, San Francisco Office of Economic and Workforce Development (Government Agency)</p> <p>Josh Anijar, Contra Costa Labor Council (Labor Organization)</p> <p>Faraz Rizvi, APEN (Environmental Justice Organization)</p> <p>Enrique Lopezlira, UC Berkeley Labor Center (Other Regional Stakeholder)</p>
Meeting Link	https://us02web.zoom.us/j/81440932841?pwd=XJFEG0V-gT3L5EDo_b_8K4wKwiHRAB.1
Key Issues Discussed	<ul style="list-style-type: none"> • Governance Structure • Budget • Numbers to be engaged (outreach) • Decision Making

Appendix 5: Advance Pay Statement of Need

Not applicable. Applicant is not seeking Advance Pay.

Appendix 6: Project Expenditures Timeline for Advance Pay

Not applicable. Applicant is not seeking Advance Pay.

Exhibit 7: Signatures of Initial HRTC Members

The following organizations have signed on to BA-HRTC Collective Partnership Agreement letter, as evidenced by the attached signature forms.

Fiscal Agent:

- Bay Area Good Jobs Partnership for Equity (BAGJPE)

Initial HRTC Members:

- Alameda Labor Council
- Arts Contra Costa County (ARTSCCC)
- Asian Pacific Environmental Network (APEN)
- Association of Bay Area Governments (ABAG) and Metropolitan Transportation Commission (MTC)
- Bay Area Community College Consortium (BACCC)
- Bay Area Council
- Bay Area Regional Health Inequities Initiative (BARHII)
- Bloom Energy
- BlueGreen Alliance
- Building Skills Partnership (BSP)
- California Forward
- California Green New Deal Coalition
- Canal Alliance
- Center for Sustainable Neighborhoods
- Centro Legal de la Raza
- Chinese Progressive Association
- Construction Trades Workforce Initiative
- Contra Costa Economic Partnership (CCEP)
- Contra Costa Labor Council (CCLC)
- East Bay Economic Development Alliance (East Bay EDA)
- Emerald Cities Collaborative (ECC)
- Greenbank Associates
- Greenbelt Alliance
- Jobs with Justice San Francisco
- Karie Crisp Vasquez
- North Bay Jobs with Justice
- North Bay Labor Council AFL-CIO (NBLC)
- North Bay Leadership Council
- Othering and Belonging Institute, UC Berkeley
- Port of Oakland
- Prospera
- Rural County Representatives of California (RCRC)

- San Francisco Building and Construction Trades Council
- San Francisco Foundation
- San Francisco Labor Council
- San Mateo County Economic Development Association (SAMCEDA)
- San Mateo Labor Council
- Services, Immigrant Rights and Education Network (SIREN)
- Sierra Club, San Francisco Bay Chapter
- Silicon Valley Creates
- Silicon Valley Leadership Group (SVLG)
- Solano Economic Development Corporation (Solano EDC)
- South Bay AFL-CIO Labor Council
- Transition US
- UC Berkeley Labor Council
- United Way Bay Area (UWBA)
- UpValley Family Centers of Napa Valley
- Working Partnerships USA

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Bay Area Good Jobs Partnership for Equity
Contact Person: Name	Joshua Arce
Contact Person: Title and Role	San Francisco Office of Economic and Workforce Development Director of Workforce Development
Contact Person: Email Address and Phone Number	Joshua.Arce@sfgov.org (415) 701-4848

Organizational Description:

The Bay Area Good Jobs Partnership for Equity (BAGJPE), an association of ten workforce development boards (WDBs) and three regional workforce planning units across the nine-county Bay Area region, will be the Fiscal Agent for this opportunity, with San Francisco Office of Economic and Workforce Development (SFOEWD) as the Fiscal Lead. BAGJPE—an association with one hundred percent of boundaries overlapping the CERF region—includes Alameda County WDB, WDB of Contra Costa County, NOVAworks, Oakland WDB, Richmond WDB, SFOEWD, WDB of Solano County, Sonoma WDB, work2future, and Workforce Alliance of the North Bay (Marin and Sonoma). BAGJPE includes the following entities:

California Workforce Association: The California Workforce Association is a non-profit member association, which represents all 45 of the Workforce Development Boards in the State of California, as well as over 70 other affiliate members from labor, education, industry, Chambers of Commerce, government and community-based organizations.

Alameda County Workforce Development Board: The Alameda County Workforce Development Board (ACWDB) is a 27-member employer-led group that provides administrative, fiscal, and policy oversight of WIOA Title I programs and services. WIOA services are available throughout Alameda County to meet the training and employment needs of local area job seekers, including adults, dislocated workers, youth, and young adults. ACWDB also engages in special discretionary projects and delivers services to the business community to help employers meet their goals.

Workforce Development Board of Contra Costa County: Appointed by the Contra Costa County Board of Supervisors, our 25-member Board brings together leaders from business, economic development, education, labor, community-based organizations, and public agencies to align a variety of resources and organizations to enhance the competitiveness of the local workforce and support economic vitality in our region.

NOVAworks: NOVAworks is a nonprofit, federally funded employment and training agency that provides customer-focused workforce development services. We work closely with local businesses, educators, and job seekers to ensure that our programs provide opportunities that build the knowledge, skills, and attitudes necessary to address the workforce needs of Silicon

Valley. NOVAworks is directed by the NOVAworks Workforce Board, which works on behalf of a consortium of eight jurisdictions, composed of the County of San Mateo, and the Santa Clara County cities of Cupertino, Los Altos, Milpitas, Mountain View, Palo Alto, Santa Clara, and Sunnyvale.

Oakland Workforce Development Board: The Oakland WDB oversees the federally-funded employment and training programs and services in Oakland. These programs and services help job seekers gain employment and connect businesses with a qualified workforce.

Richmond Workforce Development Board: Since its inception, the Richmond Workforce Development Board (WDB) has been actively involved in promoting and overseeing the local workforce system. Through the leadership of its Board and the participation of subcommittee members, we provide creative solutions that meet the current and future needs of both job seekers and employers.

San Francisco Office of Economic and Workforce Development: The Workforce Development Division of the Office of Economic & Workforce Development (OEWD) coordinates the San Francisco Workforce Development System, which is a network of public, private, and nonprofit service providers that serve San Francisco job seekers and employers. We offer San Francisco employers services and assistance to attract, grow and retain a diverse workforce.

Workforce Development Board of Solano County: The Workforce Development Board (WDB) of Solano County is a 501(c)(3) nonprofit organization that provides employment-related services for job seekers and businesses in Solano County. The WDB oversees federally-funded WIOA workforce services on behalf of Solano County. Services include the American Job Center of California System and intensive programs to support the talent development of the county. This work includes planning and policy development, and alignment of workforce services in partnership with businesses to develop an integrated, responsive, and robust workforce system that meets the needs of both businesses and job seekers.

Sonoma Workforce Investment Board: The Sonoma County Workforce Investment Board (WIB) is a group of key stakeholders appointed by the Sonoma County Board of Supervisors to address workforce challenges throughout Sonoma County. The WIB members are leaders in the community who represent business, industry, labor, education, and economic development.

work2future: work2future helps Santa Clara County residents get the skills and coaching they need to find a new job, get a promotion, or start a new career. We partner with employers to help them stay competitive and manage change with supportive and advisory services.

Workforce Alliance of the North Bay: Workforce Alliance of the North Bay leverages regional funding and aligns partners in the North Bay to ensure a skilled workforce today and in the future. Our network of career centers, employment and training initiatives, and programs result in a regional talent pool that drives economic growth for businesses and social mobility for workers and career seekers in the North Bay.

Organizational Experience:

Formed in 2021, BAGJPE aims to align each sub-region's economic and workforce development sector strategy in service of workers and economically vulnerable populations and better coordinate workforce development services and partnerships. Collectively, BAGJPE administers over \$42.1 million in federal Workforce Innovation and Opportunity Act (WIOA) funding and contracts with over 80 community-based organizations to deliver services that are tailored for and deeply embedded in economically vulnerable communities. BAGJPE regularly convenes and holds industry relationships with employers, labor, business associations, and training organizations across the region's main economic sectors.

Signature Block:


Signature from Authorized Signatory Representative	DocuSigned by: <i>Robert Lanter</i>
Typed Name of Authorized Signatory Representative	Bob Lanter, Executive Director California Workforce Association
Date	7/20/2022 1:59 PM PDT


Signature from Authorized Signatory Representative	DocuSigned by: <i>Rhonda Boykin</i>
Typed Name of Authorized Signatory Representative	Rhonda Boykin, Interim Director Alameda Workforce Development Board
Date	7/20/2022 11:06 AM PDT


Signature from Authorized Signatory Representative	DocuSigned by: <i>Tamia Brown</i>
Typed Name of Authorized Signatory Representative	Tamia Brown, Executive Director Workforce Development Board of Contra Costa County
Date	7/20/2022 10:57 AM PDT


Signature from Authorized Signatory Representative	DocuSigned by: <i>Marlena Sessions</i>
Typed Name of Authorized Signatory Representative	Marlena Sessions, Executive Director NOVAworks
Date	7/20/2022 10:54 AM PDT

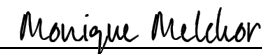
Signature from Authorized Signatory Representative	DocuSigned by: <i>Sofia Navarro</i>
Typed Name of Authorized Signatory Representative	Sofia Navarro, Executive Director Oakland Workforce Development Board
Date	7/20/2022 1:36 PM PDT


Signature from Authorized Signatory Representative	DocuSigned by: 
Typed Name of Authorized Signatory Representative	Tamara Walker, Deputy Community Services Director – Employment & Training Richmond Workforce Development Board
Date	7/20/2022 11:37 AM PDT

Signature from Authorized Signatory Representative	DocuSigned by: 
Typed Name of Authorized Signatory Representative	Joshua Arce, Director of Workforce San Francisco Office of Economic and Workforce Development
Date	7/21/2022 9:57 AM PDT

Signature from Authorized Signatory Representative	DocuSigned by: 
Typed Name of Authorized Signatory Representative	Heather Henry, President & Executive Director Workforce Development Board of Solano County
Date	7/20/2022 11:44 AM PDT

Signature from Authorized Signatory Representative	DocuSigned by: 
Typed Name of Authorized Signatory Representative	Katie Greaves, Director of Employment and Training Division Sonoma County Workforce Development Board
Date	7/21/2022 9:29 AM PDT

Signature from Authorized Signatory Representative	DocuSigned by: 
Typed Name of Authorized Signatory Representative	Monique Melchor, Director work2future
Date	7/21/2022 8:48 AM PDT

Signature from Authorized Signatory Representative	DocuSigned by: 
Typed Name of Authorized Signatory Representative	Bruce Wilson, Executive Director Workforce Alliance of North Bay
Date	7/21/2022 8:52 AM PDT

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Alameda Labor Council
Contact Person: Name	Elizabeth Ortega
Contact Person: Title and Role	Executive Secretary-Treasurer
Contact Person: Email Address and Phone Number	LOrtega@alamedalabor.org (510) 564-6074


Organizational Description:

Founded in 1901, the Alameda Labor Council, also known as the Central Labor Council of Alameda County, was chartered by the AFL CIO as the regional body for labor unity in **2/16/57**. Today, the Council serve as an umbrella organization coordinating political, community, educational programs for more than 126 unions We represent 135,000 workers in healthcare, transportation, education, construction, manufacturing and services in Alameda County.

Organizational Experience:

The Alameda Labor Council works in partnership with other labor organizations, non-profits and government agencies, as well as our elected officials in improving the lives of working families by bringing economic justice to our workplaces and social justice to our communities. We provide training and organizing classes, help workers join and form unions, create sound policies to strengthen the voice of working families, improve communities, state and nation and support workers as we bargain with employers to improve our living and working conditions.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Elizabeth Ortega Executive Secretary-Treasurer
Date	07/20/22

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	ARTSCCC (Arts Contra Costa County)
Contact Person: Name	Jenny Balisle
Contact Person: Title and Role	Executive Founding Director
Contact Person: Email Address and Phone Number	info@artsgccc.com (510) 426-6454

Organizational Description:

ARTSCCC (Arts Contra Costa County) is a collaboration between cultural leaders whose focus is an equitable and sustainable arts organization for Contra Costa County. We believe that artists and art organizations are an essential framework for strong communities and cross-cultural appreciation. We seek meaningful support for the creative sector to advocate, elevate, build, and prosper. The Arts are a vital, valuable, and creative resource that responds to the human condition, encourages critical thinking, enhances the quality of life, and is a catalyst for social change.

For decades, Contra Costa County has ranked last in arts funding and support in the San Francisco Bay Area. There’s currently no county art agency. As a service and advocacy organization, ARTSCCC top priority is supporting artists and art organizations that fall short of biased institutional structures. An equitable and sustainable arts organization for Contra Costa County is top priority.

ARTSCCC has four social media platforms (Instagram, Twitter, Facebook, and YouTube) and writing grants exclusively to support the Contra Costa County creative community. We’re connecting cultural leaders and facilitating meetings to form new collaborations. ARTSCCC will be facilitating “Community Conversations” for artists and art organizations to gather information. In addition, an Artist Directory to identify artists for opportunities, curations, and funding. We’re building a Contra Costa County Advocacy Toolkit to support cities with or without Arts Commissions.

We are proudly fiscally sponsored by Independent Arts & Media. For over twenty years, the San Francisco nonprofit specializes in fiscal arts sponsorships that serve as a transformative “free speech platform” for independent voices and public-interest work.

www.artsgccc.com

Organizational Experience:

ARTSCCC is an organization with decades of collective arts advocacy experience.

ARTSCCC Lead Advisor Ben Miyaji is an ardent arts supporter. He retired from Siemens, where he traveled around the world working on computer control systems for electric and gas utilities. Ben is currently the Palo Alto Public Art Commission Chair and has served for over 8 years. He was the Arts and Culture Commission of Contra Costa County Chair. In addition, Ben also served on the San Jose Arts Commission from 1992

to 2014 and was Chair for three consecutive years. Since his retirement, he has been a part-time wedding officiant and has performed over 6,000 wedding ceremonies.

ARTSCCC Lead Advisor Brenda K Williams (BK) is a native San Franciscan who has resided in Richmond for 30 years. She has a strong belief in volunteerism and served as a Richmond Arts and Culture Commission for eight years. She also served as Board Chair for Queer Women of Color Media Arts (QWOCMAP) where social justice issues are routinely addressed and stories of underrepresented people of color are documented. BK co-founded Richmond Women's Film Collective which supports diverse women to tell their stories through the effective use of film. A filmmaker herself, BK understands the power of storytelling and has completed an award winning documentary, *Against Hate* which illuminated the free speech claims around hate speech in Richmond around 2014.

After no women remained in political leadership in Richmond, BK cofounded Women in Politics (WIP) to ensure the representation and inclusion of women in leadership in Richmond. BK also serves as Vice President of Richmond Rainbow Pride, an organization that formed to better understand and address the needs of the LGBTQI community in and around Richmond and increase the visibility in the community.

BK was appointed to the East Richmond Heights Municipal Advisory Council (MAC) as an adviser on issues important to this community, until she left to serve as Vice Chair of the County Measure X Task Force. BK serves as Co-Chair of the Richmond Progressive Alliance, a volunteer independent progressive organization that seeks to unite Richmond's diverse communities and form alliances with other community based organizations. She also serves on Richmond's Reimagining Public Safety Task force.


ARTSCCC Founding Executive Director Jenny Balisle has served as the Arts and Culture Commission of Contra Costa County Managing Director, Richmond Arts & Culture Commission Chair, and Public Art Advisory Committee Chair. Balisle is an instructor at UC Berkeley Extension. She currently works as an administrator, artist, advocate, educator, curator, and writer.

Her exhibitions include the de Young Museum Artist-in-Residence, Orange County Center for Contemporary Art, Chicago Cultural Center, Harvard University, Farmington Museum, Museu Brasileiro São Paulo, and Shanghai Oil Painting & Sculpture Institute Art Museum. Balisle's work has been featured in such publications as *The Huffington Post*, *WOMENCINEMAKERS*, *A5 Magazine*, *ZYZZYVA*, *The Drum Literary Magazine*, and *Sculptural Pursuits Magazine*. Public art includes *The Cube Art Project*, *Hearts in San Francisco*, and *South San Francisco Utility Box Mural Project*.

Lisa Burger is Executive Director for Independent Arts & Media, a San Francisco nonprofit that provides fiscal sponsorship and development support to non-commercial art and media-related projects. Burger is currently the Artists United Board President. She has been the Managing Director of Zaccho Dance Theatre and a SOMArts Cultural Center board member. Since 2010, Ms. Burger has served on the Advisory Council for The Crucible, an Oakland nonprofit industrial arts center. She is also a consultant

specializing in nonprofit formation, operations, and early strategic development. As an attorney with San Francisco public interest law firm the Lexington Law Group, Ms. Burger's legal practice is devoted exclusively to representing plaintiffs in environmental enforcement and consumer protection litigation.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Jenny Balisle
Date	7/20/2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Asian Pacific Environmental Network
Contact Person: Name	Faraz Rizvi
Contact Person: Title and Role	Campaign and Policy Manager
Contact Person: Email Address and Phone Number	faraz@apen4ej.org ; 951-850-5598

Organizational Description:

APEN is an environmental justice organization located in the Bay Area, with a particular history of organizing in Richmond and Oakland, leading a transition away from an extractive economy based on profit and pollution and toward local, healthy, and life-sustaining economies that benefit everyone.

We're building community-owned renewable energy resources to power our neighborhoods, protecting affordable housing so that our historic cultural communities can stay together, creating a local economy of cooperatives owned and governed by community members, and taking back control of our democracy.

Organizational Experience:

Our work is grounded in the leadership of immigrant and refugee community members, who know that to win what our communities deserve, we have to build power at many levels and in many ways. our work is bringing together Asian immigrants and refugees in Oakland and Richmond to advance solutions to the issues that matter most to them. We believe that everyone can develop their leadership, and people come to this work as both teachers and learners. Working with multiple generations of Asian Americans in multiple dialects and languages, APEN plays a critical role in developing the leadership of our communities.

At the state level, we're engaging with immigrant and refugee voters in their languages to advance our shared vision. We are organizing in the communities that politicians and political parties too often ignore, and we are winning groundbreaking policies that put working-class communities of color first.

Signature Block:

Signature from Authorized Signatory Representative	<i>Faraz Rizvi</i>
Typed Name of Authorized Signatory Representative	Faraz Rizvi
Date	07/21/2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization(s)	Association of Bay Area Governments (ABAG) Metropolitan Transportation Commission (MTC)
Contact Person: Name	Brad Paul
Contact Person: Title and Role	Deputy Executive Director, Local Government Services
Contact Person: Email Address and Phone Number	bpaul@bayareametro.gov (415) 272-9502

Organizational Description:

The **Association of Bay Area Governments** (ABAG) is the regional planning agency and Council of Governments for the nine Bay Area counties and 101 cities and towns. Formed in 1961 by local elected leaders wishing to address common issues from a regional perspective, it works on land use, housing, environmental stewardship, energy efficiency and water resource protection.

Created by the state legislature in 1970 to help integrate bus and rail lines with the new BART system, the **Metropolitan Transportation Commission** (MTC) gradually expanded its work to include transportation planning, financing, coordination and management, and making sure transportation investments work with housing and development.


Today, ABAG and MTC share joint responsibility for implementing *Plan Bay Area 2050*, with a single, integrated staff serving both the ABAG Executive Board and MTC Commission. MTC and ABAG recently held a joint regional listening tour with local leaders to discuss the state of the economy and ask what MTC and ABAG could do to help support the region's economic recovery. The two regional agencies also jointly oversee the new *Bay Area Housing Finance Authority* and are working toward placing a major regional revenue measure on the 2024 ballot.

Organizational Experience:

ABAG programs such as Bay Area Regional Energy Network (BayREN), POWER and San Francisco Estuary Partnership (SFEP) distribute tens of millions of dollars a year in passthrough grants across the region. Today, ABAG/MTC planning staff are providing millions of dollars in technical assistance grants to ABAG member cities and towns to help them develop and implement their state mandated HOUSIN ELEMENTS that must be updated this year.

MTC was initially charged with regional transportation planning and reviewing applications from local government agencies for state and federal transportation grants. Legislation at the state and federal levels expanded MTC's roles and funding powers over the years. Today MTC distributes more than \$700 million a year to local public transit agencies and prioritizes requests from local agencies for millions more in state and federal funds. Acting as the Bay Area Toll Authority (BATA), MTC collects over \$600 million a year in bridge tolls and allocates these funds for the operation and upkeep of the region's seven state-owned toll bridges.

Signature Bloc

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Brad Paul
Date	July 20, 2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Bay Area Community College Consortium
Contact Person: Name	Kit O'Doherty / Rock Pfothenhauer
Contact Person: Title and Role	Co-Chairs, BACCC
Contact Person: Email Address and Phone Number	kit@baccc.net ; (650) 274-5236 c rock@baccc.net ; (831) 212-7207 c

Organizational Description:


The **Bay Area Community College Consortium (BACCC)** is comprised of 28 colleges surrounding the San Francisco and Monterey Bays and serves as a framework to:

- facilitate, collaborate, plan, manage, communicate and inform career education program investments.
- create career pathways through collaborations with K16, Adult Education, Workforce Development Boards and other partners to prepare students for high demand, livable wage jobs.
- engage with industry and employers to develop curriculum and programs that address the workforce needs of our regional and subregional economies.
- advocate for career education policy and initiatives as the liaison between our colleges and the Chancellor's Office Workforce and Economic Development Division.

Organizational Experience:

As regular conveners of the 28 community colleges across the Bay Region assisting with identifying and filling regional and subregional labor market gaps that if filled provide our students with livable wage work with quality career advancement opportunities we bring that knowledge and college, Workforce Development Board, Adult Education, K16 and industry connections to the table.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Kit O'Doherty, Co-Chair, BACCC
Date	July 20, 2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Bay Area Council
Contact Person: Name	Jeff Bellisario
Contact Person: Title and Role	Executive Director, Economic Institute
Contact Person: Email Address and Phone Number	jbellisario@bayareacouncil.org 708-224-6536

Organizational Description:


The Bay Area Council has been at the intersection of business and civic leadership, shaping the future of the Bay Area since 1945. Today, our vision is to make the Bay Area the best place to live and work. More than 330 of the largest employers in the region are members of the Bay Area Council and are committed to working with public and community leaders to keep the Bay Area the most innovative, globally competitive, inclusive, and sustainable region in the world.

Since 1990, the Bay Area Council Economic Institute has been the leading think tank focused on the economic and policy issues facing the Bay Area, one of the most dynamic regions in the United States and the world’s leading center for technology and innovation. A valued forum for stakeholder engagement and a respected source of information and fact-based analysis, the Institute is a trusted partner and advisor to both business leaders and government officials. Through its economic and policy research and its many partnerships, the Institute addresses major factors impacting the competitiveness, economic development, and quality of life of the region and the state. It is guided by a Board of Advisors drawn from influential leaders in the corporate, academic, non-profit, and government sectors.

Organizational Experience:

The Bay Area Council Economic Institute provides a shared platform for leaders to act on key issues affecting the regional economy. It accomplishes this by producing focused analyses on key issues affecting the Bay Area and its future, and by mobilizing regional and state leaders to address those issues, based on working partnerships and a strong foundation of economic and policy analysis. The Institute has completed numerous analyses on the driving forces of the regional economy and produced regional economic development action plans. By combining our research expertise with the Bay Area Council’s vast network of business members, we can make connections to employer partners and provide insight on the sectors of the economy that can provide high-road employment opportunities.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Jeff Bellisario
Date	July 21, 2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Bay Area Regional Health Inequities Initiative (BARHII)
Contact Person: Name	Melissa Jones
Contact Person: Title and Role	Executive Director
Contact Person: Email Address and Phone Number	mjones@barhii.org (510) 210-8256

Organizational Description:

BARHII is the coalition of the Bay Area’s 11 public health departments, together with over 250 community partners, focused on advancing health equity. Our work is deeply informed by the input of public health department leaders, as well as community members, and other partners across California.

Organizational Experience:

BARHII has provided health equity training, professional development, and capacity building by public health practitioners for public health practitioners for over twenty years. Among our core activities, we provide tools and resources, technical assistance, and learning collaborative spaces for Bay Area health departments to advance health equity.

BARHII’s health equity framework has shaped national conversations about health equity for two decades. It is an integral part and was adopted by the State of California Department of Public Health Office of Health Equity and is used in public health textbooks across the country. During the pandemic, BARHII’s resource guides have been used nationally to shape equitable responses and develop a rolling recovery - delivering a webinar series that has served a national audience of local health department leaders in active decision-making about COVID responses. Our Equity Officer model is currently being scaled across California by the California Department of Public Health.

Signature Block:

Signature from Authorized Signatory Representative	<i>Melissa Jones</i>
Typed Name of Authorized Signatory Representative	Melissa Jones
Date	July 21, 2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Bloom Energy
Contact Person: Name	Kendal Asuncion
Contact Person: Title and Role	Government Relations Manager
Contact Person: Email Address and Phone Number	Kendal.Asuncion@bloomenergy.com (408) 543-3275


Organizational Description:

Bloom Energy is dedicated to making clean reliable energy affordable for everyone in the world. We're proud to be based in Silicon Valley, where we lead by example in the highroad transition both through our technology and our workforce opportunities. Our fuel cells deliver reliable energy to critical facilities and businesses and enable them to transition to renewable and net-zero carbon fuels in the future. Our technologies improve local air quality since smog-causing particulate matter is not emitted during operation. Bloom's technology investments and developments in zero-carbon hydrogen, renewable natural gas, carbon capture, and maritime applications promise to help unlock deep decarbonization in various sectors of the economy and improve the air quality in the communities that shoulder the highest burden from industrial uses that can be transitioned. We are proud to employ nearly 800 local employees with over half of our local Bay Area workforce in advanced manufacturing positions, a high road career path with livable wages, full health benefits, and advancement opportunities. Currently, we are adding an additional 300 advanced manufacturing careers at our new Fremont facility and actively reaching out to talent pools in traditionally excluded communities, like youth aging out of the foster system.

Organizational Experience:

Bloom Energy brings to the table a deep understanding of the role reliable energy will play as we recover from COVID-19 and address the realities of climate emergencies. Our team of seasoned policy experts, PhD's, human resource professions, lean manufacturing leaders, and those on our manufacturing floor are committed to opening high road opportunities to Bay Area residents. We are invested in our community's overall wellbeing. At the onset of the COVID-19 pandemic, we put our manufacturing facilities and expertise to work refurbishing ventilators for patients. We also launched the annual Stars and Strides 10k and 5k Community Run in 2021 to raise over half a million dollars in two years to support the Valley Medical Center Foundation as they provide high quality healthcare services to residents at all income levels. We partnered with local NGOs and the city of San José to improve urban tree canopy. Most recently, we organized a San José Career Day with 21 other local employers to bring opportunities to jobseekers. By touching so many facets of the economy, from jobs and policy, to our NGO partners and improving air quality, we believe that our experience and expertise serve the Bay Area's wider goals for equitable, resilient, and sustainable economic growth in the years and decades ahead.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Kendal K. Asuncion
Date	07/20/2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	BlueGreen Alliance
Contact Person: Name	Josh Sonnenfeld
Contact Person: Title and Role	California Economic Development Strategist
Contact Person: Email Address and Phone Number	jsonnenfeld@bluegreenalliance.org


Organizational Description:

The BlueGreen Alliance is a national alliance of over a dozen labor unions and environmental organizations working together to solve today's environmental challenges in ways that create and maintain quality jobs and build a clean, thriving, and equitable economy. BGA has a regional office in San Francisco and a long history of leading collaborative efforts between labor and environmental groups in the Bay Area and California to build a clean high-road economy.

Organizational Experience:

BGA was heavily involved in the creation of the CERF program, supporting its initial legislation, as well as helping to shape the Planning Guidelines at the statewide level. Locally in the Bay Area, BGA has been closely involved in bringing together stakeholders to launch the Bay Area High Road Transition Collaborative (BA-HRTC). The organization additionally brings valuable expertise from its leadership of a High Road Training Partnership in Contra Costa County sponsored by the CA Workforce Development Board to plan for the transition of the Bay Area's oil refineries, in a way that meets the needs of frontline workers and community members.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Sam Appel, CA State Manager
Date	July 20, 2022



www.buildingskills.org

**Northern California Headquarters
San Jose**

1010 Ruff Dr.
San Jose, CA 95110
Phone: 408-280-5329

Alameda

1650 Harbor Bay Pkwy., Suite 200
Alameda, CA 94502
Phone: 510-437-8116

Mountain View

2061 Landing Dr.
Mountain View, CA 94043
Phone: 650-383-0237

Sacramento

1555 River Park Dr., Suite 203
Sacramento, CA 95815
Phone: 916-572-8836

**Southern California Headquarters
Los Angeles**

828 West Washington Blvd.
Los Angeles, CA 90015
Phone: 213-284-7726

Orange County

1936 West Chapman Ave
Orange, CA 92868
Phone: 714-245-9700, Ext. 1102

San Diego

4001 El Cajon Blvd., Suite 211
San Diego, CA 92105
Phone: 619-727-5703 Ext. 5723

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

July 20, 2022

Dear All Home (BA-HRTC Regional Convener):

Building Skills Partnership (BSP) is in agreement with the goals of the Community Economic Resilience Fund (CERF) proposal developed collaboratively and led by All Home.

We have reviewed the high-level vision, goals, and initial governance model for the High Road Transition Collaborative (HRTC) for the Bay Area region. We understand that this governance model may change as the process evolves but are committed to moving the process forward under the leadership of All Home.

We agree to participate actively in the CERF planning process, including the development of a governance structure that shares decision-making and balances the interests of all represented groups, the outreach and engagement plan, and the project budget. We are committed to working in partnership with a wide range of regional stakeholders with diverse interests to create a more inclusive, equitable, sustainable, competitive, and resilient economy for the Bay Area region.

BSP represents a unique partnership between over 70 janitorial employers, over 40 commercial building owners, SEIU-USWW, and the broader community. With collaboration and a holistic approach to service at the forefront of our work, BSP strives to create an equitable future for working families through its core strategies of workforce development, immigrant integration, and community advancement. As proven high-road training partnership (HRTP), BSP will bring value to the planning table by leveraging its 15+ years of experience as labor-management partnership advancing job quality and economic mobility for immigrant workers and workers of color across CA.

Our primary contact for this process will be:

Contact Person: Christian Valdez

Title: Development Director

Email Address: cvaldez@buildingskills.org

Phone: (650) 520-4785

Address: 1650 Harbor Bay Parkway, Suite 200. Alameda, CA 94502

Sincerely,

Authorized Signatory: Luis Sandoval, Executive Director

07/21/22
Date

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	California Forward
Contact Person: Name	Ismael (Ish) Herrera
Contact Person: Title and Role	Executive Director, California Stewardship Network
Contact Person: Email Address and Phone Number	ish@cafwd.org 559-304-6450

Organizational Description:

CA FWD is a statewide organization representing the sector of Other Regional Stakeholders. A 501(c)(3) nonprofit organization, CA FWD leads a statewide movement, bringing people together across communities, regions and interests to improve government and create inclusive, sustainable growth for everyone. CA FWD is driven by the belief that collective action will help ensure the economic, environmental and social prosperity of all people. CA FWD, and members of its California Stewardship Network, were instrumental in informing the creation of CERF and have helped partners throughout the state advance inclusive regional economic development planning processes. CA FWD has the expertise to help catalyze, convene and empower regional efforts to help create and achieve a prosperous, investment-worthy vision that reflects the triple-bottom line.

Organizational Experience:

CA FWD can provide support to the HRTC in ensuring alignment with statewide policy discussions pertinent to the policy priorities that surface during Phase I Planning activities. This includes facilitating the Regional Convener's participation in collecting action policy initiatives through the California Stewardship Network. Another area of support that CA FWD may provide to the HRTC is the identification, and possible facilitation, of public and private sector investment opportunities, beyond CERF Phase II Implementation resources, that can be used to implement priority projects stemming from Phase I Planning activities.

Signature Block:



Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Micah Weinberg
Date	July 21, 2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	California Green New Deal Coalition
Contact Person: Name	Zach Lou
Contact Person: Title and Role	Coalition Manager
Contact Person: Email Address and Phone Number	zach@apen4ej.org 978-505-8698


Organizational Description:

The California Green New Deal Coalition is a statewide coalition of community, labor, and environmental organizations and advocates fighting for a transformative vision of a world where all people have what we need to live dignified, healthy lives. We work with many coalition members in the Bay Area, and have been organizing to ensure the Bay Area CERF table is equitable and community-driven.

Organizational Experience:

The California Green New Deal Coalition works to lift up community- and worker-driven solutions to address the climate crisis, create good jobs, and build resilient communities. This aligns with the state goals of the CERF process, and our coalition is eager to support CERF tables where this vision is being realized.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Zachary Lou
Date	7/21/22

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Canal Alliance
Contact Person: Name	Omar Carrera
Contact Person: Title and Role	CEO, Community Outreach
Contact Person: Email Address and Phone Number	omarc@canalalliance.org (415) 306-0423

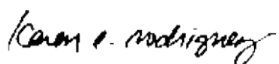
Organizational Description:

Founded in 1982, Canal Alliance has been the leading service provider and community advocate for Marin's extremely low-income immigrant community for 40 years. Each year, we partner with 60 agencies and engage hundreds of volunteers to serve over 4,000 individuals and families. As a Latino- and immigrant-led organization, Canal Alliance provides culturally-responsive services that leverage clients' unique assets and remove barriers in support of our mission to break the generational cycle of poverty for Latino immigrants and their families. Based on our commitment to ensuring that clients have visible role models to mentor and guide them toward their goals, our staff and leadership intentionally reflects the community we serve; the majority of our 100 staff are bi-cultural and bilingual in English and Spanish, and over 50% of full-time staff in our education and workforce programs are first-generation college graduates.

Organizational Experience:

As part of this effort, Canal Alliance hopes to leverage our 40-year experience as our county's leading advocate and direct service provider for the Latino immigrant community, and our successes in collaborating with the grassroots organization Voces del Canal (VdC) to advance equity and security for Latino immigrants in Marin County. In our day-to-day work we utilize leadership-building strategies that support our mission to break the generational cycle of poverty for Latino immigrants and their families. Our approach has been tested and refined during the last four years of community engagement work with the Latino immigrant community living in the Canal neighborhood on issues ranging from immigration policy, the Census, voter registration, and for the last two years, disease prevention and vaccines.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Karen E. Rodriguez, CFO, for Oscar Omar Carrera
Date	7/18/2022



**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Center for Sustainable Neighborhoods
Contact Person: Name	Tim Frank
Contact Person: Title and Role	Executive Director
Contact Person: Email Address and Phone Number	Tim-frank@msn.com 510 710 4563

Organizational Description:

The Center for Sustainable Neighborhoods is a public interest advocacy group that supports policies and projects that help build sustainable neighborhoods and regions.

Organizational Experience:

We bring an unusual mix of labor, affordable housing, green-building and environmental policy experience focused on the task of promoting sustainable economic development. We have worked on projects throughout the Bay area and have nearly twenty years of experience focused on regional as well as municipal policy here. We helped craft and led the successful campaigns to pass two ballot measures in Berkeley, one to establish the ambitious smart growth plan for the downtown, and the other to establish a permanent source of funding for affordable housing. Both of these efforts required broad coalitions. We currently staff a community/labor coalition in Napa County called Napa Working Families, which aligns the interest of environmental, climate, labor, child care and affordable housing interests in promoting a pro-growth vision for sustainable economic development. We have extensive experience with green building and are currently working to on a state funded H RTP project in Berkeley aimed at crafting a high road approach to building decarbonization for single family homes, which is a particularly difficult market to infuse with high road principles.

Signature Block:

Signature from Authorized Signatory Representative	Tim Frank
Typed Name of Authorized Signatory Representative	Tim Frank
Date	July 21 2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Centro Legal de la Raza
Contact Person: Name	Brenda Orellana
Contact Person: Title and Role	Contracts and Grants Compliance Officer
Contact Person: Email Address and Phone Number	borellana@centrolegal.org 510-216-3824 x107

Organizational Description:

Founded in 1969, Centro Legal de la Raza (Centro) protects and advances the rights of low-income, immigrant, Black, and Latinx communities through bilingual legal representation, outreach and education, and policy advocacy. Centro maintains four core programs: Workers’ Rights, Tenants’ Rights, Immigrants’ Rights, and a Youth Law Academy that mobilizes youth of color to be the next generation of attorneys and leaders. Our holistic programs are purposefully designed to ensure access to justice and a safety-net for the most vulnerable among us, including survivors of crime and families in poverty. As a bedrock legal services agency, Centro is leading collaboratives and advancing policy and systems change at a regional, state, and national level. Local governments and partners often reach out to us as leaders in a community-centered approach to service administration. In FY 20-21, we served 12,551 clients and received more than 15,000 calls for assistance.

Centro’s work builds on equity and co-empowerment – a mutual exchange of learning between clients and staff. The majority of our clients are low to extremely low-income and predominantly identify as Hispanic/Latinx followed by African-American/Black. Many of our clients are monolingual Spanish-speaking and Mam-speaking immigrants.

Our Workers’ Rights Practice promotes fair, safe, and dignified working conditions by combating wage theft, discrimination, sexual harassment, trafficking, and unsafe working conditions. During the last year, we secured more than \$2 million in settlements and judgments for workers, helping workers and day laborers pursue justice for their labor while building economic security now and for the future.

Centro’s litigation work supports systemic, institutional, and industry change for workers, tenants, and immigrants while recouping financial compensation for low-income clients. Centro has collaborated with worker leaders in successful class actions for restaurant, grocery, and factory workers, recovering almost \$4 million in wages and requiring important policy changes – such as fair tip policies and management training – that were critical to any resolution for our workers.

Organizational Experience:

Centro has extensive experience working collaboratively with partner organizations and local governments to provide critical services in Oakland, the Bay Area, and California. Centro is the lead administrator on numerous large-scale collaboratives, including the following:

1. Measure FF - Fair Labor Oakland (FLO)

Since 2016, Centro Legal has served as the fiscal lead in the Measure FF contract with the City of Oakland. Measure FF is a 2015 Oakland law mandating minimum wage and the right to paid sick days. Centro led the formation of Fair Labor Oakland (FLO), a collaborative that conducts Measure FF outreach and enforcement for low-wage workers. As lead, Centro coordinates six subgrantee partners who provide multilingual and multicultural outreach and education to ensure workers in low-wage industries are aware of the minimum wage and their right to paid sick days. We also provide free legal services to defend workers' rights and promote economic stability and justice for low-wage workers.

2. Emergency Rental Assistance Program (ERAP)

In 2020, Centro was selected to administer Alameda County's Emergency Rental Assistance Program (ERAP), providing relief to individuals and families impacted by the COVID-19 pandemic and facing threats of homelessness. To date, Centro has approved over 8,200 emergency rental assistance applications, administered \$98 million in assistance, and will continue to administer \$28 million. Centro managed four subgrantee partners, coordinated with more than forty program partners, and hired forty new staff to administer the program. We developed a legal referral system to promote housing stabilization through warm hand-offs for ERAP applicants and tenant legal services. Additionally, Centro implemented a phone hotline to directly support the community in navigating the ERAP application process and expand accessibility to services. ERAP bolstered our infrastructure and capacity to manage large-scale funding and broad-based community initiatives.

3. Alameda County Housing Secure (ACHS)

In 2018, Centro was awarded funding from both Alameda County and the City of Oakland to be the administrator for county and city-wide anti-displacement partnerships. These partnerships were designed to effectively scale up legal housing services, increase referrals among participating legal service providers, and provide effective emergency financial assistance to address the regional housing crisis. Centro served as the administrator for the Oakland partnership from 2018 to 2021 and continues to lead ACHS as the backbone for housing legal services in Alameda County.

4. CDSS Immigration Services Funding (ISF) Program Administrator

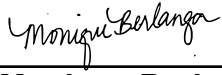
In 2021, Centro became the program administrator for California Department of Social Services Immigration Services Funding (ISF) in the Bay Area. ISF is allocated for low-income immigrants with a demonstrated need for affirmative immigration remedies, application assistance, and additional legal support. As the program administrator, Centro distributes ISF funds and facilitates the provision of regional legal services, education and outreach among twenty subgrantees. Centro has engaged its partners in meaningful collaboration to address regional needs towards equitable access to immigration service providers.

5. Alameda County Immigration Legal and Education Partnership (ACILEP)

In 2017, Centro led the formation of the Alameda County Immigration Legal and Education Partnership (ACILEP), a county-wide initiative between Centro Legal, the Alameda County Public Defender's Office, and eight community-based organizations serving low-income immigrants in African, Arab, Asian, and Latinx communities. ACILEP provides rapid response to the legal needs of residents and families facing imminent deportation. As the fiscal and program

lead, Centro coordinates efforts and manages multi-year and multi-million dollar collaborative funding.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Monique Berlanga, Executive Director
Date	7/21/2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Chinese Progressive Association
Contact Person: Name	Claire Lau
Contact Person: Title and Role	Just Recovery Campaign Coordinator
Contact Person: Email Address and Phone Number	claire@cpasf.org , 415-506-8503

Organizational Description:

Founded in 1972, the Chinese Progressive Association educates, organizes and empowers the low income and working class immigrant Chinese community in San Francisco to build collective power with other oppressed communities to demand better living and working conditions and justice for all people.


Our core strategies are community education and organizing, leadership development and alliance and movement building. CPA engages in community education and organizing around health and environmental justice, workers' rights, housing, immigrant rights, and other issues of concern to the organization's members and constituents.

Organizational Experience:

CPA's Tenant Worker Center formed out of large scale manufacturing worker organizing campaigns in the early 2000's, and continues to educate and organize low-wage immigrant workers to improve their working conditions and achieve economic justice. CPA developed innovative partnerships with labor and community colleges to fill a void in services to respond to the needs of dislocated Chinese immigrant manufacturing workers, assisting hundreds of laid-off workers in advocating for and accessing in-language services, benefits, retraining and transition into unionized service sector jobs. To date, CPA has helped low wage workers recover over \$8 million in owed wages, developed grassroots leadership and connected workplace issues to strengthening civic engagement on issues affecting working communities

CPA held a key leadership role with coalition partners to pass the Fight for \$15 in 2014, and led a broad community and labor coalition to establish a national role model for workers' rights enforcement through the SF Office of Labor Stands Enforcement. In addition, CPA provides strategic services, and advocates for immigrants and working families. Some of these services and programs include tenant education and services to SRO tenants, workers rights consultations and workforce development programs.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Shaw San Liu, Executive Director
Date	7/21/22

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Construction Trades Workforce Initiative
Contact Person: Name	Beli Acharya
Contact Person: Title and Role	Executive Director
Contact Person: Email Address and Phone Number	Beli@ctwi-btca (646)338-7367

Organizational Description:

As the workforce development nonprofit partner of the East Bay Building Trades (Alameda, Contra Costa, and Napa/Solano Building Trades), Construction Trades Workforce Initiative (CTWI) works to ensure the long term sustainability of the construction industry by bridging the gap between union construction labor and key stakeholders. By bringing organized labor and community partners together, everyone benefits. Founded in 2018, CTWI works to advance economic and social justice by strengthening pathways to family-sustaining union construction careers for underrepresented communities. We achieve this by developing educational campaigns, union-endorsed pre-apprenticeship programs and workforce policies that ensure our most vulnerable community members are connected, trained and prepared for unionized construction careers.


Organizational Experience:

CTWI serves as the fiscal agent and regional leader for Construction Pre-Apprenticeship programs in the East Bay on several State Workforce Board Programs, including High Road Training Partnerships (HRTP), High Road Construction Careers (HRCC) and the Climate Careers Initiative (CCI) totaling over \$5,000,000 in grant funds. Leveraging our knowledge and expertise, we have worked to identify, fund and develop a collaborative partnership structure with a wide range of stakeholders (Labor, CBOs, community colleges, K-12 schools, Workforce Boards, Employers, Jails/Juvenile Detention Centers, public agencies and cities) to ensure that the East Bay has a regional approach to building pathways into the union construction trades.

Through our strategic partnerships, CTWI educates and connects training providers and job seekers to career opportunities in the union construction industry through the utilization of our union-endorsed MC3 Pre-Apprenticeship and Test Preparation Programs.

CTWI is also heavily involved in developing uniform and effective workforce policies and Building Trades endorsed labor standards that prioritize the hiring of local, diverse, skilled and trained workers through partnerships with Unions Leaders, Public Agencies, Contractors and Municipalities.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Beli Acharya
Date	07/21/2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Contra Costa Economic Partnership (CCEP)
Contact Person: Name	Lindy Johnson
Contact Person: Title and Role	Director of Research and Projects
Contact Person: Email Address and Phone Number	Lindy@ebcmail.org , 925-246-1880

Organizational Description:

The Contra Costa Economic Partnership (CCEP) is a public-private partnership founded in 1995 by business and civic leaders invested in the future of Contra Costa County. CCEP conducts research and leads projects and initiatives aimed at equitably developing the local and regional economy.

Organizational Experience:

CCEP has undertaken a wide range of research and projects during its tenure including work focused on workforce, land use and infrastructure development. Recently, the CCEP facilitated the Contra Costa County Equitable Economic Recovery Task Force and completed *Meeting Demand: Health Care Workforce in Contra Costa County*, a report on the opportunities and barriers for development, recruitment, and retention in growing local health care fields. CCEP is currently working on further health care workforce initiatives, researching the opportunity gap in Contra Costa and partnering in the development of a potential guaranteed income pilot. The CCEP also houses Earn & Learn, a campaign that effectively promotes and scales work-based learning experiences.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Kristin Connelly, Executive Director
Date	07/20/2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Contra Costa Labor Council
Contact Person: Name	Joshua Anijar
Contact Person: Title and Role	Executive Director
Contact Person: Email Address and Phone Number	josh@cclabor.net/602-770-9307

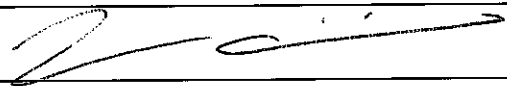
Organizational Description:

The Contra Costa Labor Council is a federated body of over 86 unions who represent over 86,000 union members and their families in Contra Costa County.

Organizational Experience:

The Contra Costa Labor Council is a strong voice for worker rights, community empowerment and policy development. In 2020, the Council helped lead the successful effort, working with a range of community and nonprofits, to address many of the County's shortcomings around health care, fire safety and other early childhood education through Measure X. The Council has been on the front lines of the climate debate between good jobs and affected communities that surround these workplaces. We have engaged with community, environmental and labor stakeholders to address the needs of displaced workers in the energy sector, like the workers at Marathon and trying to find solutions for workers at US Steel in Pittsburg who face a plant closure in 2023. The need for high road partnerships for industrial jobs is key to the sustainability of Contra Costa's working communities..

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Executive Director
Date	7/20/22

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	East Bay Economic Development Alliance
Contact Person: Name	Stephen Baiter
Contact Person: Title and Role	Executive Director
Contact Person: Email Address and Phone Number	stephen@eastbayeda.org 510.272.3874 (office) 510.679.7911 (cell)

Organizational Description:

Founded in 1990, the East Bay Economic Development Alliance (East Bay EDA) was born out of the recognition by top leaders of the need to work together and tackle shared challenges. Today, East Bay EDA is a 150+ member organization that serves as the regional voice and networking resource for strengthening the economy, building the workforce and enhancing the quality of life in the East Bay. We are a cross-sector, public-private partnership that promotes strategic economic development throughout Alameda and Contra Costa counties.

Our leadership includes appointees from the East Bay Boards of Supervisors, Mayors’ Conferences, City Manager Associations, the regional Economic Development Directors’ Council, along with high-level business and nonprofit leaders from across the region.

East Bay EDA and its members regularly serve on advisory boards, sign support letters, as well as provide input on regional planning efforts and projects that improve the region’s business climate and expand economic opportunities throughout the East Bay.

Organizational Experience:

As a longstanding, cross-sector organization, East Bay EDA has demonstrated experience bringing together diverse networks of business, government, and community leaders on cross-cutting regional economic development issues, ranging from business climate and innovation, land use and infrastructure, to education and workforce development. Through our [core leadership committees](#), East Bay EDA focuses on strategic activities and collaborative partnerships that advance policies, projects, and programs that facilitate more equitable access to employment, education, and quality of life for all residents. Our organization was an active participant in the development of the Comprehensive Economic Development Strategy (CEDS) effort that was led by the Association of Bay Area Governments (ABAG) and Metropolitan Transportation Commission (MTC).


Just since the start of the COVID-19 pandemic, East Bay EDA has led a number a cross-sector initiatives that strengthened the region’s capacity-building and understanding of the current economic climate through the following:

- **East Bay Forward:** In 2021, East Bay EDA convened business and nonprofit leaders, education professionals, elected officials, local governments, civic entrepreneurs, and many other stakeholders to inform and develop a regional blueprint for realizing an inclusive, resilient and sustainable economic future. The blueprint focuses on strategic priorities that are intended to spur long-term equitable economic growth, which are strongly aligned with CERF’s regional planning goals. East Bay Forward seeks to refocus, realign and reorganize local and regional networks and systems that influence

issues related to business climate, land use and infrastructure, workforce development, and community well-being. The priorities that emerged from this process have been deemed essential to enabling our region to better coordinate and mobilize regional assets and resources, as well as to be better prepared for future opportunities and challenges.

- COVID-19 Community Response Network & Speaker Series:** Since the onset of the COVID-19 pandemic, East Bay EDA led regular convenings with East Bay cities, chambers of commerce, and other local, state, and federal partners to provide timely public health updates and business resources to assist employers and workers quickly adapt to impacts of the pandemic. East Bay EDA also hosted monthly virtual speaker series on critical topics ranging from the safe return to workplaces, industrial development trends, to the East Bay’s innovation ecosystem.
- Resilient East Bay:** The COVID-19 pandemic has caused significant disruptions to the East Bay's economy, yet manufacturing is a dynamic and resilient sector that will be key to the region's equitable recovery. Through grant funding from the U.S. Economic Development Administration, the Resilient East Bay project will lead and implement a regional, business-driven economic analysis and strategy by providing support to small and mid-size businesses in Manufacturing, Transportation, Distribution & Logistics, and Biomedical/Life Sciences. A Resilient East Bay Advisory Committee comprised of East Bay EDA members as well as high-level industry representatives from manufacturing subsectors and business-serving organizations will guide and inform the initiative.
- Small Business Support:** In conjunction with the aforementioned COVID-19 Community Response network and speaker series events, East Bay EDA has been gathering, organizing, and publishing a variety of information and resources (such as our [business resource map](#)) to help local small businesses, including administering a grant program for small businesses located in Alameda County. This work has deepened our connections and partnerships with many communities and cities across the East Bay as we have learned more about how to work most effectively with a distributed network of partners to provide meaningful and tangible assistance to small business owners, particularly BIPOC individuals, immigrants, women, and other historically under-resourced groups.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Stephen Baiter, Executive Director
Date	July 21, 2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Emerald Cities Collaborative
Contact Person: Name	Neha Bazaj
Contact Person: Title and Role	Senior Economic Inclusion Manager
Contact Person: Email Address and Phone Number	nbazaj@emeraldcities.org 510-364-0743

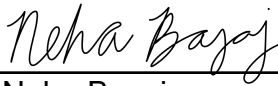
Organizational Description:

Emerald Cities Collaborative (ECC) is a national nonprofit network of organizations working together to advance a sustainable environment while creating sustainable, just and inclusive economies with opportunities for all — an approach we call "the high road." ECC develops energy, green infrastructure and other sustainable development projects that not only contribute to the resilience of our metropolitan regions but also ensure an equity stake for low-income communities of color in the green economy. This includes developing the economic infrastructure for family-supporting wages and career paths for residents of such communities, as well as contracting opportunities for women, BIPOC and other disadvantaged businesses.

Organizational Experience:

Emerald Cities was founded in 2010 following the American Recovery and Reinvestment Act to build coalitions amongst labor, community and government to leverage those dollars to promote the economic and environmental well-being of underserved communities. Since 2010 we have developed a Community Workforce Agreement between labor and community in San Francisco, have leveraged incentive money to retrofit multifamily affordable housing properties (using high-road and minority contractors), and have advanced energy and food/agricultural policy that is in service of minority and disadvantaged workers, underserved residents and the environment. We have the opportunity again with the American Rescue Plan and CERF to leverage this devastating moment for positive change. CERF's vision for California's regional economies is Emerald Cities' vision for our economies.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Neha Bazaj
Date	July 20, 2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Greenbank Associates
Contact Person: Name	Alice Sung, AIA, LEED AP, BD+C, SEA, NACRP
Contact Person: Title and Role	Principal, Strategist / Program Designer /Bridger
Contact Person: Email Address and Phone Number	asung1@gmail.com (510) 658-8060 (office) ; (510) 504-9105 (mobile)

Organizational Description:


Greenbank Associates is a 100% minority, woman-owned, registered Alameda County SLEB, and CA DGS Micro-SBE, founded in 2004, offering consulting and facilitation in 7 key areas: sustainability, zero carbon green buildings, strategic planning and program design, education/training, resilience and adaptation, community engagement/facilitation and environmental justice/equity approaches. We combine global systems thinking with broad technical, management, and practical expertise to “meet communities where they are at,” building capacity towards strategic, equitable decarbonization programs centering equity through Just Transition to achieve State energy and carbon reduction goals towards Climate Justice. Greenbank has served many communities of the Bay Area, primarily in Alameda County, for over 25 years leading numerous community workshops for public projects such as: community centers, local K-12 schools, community college buildings, gyms, mixed-use multi-family housing and senior facilities. As a leader-member in many organizations such as the East Bay AIA, Collaborative for High Performance Schools, USGBC, NAACP Centering Equity in Sustainable Buildings Sector (CESBS), International Society of Sustainability Professionals, Climate Reality Bay Area and the Building Decarbonization Coalition, the firm has volunteered thousands of hours in pro bono and advocacy work and is highly networked.

Organizational Knowledge, Experience:

As Principal, Alice Sung is a licensed architect of over 25 years, as well as a LEED Accredited Professional with Building Design and Construction specialty, a certified Sustainability Professional (Sustainability Excellence Associate, SEA) and a trained National Association of Resilience Planners (NACRP) member. She is a recognized Environmental Justice Movement Fellow by The Tishman Environment and Design Center at The New School, with demonstrated leadership in leading strategic planning, guidelines development, building/renewable energy planning, design, construction, and now climate justice and equity towards a zero carbon future. She is a contributing author and content lead of the ‘Water Re-use Practice Guide’ and the newly released ‘Building Decarbonization Practice Guide.’

Reason to be at the Planning Table: Alice is dedicated to innovative team collaboration, committed to maximizing GHG reductions at pace and scale, through a justice and equity lens. Having been shut down for 2 years in a pandemic, she is eager to use her technical expertise combined with lived experience and strategic approaches for environmental justice and equity in community engagement, to bridge the green building sector with HRTC partners to meet community-led solutions of the CERF program planning phase. She is trained in the Spectrum of Community Engagement to Community Ownership, Social Environmental Economic Design (SEED), Pathways to Equity, Participatory Action Research, and more.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Alice Sung
Date	July 19, 2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Greenbelt Alliance
Contact Person: Name	Zoe
Contact Person: Title and Role	Director of Climate Resilience
Contact Person: Email Address and Phone Number	zsiegel@greenbelt.org 510 367-4464

Organizational Description:


Greenbelt Alliance is a 60+ year old environmental non-profit in the San Francisco Bay Area that to educates, advocates, and collaborates to ensure the Bay Area’s lands and communities are resilient to a changing climate.

Organizational Experience:

Over Greenbelt Alliance’s 60-year history, we have stewarded this region’s beautiful natural landscapes while promoting the growth needed for thriving communities for generations to come. As a result, today, almost 3.3 million acres of the Bay Area’s nine counties are protected open spaces. Today, we are leveraging our expertise in land-use policy advocacy and regional collaboration to realize a climate-resilient Bay Area. To us, this looks like communities and people thriving in the places they live, work, and play. Staying safe during climate disasters. Connecting with open spaces in new and powerful ways. Suffering less and recovering quickly after the next wildfire, flood, or drought. All thanks to equitable solutions drawing on the powerful role of nature. The path toward this future is complex and more urgent than ever. At Greenbelt Alliance, we focus on data-driven and innovative policy solutions fostering much-needed regional collaboration to plan and invest in resilient communities.

At Greenbelt Alliance, we believe that local and regional policy decisions must prioritize attention, sustained resources, and solutions for the Bay Area’s low-income communities of color most vulnerable to the impacts of climate change. These are also communities that have traditionally been excluded—deliberately—from large scale investment and planning decision-making. We believe that advancing equitable climate resilience is part of advancing our society’s call for racial justice. Which is why Greenbelt Alliance is increasing our focus on ensuring our most vulnerable communities are centered in regional and local efforts to build climate resilience. We will drive our climate advocacy placing equity and anti-racism front and center.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Amanda Brown-Stevens, <i>Executive Director</i>
Date	07/18/2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Jobs with Justice San Francisco
Contact Person: Name	Tracey Brieger
Contact Person: Title and Role	Deputy Director
Contact Person: Email Address and Phone Number	tracey@jwjsf.org, 415-215-5473


Organizational Description:

Jobs with Justice San Francisco is a long term, multiracial alliance of 30 community organizations and labor unions whose members include teachers, nurses, city workers, service workers, seniors, people with disabilities and youth. Originally founded in 2010 to address tensions between community and labor, we are experienced at bringing labor and community together to advance meaningful change in the lives of workers and communities in San Francisco. Our core campaigns are workers rights, housing and climate jobs.

Organizational Experience:

We know that workers don't lead single issue lives. Working people and families need secure jobs with living wages, robust benefits and strong protections at work. Yet workers' wellbeing and ability to improve their economic situation doesn't stop at the workplace: to ensure that workers and communities thrive, we also need affordable healthcare, quality public education, just immigration policies, and a safe and stable environment. JWJSF has built strong experience crafting programs to address these issues and more. In 2014, we won one of the first \$15 minimum wage policies in the country, improving living standards for 23% of San Francisco workers, largely workers of color. That same year, we passed the Retail Worker Bill of Rights—a ground-breaking fair workweek and scheduling law. The JWJ coalition and partners have also won free higher education at San Francisco's community college system for city residents; a landmark \$80 million community benefits agreement with a major hospital chain to support public transportation, affordable housing, good jobs and accessible healthcare; and Support at Home, city-funded in-home supportive care for low and moderate income seniors. In 2019, we won San Francisco's "Housing our Workers" legislation that will generate over \$400 million in funding for affordable housing and transitional housing for homeless people.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Tracey Brieger
Date	20 July 2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	California Institute of Integral Studies
Contact Person: Name	Karie Crisp Vazquez
Contact Person: Title and Role	Researcher (Doctoral candidate)
Contact Person: Email Address and Phone Number	karie.crisp@gmail.com (preferred) or kcrispvazquez@mymail.ciis.edu 415.713.1979

Organizational Description:¹


California Institute of Integral Studies (CIIS) is an accredited university that strives to embody spirit, intellect, and wisdom in service to individuals, communities, and Earth. Integral studies are a response to the growing need to synthesize the fragmentary aspects of contemporary thought and culture into a meaningful whole. Providing an integral education for a changing world, the Institute creates and integrates knowledge beyond the confines of traditional academic disciplines. CIIS values cultural diversity, multiple ways of knowing, spirituality, a sense of community, emancipatory ideals, and ecological sustainability, developing a reflective and innovative learning community.

Organizational Experience:

Since its founding in 1968, CIIS has been at the forefront of cutting-edge thought, integrating disciplines, redefining boundaries, and pushing the academy to look at education differently. For over 50 years, CIIS’s educational approach has emphasized both the inner (psychology and culture) and outer (systems and behavior) dimensions of transformations alongside the transdisciplinary weaving of subjects. I bring this lens to my research efforts and would like to volunteer my time with the Research Planning and Outreach Committee. I am familiar with Participatory Action Research (PAR) and Community Engagement Research (CEnR) frameworks. Additionally, I am a trained facilitator in Prosocial which is a method based on evolutionary science that enhances group collaboration and cooperation. I believe this skill set will be beneficial to the CERF effort.

Thank you for your consideration and for all your work on this effort thus far.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Karie Crisp Vazquez
Date	July 21, 2022

¹ Note that while I am a doctoral student at CIIS, I am not representing them as an organization. I am independently researching ecological governance and bioregional economies. CERF presents an exciting opportunity to set California on a carbon neutral path and it may serve as a model for other parts of the US/World. As a scholar-activist, my intention is to offer my skill sets to enthusiastically engage in this effort. [My Linked In profile.](#)

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	North Bay Jobs with Justice
Contact Person: Name	Max Bell Alper
Contact Person: Title and Role	Executive Director
Contact Person: Email Address and Phone Number	max@northbayjwj.com 510-504-8225


Organizational Description:

North Bay Jobs with Justice is a growing grassroots coalition of over 30 community and labor organizations building power and winning economic and racial justice for workers on the frontlines of climate change. With nearly a decade of experience in the rural/suburban counties of Sonoma, Napa, and Marin, NBJwJ is building strategic campaigns that result in effective local public policy and long-term power building by working families. The coalition has passed local policies to raise the minimum wage, provide resources and protections to workers during the pandemic, and ensure job security for hospitality workers. Wildfires, megadrought, and floods are exacerbating the negative impacts of an already unequal and unjust economy. With communities of color, low wage workers, and immigrant families leading the way, we believe that a more just and resilient future is possible.

Organizational Experience:

Through our coalition, we have a very extensive, diverse, and engaged base of essential workers. In addition, right now we are expanding our reach to unorganized workers, in particular amongst immigrant and Indigenous agricultural and landscaping workers. We have built a leadership committee of dozens of directly impacted workers and a network of over 1,000 workers who are engaged with our work. These experiences and relationships allow us to engage in profound and deep ways with the most impacted communities in ways that bring forward their leadership and experiences.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Max Bell Alper
Date	7/18/22

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	North Bay Labor Council, AFL-CIO (NBLC)
Contact Person: Name	Jack A. Buckhorn
Contact Person: Title and Role	Executive Director – Administration and Management of the NBLC
Contact Person: Email Address and Phone Number	jbuckhorn_nbhc@att.net (707) 477-9140


Organizational Description:

The NBLC represents over 70 thousand working people and some 70 union affiliates in Sonoma, Lake, Mendocino, and Marin Counties. The Labor Council is a democratically elected body dedicated to represent the interests of working people at the state and local level.

Organizational Experience:

We mobilize our members and community partners to advocate for social and economic justice. NBLC works to elect candidates to public office who support Labor Standards and will stand by working people. The North Bay Labor Council strives daily to vanquish oppression and make our communities better for all people—regardless of race, color, gender, religion, age, sexual orientation, immigration status, ethnic or national origin.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Jack A. Buckhorn
Date	July 19, 2022

Collective Partnership Agreement Letter Signature

Name of Organization	North Bay Leadership Council
Contact Person: Name	Cynthia Murray
Contact Person: Title and Role	CEO
Contact Person: Email Address and Phone Number	cmurray@northbayleadership.org 707-283-0028

Organizational Description:

Over thirty years ago, business leaders founded the North Bay Leadership Council on a simple premise: We can accomplish more by working together. Today, the Council includes over 55 select employers in the region. Our members represent a wide variety of businesses, non-profits and educational institutions, with a collective workforce in excess of 25,000.

North Bay Leadership Council is an employer-led public policy advocacy organization committed to providing leadership in ways to make the North Bay sustainable, prosperous, innovative and equitable. As business and civic leaders, our goal is to ensure economic health by promoting better education, infrastructure, and governance to make our region a better place to live and work.

Organizational Experience:

NBLC is the only regional organization in the North Bay representing Marin, Sonoma and Napa Counties. We have a history of collaboration working with other organizations in our region and in the Bay Area. NBLC is committed to working with employers to improve their ESG and DEI policies and programs. All members sign a Covenant of Trust which includes:


Our Mission: North Bay Leadership Council is the strong voice of employers who advocate for sound public policy affecting the North Bay, demonstrate and grow leadership within the region, and collectively work for a more resilient, prosperous and equitable future.

Values: Our work will be guided and informed by our beliefs and commitments to:

- Community - we want strong, resilient communities
- Inclusiveness - we respect people, value diversity and are committed to equity
- Collective Impact - we value and encourage collaboration, partnership, and cooperation in seeking sound public policy and will be a force for good
- Civic Leadership - we support standing up for our rights and shouldering responsibilities in participating in the governmental process
- Integrity – we must act with conviction and courage even in the face of adversity

The North Bay is often short-shrifted in Bay Area initiatives and we want to participate to ensure that the North Bay fully contributes and benefits from the CERF opportunity.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Cynthia Murray
Date	7-22-22

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Othering and Belonging Institute, UC Berkeley
Contact Person: Name	Eli Moore
Contact Person: Title and Role	Program Director, Community Power and Policy Partnerships
Contact Person: Email Address and Phone Number	elimoore@berkeley.edu 510-998-9028

Organizational Description:

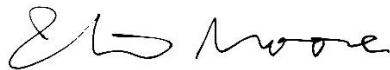
The Othering & Belonging Institute at the University of California, Berkeley advances groundbreaking research, policy, and ideas that examine and remediate the processes of exclusion, marginalization, and structural inequality—what we call othering—in order to build a world based on inclusion, fairness, justice, and care for the earth—what we call belonging.

The institute supports the proposed Bay Area High Road Transition Collaborative because of its stated commitment and design to address one of the greatest challenges facing the region: transitioning to an economy in which all people can live well, and our ecosystems and health are thriving.

Organizational Experience:

The Community Power and Policy Partnerships (CP3) Program at the Othering and Belonging Institute partners with community-based organizations to advance strategies through which members of marginalized communities have the resources, tools, and power to transform the structures that shape community wellbeing and belonging. We facilitate, and advise our partners in facilitating, participatory processes in which residents most impacted by issues of concern lead transformative change. We produce interactive workshops, planning formats, rigorous research, and communications tools that are integrated with our partners' grassroots organizing and leadership development strategies. This leads to analysis, policy, and strategies that reflect the direct experience and vision of affected community members and the insights of scientific and technical analysis. Our work is anchored locally in a long-term partnership with communities in Richmond, California, but we work with communities across the U.S. based on shared values and the potentially transformative nature of the partnership's impact.

Our ongoing work relates to key sectors and communities who will be central in the BA-HRTC process: housing, transportation, land use, and Richmond and Contra Costa County.

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Eli Moore
Date	7/20/22

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Port of Oakland
Contact Person: Name	Julina Bonilla
Contact Person: Title and Role	Workforce Development Manager
Contact Person: Email Address and Phone Number	jbbonilla@portoakland.com 510-333-2669

Organizational Description:

The Port of Oakland (Port), located in Oakland, California, operates three revenue lines of business: Maritime, Aviation and Commercial Real Estate. The Port’s investment in marine terminals, airport infrastructure and commercial real estate has been a major driver of the Bay Area’s economy. The Bay Area is defined as the nine counties of Alameda, San Francisco, San Mateo, Sonoma, Contra Costa, Santa Clara, Marin, Napa and Solano. There are approximately four hundred firms serving the Port of Oakland Seaport, the Oakland International Airport, and the Port’s Commercial Real Estate tenants. As a transportation hub for the San Francisco Bay Area region, the Port supports over 84,000 regional jobs and partners with an array of diverse employers, industry partners, and local stakeholders to promote economic activity for the region.

Organizational Experience:


As an anchor organization for Oakland and the greater Bay Area, the Port of Oakland plays an essential role as a stakeholder convenor to ensure all parties are represented in defining and receiving the support needed to promote economic activity, equitable access, and vibrant communities. The Port’s commitment towards achieving these goals is aligned with the vision and goals of the BA-HRTC 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 impact community/member themselves* as demonstrated in the Port’s past, current, and future efforts below:

Program/Initiative	Description	Governance/Members
Operations Jobs Policy <i>Long-term Outcome</i> <i>“Residents and Disadvantaged Workers are thriving in On-Site Operation Jobs at the CenterPoint landing”</i>	Adopted by the Port Commissioners in 2017, the Jobs Policy is a collaborative effort to level the playing field and provide community members with priority access to uplift workers, improve job quality, and support family sustaining jobs.	Jobs and Workforce Stakeholder Working Group (SWG) comprised of diverse groups of industry, labor, regional community leaders, and representatives of local neighborhoods.

<p>The Port of Oakland Seaport Air Quality 2020 and Beyond Plan</p> <p>Dedication <i>To the vibrant health and well-being of Oakland – its people and environment</i></p>	<p>A culmination of two-years of analysis by Port staff and engagement by stakeholders focused on developing emissions reduction programs, projects, designing infrastructure and building and strengthening to support zero emission and strengthen partnerships that promote a pathway to zero emissions.</p>	<p>Stakeholders represented local community groups such as the West Oakland Environmental Indicators Project, neighborhood groups from the surrounding communities, members of the West Oakland Community Advisory Group, community-based environmental advocacy orgs, local utilities, Port tenants, business groups, state regulatory agencies, organized labor, and Port staff.</p>
<p>Seaport Stakeholder Roundtable (SSR)</p>	<p>The Port convened the SSR to elicit input from a diverse group of stakeholders on the Seaport’s land use and capital investment planning over the next 10-30 years. The Seaport Plan will refine, reflect, and implement the Port Board’s policy goals for the Seaport, including business growth, land use, infrastructure investment, jobs, and environmental stewardship, especially air quality.</p>	<p>SSR members represented diverse community groups, elected officials, Port maritime business partners and employers, Port truckers, regulatory agencies, and city, county and State and Port staff.</p>
<p>West Oakland Job Resource Center (WOJRC) - High Road Training Partnership</p>	<p>WOJRC. in partnership with the Northern Ca Teamsters Apprenticeship Trust, developed a high-road Transportation, Distribution, and Logistics Pre-apprenticeship Training Program to serve economically disenfranchised communities in Oakland and the greater East Bay.</p>	<p>Port staff serves as technical assistance on this partnership.</p>

As such, the Port of Oakland possesses considerable experience and knowledge in leading broad-based collaborations with diverse stakeholders to address challenging policy issues. The Port is committed to convening diverse tables for the CERF grant as well as partnering to support both local and regional workforce planning efforts. We look forward to supporting the BA-HRTC collective partnership.

Signature Block:

Signature from Authorized Signatory Representative	 <small>Amy Tharpe (Jul 20, 2022 17:03 PDT)</small>
Typed Name of Authorized Signatory Representative	Amy Tharpe, Director of Social Responsibility, Port of Oakland
Date	July 20, 2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Prospera
Contact Person: Name	Claudia Arroyo
Contact Person: Title and Role	Executive Director
Contact Person: Email Address and Phone Number	claudia@prosperacoops.org / (510) 695-2270

Organizational Description:

Prospera, based in Oakland, partners with Latina entrepreneurs to launch businesses that foster cooperation, economic independence, and well-being in immigrant communities, with a focus in the Bay Area.

Our comprehensive, culturally specific programs address the unique challenges and the immense resourcefulness that Latinas bring. Through our Spanish-language programming, we support women to build collaborative communities with other entrepreneur women, develop their leadership, and access resources to advance their wellbeing and financial health.

Organizational Experience:

Our 25 years of experience building Latina-owned cooperatives has demonstrated that cooperatives not only offer worker-owners a living wage but catalyze authentic leadership development, meaningful community engagement and the cultivation of lasting wealth and well-being. Through business and cooperative ownership, Latinas create meaningful jobs, sustain families, and generate thriving local economies. Immigrant families increase and stabilize their wellbeing and build wealth; they also support and value the businesses owned by the women in their families.

Prospera involves participants in all stages of program development, from strategic planning to program design, evaluation, and improvement. Our unique approach and the emphasis on community building is where our work really differs from others in the field. We have spent years building trust in the Latinx community, a community that due to fear is often hesitant to ask for resources and assistance. Our programs are offered completely in Spanish without the need of a translator.

We are an organization run by and for Latina immigrant women. We place tremendous value on the lived experiences and cultural fluency of our staff and Board of Directors, who represent the community that we serve. 100% of our staff are women, 60% Latina, and 100% of our staff is bilingual. 100% of our board members are Latina women including our board chair, who is a former Prospera Fellow. However, Latinas are not a monolith. Within this broad identity category, we represent a wide range of cultural and spiritual practices, socioeconomic classes, educational backgrounds, and immigration statuses. We are multilingual and multiracial. Together we make up a rich tapestry of perspectives that informs everything we do.

Signature Block:

Signature from Authorized Signatory Representative	DocuSigned by: <i>Claudia Arroyo</i>
Typed Name of Authorized Signatory Representative	Claudia Arroyo, Executive Director
Date	14/07/2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Rural County Representatives of California (RCRC)
Contact Person: Name	Robert Burris
Contact Person: Title and Role	Deputy Chief Economic Development Officer
Contact Person: Email Address and Phone Number	bburris@rcrcnet.org 916 447 4806


Organizational Description:

We are committed to working collaboratively with a wide range of regional stakeholders from a diverse set of interests to participate in the process to create a more inclusive, equitable, and competitive regional economy. To that end, we have reviewed the working governance structure and we agree to participate in the CERF process and support the policies and development of deliverables in the proposal as they evolve including key elements such as: governance, stakeholder outreach and engagement, capacity building, and data and research. We understand that the governance structure may evolve as the process is refined.

Organizational Experience:

RCRC serves as the premier advocacy organization and innovative service provider on behalf of our 39-member rural counties. Three of the Bay Area counties included in this collaborative are RCRC member counties. We bring advocacy, economic development, and innovative community financing expertise to the effort and look forward to working with the All Home and its partners to create and support projects that bring lasting economic resiliency to Bay Area region.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Robert Burris
Date	07/20/2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	SF Building & Construction Trades Council
Contact Person: Name	Rudy Gonzalez
Contact Person: Title and Role	Secretary-Treasurer, Principal
Contact Person: Email Address and Phone Number	rudy@sfbctc.org 415-794-0377


Organizational Description:

The SF Building & Construction Trades Council represents 32 affiliates unions in the construction sector. We advance policy and negotiate on behalf of improved working conditions for construction union members, apprentices, pre-apprentices, and future construction workers.

Organizational Experience:

In our 125th year, we continue to convene stakeholders in the construction industry to promote career pipelines for workers. We are especially proud of the registered apprenticeship training programs our affiliates sponsor, including pre-apprenticeship programs regionally and locally. In SF we are launching an equity focused program to help women of color enter and STAY in construction, with an emphasis on leadership development/mentoring and childcare access. We are also responsible for monitoring compliance and participation in the Multi-Craft Core Curriculum (MC3) for local partner organizations with NABTU (North America’s Building Trades Unions), like City Build Academy. We are uniquely suited to align workforce training opportunities with career pipelines, particularly with disadvantaged communities.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Rudy Gonzalez
Date	7-21-2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	San Francisco Foundation
Contact Person: Name	Fred Blackwell
Contact Person: Title and Role	CEO
Contact Person: Email Address and Phone Number	christab@sff.org , 415-655-3336

Organizational Description:

With almost \$2 billion in assets, the San Francisco Foundation is one of the largest community foundations in the country. Together with our donors, the Foundation distributed \$166 million in grants to nearly 3,000 non-profit organizations in fiscal year 2021. We are committed to advancing greater racial equity and economic inclusion to ensure that everyone in the Bay Area has a chance to get a good job, live in a safe and affordable home, and have a strong political voice.


Organizational Experience:

SFF has invested in, led, and brought together organizations across the region and state to build capacity and coordinate efforts related to just economic development, housing, and power-building efforts. Examples of our leadership include:

- San Francisco Foundation was a key convener of the [CASA compact](#), which brought together for-profit and nonprofit developers, affordable housing advocates, direct service providers, and business and philanthropic leaders, to align behind a shared agenda and push forward reforms. This process helped build an initial regional infrastructure to advance affordable housing across the Bay Area.
- SFF has led, or co-led, multiple regional and state coalitions, including the [Partnership for the Bay's Future](#), [Great Communities Collaborative](#), and [ReWork the Bay](#).

In addition to the convening experience, San Francisco Foundation holds direct relationships with many of the city, nonprofit, and private sector partners that will be engaged in this work. SFF also holds strong relationships with the other community foundations in the region, including collaborating to form regional pooled funds and other efforts to coordinate philanthropic support in the Bay Area.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Fred Blackwell CEO, San Francisco Foundation
Date	07.18.2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	San Francisco Labor Council
Contact Person: Name	Kim Tavaglione
Contact Person: Title and Role	Executive Director
Contact Person: Email Address and Phone Number	kim@sflaborcouncil.org (415)740-4461


Organizational Description:

The San Francisco Labor Council is the voice of working people in San Francisco. Having been founded 1893, The Council is one of the oldest labor councils in the country. We represent over 100,000 workers in SF and over 100 affiliates. We run our own We Rise immigration center. We also run a 501 c3 which combines Community Organization power with Labor Power called SF CLout.

Organizational Experience:

San Francisco Labor Council leads on worker rights and on important issues regarding worker benefits and voice. We work with labor, non-profits and our governmental agencies such as OEWD and our electeds to enforce worker rights and sometimes when necessary limit corporate greed. We are viewed as the voice of San Francisco Working Families.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Kim Tavaglione
Date	7/19/22

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	SAMCEDA
Contact Person: Name	Rosanne Foust
Contact Person: Title and Role	President & CEO
Contact Person: Email Address and Phone Number	rfoust@samceda.org 650-413-5600, Ext. 1

Organizational Description:

[Insert a brief description of your organization or entity and its role in the community or region.]

For seven decades, the San Mateo County Economic Development Association (SAMCEDA) has been a leading voice for the economic engine that is San Mateo County. SAMCEDA believes in the power of a strong economy driven by an appreciation of what that engine provides to our ecosystem on the Peninsula.


By working with employers of all sizes and industries, engaging with our public sector and our elected leadership, recognizing that we have 21 individual jurisdictions (20 cities and one county) and collaborating and communicating with the Chambers of Commerce, non-profit organizations and our educational institutions, SAMCEDA tackles the most difficult challenges through goal-oriented solutions.

Organizational Experience:

[Insert a brief description of your organization’s knowledge, experience and reason to be at the planning table.]

SAMCEDA supports projects that enhance the economic, environmental, living and transportation qualities that are important to businesses, communities, and residents in San Mateo County. Emphasizing a collaborative approach between public, private, and community stakeholders throughout the development process, SAMCEDA supports projects that have the potential to bring direct benefit to the communities, cities and surrounding areas in which they are located.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Rosanne Foust
Date	7/20/22

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	San Mateo Labor Council
Contact Person: Name	Julie Lind
Contact Person: Title and Role	Executive Secretary-Treasurer (Chief Officer)
Contact Person: Email Address and Phone Number	<u>julie@sanmateolabor.org</u> ; 650-572-8848

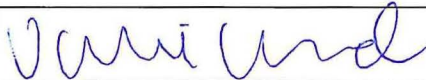
Organizational Description:

The San Mateo Labor Council is an umbrella organization for labor unions in San Mateo County. We represent 99 affiliates unions and nearly 90,000 members and their families throughout SMC.

Organizational Experience:

In addition to the legislative and political advocacy, member education and training and supportive services the Labor Council coordinates, we also have a nonprofit arm. It is through our nonprofit that we have run the Trades Introduction Program (TIP) since 2014. TIP is a state certified MC3 apprenticeship readiness program that thus far has placed nearly 300 of its graduates into registered apprenticeship programs. TIP places special emphasis on recruiting women, BIPOC individuals, justice involved folks and recently emancipated foster youth into our program.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Julie Lind
Date	7/14/2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Services, Immigrant Rights and Education Network
Contact Person: Name	Maricela Gutiérrez
Contact Person: Title and Role	Executive Director
Contact Person: Email Address and Phone Number	Maricela@sirenimmigrantrights.org

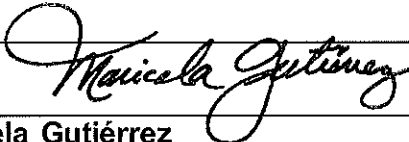
Organizational Description:

SIREN's mission is to empower low-income immigrants and refugees through community education and organizing, leadership development, policy advocacy, civic engagement and legal services. We believe that all people regardless of legal status or nationality are entitled to essential services, human dignity, basic rights and protections, and access to full participation in society.

Organizational Experience:

Since SIREN's existence, we have worked to advance immigrant and refugee rights by reaching out to over 800,000 immigrants through our legal services, community organizing, civic engagement, and policy advocacy efforts. Founded in San Jose, Ca., SIREN established a second office in Fresno, Ca., in 2017. SIREN also became DOJ accredited in 2010 and has thus been able to increase its capacity to provide immigration legal services. SIREN currently assists immigrants with Citizenship, Deferred Action for Childhood Arrivals (DACA) renewals, Freedom of Information Act and FBI requests, and Family-Based Petitions, just to name a few. Additionally, our community organizing team promotes leadership development and community organizing on health, public benefits and immigration issues. SIREN created immigrant-led community-based projects, such as the Organizing hubs in San Jose, Mountain View and Fresno, as well as developed youth and multiracial immigrant community organizers. Lastly, SIREN is part of key collaborations to advocate for policy priorities, such as being a steering committee member of California Immigrant Policy Center (CIPC) and the California Partnership (CAP) to advocate on state policies that impact the immigrant community. In order to protect immigrants' civil rights, SIREN is one of the leading organizations of the Santa Clara County Forum for Immigrant Rights and Empowerment (FIRE), which consists of local legal services, community and youth-based organizations.

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Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Maricela Gutiérrez
Date	7/21/2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Sierra Club, San Francisco Bay Chapter
Contact Person: Name	Jacob Klein
Contact Person: Title and Role	Senior Chapter Organizer (SF Bay Chapter and Redwood Chapter)
Contact Person: Email Address and Phone Number	Jacob.klein@sierraclub.org 510-545-2273

Organizational Description:

The San Francisco Bay Chapter is the local arm of the Sierra Club, America's largest and most effective grassroots environmental organization. The Bay Chapter is comprised of the nearly 40,000 Sierra Club members who live in Alameda, Contra Costa, Marin, and San Francisco counties. We work closely with the Chapters that represent the remaining Bay Area Counties—Santa Clara, San Mateo, Solano, Napa, and Sonoma.


Organizational Experience:

The Bay Chapter has a rich and vibrant history of environmental leadership going back to our founding in 1924. We have played a big role in shaping the Bay Area — and California — that we know and love. We are a grassroots, volunteer-driven model with our volunteer leaders working across regions and issues to address environmental and community campaigns. Our issues range from transportation to public lands to zero waste to fossil fuel accountability to decarbonization.

The Sierra Club is guided by our core values of anti-racism, balance, collaboration, justice, and transformation. We have adopted the Jemez Principles of Democratic Organizing to set our advocacy by.

We collaborate with community members, environmental justice groups, labor unions, regulatory agencies, elected bodies and more to achieve a healthy and sustainable natural and urban environment that is an inspiration for communities everywhere. Some of the coalitions we've participated in include No Coal in Oakland, No Coal in Richmond, Save the Bay, Building Electrification, and more.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Chance Cutrano Chair, Sierra Club SF Bay Chapter
Date	7/21/22

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Silicon Valley Creates
Contact Person: Name	Alexandra Urbanowski
Contact Person: Title and Role	Associate Director
Contact Person: Email Address and Phone Number	alexandra@svcreates.org 603-531-3458 (cell)

Organizational Description:


SVCreates is the local arts agency for Santa Clara County, CA. Our mission to uplift and empower Silicon Valley’s creative culture by building the capacity of our multicultural arts community, raising the visibility and voice of our creative sector, and increasing access to the arts for high need communities. SVC is a nonprofit 501(c)3 organization with 40+ years of experience in grantmaking, professional development, arts education, and place making. The Santa Clara County/Silicon Valley region has a culturally diverse population of nearly 2 million and a geography that ranges from urban San Jose to rural Gilroy with miles of suburban sprawl in between. SVC stewards a portfolio of 100+ small & mid-sized arts nonprofits, investing approximately \$1.4 million annually in program support and grants in our arts ecosystem. Guided by a strategic plan, research, and an organizational equity statement, we embrace a dynamic, diverse, and resilient arts ecosystem and we contribute to that ecosystem by offering programs and resources for arts organizations and cultural workers, engaging research to understand and advance the sector, providing a media platform to highlight cultural workers and artists in the region (Content Magazine) and partnering with local government and other institutions to increase equitable access to arts.

Organizational Experience:

Silicon Valley’s cultural ecosystem is a vast, organic network of hundreds of small- to mid-sized multidisciplinary arts and cultural organizations and thousands of artists, creative entrepreneurs, volunteers, and individual participants. SVCreates’ work as a capacity builder, incubator, and advocate for this sector for over 40 years has positioned us thought-leader and a key partner with other sector leaders to advance the role the arts and individual cultural leaders play in the health of our local communities. Within Santa Clara County we leverage relationships with municipalities, the business sector, educational institutions and philanthropy to help ensure that cultural workers are supported in their need to live and work in our region, that arts are incorporated into our education system, and that arts organizations (a component of our small business sector) are recognized for the role they play in economic development and community healing. Our recent research publication “The Business of Arts & Culture” (<https://svcreates.org/the-business-of-arts-and-culture-2021/>) helped to capture the landscape of the arts ecosystem in

Silicon Valley and amplify its strengths and challenges. Beyond Santa Clara County we partner with arts council's through out California to work on regional and state-wide issues and solutions. We are one of the largest county arts council's in Northern California and the Bay Area and, because we are a private nonprofit not a department of county government, we have the flexibility to provide resources across county borders.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Connie Martinez, CEO
Date	July 21, 2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Silicon Valley Leadership Group (SVLG)
Contact Person: Name	David Palter
Contact Person: Title and Role	Sr. Director, Education and Workforce
Contact Person: Email Address and Phone Number	dpalter@svlg.org , 408-501-7876


Organizational Description:

SVLG, founded in 1978 by David Packard of Hewlett-Packard, represents hundreds of Silicon Valley’s most respected employers on issues, programs and campaigns that affect the economic vitality and quality of life in Silicon Valley. Collectively, Leadership Group members provide nearly one in three private sector jobs in Silicon Valley and contribute more than \$3 trillion to the global economy.

Organizational Experience:

Forging sustainable training and hiring partnerships between our region’s 28 community colleges and employers will be critical to the success of BA-HRTC. Since 2017, SVLG has been a leading industry intermediary between employers and community colleges in the Bay Area. It has been a privilege to leverage our long relationships with leaders across the business, education, elected and nonprofit landscape to connect over 3,000 students to career opportunities, and we look forward to expanding this work with BA-HRTC.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	David Palter
Date	7/20/2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Solano Economic Development Corporation (Solano EDC)
Contact Person: Name	Chris Rico
Contact Person: Title and Role	President and CEO
Contact Person: Email Address and Phone Number	chris@solanoedc.org 707-864-1855 x11

Organizational Description:

Founded in 1983, the Solano EDC is a collaboration of private and public stakeholders that provide a leadership role for economic development efforts in Solano County and its seven cities. In today’s environment, it is essential Solano County preserve its economic development base and also strives to enhance all prospects for expansion of existing business and industry. Solano EDC is committed to supporting partnerships and developing new opportunities that will increase economic activity and job generation.

Organizational Experience:

For nearly four decades the Solano Economic Development Corporation has led myriad county wide efforts in all facets of economic development. We are at the nexus of business, government, education, and philanthropy and serve as the convener and lead organization in most public/private partnerships. Our organization is supported through broad membership of businesses, local government, unions, non-profits, healthcare. We are currently leading our third federal grant funded economic development strategic planning process with the support of STA (our regional transit authority), the county, and all seven cities in Solano County. This is known as Moving Solano Forward 3 which builds upon the work of the two previous iterations. Through these processes we have identified key industry clusters and have worked alongside our Workforce Development Board to create high road pathways into these industries.


We also led the creation of a Comprehensive Economic Development Strategy (CEDS) which, in turn, led to additional funding for continued economic development planning at the county level and in several of our cities. Recently we led and organized regional stakeholders to ensure that every Solano County resident was counted in the census with great success. (ranked 8th out of 58 counties) We have worked alongside neighboring counties on broadband strategies and have partnered with our regional transit authority (STA) on various transit initiatives.

Solano County is an active and proud defense community! Solano EDC is an active member of the Travis Community Consortium which is also domiciled within our organization. TCC was formed in 2003 and unified major governmental and community organizations and serves the critical role of unwavering engagement and advocacy for the enhancement of the long-term military value of Travis AFB mission as a key component of our National Defense Strategy. Travis AFB is an integral part of our local community as the largest employer in the region that contributes over \$2.6 billion annually to our economy.

Bay Area Regional Energy Network (BayREN) is a collaboration of the nine counties that make up the San Francisco Bay Area. BayREN provides regional-scale energy efficiency programs, services, and resources. Solano County BayREN team is strategically housed within Solano Economic Development Corporation (Solano EDC) to leverage opportunities to connect BayREN resources to business and community partners as well as with Solano County’s seven cities. Solano BayREN was formed in 2019 to help address the challenge of reaching local governments, small to medium sized businesses, multifamily property owners and residents with energy efficiency information, rebates, financing, and energy saving opportunities.

In light of the depth and breadth of our experience, we feel that we should be at the planning table representing a county where one in three of our citizens currently receives some kind of government assistance. There’s a great need for high road jobs and we’re excited to work to create these opportunities.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Chris Rico Solano EDC President and CEO
Date	July 21, 2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	South Bay AFL-CIO Labor Council
Contact Person: Name	Jean Cohen
Contact Person: Title and Role	Executive Officer
Contact Person: Email Address and Phone Number	jean@southbaylabor.org , 408-206-2060

Organizational Description:


The South Bay AFL-CIO Labor Council is a democratically governed, worker-led organization which represents 101 unions and more than 100,000 union members in Santa Clara and San Benito counties. For over 50 years the Labor Council has championed the cause of working families in the South Bay. The Labor Council's primary goal is to advance policies and practices that benefit working families. We achieve this objective with a combination of activities, including community organizing, leadership training, campaigning, and issues advocacy.

Organizational Experience:

The South Bay Labor Council brings to the BA-HRTC the deep knowledge and experience of working people from the many diverse communities and industries across Santa Clara County. Our collective experience includes:

- *Organizing and advocating for the creation and retention of quality jobs;*
- *Helping to secure, and to monitor, employer commitments to job quality, equity and career pathways;*
- *Bringing worker voice, knowledge and experience to the development of career pathway programs, including providing best practices for proven models such as joint Registered Apprenticeships, HRTPs / HRCCs, and other proven and emerging high-road, worker-driven models;*
- *Engaging local unions and community organizations in partnership to center the voiced and needs of workers of color, immigrants, women, and other historically under-represented communities.*

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Jean Cohen, Executive Officer
Date	7/19/22

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Transition U.S.
Contact Person: Name	Ayako Nagano
Contact Person: Title and Role	Board Chair
Contact Person: Email Address and Phone Number	ayako@midorilaw.com / 510-717-1420 (I don't check my voice mail that well)

Organizational Description:

Transition US is a 501(c)(3) nonprofit organization that serves as the official national hub for the Transition Movement here in the United States. Founded with great help from [Post Carbon Institute](#) in 2009 and governed by a Memorandum of Understanding with the [international Transition Network](#), the mission of Transition US is to catalyze a network of communities working to cultivate a just, caring, resilient, and regenerative world through training, support, and collaboration.


Transition US has a new slate of BIPOC female leadership in 2022, and will be piloting a project called [Regeneration Nation](#). ReGeneration Nation is a three year project that will focus on nurturing a network ecosystem of regenerative communities actively sharing & co-creating the messages, models, and resources needed to reimagine and rebuild our world. AND, Regeneration Nation has a pilot project focused on California's bioregions. We have board members, staff and relations that represent the University of California, labor organizers, and community activists / organizers spanning many of California's bioregions like the Bay Area, the central coast, Los Angeles, Fresno, Humboldt, San Diego, and beyond.

Organizational Experience:

Transition US is a coalition member of the New Economy Coalition and the Solidarity Economy Network, which promotes worker-owned cooperatives and other structures that do not just continue the status quo of capitalism which creates the -isms that we suffer from, by preserving the "capital hoarding" versus "working class." On this point, **we'd like to be at this table to discuss and continually look for those opportunities to create new economic models that don't just preserve the status quo.**

Personally, I represent the EPA's region 9, I am one of 30 council members nationally serving on a federal advisory council called the National Environmental Justice Advisory Council - we advise the Office of Environmental Justice on how to better engage and serve frontline EJ communities, **can bring that equity lens to this process.**

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Ayako Nagano
Date	07/20/2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	UC Berkeley Labor Center
Contact Person: Name	Enrique Lopezlira
Contact Person: Title and Role	Director, Low-Wage Work Program
Contact Person: Email Address and Phone Number	elopezlira@berkeley.edu (510) 643 - 6815


Organizational Description:

The UC Berkeley Center for Labor Research and Education (Labor Center) is a public service and outreach program of the Institute for Research on Labor and Employment. Founded in 1964, the Labor Center conducts research and education on issues related to labor and employment. The Labor Center's curricula and leadership trainings serve to educate a diverse new generation of labor leaders. The Labor Center carries out research on topics such as job quality and workforce development issues, and we work with unions, government, and employers to develop innovative policy perspectives and programs. We also provide an important source of research and information on unions and the changing workforce for students, scholars, policymakers and the public.

Organizational Experience:

The Labor Center carries out research on topics such as job quality and workforce development issues, and we work with unions, government, and employers to develop innovative policy perspectives and programs. We also provide an important source of research and information on unions and the changing workforce for students, scholars, policymakers and the public.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Enrique Lopezlira
Date	07/19/2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	United Way Bay Area
Contact Person: Name	Laura Escobar
Contact Person: Title and Role	Vice President, Safety Net Services
Contact Person: Email Address and Phone Number	lescobar@uwba.org 415-808-4380

Organizational Description:

United Way Bay Area (UWBA) mobilizes the Bay Area to dismantle the root causes of poverty and build equitable pathways to prosperity UWBA brings together partners from the nonprofit, business, and government sectors to address Bay Area poverty. We focus on four key impact areas:

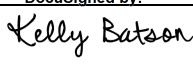
- **Housing Justice:** Improve access to stable, affordable housing and homelessness prevention.
- **Employment & Career Opportunities:** Build systems and pathways to career and employment opportunities.
- **Financial Stability:** Help families increase income and savings on their way to financial stability.
- **Basic Needs:** Ensure access to basic needs like food, housing, and legal services.

We partner across sectors, develop solutions, capture the data we need, and use those insights to support public policy and create research-backed community initiatives.

Organizational Experience:

UWBA has a deep commitment to supporting workers and their families across our impact areas. Our partnership with Labor is one example of that commitment. Since 1946, United Way Worldwide (UWW) and the American Federation of Labor-Congress of Industrial Organizations (AFL-CIO) have worked together to support workplace fundraising, payroll deductions and to operate the Community Services Liaison Program throughout the United States. The Labor Community Services program is a comprehensive resource for working families. Our Labor Liaisons provide information and referral, direct hardship assistance, high-impact workforce programs, community organizing, immigration legal services and civic engagement opportunities. The United Way Bay Area Labor Community Services team consists of three Labor Liaisons who work with the San Francisco, San Mateo, and Contra Costa Central Labor Councils. In addition to our Labor Community Services, our SparkPoint Centers have a career focus that connects the financial, education and workforce areas through various services, including career coaching and job placement. Our Youth Workforce program supports young people through career exploration and career readiness services.

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Signature from Authorized Signatory Representative	DocuSigned by: 
Typed Name of Authorized Signatory Representative	<small>88c2d77564b045e</small> Kelly Batson, Chief Community Impact Officer
Date	7/21/2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	UpValley Family Centers of Napa County
Contact Person: Name	Indira Lopez-Jones
Contact Person: Title and Role	Program Director
Contact Person: Email Address and Phone Number	(707) 965-5010 ilopez@upvalleyfamilycenters.org

Organizational Description:

UpValley Family Center’s (UVFC’s) mission is about addressing inequities and ensuring that all families have access to health and wellness resources. The UpValley Family Centers of Napa County provides guidance, support, and resources in the community, in the home, and for the individual, so that everyone can achieve a better life. We envision that through healthy relationships and networks of support, all people are safe, valued, and prepared to create the future they want for themselves, their families, and their community. Since 1999, UVFC has been the primary trusted resource for low-income communities in the northern Napa Valley, serving as a one-stop shop for access to the resources people need to survive, and thrive.

Organizational Experience:

Our rural region’s economy relies on low-wage agricultural and hospitality workers, the majority of whom are Latino, and many are recent immigrants. As trusted organization, we are well positioned to help Latino families learn about and access resources. Moreover, our organization works to elevate parent voice and civic engagement to advance long-term change, and are committed to building grassroots power to address inequities. We are dedicated to ensuring Napa County’s Latino working families have the tools to advocate with local decision-makers around solutions that address their identified needs. UVFC has been widely recognized for its quick and comprehensive response directly following the 2017 and 2020 wildfires and again during the current pandemic. In response to the fires, UVFC mobilized to assess the damages sustained by residents, particularly low-wage workers and immigrants in the community and provided much-needed informational, emotional, and financial support to those who were hardest hit by these tragedies.

In addition, as part of just recovery efforts in the county, UVFC is actively participating in the Workforce Pathways Program as an effective model for addressing local workforce issues and providing individual workers with opportunities for career advancement. The Workforce Pathways Collaborative established relationships with local education entities such as Napa Valley College, Napa Valley Adult Education and employers, including Sheet Metal Workers Local, Clean Energy institutions and construction companies to provide workforce training, continued education and job placement assistance.

Signature Block:

Signature from Authorized Signatory Representative	<i>Jenny Ocon</i>
Typed Name of Authorized Signatory Representative	Jenny Ocon, Executive Director
Date	July 18, 2022

**Bay Area High Road Transition Collaborative (BA-HRTC)
Collective Partnership Agreement Letter Signature**

Name of Organization	Working Partnerships USA
Contact Person: Name	Louise Auerhahn
Contact Person: Title and Role	Director of Economic & Workforce Policy
Contact Person: Email Address and Phone Number	lauerhahn@wpusa.org , 408-809-2131

Organizational Description:


Working Partnerships USA is a community organization bringing together the power of grassroots organizing and public policy innovation to drive the movement for a just economy.

Based in Silicon Valley, we tackle the root causes of inequality and poverty by leading collaborative campaigns for quality jobs, healthy communities, equitable growth and vibrant democracy. We build the capacity of workers, low-income neighborhoods and communities of color to lead and govern.

Organizational Experience:

Since 1995, Working Partnerships USA has worked to build an inclusive Bay Area economy, leading efforts to shifts toward policies and systems that create quality, sustainable jobs. Our model combines grassroots community and worker organizing with research, policy, and coalition building to place the voices of working people, women, immigrants and communities of color at the center of economic policy. Examples of our work include co-authoring the Economic Prosperity Strategy for the Bay Area; grassroots organizing that raised the minimum wage for over 220,000 South Bay workers; and collaborating with UC Berkeley and ReWork the Bay to engage workers in understanding and developing pro-active approaches to the “future of work”. We also convene and serve as fiscal agent for the High Road Construction Careers Collaborative (HRCC) for our region, encompassing Santa Clara, San Mateo and San Francisco Counties.

Signature Block:

Signature from Authorized Signatory Representative	
Typed Name of Authorized Signatory Representative	Derecka Mehrens, Executive Director
Date	7/18/22



October 19, 2022

San Francisco Office of Economic and Workforce Development
Merrick Pascual
Chief Financial Officer
One South Van Ness, Fifth Floor
San Francisco, CA 94103

Dear Mr. Pascual:

I am pleased to inform you that your proposal submitted under the Community Economic Resilience Fund (CERF) Program Solicitation for Proposals Program Year 2022-2024 has been selected for funding in the amount of \$5,000,000. Awards for this subgrant are made with State General Funds.

Awardees must complete the required project modifications as outlined in the Modification Request Summary provided by the Employment Development Department (EDD). Required modifications must be completed within 90 days of the contract execution date.

The CERF Interagency Team composed of an EDD Project Manager, a Senior Program Analyst with the Office of Planning and Research (OPR) and a Regional Economic Recovery Coordinator with Governor's Office of Business and Economic Development (GO-Biz) will contact you to assist with the required modification and provide technical assistance throughout the term of the subgrant.

Contact Information:

EDD Project Manager – Debra Silenieks – Debra.Silenieks@edd.ca.gov
OPR Senior Program Analyst – Jesus Salazar – Jesus.Salazar@opr.ca.gov
GO-Biz Regional Economic Recovery Coordinator – Rob Moreau –
Rob.Moreau@gobiz.ca.gov

For further assistance, please contact the EDD Project Management team at CERFadmin@edd.ca.gov.

Sincerely,

A handwritten signature in cursive script that reads "Nancy Farias".

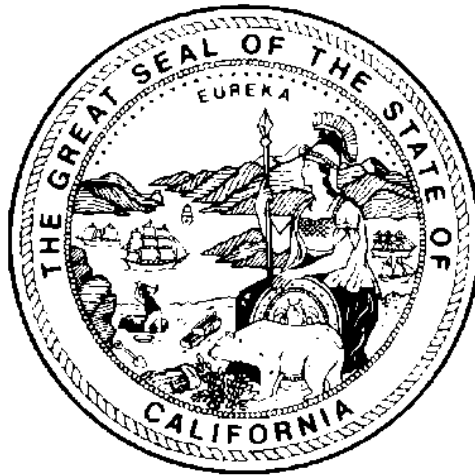
Nancy Farias
Director
Employment Development Department

NOTICE OF AVAILABILITY OF FUNDS

by the Employment Development Department
in coordination with the California Labor and Workforce Development Agency, the Governor's
Office of Planning and Research, and the Governor's Office of Business and Economic
Development
on behalf of the California Labor and Workforce Development Agency

Community Economic Resilience Fund Program Program Year 2022-24

Solicitation for Proposals



May 2022

The Employment Development Department is an equal opportunity employer/program. Auxiliary Aids and Services are available upon request to individuals with disabilities. Request for services, aids and alternate formats may be made by calling 1-916-654-8434. TTY users call the California Relay Services at 711.

Revised June 21, 2022

Application Package Instructions and Exhibits

The following contains the Solicitation for Proposals (SFP) instructions and required exhibits for the Community Economic Resilience Fund (CERF) Program Year (PY) 2022-24 funding opportunity. The Core Application Package components (Phase I Concept Proposal, Collective Partnership Agreement Letter, and Outreach and Engagement Plan) are limited to a total of 20 pages. Exhibits are exempt from this page limit. Applicants should carefully read the SFP for the required elements and follow instructions carefully to meet all proposal application requirements. Reference Appendix A for full instructions.

Core Application Requirements

1. [Cover/Signature Page and Executive Summary \(DOCX\)](#)
2. [Proposal Narrative \(Exhibit A\) \(DOCX\)](#)
 - a. Section I: Project Planning
 - b. Section II: Community Engagement and Governance Structure

Required Exhibits

1. [Exhibit B: Proposed Budget \(DOCX\)](#)
2. [Exhibit B2: Proposed Budget Narrative \(DOCX\) \(Revised\)](#)
3. [Exhibit C: Supplemental Budget \(DOCX\) \(if applicable\) \(Revised\)](#)
4. [Exhibit D: Proposed Work Plan \(DOCX\)](#)
5. [Exhibit E: Statement of Willingness \(DOCX\)](#)

Required Appendices

1. Fiscal Agent Resume
2. Regional Convener Resume
3. MOU Between Fiscal Agent and Regional Convener
4. Documentation of Meaningful Engagement
5. Advance Pay Statement of Need (if applicable)
6. Project Expenditure Timeline for Advance Pay (if applicable)
7. Signatures of Initial HRTC Members

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I. CERF Program

A. Overview

The shock of COVID-19 on California’s economy, combined with the escalating impacts of climate change, underscored the importance of building a more sustainable, resilient, and inclusive economy across California. Rising temperatures are making our winters shorter and our droughts more intense, outpacing our ability to manage water supplies and the natural environment¹. At the same time, inequitable access to quality jobs in sustainable industries is preventing the state from accelerating its transition to a carbon-neutral economy. Negative impacts of future disruptions will continue to affect the state’s diverse and interconnected regions, industries, and communities in unprecedented ways.

Recovery efforts have also revealed that not all Californians have had the same opportunities to participate in the state’s vibrant economy. Even prior to COVID-19, equal pathways to economic security were a persistent challenge throughout California; a factor being a lack of access to quality jobs in underserved regions. In 2019, 17 percent of workers in the Bay Area earned less than \$15 per hour compared to 40 percent of workers in the Fresno metropolitan area². Unemployment rates across regions can also illustrate the regional inequities preventing many of our communities from benefiting from California’s broad economic success. In October of 2020, Marin County had an unemployment rate of 5.4 percent, while Imperial County’s was 18.8 percent³.

Uneven economic recovery trends further exacerbate income inequality in the state⁴. Research shows that a child who grows up in the Fresno area in the bottom 20 percent of family income has only a 7.2 percent chance of making it into the top 20 percent as an adult, compared to

¹ Public Policy Institute of California (PPIC). “Managing Drought in a Changing Climate.” <https://www.ppic.org/wp-content/uploads/managing-drought-in-a-changing-climate-four-essential-reforms-september-2018.pdf>.

² California Future of Work Commission. “California Future of Work Report.” <https://www.labor.ca.gov/wp-content/uploads/sites/338/2021/02/ca-future-of-work-report.pdf>.

³ California Future of Work Commission. “California Future of Work Report.” <https://www.labor.ca.gov/wp-content/uploads/sites/338/2021/02/ca-future-of-work-report.pdf>.

⁴ Pew Research Center. “1. Trends in the U.S. income and wealth inequality.” <https://www.pewresearch.org/social-trends/2020/01/09/trends-in-income-and-wealth-inequality/>.

12.9 percent for a child in San Jose⁵. COVID-19 also clarified ethnic disparities in economic opportunity. In 2019, 44 percent of Latino workers earned less than \$15 per hour compared to 20 percent of white workers and 32 percent of Black workers⁶. Working people of color in California are over three times more likely than white workers to live in poverty⁷. Additionally, in 2019, women made up the majority of the workers in the state earning less than \$15 an hour⁸. These inequities prevent disinvested communities, particularly low-income communities, California Native American Tribes⁹, and communities of color from participating fully in California’s economic, social, and civic life.

California has therefore embraced economic equity as a goal for state policy, forging a new social contract for shared prosperity in a rapidly changing global economy. The state is also striving to enhance economic resilience, especially considering the ongoing impacts of the pandemic and climate change, by supporting the development of more inclusive and resilient regional economies that better withstand acute disruptions and prepare for impending transitions.

Legislation

On September 23, 2021, Governor Gavin Newsom signed Senate Bill (SB) 162 (Chapter 259, Statutes of 2021)¹⁰, which established the Community Economic Resilience Fund (CERF). SB 162 supports regionally centered plans to respond to the diverse needs across our state and to build sustainable and resilient regional economies. Initially, \$600 million was appropriated from the

⁵ Public Policy Institute of California. “Income Inequality and Economic Opportunity in California.” <https://www.ppic.org/wp-content/uploads/incoming-inequality-and-economic-opportunity-in-california-december-2020.pdf>.

⁶ California Future of Work Commission. “California Future of Work Report.” <https://www.labor.ca.gov/wp-content/uploads/sites/338/2021/02/ca-future-of-work-report.pdf>.

⁷ PolicyLink, USC Equity Research Institute. “National Equity Atlas.” https://nationalequityatlas.org/indicators/Working_poor#/.

⁸ California Future of Work Commission. “California Future of Work Report.” <https://www.labor.ca.gov/wp-content/uploads/sites/338/2021/02/ca-future-of-work-report.pdf>.

⁹ Native American Heritage Commission (NAHC). “Native American Heritage Commission Tribal Consultation Policy.” <http://nahc.ca.gov/wp-content/uploads/2020/09/Signed-NAHC-Tribal-Consultation-Policy.pdf>.

¹⁰ “Senate Bill No. 162.” Bill Text – SB-162 Community Economic Resilience Fund Program. September 23, 2021. https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=20210220SB162.

American Rescue Plan Act Coronavirus Fiscal Recovery Fund of 2021 until the 2022 budget revised the source of funds to the State General Fund in SB 115 (Chapter 2, Statutes of 2022)¹¹.

Purpose

The purpose of the CERF funding is to build an equitable and sustainable economy across California's diverse regions and foster long-term economic resilience in the overall transition to a carbon-neutral economy. A single roadmap for California's economic future is not the right approach given California's size and complexity. Rather, a regional approach, which will account for dynamics like shifting industries and talent pools, better suits the state. CERF will use a high-road approach to economic development to support the creation of quality jobs and equal access to those jobs. A high-road economy favors businesses that invest in their workforces, pay living wages, and engage in environmentally sustainable business practices.

Community- and worker-centered inclusive economic planning has never been attempted at this scale. The COVID-19 pandemic demonstrated that our economy did not work for all, so the same approach to economic planning is not an option. Although this process will be new and challenging, including voices that have been traditionally left out of economic planning is critical to achieving equitable outcomes.

Program Structure

CERF has been designed in a two-phase grant structure with the intention of creating inclusive planning processes and meaningful ways to engage diverse communities. Phase I planning efforts will inform regional investment opportunities during Phase II of the program. Inclusive engagement across diverse regional stakeholders will be a foundational step in the diversification of California's economies and the creation of high-quality accessible jobs.

CERF planning grants will allow for flexible economic analysis at various geographic scales, including economic flows between different regions, and implementation grants will allow for projects that cross regional boundaries. Participants interested in applying for Phase II implementation grants must participate during the planning phase or receive a letter of support from the High Road Transition Collaborative (HRTC) to be eligible for funding.

CERF will also align and leverage state investments (e.g., High Road Training Partnerships, infrastructure investments, community capacity-building programs), federal investments (e.g., Economic Development Administration's Build Back Better Regional Challenge), and philanthropic and private-sector investments to maximize recovery and planning efforts.

¹¹ "Senate Bill No. 115." Bill Text – SB 115-Budget Act of 2021. February 14, 2022.
https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=202120220SB115.

1. Phase I: Planning Phase

In Phase I, also referred to as the Planning Phase, the CERF program will provide \$5 million dollar planning grants to each region to support one High Road Transition Collaborative (HRTC) per region¹². Regions were developed to prioritize recovery and transition strategies and to be consistent with existing economic development efforts, as well as other state definitions of regional economic and labor markets. HRTCs will be composed of an administrative Fiscal Agent, a Regional Convener, and a wide range of partners reflecting the diversity of each region. Planning grants will be awarded to one HRTC and be administered jointly by the Fiscal Agent and Regional Convener; the Fiscal Agent will legally and financially represent the HRTC throughout Phase I.

The HRTCs will implement transparent and inclusive processes to advance long-term prosperity and equity, work directly with Regional Climate Collaboratives (RCC) Program¹³ where applicable, and include balanced representation from labor, business, community, government, and other stakeholders, including, but not limited to, economic development, philanthropy, education, and workforce partners¹⁴. Together, these partners will form their respective regional HRTC to engage in strategic planning for economic resilience and equitable pathways to high road opportunities. HRTCs will work across industries, agencies, and communities to encourage engagement from all stakeholder groups, create inclusive and equitable economic plans, build capacity, break down silos to maximize the effectiveness of planning and implementation projects, and generate systemic changes to advance economic resilience.

Planning grants can be used for a wide range of planning activities including capacity-building, community engagement, and research. Plans developed during the Planning Phase will inform projects eligible for funding during the Implementation Phase of the program. Plans will be based on actionable research in partnership and shared decision-making with communities and in consultation with expert institutions, with a focus on the CERF Objectives of equity, sustainability, job quality, economic competitiveness, and resilience. Strategies will complement, incorporate, or expand on existing plans such as Comprehensive Economic Development Strategies (CEDS) as applicable and relevant.

¹² OPR, LWDA, and GO-Biz. “Finalized CERF Regions and Responses to Frequently Asked Questions.” https://opr.ca.gov/economic-development/just-transition/docs/20211217-CERF_Final_Regions_FAQ.pdf.

¹³ Leyva. “Senate Bill No. 1072.” Bill Text - SB-1072 Regional Climate Collaborative Program: technical assistance. September 14, 2018. https://leginfo.legislature.ca.gov/faces/billTextClient.xhtml?bill_id=201720180SB1072.

¹⁴ As specified in SB-162 Community Economic Resilience Fund Program Section 14531. (c) (4).

2. Phase II: Implementation Phase

In Phase II, EDD will fund implementation projects on a rolling basis identified in the planning phase based on criteria such as demonstrated community support, alignment with state climate goals, and demonstration of labor standards and job quality. Implementation Phase solicitation and detailed criteria will be released in Fall 2022. Participants interested in applying for Phase II implementation grants must participate during the planning phase or receive a letter of support from the HRTC to be eligible for funding.

3. CERF Tribal Funding Opportunity

The CERF Interagency Leadership Team has allocated \$20 million dollars available for California Native American Tribes¹⁵ out of the \$600 million dollars for economic planning and implementation projects. This funding opportunity reserves a portion of CERF funding exclusively for tribal use and is intended to be designed with maximum flexibility to meet the needs of California Native American Tribes in their economic development processes. CERF recognizes the critical role that tribes play in transforming the state's economy and respects the sovereignty of tribal governments and their decision of how they engage with the program. The CERF team is working to ensure funds are accessible and can support tribal-led economic recovery and resilience projects.

To allow ample time for outreach and engagement with tribes, and to inform program design and reflect Planning and Implementation Phase criteria, the proposed timeline calls for the release of the Tribal Funding Opportunity solicitation after release of solicitations for both the Planning and Implementation Phases of the CERF program.

Tribes interested in applying for the CERF Tribal Funding Opportunity may still also apply for CERF funding through the Planning and Implementation Phases described in this solicitation. Tribes are highly encouraged to participate in the CERF Planning Phase HRTCs and to apply for funding during the Implementation Phase. Tribes are not required to participate in their region's Planning Phase processes to be eligible for Implementation Phase funding. The CERF Tribal Funding Opportunity will be open to California Native American Tribes regardless of their participation in the Planning and Implementation Phases.

Additional information and application requirements for the CERF Tribal Funding Opportunity is forthcoming.

¹⁵ Native American Heritage Commission (NAHC). "Native American Heritage Commission Tribal Consultation Policy." <http://nahc.ca.gov/wp-content/uploads/2020/09/Signed-NAHC-Tribal-Consultation-Policy.pdf>.

B. Availability

Each of the CERF Regions outlined in Appendix I will receive one award in the amount of up to \$5,000,000 for the Planning Phase. The Period of Performance (POP) for planning projects funded under this SFP will be between 18 to 24 months with an anticipated start date of October 2022.

No obligation of funds will be allowed before or beyond the grant POP. Any grant funds not expended during the grant agreement period shall be returned to the state.

C. Target Regions and Populations

All the CERF Regions will receive funding during the Planning and Implementation Phases. CERF emphasizes inclusive planning to ensure equitable outcomes for each region's disinvested communities. Disinvested communities face many challenges resulting from inequitable land use and zoning policies, exclusionary economic development processes, underinvestment, and a lack of meaningful engagement with community residents in planning and policy decisions.

Investments that benefit disinvested communities will be a priority for proposed projects in the Implementation Phase. More details on required project criteria are forthcoming in the Implementation Phase solicitation guideline period.

CERF defines 'disinvested communities' as any of the following:

- Census tracts identified as 'disadvantaged' by the California Environmental Protection Agency¹⁶.
- Census tracts with median household incomes at or below 80 percent of the statewide median income or with the median household incomes at or below the threshold designated as low income by the Department of Housing and Community Development's list of state income limits adopted pursuant to Section 50093 of the California Health and Safety Code.
- 'High poverty area' and 'High unemployment area' as designated by the California Governor's Office of Business and Economic Development California Competes Tax Credit Program¹⁷.

¹⁶ California Office of Environmental Health Hazard Assessment (OEHHA). "CalEnviroScreen." <https://oehha.ca.gov/calenviroscreen>.

¹⁷ GO-Biz. "California Competes Tax Credit List of High Poverty and High Unemployment Areas." <https://static.business.ca.gov/wp-content/uploads/2021/11/High-PU-Fiscal-Year-2021-2022-P3-List.pdf>.

- California Native American Tribes as defined by the Native American Heritage Commission (NAHC) Tribal Consultation Policy¹⁸.

CERF recognizes that the term “disinvested” may overlook the ongoing work in these communities, and particularly the residents for whom these communities are home. In many of these communities, residents and community leaders are actively engaged in local planning, economic development processes, campaigns, and other activities to improve their communities’ quality of life. These efforts are extremely important, especially since these communities disproportionately experience the negative impacts of the pandemic and climate change. CERF is structured to ensure these communities enjoy the benefits of investment.

CERF also highly encourages HRTCs to work with tribal governments that want to participate in the Planning Phase. HRTCs must respect and uphold sovereign status throughout the development of the HRTCs and other deliverables of the Planning Phase. Proposed Governance Structures¹⁹ should additionally outline measures that will be taken to protect the confidentiality of Tribal data and Traditional Ecological Knowledge collected or shared as part of the planning process. The CERF team will provide additional guidance on respectful and meaningful collaboration with California Native American Tribes in the post-award phase.

D. Eligibility

Applications for planning grants must include both an organization that will serve as the Fiscal Agent and an organization that will serve as the Regional Convener. Both organizations will hold equal importance and value throughout the CERF Planning Phase. A single organization may serve as both Fiscal Agent and Regional Convener in the case that it meets all desired qualifications.

Fiscal Agent: The Fiscal Agent will act as the intermediary in grant management. The Fiscal Agent is a legal entity representing the HRTC and is responsible for submitting the Planning Phase Application Package. The Fiscal Agent must have legal authority, history, and capacity to administer state funds. The Fiscal Agent will represent the HRTC and make disbursements on behalf of the region.

Regional Convener: The Regional Convener is the lead organization tasked with organizing an inclusive group of regional stakeholders to form the HRTC and implement the planning grant in its region.

The Convener should possess all or most of the following characteristics:

¹⁸ Native American Heritage Commission (NAHC). “Native American Heritage Commission Tribal Consultation Policy.” <http://nahc.ca.gov/wp-content/uploads/2020/09/Signed-NAHC-Tribal-Consultation-Policy.pdf>.

¹⁹ See *Section C. Collective Partnership Agreement Letter* in *Section IV. Application Package Requirements and Submission* for more information on the Proposed Governance Structure

- A proven track record of coordinating across sectors.
- Strong knowledge of the CERF Region and its economic needs, challenges, and opportunities across sectors.
- The ability to lead diverse stakeholders to successful action with a proven history of successful organizing in the designated CERF Region.
- Proven relationships and credibility with labor organizations; employers, businesses, and business associations; grassroots and community-based organizations, community organizers, and community members; government agencies; economic development agencies; philanthropic organizations; education and training providers; workforce entities¹⁵; environmental justice organizations; worker centers; disinvested communities ; California Native American Tribes (if applicable); and other regional stakeholders capable of contributing to the success of the project.
- Demonstrated commitment to advance equity outcomes in the region.
- Familiarity with grantmaking and knowledge of philanthropic ecosystems.

Types of entities that are eligible to serve in the Fiscal Agent and/or Regional Convener role include, but are not limited to:

- Non-profit organizations and foundations.
- Community-based organizations.
- District organizations of an EDA-designated Economic Development District.
- Institutions of higher education or consortium of institutions of higher education
- California Native American Tribes or a consortium of California Native American Tribes.
- Local governments, Special Districts, Metropolitan Planning Organizations (MPO), etc., may apply if they meet desired qualifications and if 80 percent of jurisdiction boundaries overlap with the CERF region.

For-profit entities are not eligible to serve in the Fiscal Agent or Regional Convener role but can be subcontracted to provide research or other services.

See Appendix C: “Fiscal Agent and Regional Convener Responsibilities” for more details on Convener and Fiscal Agent roles and responsibilities, as well as required evidence of a partnership between the two parties where applicable.

E. Collaboration with the Interagency Leadership Team

The success of the CERF program will require the interagency team comprised of the California Labor and Workforce Development Agency (LWDA), the Office of Planning and Research (OPR), and the Governor’s Office of Business and Economic Development (GO-Biz) to collaborate on a wide range of activities related to the management, design, oversight, and administration of the program. Throughout the life of the program, the interagency team will participate in regularly scheduled reporting meetings to discuss stakeholder input, agendas, policy

recommendations and program guidelines. Each agency is tasked with a different responsibility ranging from grant administration, program design, and technical assistance.

Below are brief descriptions of the responsibilities of each agency:

Employment Development Department (EDD): EDD's Workforce Services Branch shall be responsible for the management and execution of all grants and contracts including the administration of and accountability for both the planning and implementation grants.

The Governor's Office of Planning and Research (OPR): OPR will manage the design and operations of the program in addition to providing technical assistance to support and guide processes and deliverables for Phase I.

The Governor's Office of Business and Economic Development (GO-Biz): GO-Biz will support with outreach, technical assistance, and capacity building.

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 convenings will ensure progress, share best practices and lessons learned across the regions, and provide technical assistance by the state.

F. Collaboration with the Evaluation Team

An independent team will conduct a developmental evaluation to explore the success of the CERF program and the HRTCs. Awardees must collaborate with and be responsive to the process evaluation team. This includes providing information to the evaluators, allowing the evaluators to join meetings or sessions for information gathering purposes, and joining partnership sessions for planning, discussion, or technical assistance.

II. Post-Award Program Requirements and Deliverables

A. Planning Phase (Phase I) Requirements Overview

The Planning Phase requirements involve building inclusive planning tables, which will result in developing 1) High Road Transition Collaboratives, and 2) Regional Plans.

Inclusive Table-Building

The awardees must employ inclusive table-building strategies during the Planning Phase. These strategies will help the Collaborative ensure that it is accountable, addresses the needs of disinvested communities, represents the diversity of the region, and transparently oversees the facilitation of the planning process.

Awardees will conduct a detailed stakeholder mapping analysis (see the Regional Plans section) to create a profile of the diverse stakeholders in the CERF Region and design their planning tables accordingly.

To ensure buy-in to the region's vision for CERF, awardees must use inclusive table-building strategies during Application Package development (e.g., Collective Partnership Agreement Letter, Outreach and Engagement Plan, etc.), and throughout the planning process. These strategies must consider the strength and diversity of the Collaborative's partnerships, ongoing regional processes, and a Collaborative Governance Structure.

Strength and Diversity of Collaborative Partnerships

The HRTC needs to be representative of the diversity of each region. The HRTC partnerships should account for diversity across sectors, subject matter expertise, lived experience, and inter-generational perspectives to serve the CERF Region effectively.

Ongoing Regional Processes

The Fiscal Agent and/or Regional Convener must identify other ongoing planning processes or projects across the CERF Region to ensure the alignment between these processes and CERF and to ensure a coordinated response to reaching the state's goals. Examples of such efforts include: CEDS, climate plans, High Road Training Partnerships, General Plans, Regional Transportation Plans, and other community-led initiatives.

Collaborative Governance Structure

The Collaborative Governance Structure will play a key role in supporting HRTCs to build robust governance processes, align with economic planning and other ongoing processes, and overcome challenges inherent in shared decision-making. The Collaborative Governance Structure must illustrate transparent decision-making processes that not only center disinvested communities and impacted workers, but actively shift decision-making power to those groups. The Collaborative Governance Structure must also reflect that no individual member of the HRTC governance committee has more decision-making power than the other.

The Collaborative Governance Structure will represent entities that are traditionally involved in economic development, as well as entities and communities that have historically been excluded from economic development processes to collectively develop a vision that will serve the CERF Region. The Regional Convener must ensure that the HRTC includes balanced representation from:

- Labor organizations.
- Employers, businesses, and business associations.
- Grassroots and community-based organizations, community organizers, and community members.
- Government agencies.
- Economic development agencies.

- Philanthropic organizations.
- Education and training providers.
- Workforce entities²⁰.
- Environmental justice organizations.
- Worker centers.
- Disinvested communities.
- California Native American Tribes.
- Other regional stakeholders capable of contributing to the success of the project.

If the HRTC does not include representation from any of the entities listed above, the Proposed Governance Structure must include a thorough explanation of the decision or circumstances.

The state may reach out to various stakeholders in each CERF Region as part of its work on reviewing inclusive table-building processes.

The following sections describe the deliverables awardees will produce during the POP.

B. High Road Transition Collaboratives:

Collaboratives will provide information about the formal and informal partnerships and coalitions they have developed and discuss how they did so. Formal partnerships are legally bound (e.g., through MOUs, contracts, etc.). The informal partnerships are not legally bound but have the potential to lead to formal partnerships in the near future.

The reports must include the following:

Governance Structure: Lay out the governance structure and explain whether and how the structure evolved over time to respond to the region’s needs. If the structure has evolved, explain why.

Outreach and Engagement Plan: Summarize the engagement plan and explain whether it has evolved over time. If the plan has evolved, explain how and why.

Partnerships: Discuss the formal and informal partnerships and coalitions that are built throughout the process. Provide details such as:

- The coalitions and partnerships developed. Provide the name of the organizations and parties involved.
- The number of MOUs or other formal agreements (e.g., collective partnership agreements, data sharing agreements) created.
- The potential to develop formal partnerships in the future.

²⁰ Entities listed up until this point are as specified in SB-162 Community Economic Resilience Fund Program Section 14531. (c) (4).

- The strategies for keeping these coalitions active to ensure long-term and sustainable economic development and recovery. Note that after plans are developed and adopted, GO-Biz plans to work with conveners to ensure they are accepted as regional CEDS and will work to establish Economic Development Districts in regions without an existing organization.

Inclusivity: Discuss how these partnerships and coalitions advance the goals of responding to the needs of diverse stakeholders and especially disinvested communities.

C. Regional Plans

Collaboratives will develop a regional economic recovery and transition plan that addresses essential elements of a High Road strategy. The plan will be co-developed with diverse stakeholders throughout the process, from visioning to analysis, and to strategy and roadmap creation. Analyses and plans must account for sub-regional and inter-regional dynamics. The plans must also build on existing regional and/or subregional economic development plans and strategies as appropriate.

The Regional Plan includes two parts. Part 1 presents a snapshot of socio-economic conditions in the region: mapping stakeholders, providing a regional summary, and conducting analyses. Part 2 establishes a forward-looking economic development and transition roadmap using the information obtained in Part 1. HRTCs will develop a series of investment strategies that will be informed by the forward-looking economic transition roadmap.

The state understands that awardees may need to apply an iterative process as they develop their plans and collaboratives. For example, awardees may need to modify their goals and plans based on their analysis and findings.

Each of the following analyses and the roadmap must address the CERF Objectives:

- **Equity:** Analyses must consider the needs and the interest of diverse communities across the region, with an explicit intention to include populations historically excluded from planning and economic development processes, especially disinvested communities.
- **Sustainability:** Analyses must focus on economic development that is self-sustaining and aims at a carbon-neutral, climate-resilient economy addressing the needs of the region's communities.
- **Job quality and access:** Analyses must prioritize jobs that provide a family-sustaining wage, health benefits, a pension, worker advancement opportunities, a safety net, and collective worker input. These jobs are stable, with predictable schedules, and safe working conditions.
- **Economic competitiveness and resilience:** Analyses must focus on strategies to avoid, withstand, and recover from economic shocks so that the CERF Region can compete effectively in the global economy and deliver prosperity to communities in the region.

Regional Plan: Part 1

The first part of the regional plan presents a baseline of the region. It considers the region's stakeholders, assesses the factors affecting the region's economic, environmental, and health conditions, and conducts detailed economic and workforce analyses. The intention is to ensure that the plans take a full account of the factors shaping economic development in the region before developing strategies for recovery and transition.

Conduct the following analyses. In each section, summarize findings and explain how these findings inform the planning process and how they correspond with the Collaborative's goals.

1. Stakeholder Mapping

A snapshot of the historically active stakeholders that can influence creating a High Road economy in the CERF Region and/or benefit from it.

- Provide the list of organizations and entities and discuss their potential role in developing the plan and engaging in the Implementation Phase. These stakeholders may include but are not limited to employers, businesses, community-based organizations, community members and residents, government and economic development agencies, labor organizations, philanthropic organizations, academic institutions, education and training providers, workforce entities, and industries.
- Overview of the state of disinvested communities in the region. Discuss how and in which areas these communities face economic barriers. Include a snapshot of the plan to outreach to organizations that represent these communities and how the HRTC intends to ensure their active participation.
- Create and show a network of existing partners and their existing regional and subregional plans, strategies, and related reports to demonstrate synergies, potentials, and challenges.
- Clarify opportunities for collaborations and partnerships.

2. Regional Summary

A summary background of the demographic and socio-economic conditions of the region, highlighting areas with low and high economic diversification and resiliency, as well as any industry trends that impact the regional economy. The regional summary must identify regional inequities, such as economic, health, and environmental inequities, currently facing communities in the region.

The regional summary must include the following analysis and discussion:

i. Economy and Economic Development

- Identify economic development opportunities and forces in the region.
- Review inequities in economic development across the region.
- Identify major low- and high- wage industries and occupations in the region.

- Explore economic well-being and cost of living across the region.
 - Economic Shocks: Discuss the impacts caused by economic shocks (e.g., pandemics, natural disasters) or longer-term economic shifts (e.g., global market signals, automation, policy levers) in the region. These include economic harm to communities (i.e., workers, small businesses, impacted industries, the public sector, and selected regions and populations) as well as the potential for new economic development opportunities.
- ii. Climate and Environmental Impact: Identify anticipated climate impacts and the factors that increase the region’s vulnerability to those impacts
- Identify short term and long-term impacts of climate change on the people and economy of the region. These include disproportionate impacts on disinvested communities and expected increases in occupational hazards for workers.
 - Identify major sources of air pollution, water pollution, toxic and hazardous waste and their impacts on diverse communities, especially disinvested communities.
 - Identify major sources of Greenhouse Gas (GHG) emissions and their impacts on diverse communities, especially disinvested communities.
 - Assess impacts of climate change on targeted emerging industries, sectors, or clusters and how these impacts might hinder success of the proposed plans and transition strategies (e.g., damage to critical infrastructure, loss of productivity, loss of population).
- iii. Public Health Analysis:
- Provide a snapshot of the impacts of the current economic trends and climate change effects on public health, especially the impacts on disinvested communities.
 - Explore the main causes of chronic illnesses and diseases in the region, and whether and how they are related to economic inequalities, climate impacts, environmental factors, etc.
 - Analyze health disparities across the region, disaggregated by race, gender, and other demographics.

3. Labor Market Analysis

A snapshot of labor and workforce dynamics in the region, including an overview of major employers, occupations, and wages, the impacts of the recent trends, changes, and forces on the labor market, and projected labor trends in existing key industries. The analysis must also identify the following:

- Industry-specific labor standards that meet high-road priorities.
- Barriers that limit access to high-quality jobs.
- Relevant training programs, apprenticeships, or high road training partnerships in the region.

4. Industry Cluster Analysis:

A snapshot of current major industries as well as industry trends and projections. The analysis must also:

- Include an in-depth analysis of potential growth clusters based on the region's comparative advantages, market trends, workforce, infrastructure assets, policy trends, aligned state/federal investments, supply chain, and innovation ecosystem.
- Identify major sources of GHG emissions, air and water pollution, and toxic or hazardous waste from existing or proposed clusters.
- Conduct measurements of potential for job growth within industries.
- Identify workers and sectors at risk of displacement due to identified trends and analyses.

5. SWOT Analysis

An in-depth analysis of regional Strengths, Weaknesses, Opportunities, and Threats (i.e., SWOT), especially as it relates to equitable economic resilience and growth of sustainable industry clusters. The SWOT analysis will draw from data and components through conducting the above analyses.

Regional Plan: Part 2

HRTCs will also be required to develop a holistic economic development and transition roadmap with strategies that prioritize the creation of high-quality jobs, equitable access to jobs and resources, and emphasizes developing sustainable and resilient economies and industries. These industries include but are not limited to renewable energy, energy efficiency, carbon removal, zero-emission vehicles, advanced manufacturing, agriculture, forestry, artificial intelligence, and climate restoration and resilience. The roadmap and strategies must refer to the findings of the analyses in Part 1. The roadmap must include:

1. Vision and Goals

Develop a vision and specific regional goals for creating a High Road economy that is sustainable, inclusive, and equitable.

2. Strategies for the growth of targeted industries:

- i. Industrial Cluster Development: This section will provide a snapshot of current trends and projected growth. It will consider, but is not bound by, existing relevant plans such as CEDS (if applicable and appropriate) along with the following elements that work together to support creation of quality jobs:
 - **Clear Local Market Signals**: Assess how proposed industries and affiliated investments align with market trends and local/state/federal policies.

- Value Chain and Infrastructure: Explain how investments support the growth and clustering of businesses in the value chain of the proposed industry. Identify specific infrastructure required to grow the industry.
 - Innovation Ecosystem: Describe how investments connect the private sector to local innovation resources, facilitate the movement of new technologies to market, incubate early-stage businesses, etc.
- ii. Workforce Development: Explain how the industrial strategy plans to match skills to available jobs, address talent and recruitment, and facilitate strategic collaboration among businesses, training and education institutions, labor, etc.

3. Strategies for increasing economic diversification

Strategies must focus on economic diversification in at-risk locations (i.e., considering the impacts of economic disrupters such as climate change on the local workforce and economy). Investments must clearly address barriers to attraction and retention of businesses, as well as barriers to quality job access for disinvested communities.

4. Strategies for responding effectively to economic shocks.

These include the following:

- Protecting diverse communities, especially disinvested communities.
- Using economic shocks and disasters as opportunities for growth.

5. Strategies for increasing economic equity.

These strategies must refer to the analyses of workforce and demographic trends, and focus on closing gaps, reaching universal levels of service, or disaggregating results by race, ethnicity, income, etc.

- Strategies must create and sustain pathways into quality jobs and family-sustaining careers and improve job quality and wages in sectors that do not offer quality jobs. Analysis and recommendations must highlight how they propose to serve historically marginalized and disinvested groups and how those groups will learn about proposed interventions.
- Strategies must support workers potentially impacted by at-risk industries and must prevent displacement of incumbent workers or replacement of high-road jobs with low-quality jobs.

6. Strategies for increasing health and environmental equity.

These strategies must include limiting the impacts of economic development activities on the natural environment. They must also avoid exacerbating the effects of climate change and include pathways for mitigating the effects of anticipated climate impacts on targeted industries and occupations. They must also address public health needs, with special attention to the needs of disinvested communities.

7. Strategies for aligning with State strategies.

An assessment of how regional economic development strategies (i.e., planning priorities, grant programs, and regulations) can align with, support, and be supported by existing state strategies in areas like clean energy, air pollution reduction, transportation decarbonization, climate adaptation, sustainable water management, and natural and working lands.

Strategic Investments and Projects

The Collaboratives will also identify 2-5 strategic investments or projects to enact recovery and transition to be funded in Phase II (Implementation) that meet the following criteria, which are currently presented at a high-level.

Clarify Investments or Project Goals in Detail:

- Proposed projects must layout goals and success points in detail and provide threshold(s), benchmark(s), or target(s) for measuring or tracking success.
- Projects must provide the methodology for tracking or measuring the defined threshold(s), benchmark(s), or target(s).

1. Demonstrate Proposed Impacts to Communities/Industries:

Proposed investments must mitigate economic harm to workers, households, small businesses, impacted industries, and the public sector, and especially disinvested communities.

2. Demonstrate Project Feasibility, Commitments, and Community Support:

- Proposed projects must demonstrate support from the HRTC.
- Projects should show support from various stakeholders (e.g. community-based organizations, governmental, non-governmental entities, tribal entities, businesses, industries). Letters of support, meeting minutes, MOUs, court hearing minutes, or other documentation may demonstrate support.

3. Promote State Climate Goals:

- Investment projects lead to the development of low-carbon or regenerative industries.
- Investments that support economic diversification are designed to minimize GHG emissions and/or water or energy usage.

4. Support Labor Standards and Job Quality:

- Projects must include labor standards where applicable such as prevailing wage, project labor agreements, or community workforce agreements.

- Projects need to create high-quality jobs²¹ that bring sustainable income to the regions.
- Projects must define a plan with goals, targets, strategies, and activities to recruit, train, re-train, and support workers from disinvested communities.

5. Demonstrate Clear Role in Regional Strategy:

Industrial development should consider existing CEDS along with the following elements that work together to support the creation of quality jobs:

- i. Clear Local Market Signals: Explain how investments align with market trends:
 - Value Chain and Infrastructure: Describe how investments support the growth and clustering of businesses in the value chain. Identify specific infrastructure required to grow the industry.
 - Innovation Ecosystem: Describe how investments connect the private sector to local innovation resources, facilitate the movement of new technologies to market, incubate early-stage businesses, etc.
- ii. Workforce Development: Explain how the industrial strategy plans to match skills to available jobs, address talent and recruitment, and facilitate strategic collaboration among businesses, training and education institutions, labor, etc.
- iii. Economic Diversification: Describe how strategies will address specific barriers to attraction and retention of businesses, as well as barriers to access for disinvested communities.
- iv. Complement Existing Funding: If state or federal funding is available elsewhere for a proposed project (e.g., broadband), Collaboratives must improve equity outcomes, which include but are not limited to job access for those in disinvested communities, income inequality, income growth, business ownership, business revenue, job and wage growth, among others.
- v. Achieve Timely Implementation: Funds must be encumbered by October 2026.

Examples of projects include, but are not limited to, the following:

- Technical assistance, counseling, or other services to assist with small business planning needs.
- Programs that support economic diversification and the development of sustainable industries.
- Entrepreneurship and commercialization programs.

²¹ See *Appendix B: Glossary of Terms* for a definition of high-quality jobs

- Programs to connect small and minority-owned businesses to industrial hubs and research institutions.

III. Budgeting and Performance Requirements

A. Cost Sharing

Phase I planning grants will be awarded at a 100% grant rate for a maximum amount of \$5 million. Therefore, no match is required.

B. Allowable Uses of Funds

Planning grants are to be used to cover the cost of producing a robust regional economic development plan and creating an inclusive planning table. Planning grants are to be used to strengthen collaboration, include evidence-based strategies, and ensure the participation of diverse stakeholder groups. Please refer to Appendix D for Allowable Costs and Cost Items and Appendix E for Disallowable Costs.

C. Administrative Cost Limits

A maximum of 10 percent of the total requested grant amount will be allowed for administrative costs. Please refer to Appendix F for the definition of administrative costs.

D. Travel reimbursements

Must adhere to the applicant's travel policy or the state rates and conditions established on the CalHR website. Out-of-state travel must be directly related to CERF and authorized in advance by EDD and OPR. If following the applicant's travel policy, a copy will be requested during contract negotiations. For additional information on excess lodging requests, please visit the Excess Lodging Rate Request section under CalHR.

E. Subcontractor Procurement

Subcontractor procurement processes must adhere to state and local requirements

F. Advance Payment

EDD may provide, with legislative authority and Department of Finance (DOF) approval an Advance Payment option to community-based non-profit organizations or a Native American tribe. Advance Payment options aim to reduce barriers in participating in CERF. Applicants may apply to receive up to 25 percent of their total grant award through an Advance Payment option. For the request to be considered, applicants will need to submit the documents below in addition to the grant Application Package. Please note, these additional requirements do not impact the Application Package's page limit. Applicants are not required to use the Advance Payment option if the reimbursement model is preferred.

Note – Applicants requesting Advance Pay will only be eligible for a one time advance payment and will be required to demonstrate good standing with the IRS. Advance Payment is subject to approval from DOF; the requested percentage at the time of the application is not guarantee. The information provided in the Advance Pay Statement of Need, Project Expenditure Timeline for Advance Pay, Proposed Budget (Exhibit B) and Proposed Budget Narrative (Exhibit B2) will be taken under consideration for final advance pay.

To receive advance payment, applicants must adhere to the following at the time of the grant agreement:

1. Provide a one-page statement of need for advance pay.
2. Complete Advance Pay column on Exhibit B – Proposed Budget.
3. Provide details in Exhibit B2 – Proposed Budget Narrative for the categories utilizing Advance Pay.
4. Provide a high-level 6-month spending timeline including anticipated spend down and categories for the projected period of time.

IV. Application Package Requirements and Submission

All applications must adhere to Application Package requirements, use the required format, and include all the requested information and attachments; otherwise, the application will be deemed nonresponsive. Applications that do not meet the minimum requirements will not be scored or considered for funding. Refer to SFP Instructions in Appendix A for guidance on how to properly complete, format, and submit all elements of the Application Package. A maximum of 20 pages (12-point Arial font, single-spaced) will be accepted for the Concept Proposal, Collective Partnership Agreement Letter, and Outreach and Engagement Plan combined. Applicants have the flexibility to decide how they want to distribute the 20 pages over the Concept Proposal, Collective Partnership Agreement Letter, and Outreach and Engagement Plan.

One Application Package will be accepted from each applicant. Please do not submit more than one Application Package. The Fiscal Agent and Regional Convener must enlist partners representing the CERF Region to collectively form the HRTC. The state expects and encourages the HRTC to evolve throughout the Planning Phase, but the initial HRTC members – which will include the Fiscal Agent, Regional Convener, and partners – will collectively develop the Application Package based on shared visions and goals that address the needs of the CERF Region. The Fiscal Agent will be responsible for submitting the Application Package.

Data and Supporting Evidence

Successful applications must use a combination of quantitative and qualitative supporting data as applicable from a variety of reliable sources that demonstrate the socio-economic, climate, and community-wide factors that inform the application. The data should reflect the applicant’s comprehensive understanding of the issues and capacities specific to the identified CERF Region and suggest the potential for success. Relevant data sources include the EDD Labor Market

Information Division (LMID), Bureau of Labor Statistics (BLS), local surveys, or any other reliable data source such as consultation with industry associations, local jurisdictions, or mandatory and non-mandatory partners.

Applicants should also use local data sources that illustrate the experience of individuals and specific communities, such as analyses of local news articles and reliable social media groups, or data from interviews, focus group sessions, or surveys.

Appendix H suggests several data sources and tools, which applicants and successful grantees may use.

A. Phase I Concept Proposal

The Phase I Concept Proposal will include the following elements:

- Describes the vision and goals for the HRTC and how the Convener will meet the Post-Award Planning Phase Requirements detailed above.
- Identifies the Fiscal Agent and Regional Convener (if different), details why the Regional Convener is best suited to represent the CERF Region, and explains the organization composition and current or proposed leadership and/or decision-making body of the Regional Convener.
- Describes the applicants' experience and ability to convene the HRTC, including their history of engagement in economic development or community-based planning processes and success working with diverse stakeholders towards actionable decisions.
- Explains the relevant dynamics in the CERF Region that the HRTC will be navigating, including the following:
 - Identifying major industries, economic shifts, challenges and opportunities related to shared economic growth and prosperity.
 - Identifying major economic development projects or initiatives that have impacted or continue to impact communities and industries in the region.
- Explains how subregional or interregional efforts will be managed and how these efforts will connect to the regional strategy, if applicable.
- Identifies complementary economic development or planning processes ongoing in the CERF Region and possible areas of collaboration or integration with CERF.
- Lists preliminary metrics of success for the HRTC in line with CERF Planning Phase priorities and objectives.
- Provides a strategy for ensuring the sustainability of the HRTC into the implementation phase.
- Describes how the HRTC will address geographic equity and ensure participation from and collaborative decision-making with disinvested communities.

B. Proposed Work Plan

The Proposed Work Plan will include the following:

- Detailed descriptions and justification of proposed activities that reflect CERF Objectives.
- Target timelines.
- Descriptions of potential challenges and proposed solutions to developing the HRTC (e.g., geographical barriers for organizing meetings, language access).

C. Outreach and Engagement Plan

The Outreach and Engagement Plan must describe strategies and methods that will be used to inform, engage, and empower residents and key stakeholders throughout the planning process. It should build on the partnerships demonstrated in the Collective Partnership Agreement Letter. It may require additional training, orientation, and support to ensure meaningful participation on behalf of disinvested communities, organizations that serve disinvested communities, and other lower-capacity organizations. The Fiscal Agent and/or Regional Convener and HRTC members should all strive to ensure that they are able to engage with these communities and organizations in a way that acknowledges and overcomes traditional power imbalances.

Priority will be given to proposals that employ a combination of activities to meaningfully engage community stakeholders and create a culturally, linguistically, technologically, and, if in person, physically accessible methods for community participation. At a minimum, the Outreach and Engagement Plan must address the following:

- A budget, explanation²², and timeline of proposed community outreach activities²³.
- How the applicant will effectively conduct outreach across the entire CERF Region, particularly in disinvested communities including immigrant workers, non-native speakers, older adults, youth, people with disabilities, communities of color, California Native American Tribes and/or other communities not traditionally involved in economic development or regional planning efforts.
- How the initial HRTC members mentioned in the Collective Partnership Agreement Letter will support the implementation of the Outreach and Engagement Plan.
- How the Outreach and Engagement Plan will ensure the HRTC is representative of the communities in the region, and how stakeholders who may not already be actively involved in planning and development activities will be engaged.
- How the Convener will ensure transparent decision-making that centers community voices.
- How the public will be informed of the planning progress, including tracking performance and other indicators, as well as progress on the implementation of the Outreach and Engagement Plan.

²² To be reflected in Exhibit B: Proposed Budget and Exhibit B2: Proposed Budget Narrative

²³ To be reflected in Exhibit D: Proposed Work Plan

- The ways in which the community will provide feedback on the planning process, including how the HRTC will receive and incorporate formal feedback from the community, and the minimum number of community members the HRTC plans to engage.
- How the Governance Structure includes the entities in the Collective Partnership Agreement Letter, and how these entities will support the implementation of the Outreach and Engagement Plan.

D. Collective Partnership Agreement Letter

Creating resilient regional economies will require partnership, power-sharing, and a shared burden of responsibility. Traditional systems have discouraged disinvested communities from engaging in economic development and participating in decision-making. CERF aspires to disrupt business-as-usual processes and ensure disinvested communities participate in regional planning and economic development efforts. The Regional Convener will need to invite a diverse group of stakeholders to form the initial HRTC and develop a partnership agreement letter together. HRTC members joining the Collective Partnership Agreement Letter should also consider that regional tables will evolve throughout the planning process to ensure they accurately capture the diversity of each region. The Collective Partnership Agreement Letter will be a fundamental component in developing trust, partnership, and a commitment to power-sharing among HRTC members.

At a minimum, the Fiscal Agent and/or Regional Convener and initial HRTC members should include the following in their Collective Partnership Agreement Letter:

1. Proposed Governance Structure:

HRTC members in partnership with the Regional Convener will need to develop a democratic governance structure that shares decision-making and balances the interests of all represented groups.

2. Signatures of Initial HRTC Members (exempt from the 20-page limit and should be included as Appendix 7):

By signing the Collective Partnership Agreement Letter, each HRTC member agrees to the goals laid out in the Application Package and agrees to participate in developing a fair governance structure, an effective outreach and engagement plan, and a budget. HRTC members in the Collective Partnership Agreement Letter commit to working in partnership to achieve the goals set out in the program and collectively share the weight of responsibility in creating a more inclusive, equitable, and competitive regional economy.

At a minimum, each proposed HRTC member must include the following:

- Description of the type of entity and its role in the community or region.
- Description of the entity's knowledge, experience, and reason to be in the planning table.

- A contact person, their role, and email address or phone number.
- A signature from an authorized signatory representative of the entity.
- Date.

E. Application Package Exhibits²⁴

1. Exhibit B: Proposed Budget

The Proposed Budget should be easy to read and provide a clear understanding of how HRTCs plan to allocate funding resources. Program Costs and Administrative Costs must add up to the total award amount.

Priority will be given to budget proposals that include the following:

- Budgets that allocate resources equitably across entities within the HRTC to lead or support specific activities that reflect the needs of planning efforts.
- Budgets that reflect the overall project objectives and program goals.
- Budgets that focus on equity and inclusion.
- Budgets that explain the proposed community outreach activities.

2. Exhibit B2: Proposed Budget Narrative

The Proposed Budget Narrative will accompany the Proposed Budget and must ensure that all HRTC members have had an opportunity to direct the project budget. The Proposed Budget and Proposed Budget Narrative must provide written explanation of budget allocations, describing details and rationale for proposed expenditures. For instance, details may include specifics of personnel costs (e.g., positions, salaries, benefits), contracts, etc. The Proposed Budget should be easy to read and provide a clear understanding of how HRTCs plan to allocate funding resources.

Priority will be given to budget proposals that include the following:

- Budgets that allocate resources equitably across entities within the HRTC to lead or support specific activities that reflect the needs of planning efforts.
- Budgets that reflect the overall project objectives and program goals.
- Budgets that focus on equity and inclusion.
- Budgets that explain the proposed community outreach activities.

3. Exhibit C: Supplemental Budget (if applicable)

If applicant plans to purchase equipment that has a unit cost of \$5,000 or more and a useful life span of more than one year, the Supplemental Budget must be completed. Additionally, if the

²⁴ Exempt from 20-page limit

applicant has allocated funding for contracts in Exhibit B, the supplemental budget must include a list of anticipated contracts even if the name of the contractor is unknown.

4. *Exhibit D: Proposed Work Plan*

The Proposed Work Plan exhibit is a high level overview of activities and timelines. It should correspond with more detailed descriptions of the Work Plan in Section IV.B.

5. *Exhibit E: Statement of Willingness*

Applicants are strongly encouraged to sign a Statement of Willingness, which demonstrates a commitment to participate in the planning process regardless of award status.

F. Application Package Appendices

1. *Fiscal Agent Resume*

- Identify the applicant's past or present accomplishments in regional economic development, planning, or recovery projects, if applicable.
- Demonstrate the applicant's experience managing grant awards and financial capability to administer and manage funds.
- Demonstrate the applicant's capacity and experience in collecting and reporting financial data.
- Address all requirements listed in section I.D and Appendix C.
- Not exceed two pages (single-space, 12-point font).

2. *Regional Convener Resume*

- Identify the applicant's past or present accomplishments in regional economic development or community-based planning processes and success working with diverse stakeholders towards actionable decisions.
- Identify convener's experience working on regional economic development, planning, or recovery projects with communities in their CERF Region.
- Identify the full- or part-time staff that will be dedicated to CERF.
- Address all requirements listed in section I.D and Appendix C.
- Not exceed two pages (single-space, 12-point font).

3. *Memorandum of Understanding (MOU) between Fiscal Agent and Regional Convener*

The 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 CERF.

4. *Documentation of Meaningful Engagement*

Fiscal Agents and/or Regional Conveners and HRTC members will need to provide meeting minutes, sign-in sheets, or any other documents created during the development process of the Concept Proposal, Collective Partnership Agreement Letter, Outreach and Engagement Plan, and Proposed Budget and Proposed Budget Narrative. Fiscal Agents and/or Regional Conveners

and HRTC members must show meaningful engagement with, but not limited to, the following organizations:

- Labor organizations.
- Employers, businesses, and business associations.
- Grassroots and community-based organizations, community organizers, and community members.
- Government agencies.
- Economic development agencies.
- Philanthropic organizations.
- Education and training providers.
- Workforce entities²⁵.
- Environmental justice organizations.
- Worker centers.
- Disinvested communities.
- California Native American Tribes.
- Other regional stakeholders capable of contributing to the success of the project.

If the HRTC does not include representation from any of the entities listed above, the Proposed Governance Structure must include a thorough explanation of the decision or circumstances.

5. Advance Pay Statement of Need (if applicable)

If the applicant is applying for Advance Pay, they must include a 1-page statement (single-space, 12-point font) detailing the need for the Advance Pay. The statement must include the type of organization, amount requested, and information on the organizational structure that supports the request.

Advance Pay is subject to approval and amount or percentage requested is not guarantee. The information provided in the Advance Pay Statement of Need, Project Expenditure Timeline for Advance Pay, Proposed Budget (Exhibit B) and Proposed Budget Narrative (Exhibit B2) will be taken under consideration for final advance pay recommendations.

6. Project Expenditure Timeline for Advance Pay (if applicable)

Applicants requesting Advance Pay must submit a projected 6-month timeline for spending the amount advanced. The applicants are strongly encouraged to develop a detailed planned that demonstrates their ability to spend the requested amount. The Project Expenditure Timeline

²⁵ Entities listed up until this point are as specified in SB-162 Community Economic Resilience Fund Program Section 14531. (c) (4).

must align with all project objectives and demonstrate sound rationale for supporting the HRTC from Advance Pay to reimbursable.

7. Signatures of Initial HRTC Members – See Section IV-D2 on page 23 for additional details on appendix requirements.

G. Dates and Deadlines

CERF Application Package Timeline

Event	Date
CERF SFP release	May 26, 2022
Last date to submit inquiries for the webinar	June 8, 2022 by 5:00 pm PT
Deadline to preregister for the informational webinar	June 13, 2022
Informational webinar	June 15, 2022 at 10:00 am PT
Deadline for Notice of Intent to Apply	June 22, 2022 by 5:00 pm PT
CERF Application Packages due	July 25, 2022 by 3:00 p.m. PT
CERF Application Package review and evaluation	July 26 – August 09, 2022
Award announcements	September 2022
Deadline to appeal (optional)	August 09, 2022
Estimated planning project start date	October 01, 2022

Delivery

Applicants must submit a complete Application Package with all required elements to WSBCERF@edd.ca.gov and two hard copy Cover/Signature pages with original wet signatures by the applicant’s contract signatory authority by Monday, July 25, 2022 by 3:00 p.m. PT. Refer to SFP Instructions for further guidelines on electronic submission. Send only the hard copy cover pages (mailed or courier must be postmarked by Monday, July 25, 2022) via one of the following methods:

By Mail EDD WSB CERF PY22-24, MIC 88
Workforce Services Branch, MIC 88
Employment Development Department
PO Box 826880
Sacramento, CA 94280-0001

**By Courier
(UPS, FedEx,
DHL, etc.)** EDD WSB CERF PY22-24, MIC 88
Workforce Services Branch, MIC 88
Employment Development Department
722 Capitol Mall, Room 2099
Sacramento, CA 95814

In-Person EDD WSB CERF PY22-24, MIC 88
Workforce Services Branch, MIC 88
Employment Development Department
722 Capitol Mall, Building Agent’s Office
Lobby Room 1100
Sacramento, CA 95814

V. Award and Contracting Process

After the deadline, the representatives from the CERF team will review the Application Packages that meet the minimum qualifications. Funding decisions are based on scoring rubric, performance history, and regional and target population needs. The team will notify all applicants regarding the status of submitted Application Packages. A summary of projects funded under this SFP will be publicly posted on the EDD website.

A. Application Review, Scoring, and Evaluation

Teams of independent reviewers will score and rank applications based on the criteria outlined in this SFP. For those organizations that have participated in past grant programs administered by EDD’s Workforce Services Branch, past and present performance will be considered in making funding decisions.

Only those applications that score in the top tier, are deemed meritorious, and are in the best interest of the state will be recommended for funding. EDD reserves the right to conduct on-site reviews prior to making final funding recommendations. After completion of the evaluation process, the CERF Interagency Team will make final funding decisions based on the ranked scores and other factors such as the applicant’s past performance or innovative approaches to economic resiliency planning.

All projects selected for funding are contingent upon the revision and approval of the contract exhibits. Project exhibits are not automatically approved. Subrecipients may be required to revise the project exhibits to comply with state mandates during the approval and contract

negotiation process. EDD’s Workforce Services Branch will provide guidance should revisions be necessary. EDD reserves the right to rescind any offer of funding if a sub-recipient does not comply with the revision process.

The scoring value of each section of the SFP is as follows:

CERF Planning Phase Scoring Rubric: 200 Points Total

Objectives and Vision	Points
<i>Concept Proposal and Collective Partnership Agreement Letter</i> prioritize the CERF Objectives defined below:	
1. Equity: Proposal demonstrates shared benefits of the regional plan across all affected communities, both urban and rural, with targeted efforts to reach historically excluded populations and members of disinvested communities.	9
2. Sustainability: Proposal emphasizes three pillars of equity, environment, and economy. It focuses on equitable economic development that is self-sustaining and aims at a carbon-neutral economy addressing the needs of diverse communities including disinvested communities. Sustainable approaches must decrease reliance on fossil fuels and increase water and/or energy efficiency.	9
3. Job Quality: Proposal details commitment to creating jobs that provide family-sustaining wage, healthcare benefits, a pension, worker advancement opportunities, a safety net, and collective worker input. These jobs are stable, with predictable schedules, and safe.	9
4. Economic Competitiveness: Proposal emphasizes goals for region to be able to compete effectively in the global economy and deliver prosperity to the region. This includes leveraging a region’s comparative advantage, diversifying its economy, and training its workforce to prepare for jobs in emerging industries.	9
5. Economic Resilience: Proposal builds region’s ability to recover, withstand, and avoid economic shocks. This includes foreseeing, adapting to, and leveraging changing conditions to a region’s economic advantage.	9
Objectives and Vision Total	45

Project Planning	
<i>Concept Proposal</i>	
1. Concept Proposal identifies the Fiscal Agent and Regional Convener (if different entities), provides justification for why the Regional Convener is the	5

Project Planning		
best organization to represent the CERF Region, and provides details on the Regional Convener organization's composition and current or proposed leadership and/or decision-making body.		
2. Concept Proposal includes detailed description of Regional Convener's experience in economic development and/or community-based planning processes, and leading and/or working in collaborative settings with a diverse set of partners and stakeholders that resulted in successful planning and/or project implementation outcomes.		5
3. Concept Proposal describes major economic development projects or initiatives and how they have impacted or continue to impact communities and industries in the region. 4. Concept Proposal considers how major industries, economic shifts, and challenges and opportunities in the region can impact reaching CERF Objectives.		5
5. Concept Proposal demonstrates the applicant's understanding of ongoing regional, subregional, and interregional processes, and how they will connect to the deliverables and goals of the Planning Phase.		5
6. Concept Proposal includes a list of preliminary metrics to help track the HRTC's success in reaching the CERF Objectives		5
7. Concept Proposal includes plans for long-term operation and maintenance of the HRTC, including coordination with appropriate responsible parties during the Implementation Phase.		5
8. Applicant demonstrates effective strategies to address equitable geographic representation in the HRTC and equitable distribution of resources across the CERF Region. These strategies must also be reflected in elements of the Collective Partnership Agreement Letter, including the Proposed Governance Structure, Proposed Budget, Proposed Budget Narrative, and Outreach and Engagement Plan.		5
Proposed Work Plan – Section IV.B and Exhibit D		
1. Proposed Work Plan clearly communicates the Planning Phase process and approach, demonstrates a feasible timeline with proposed activities, and describes potential challenges and proposed solutions in developing the HRTC. 2. Proposed Work Plan provides clear justification for the proposed planning activities and the resulting impact of planning activities on the CERF Region's ability to achieve CERF Objectives.		15

Project Planning	
<i>Proposed Budget and Proposed Budget Narrative – Exhibits B and B2</i>	
<ol style="list-style-type: none"> 1. Proposed Budget and Proposed Budget Narrative provide detail adequate to understand proposed planning activities, including allocation of resources across entities within the Collaborative to lead or support specific activities that reflect their strengths and experience 2. Budget and Narrative present reasonable tasks and deliverables and feasible financial projections and timeline within the grant term that reflect the CERF Objectives and HRTC vision. 	10
Project Planning Total	60

Community Engagement and Governance Structure	
<i>Outreach and Engagement Plan</i>	
<ol style="list-style-type: none"> 1. Outreach and Engagement Plan includes detailed descriptions and timelines of diverse and appropriate community engagement activities that will be employed throughout the duration of the grant. The plan includes strategies to remove barriers to participation. 	10
<ol style="list-style-type: none"> 2. Outreach and Engagement Plan presents an inclusive process to solicit, receive, and incorporate community feedback and describes ways for the public to remain inform and engaged. 	10
<i>Collective Partnership Agreement Letter</i>	
<ol style="list-style-type: none"> 1. HRTC is comprised of key stakeholders characterizing a diverse representation of the region. The Collective Partnership Agreement Letter demonstrates each partner’s unique strengths and proven track records of serving communities in the region, especially disinvested communities. <ol style="list-style-type: none"> a. Letter provides clear description of relationships between all the partners to demonstrate anticipated success of partnerships. b. Letter proposes processes that will build trustful and resilient partnerships across members of the HRTC, disinvested communities, local government agencies, and other local and/or regional stakeholders. c. HRTC partners demonstrate a strong commitment to the partnership and agree to support the policies and development of deliverables in the proposal as they evolve. 2. Letter illustrates a decision-making process that is democratic, transparent, equitable, and centered around disinvested communities. The proposed process shares and builds decision-making power with grassroots and 	30

Community Engagement and Governance Structure	
community-based organizations, environmental justice organizations, labor unions and central labor councils, worker centers, and disinvested communities.	
Documentation of Meaningful Engagement	
<ol style="list-style-type: none"> 1. Documentation of Meaningful Engagement shows that key stakeholders and disinvested communities were meaningfully involved and centered in the development of the Concept Proposal, Collective Partnership Agreement Letter, Outreach and Engagement Plan, and Proposed Budget and Proposed Budget Narrative. 2. Documentation shows how the proposed planning activities were shaped and informed through a community process. 	10
Community Engagement and Governance Structure Total	
	60

Administrative Capacity	
Fiscal Agent Resume	
1. Fiscal Agent Resume details a history of experience necessary to implement the proposal, including a track record of coordinating with state agencies and implementing grants.	5
2. Resume describes expertise in coordinating and managing program funds with internal processes for financial tracking and accountability across a diverse coalition of partners.	5
3. Resume proves Fiscal Agent’s ability to provide payments to High Road Transition Collaborative (HRTC) members, including supporting Advance Pay if the Application Package indicates it as the payment model	5
4. Resume demonstrates Fiscal Agent’s expertise in gathering and reporting information on implementing the proposal.	5
Regional Convener Resume	
1. Regional Convener Resume describes the Regional Convener’s organizational capacity to implement the proposal. This includes administrative experience in managing similar programs and/or grant implementations and expertise in gathering, managing, and reporting information.	10
Administrative Capacity Total	
	30

Signature on “Statement of Willingness” Exhibit	
1. Statement of Willingness	5
Statement of Willingness Total	5

SCORING RUBRIC TOTAL	200
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B. Award Notification

Awards will be announced on the EDD website, and applicants will be notified of the funding decisions. Award decision notices are anticipated to be mailed by August 2022. An award offer does not constitute approval of the Application Package as submitted. The Fiscal Agent is required to enter into negotiations with EDD to finalize program components, staffing levels, and administrative systems in place to support grant implementation. If the negotiations do not result in a mutually acceptable submission, EDD reserves the right to terminate negotiations and decline to fund the application.

C. Agreement and Contracting

EDD will contact the subrecipients to finalize contract details. EDD may request that the contracts incorporate changes to the original Application Packages. After any necessary negotiations, EDD will mail the finalized contract to the subrecipients for signature. The state expects contract negotiations to begin in August 2022 with a projected start date of October 01, 2022. A Notice of Award does not automatically entitle the subrecipient to funding. EDD reserves the right to terminate any offer of funding if a subrecipient does not negotiate in good faith. Subrecipients are advised to consider whether official action by a County Board of Supervisors, City Council, or other similar decision-making body will be necessary before agreeing to accept funds awarded under this SFP. The time needed for such official action will affect the subrecipient’s ability to meet the project terms and conditions.

D. Appeals Process

An Application Package may be disqualified for not meeting the Application Package requirements. Read the SFP carefully and consult the SFP Instructions in Appendix A for detailed instructions on how to properly complete and submit all Application Package elements and to ensure all requirements have been met. An appeal of the disqualification decision may be filed, however, take into consideration the following:

- There is no appeal process for not meeting the Application Package submission deadline.
- Final funding decisions cannot be appealed.
- The Application Package requirements are those conditions that must be met in order for the application to be forwarded for evaluation and scoring. See Section IV.

Application Package Requirements and Submission and Appendix A. SFP Instructions for more information on submission requirements.

EDD will email and mail disqualification letters to applicants. Applicants have seven calendar days from the date the disqualification email is received to appeal. Send all appeals to WSBCERF@edd.ca.gov by close of business on the seventh calendar day. The appellant must submit the facts in PDF form. The review will be limited to the information provided in writing. To be considered for review, the appeal must contain the following information:

- Appealing organization's full name, address, and telephone number.
- A brief statement of the reasons for the appeal, including citations to the SFP and pertinent documents.
- A statement of the relief sought.
- Any and all corrective documentation (for example, if a Collective Partnership Agreement Letter did not contain an organization's contact information, the applicant must include a new Collective Partnership Agreement Letter that meets the requirements indicated in the SFP Instructions).
- A scanned copy of the statement with an original wet signature of the applicant's signatory authority.
- Appeals must be submitted in PDF form to WSBCERF@edd.ca.gov.

EDD will respond to appeals via email. The review will be limited to determining whether the corrective actions taken by the applicant were successful and the proposal meets the minimum Application Package requirements of the SFP to be evaluated.

E. Monitoring and Audits

During the POP, grantees and subrecipients will be monitored and/or audited by the state in accordance with existing policies, procedures, and requirements governing the use of funds. Grantees and subrecipients are expected to be responsive to all reviewers' requests, provide reasonable and timely access to records and staff, facilitate access to subcontractors, and communicate with reviewers in a timely manner. Complete and accurate reporting is essential during the monitoring process. See Appendix J for post-award reporting requirements.

F. Record Retention

Grantees and subrecipients will be required to maintain project and fiscal records sufficient to allow state and local reviewers to evaluate the project's effectiveness and proper use of funds. The record-keeping system must include both original and summary (computer-generated) data sources. Grantees and subrecipients will retain all records pertinent to the grant contract for a period of five years from the date of the final payment of the contract unless a longer period of record retention is stipulated.

G. Closeout

Closeout period refers to the 60-day period after a grant code or subgrant agreement has reached its term end date or its funding has been fully utilized. During this period, the grantee or subrecipient submits a closeout package to the state, and the state confirms that all applicable administrative actions and required work of the grant code or subgrant agreement have been completed by the subrecipient. The closeout period is a critical piece in the cycle of a grant code or subgrant agreement. It is used by the grantee or subrecipient to liquidate remaining obligations and to prepare and transmit final fiscal and program documents. Closeout documents and an end of project narrative closeout report will be required 60 days after the end of the grant term. Applicants should include costs associated with closeout activities in the budget plan.

H. Compliance

All funds are subject to their related state statutory and regulatory requirements. The Fiscal Agent is responsible for evaluating each subrecipient's risk of noncompliance based on a set of common factors. These risk assessments may include factors such as prior experience in managing state general funds and regulatory requirements, previous audits, personnel, and policies or procedures for award execution and oversight. Ongoing monitoring of any given subrecipient should reflect its assessed risk and include monitoring, identification of deficiencies, and follow-up to ensure appropriate remediation.

VI. Program Evaluation

The state will pursue a statewide evaluation of the activities awarded through this SFP. The awardees and subrecipients will be required to participate in that evaluation by providing the requested data and information. Therefore, throughout the POP, awardees and subrecipients must document lessons learned and effective practices ascertained through this project. At designated points throughout the fiscal year, the Interagency 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.

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Appendices

Appendix A. Application Instructions

Applicants must follow the specific instructions indicated below and complete all requested exhibits included in the SFP announcement. The Cover/Signature Page, Executive Summary, Proposal Narrative, and all Exhibits must be completed in Arial 12 point font. The Cover/Signature Page, Executive Summary, required SFP exhibits, and mandatory appendices are not included in the 20 page limit, which applies only to the Proposal Narrative – Exhibit A. If you have any questions regarding the Application Package after having carefully reviewed the SFP and Appendices, please email EDD staff at: WSBCERF@edd.ca.gov

Format and Document Order

The following chart lists the order of documents that must be included in the Application Package. This may also be used as a checklist to help ensure submission of a complete grant package.

1. Cover/Signature Page and Executive Summary	
3. Proposal Narrative – Exhibit A (must include the following sections)	
Section I. Project Planning	
Section II. Community Engagement and Governance Structure	
4. Required Exhibits	
Exhibit B – Proposed Budget	
Exhibit B2 – Proposed Budget Narrative	
Exhibit C – Proposed Supplemental Budget (if applicable)	
Exhibit D – Proposed Work Plan	
Exhibit E – Statement of Willingness	
5. Required Application Package Appendices	
1. Fiscal Agent Resume	
2. Regional Convener Resume	
3. MOU Between Fiscal Agent and Regional Convener	
4. Documentation of Meaningful Engagement	
5. Advance Pay Statement of Need (if applicable)	
6. Project Expenditure Timeline for Advance Pay (if applicable)	
7. Signatures of Initial HRTC Members	

Cover/Signature Page and Executive Summary

The Cover/Signature page must be completed in its entirety and submitted both as a printed hard copy with wet signatures and electronically as a Microsoft (MS) Word and PDF document with the authorized signatory's electronic signature. Please ensure that contact information for both the authorized contact person and the authorized signatory is correct. Save this document according to the following naming convention: [Applicant Name] [Grant Initialism] PY 22-24 CoverPageExecSum. For example, "CommunityOrg ESP PY 22-24 CoverPageExecSum."

Send only the hard copy cover pages (mailed or courier must be postmarked by Monday, July 25, 2022) via one of the methods noted on Page 37. The electronic version must be submitted with the complete proposal package by Monday, July 25, 2022 by 3:00 p.m. PT.

Executive Summary

The Executive Summary is limited to two pages. All sections must be completed. The Executive Summary will be publicly posted online and must be written in complete sentences (unless otherwise indicated) with proper grammar. Acronyms must be spelled out the first time they are used. Summaries that do not meet these requirements will be returned to the applicant to be rewritten.

Note – The Executive Summary does not count towards the maximum page limit and will not be scored.

Proposal Narrative - Exhibit A

Complete the required sections of Exhibit A. The SFP contains additional details and information that the applicant must take into consideration when drafting their responses. Save this document according to the following naming convention: [Applicant Name] [Grant Initialism] PY XX-XX [Exhibit]. For example, CommunityOrgXYZ ESP PY 22-24 ExE for Exhibit E. Names can be no longer than 40 characters.

Note – Each section will be reviewed and scored individually.

Required Exhibits

Complete only the required information in the exhibits. Do not change or alter the exhibits. Submit as a MS Word document with the following title: [Applicant Name] [Grant Initialism] PY XX-XX [Exhibit]. For example, CommunityOrgXYZ ESP PY 22-24 ExE for Exhibit E. Names can be no longer than 40 characters. Disclaimer: The exhibits have been updated for accessibility in compliance with the Americans with Disabilities Act. Exhibits must be completed accurately.

Note – Exhibits do not count towards the maximum page limit. Exhibits will be scored individually.

Required Application Package Appendices

In addition to completing the required exhibits, the applicant will need to include appendices as part of their application. Applicants will have the ability to develop their own format for these documents. Applicant must review this SFP for additional details pertaining to the requirements of each document. Submit as a MS Word document with the following title: [Applicant Name] [Grant Initialism] PY XX-XX [Appendices 1]. For example, CommunityOrgXYZ ESP PY 22-24 Appendices 1 for Fiscal Agent Resume. Names can be no longer than 40 characters.

Note – Appendices do not count towards the maximum page limit. Appendices will be scored individually.

Appendix B. Glossary of Terms

These definitions serve as a brief introduction to the terms used throughout this SFP. Please carefully consult the SFP for more detailed descriptions.

Capacity Building: The process of strengthening local coordination, leadership, knowledge, skills, expertise, and access to resources in communities with the goal of helping to develop or increase the ability of that community to organize or access inclusive economic planning efforts, access funds, or implement projects in the future. Capacity building activities include, but are not limited to, identifying and planning for economic transitions in a given region and the tools and resources to plan inclusively for a region’s economic future.

California Native American Tribe: A Native American Tribe that is on the contact list maintained by the Native American Heritage Commission (NAHC) for the purposes of Chapter 905 of the Statutes of 2004 (Pub. Resources Code, § 21073).

Carbon Neutrality: The point at which the removal of carbon pollution from the atmosphere meets or exceeds emissions²⁶.

Coordinator: Person hired or contracted by the Regional Convener to facilitate the High Road Transition Collaborative.

Disinvested Communities: CERF defines ‘disinvested communities’ as:

- Census tracts identified as ‘disadvantaged’ by the California Environmental Protection Agency²⁷; or
- Census tracts with median household incomes at or below 80 percent of the statewide median income or with the median household incomes at or below the threshold designated as low-income by the Department of Housing and Community Development’s list of state income limits adopted pursuant to Section 50093 of the California Health and Safety Code; or

²⁶ Governor Gavin Newsom. “Executive Order B-55-18 To Achieve Carbon Neutrality.” <https://www.ca.gov/archive/gov39/wp-content/uploads/2018/09/9.10.18-Executive-Order.pdf>

²⁷ California Office of Environmental Health Hazard Assessment (OEHHA). “CalEnviroScreen.” <https://oehha.ca.gov/calenviroscreen>.

- ‘High poverty area’ and ‘High unemployment area’ as designated by the California Governor’s Office of Business and Economic Development California Competes Tax Credit Program²⁸; or
- California Native American tribes as defined by the list maintained by the Native American Heritage Commission²⁹.

Economic Competitiveness: The ability to compete effectively in the global economy and deliver prosperity to the region. This includes leveraging a region’s comparative advantage, diversifying its economy, and training its workforce to prepare for jobs in emerging industries.

Economic Resilience: The ability to avoid, withstand, and recover from economic shocks. This includes foreseeing, adapting to, and leveraging changing conditions to a region’s economic advantage.

Equity: Prioritizing equity requires identifying how the benefits and burdens of economic development, regional planning, and other relevant processes are distributed in and across communities. Equity includes “leveling the playing field” by identifying and remediating systemic barriers facing specific groups. It requires identifying present-day disparities and confronting the planning, development, and decision-making processes that keep existing barriers in place and perpetuate historical injustices³⁰. For CERF, equity means that CERF Regions share the benefits and burdens of the CERF Phase 1 process across all affected communities, both urban and rural, with targeted efforts to reach historically excluded populations and members of disinvested communities. Identifying constituent aspects of equity can help focus efforts to achieve better outcomes.

- **Economic Equity:** All people of the state regardless of race, gender, or nativity, can contribute to and access the opportunities of a strong, resilient economy.
- **Environmental Equity:** All people of the state have equal protection from the impacts of environmental degradation and climate change and equal access to natural resources and recreation opportunities in a clean, healthy environment.

²⁸ GO-Biz. “California Competes Tax Credit List of High Poverty and High Unemployment Areas.” <https://static.business.ca.gov/wp-content/uploads/2021/11/High-PU-Fiscal-Year-2021-2022-P3-List.pdf>.

²⁹ Native American Heritage Commission (NAHC). “Native American Heritage Commission Tribal Consultation Policy.” <http://nahc.ca.gov/wp-content/uploads/2020/09/Signed-NAHC-Tribal-Consultation-Policy.pdf>.

³⁰ Department of Toxic Substances Control (DTSC) Office of Environmental Equity. <https://dtsc.ca.gov/office-of-environmental-equity/>.

- **Health Equity:** All people of the state have full and equal access to opportunities that enable them to lead healthy lives³¹. Focusing efforts on achieving health equity can lead to significant progress in addressing the impacts of climate change, economic disruptions, and other aspects of economic recovery and transition.

Fiscal Agent: The organization responsible for disbursement of funds from the state. The Fiscal Agent and submits the CERF Solicitation for Proposal

High Quality Jobs: Job quality varies across industry, occupation, and region. Indicators of high-quality jobs include family-sustaining wages, clearly defined routes to advancement into higher-wage jobs, benefits (like paid sick and vacation), adequate hours and predictable schedules, access to training, occupational health and safety, worker representation or right to organize, and no employer or subcontractor record of wage theft or other violations of labor law. High quality jobs bring sustainable income to the region.

High Road: “A set of economic and workforce development strategies to achieve economic growth, economic equity, shared prosperity and a clean environment. The strategies include, but are not limited to, interventions that: (1) improve job quality and job access, including for women and people from underserved and underrepresented populations; (2) meet the skill and profitability needs of employers; (3) meet the economic, social, and environmental needs of the community³².”

High Road Transition Collaboratives (HRTCs or “Collaboratives”): Inclusive regional planning groups that consist of balanced and meaningful representation from regional stakeholders. Like a “team of teams,” the Collaboratives incorporate existing local planning efforts and organizations from across the region.

Implementation Phase: Phase 2 of the CERF program; applicants will advance projects throughout the region that advance globally competitive and sustainable industries with accessible and high-quality jobs.

³¹ California Department of Public Health (CDPH) Office of Health Equity (OHE).
<https://www.cdph.ca.gov/programs/ohe/Pages/OfficeHealthEquity.aspx>.

³² Pursuant to Division 7, Chapter 2, Section 14005 (r) of the Unemployment Insurance Code (UIC).
https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=14005.&lawCode=UIC.

Inclusive Economy: An economy in which there is expanded opportunity for more broadly shared prosperity, especially for those facing the greatest barriers to improving well-being. Inclusive economies are equitable, participatory, growing, sustainable, and stable. Inclusive practices expand opportunities for historically underrepresented or disinvested groups to participate in, consult on, and make decisions about the CERF planning process and to share in the outcomes of CERF³³.

Industry Cluster: “A geographic concentration or emerging concentration of interdependent industries with direct service, supplier, and research relationships, or independent industries that share common resources in a given regional economy or labor market.”³⁴

Industry Cluster Analysis: An overview of current industry trends and projections, as well as an in-depth analysis of potential growth clusters based on the region’s comparative advantages, market trends, workforce, infrastructure assets, policy trends, aligned state/federal investments, supply chain, and innovation ecosystem.

Interagency 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. The team is responsible for planning, oversight, decision-making, and establishing evaluation criteria and metrics.

Job quality: A commitment to jobs that provide a family-sustaining wage, health benefits, a pension, worker advancement opportunities, a safety net, and collective worker input; these jobs are stable, with predictable schedules, and safe³⁵.

Labor market analysis: A snapshot of labor dynamics in the region, including an overview of the labor market and projected labor trends in existing key industries.

Memorandum of Understanding (MOU): An agreement between two or more parties that is legally binding and outlines the responsibilities of each of the parties to the agreement.

³³ Chris Benner and Manuel Pastor. “Inclusive Economy Indicators Framework and Indicator Recommendations.” <https://www.rockefellerfoundation.org/wp-content/uploads/Inclusive-Economies-Indicators-Full-Report-DEC6.pdf>

³⁴ Pursuant to Division 7, Chapter 2, Section 14005 (k) of the Unemployment Insurance Code (UIC). https://leginfo.legislature.ca.gov/faces/codes_displaySection.xhtml?sectionNum=14005.&lawCode=UIC.

³⁵ Ana Luz Gonzalez-Vasquez and Magaly N. Lopez. “The High Road to Economic Prosperity.” https://www.labor.ucla.edu/wp-content/uploads/2021/05/Eval-Report_The-High-Road_UCLA-Labor-Center_FINAL.pdf.

Planning Phase: Phase 1 of the CERF program; applicants establish inclusive, diverse, transparent, and accountable High Road Transition Collaboratives to develop integrated resiliency and transition plans.

Regional Convener: The lead organization tasked with organizing an inclusive group of regional stakeholders to form the HRTC and, with the Fiscal Agent, implement the planning grant in its region.

Sustainability: A concept that emphasizes three pillars of equity, environment, and economy. It focuses on equitable economic development that is self-sustaining and aims at a carbon-neutral economy addressing the needs of diverse communities including disinvested communities. Sustainable approaches should decrease reliance on fossil fuels and increase water and/ or energy efficiency.

Technical Assistance (TA): Aid and support provided to Applicants to facilitate development, selection, and the implementation of CERF Phase 1.

Appendix C. Fiscal Agent and Regional Convener Responsibilities

CERF grants are intended to support a coalition of members working together in the interests of their respective region. Applications for planning grants should include both a Fiscal Agent and a Regional Convener role, which hold equal importance and value. A single organization may serve as both Fiscal Agent and Convener if it meets all desired qualifications. A memorandum of understanding (MOU) between the Fiscal Agent and Convener will be required as part of the Application Package to demonstrate commitment to working together and understanding of roles and responsibilities, which are outlined as followed:

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:

- **Registration with the SAM:** Fiscal Agents must register with the SAM in order to apply for and receive funding for this initiative. **Note** – registration with the SAM must be reviewed and updated every 12 months to remain current, accurate, and complete in the SAM database. A recipient must always maintain an active registration with current information during which it has an application under consideration or an active state general funds. Applicants must ensure that this information is updated well in advance of submitting an Application Package for funding. The process of registration and/or renewal can take several weeks to complete and requires privileged information, including financial and banking information, which may take time to obtain. It is the applicant’s responsibility to have all information up to date and accessible through the SAM prior to submitting the Application Package. Visit the [SAM website](#) for more information about registration requirements.
- **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.
- **Program Ledgers and Monthly Reporting:** Contemporaneously 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) using an approved web-based accounting platform. 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. Applicants must indicate the accounting platform they propose to use. The Fiscal Agent will prepare and disseminate financial reports on a monthly basis, or as requested, in formats prescribed by the EDD.

- **Sub-Contract Administration and Disbursement of Funds:** Enter into sub-agreements with vendors and other third parties to support the identified programs on behalf of the Collaborative and EDD. Any sub-agreements done at the direction of EDD, as directed by the CERF Leadership Team, are subject to EDD approval. Disburse funds in satisfaction of payment obligations under each sub-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 Phase 1 of the grant. Disbursement of funds in support of additional phases of the implementation of CERF in the defined region must be approved by personnel identified by EDD. Collaboratives must assist EDD with the timely closing out of grants and programs with respect to sub-agreements. Collaboratives must also ensure funding is encumbered and expended by timelines set by EDD.
- **Equipment and Personnel:** Purchase and/or maintain equipment and employ personnel necessary to complete the Fiscal Agent's responsibilities as outlined in the Fiscal Agent Services Agreement, including the above noted web-based accounting platform. All personnel shall be sufficiently skilled, experienced, and knowledgeable to perform the duties necessary under the Agreement.
- **Audits:** Cooperate with EDD and any other state agency exercising lawful authority, or their respective agents, by providing all documentation related to the fiscal agency, promptly upon request.
- **Public Records:** Cooperate with EDD in responding to any requests under the Public Records Act for records related to the fiscal agency.
- **MOUs:** Develop and maintain MOUs with internal and external partners, as needed.
- **Reporting:** Prepare and disseminate financial reports on a quarterly basis pursuant to state reporting requirements
- **Accounts:** Maintain 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 EDD.

Responsibilities of Regional Convener

Regional Conveners are entities that are uniquely positioned to engage and unify stakeholders to promote High Road Transition models that help address the challenges that inequity, global economic shifts, and climate change have created. The responsibilities of HRTC members that will serve as the Convener will include, but are not limited to:

- **Identifying resources:** Identify resources and connect with partners that provide experience in the development and sustainability of economic recovery models,
- **Convening:** Convene public, private, academic, industry, workforce, labor, and community leaders around a singular vision for an equitable economic transition based on High Road principles,
- **Hiring and contracting:** Hire or contract and oversee qualified coordinator(s) to support with outreach, with support from the state on coordinator job descriptions,
- **Coordinating:** Serve as the central coordinator of economic development plans and future implementation projects. Establish a coordinated line of communication among HRTC members to foster stakeholder connectivity and between the HRTC and the Fiscal Agent to accelerate collaboration and support.

The Convener for the planning project must also ensure that the HRTC includes balanced representation from:

- Labor organizations
- Employers, businesses, and business associations
- Grassroots and community-based organizations, community organizers, and community members
- Government agencies
- Economic development agencies
- Philanthropic organizations
- Education and training providers
- Workforce entities³⁶
- Environmental justice organizations
- Worker centers
- Disinvested communities

³⁶ Entities listed up until this point are as specified in SB-162 Community Economic Resilience Fund Program Section 14531. (c) (4).

- California Native American Tribes
- Other regional stakeholders capable of contributing to the success of the project.

Appendix D. Allowable Costs and Cost Items

In general, to be an allowable charge, a cost must meet the following criteria:

- Be necessary and reasonable for the performance of the award;
- Be allocable to the award;
- Conform to any limitations or exclusions set forth in the award;
- Be consistent with policies and procedures that apply uniformly to allowable uses of general funds;
- Be accorded consistent treatment;
- Be determined in accordance with generally accepted accounting principles;
- Be adequately documented;

Direct Costs: Direct costs incurred during the grant term and specified in the Grant Agreement will be eligible for reimbursement. Direct costs are defined as costs directly tied to the planning process including, but not limited to:

- **Research:** To conduct or gain access to research, market and feasibility studies, compiling and analyzing community needs-related information studies, access to proprietary data
- **Data, Planning, and Communication Tools:** Video conferencing, project management, mapping and any other related software subscription that can facilitate or improve participation of stakeholders during the planning process.
- **Community 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.
- **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, which does not include travel.
- **Consultant Fees:** Costs of consultants that provide training, research, project planning or capacity building services

Appendix E. Disallowable Costs

The following costs are ineligible uses of planning grant funds:

- Exceeding the 10 percent cost cap for Administrative cost.
- Lobbying or advocacy work, such as direct lobbying for the passage of specific bills or local propositions.
- Expenses not related to CERF planning efforts.
- Commission fees.
- Ongoing operational costs beyond the grant term.
- Using funds for mitigation activities that are already mandated by local or state governing bodies or agencies.
- Expenses for publicity not directly related to CERF planning efforts.
- Bonus payments of any kind.
- The purchase of alcohol.
- Paying down debt or debt servicing fees.
- Damage judgments arising from the acquisition, construction, or equipping of a facility, whether determined by judicial process, arbitration, negotiation, or otherwise.
- Services, materials, or equipment obtained under any other state program;
- Real estate brokerage fees and/or expenses.
- Stewardship of legal defense funds.

Appendix F. Administrative Costs

Under CERF, there is an administrative cost limit of 10 percent. The following functions and activities constitute the costs of administration subject to the administrative cost limitation:

1. The costs of administration are expenditures incurred by direct grant recipients, as well as local grant recipients, local grant subrecipients, local Fiscal Agents, and which are not related to the direct provision of services, including services to participants and employers. These costs can be both personnel and non-personnel and both direct and indirect.
2. The costs of administration are the costs associated with performing the following functions:
 - a. Performing the following overall general administrative functions and coordination of those functions:
 - i. Accounting, budgeting, financial and cash management functions;
 - ii. Procurement and purchasing functions;
 - iii. Property management functions;
 - iv. Personnel management functions;
 - v. Payroll functions;
 - vi. Coordinating the resolution of findings arising from audits, reviews, investigations, and incident reports;
 - vii. Audit functions;
 - viii. General legal services functions;
 - ix. Developing systems and procedures, including information systems, required for these administrative functions;
 - x. Fiscal Agent responsibilities.
 - b. Performing oversight and monitoring responsibilities related to administrative functions.
 - c. Costs of goods and services required for administrative functions of the program, including goods and services such as rental or purchase of equipment, utilities, office supplies, postage, and rental and maintenance of office space.
 - d. Travel costs incurred for official business in carrying out administrative activities or the overall management of the CERF grant.
 - e. Costs of information systems related to administrative functions (for example, personnel, procurement, purchasing, property management, accounting and payroll systems) including the purchase, systems development and operating costs of such systems.
3. Awards to subrecipients or contractors that are solely for the performance of administrative functions are classified as administrative costs:
 - a. Personnel and related non-personnel costs of staff that perform both administrative functions specified in item 2 of this section and programmatic services or activities must be allocated as administrative or program costs to the

benefitting cost objectives/categories based on documented distributions of actual time worked or other equitable cost allocation methods.

- b. Specific costs charged to an overhead or indirect cost pool that can be identified directly as a program cost are to be charged as a program cost. Documentation of such charges must be maintained.
 - c. Except as provided item 2a of this section, all costs incurred for functions and activities of subrecipients and contractors are program costs.
 - d. Continuous improvement activities are charged to administration or program category based on the purpose or nature of the activity to be improved. Documentation of such charges must be maintained.
4. Costs of the following information systems including the purchase, systems development, and operational costs (for example, data entry) are charged to the program category:
- a. Employment statistics information
5. Where possible, entities identified in item must make efforts to streamline services in item of relevant section to reduce administrative costs by minimizing duplication and effectively using information technology to improve services.

Appendix G. Internet Resources

The following websites provide additional information that may help develop project plans, build partnerships, obtain data, and respond to questions in the SFP:

- **California Association for Local Economic Development (CALED)**
 - Economic development organization dedicated to advancing its members' ability to achieve excellence in delivering economic development services to their communities and business clients within California.

- **California Community Colleges Economic and Workforce Development (CCCEWD)**
 - The primary system for delivering career technical education and workforce training to Californians.

- **California Department of Education (DOE)**

- **California Department of Finance-Demographic Research (DOF)**
 - State finance census data includes population by gender, age, and race by county.

- **California Department of Health Care Services (DHCS)**

- **California Department of Industrial Relations-Division of Apprenticeship Standards (DIR-DAS)**

- **California Department of Rehabilitation (DOR)**

- **California Department of Social Services (DSS)**

- **California Employment Development Department (EDD)**
 - EDD is the administrative entity for the CERF SFP. This site contains links to a wide range of employment and training resources, including labor market information, information notices and directives.

- **California Labor and Workforce Development Agency (LWDA)**
 - The Labor Agency oversees seven major departments, boards, and panels that serve California businesses and workers including the EDD.

- **California Workforce Association (CWA)**

- CWA is a non-profit membership organization that develops public policy strategies and builds local capacity to address critical workforce issues while collaborating with workforce development partners in California.
- **California Workforce Development Board (CWDB)**
 - The CWDB establishes policy for, and provides guidance to, Local Workforce Development Boards.
- **California's 2020-2023 Unified Strategic Workforce Development Plan (State Plan)**
 - The State Plan serves as the framework for the development of public policy, fiscal investment, and operation of the state workforce and education system.
- **Comprehensive Economic Development Strategy (CEDS)**
 - A CEDS is a strategy-driven plan for regional economic development.
- **EDD Labor Market Information Division (LMID)**
 - Find labor market information to research and write the proposal.
- **Governor's Office of Business and Economic Development (GO-Biz)**
 - GO-Biz serves as the state's leader for job growth, economic development, and business assistance efforts.
- **Governor's Office of Planning and Research (OPR)**
 - OPR is the state's Comprehensive Planning Agency.
- **Just Transition Initiative (Just Transition)**
 - A Just Transition is a sustainable and equitable economic transition to carbon-neutrality that builds a robust clean economy in which all Californians prosper.
- **Local Workforce Development Areas (Local Area)**
- **Preparing for Shovel-Worthy Funding (Shovel Worthy Projects)**
 - A shovel-worthy project is one with positive change for people, with a focus on the outcome rather than the delivery of a completed project.
- **Regional Climate Collaboratives (RCC)**
 - RCCs are networks that coordinate adaptation (and sometimes mitigation) work across jurisdictional boundaries in municipal regions of the U.S. and often include local and state government representatives as well as nonprofit, academic, and private partners.

- **United States Census Bureau (Census Bureau)**
 - Serves as the leading source of quality data about people, business, and the economy.

- **University of California (UC)**
 - The University of California is a public land-grant research university system in the U.S. state of California.

Appendix H. Data Resources and Tools

This section introduces several tools and resources the applicants may use to prepare their Application Packages. The state expects the applicants to use their judgment on applying appropriate tools, data sources, and methodologies.

[Cal-Adapt](#): this resource allows exploring peer-reviewed data that show how climate change might affect California at the state and local levels.

[CalEnviroScreen](#): CalEnviroScreen is a screening methodology that helps identify California communities that are disproportionately burdened by multiple sources of pollution.

[CCHVIs](#): This tool is an interactive data visualization platform for the Climate Change & Health Vulnerability Indicators for California (CCHVIs).

[Climate and Economic Justice Screening Tool](#): This tool helps Federal agencies identify disadvantaged communities that are marginalized, disinvested, and overburdened by pollution.

[Regional Planning Units](#): This dashboard assists workforce partners, businesses, and educational institutions by providing data to build and strengthen partnerships in alignment with the Workforce Innovation and Opportunity Act.

[The California Healthy Places Index \(HPI\)](#): HPI assists with exploring local factors that predict life expectancy and comparing community conditions across the state.

[US Cluster Mapping](#): The website provides data records on industry clusters and regional business environments in the U.S. to promote economic growth and national competitiveness.

Appendix I. CERF Regions: Map and Jurisdictions

The following image shows the map of the 13 CERF Regions. The table below lists counties represented in each CERF Region



CERF Regions	Counties
Southern Border	<ul style="list-style-type: none"> • Imperial • San Diego
Inland Empire	<ul style="list-style-type: none"> • Riverside • San Bernardino
Los Angeles County	
Orange County	
Central Coast	<ul style="list-style-type: none"> • Monterey • San Benito • Santa Barbara • Santa Cruz • San Luis Obispo • Ventura
Northern San Joaquin Valley	<ul style="list-style-type: none"> • Merced • San Joaquin • Stanislaus
Central San Joaquin Valley	<ul style="list-style-type: none"> • Fresno • Kings • Madera • Tulare
Kern County	
Eastern Sierra	<ul style="list-style-type: none"> • Alpine • Amador • Calaveras • Inyo • Mariposa • Mono • Tuolumne
Bay Area	<ul style="list-style-type: none"> • Alameda • Contra Costa • Marin • Napa • San Francisco • San Mateo • Santa Clara • Solano • Sonoma

Sacramento	<ul style="list-style-type: none"> • Colusa • El Dorado • Nevada • Placer • Sacramento • Sutter • Yolo • Yuba
Redwood Coast	<ul style="list-style-type: none"> • Del Norte • Humboldt • Lake • Mendocino
North State	<ul style="list-style-type: none"> • Butte • Glenn • Lassen • Modoc • Plumas • Shasta • Sierra • Siskiyou • Tehama • Trinity

Appendix J. Post-Award Reporting Requirements

Successful applicants must comply with all administrative and reporting requirements to remain eligible for awarded funds. Applicants that do not comply may be de-obligated. The post-award reporting is subject to change.

All CERF planning and implementation awardees must comply with the outcome and reporting requirements as established by the Interagency Leadership Team and fiscal oversight by EDD. The reporting requirements will be discussed in further detail during the contracting process. At a minimum the awardees must provide the following reports:

1. Monthly Reports:

- a. Progress Status Reports (PSR): Summarize what the HRTC has done, what the next steps are, what lessons the Collaborative learned, if the Collaborative has faced any challenges, or if the Collaborative needs course correction. PSR is submitted at the end of each month and should be one to five pages.
- b. Monthly Budget Report: Prepare and disseminate financial reports on a quarterly basis pursuant to state reporting requirements.

2. Planning Phase Plan: Awardees must submit a report laying out:

- a. The structure of the HRTCs, including the governance structure, and
- b. The plans with estimated expenses for the following:
 - i. Convening the Collaboratives and an inclusive regional planning process
 - ii. Developing a comprehensive plan for the region's High Road transition. This includes a plan and timeline for conducting the analyses and developing the roadmap defined in this solicitation.

The state acknowledges that the details of this plan may change over time. The Planning Phase Plan should be 10-20 pages.

Awardees must submit the Planning Phase Plan within the first two months of the Planning Phase.

3. Regional Summary Report: Submit the Regional Summary analysis (See the section called "A2. Regional Plans" in this SFP). Awardees must submit this report by March 31, 2023.

4. Lessons Learned Report: To establish a baseline of best practices for inclusive economic planning, all CERF grantees must provide:

- a. A detailed analysis of grantee challenges and achievements relating to:
 - i. Convening an inclusive regional planning process;
 - ii. Developing a comprehensive high road recovery plan; and
 - iii. Implementing strategies to create high road jobs (applies only to the implementation phase).
- b. A written narrative explaining how the Collaborative could improve its process towards a more successful outcome.

- c. A written narrative discussing how the state could improve the structure of the CERF program.

Grantees must provide this report at the end of the Planning Phase. Collaboratives must submit this report for the Planning Phase to be deemed complete.

5. **Evaluation Report:** CERF grantees and subrecipients must also provide reports, data, and information to guide the detailed evaluation of the planning phase. Please see the Evaluation Section for details.

Grantees must provide this report at the end of the Planning Phase. The report is required for the Planning Phase to be deemed complete.

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Award List and Project Summaries

The California Employment Development Department (EDD), in coordination with the Labor and Workforce Development Agency, the Governor’s Office of Planning and Research (OPR) and the Governor’s Office of Business and Economic Development (GO-Biz), announced today it has awarded \$55,000,000 of the Community Economic Resilience Fund to 11 organizations for Program Year 2022-24 (PY22-24) Solicitation for Proposals (SFP). Awardees and project summaries are listed below. Funding decisions are final.

Project List

Applicant Name	Region	Award
Fiscal Agent: North State Planning and Development Collective – Chico State Enterprises Regional Convener: Partnership between Sierra Institute for Community and Environment and North State Planning and Development Collective – Chico State Enterprises	North State	\$5,000,000
Fiscal Agent: Arcata Economic Development Corporation Regional Convener: California Center for Rural Policy at CalPoly Humboldt	Redwood Coast	\$5,000,000
Fiscal Agent and Regional Convener: Valley Vision, Inc.	Sacramento	\$5,000,000
Fiscal Agent: Bay Area Good Jobs Partnership for Equity, with the San Francisco Office of Economic and Workforce Development as the Fiscal Lead Regional Convener: All Home	Bay Area	\$5,000,000
Fiscal Agent and Regional Convener: Sierra Business Council	Eastern Sierra	\$5,000,000



<p>Fiscal Agent: Merced Community College District</p> <p>Regional Convener: County of Merced, Department of Workforce Investment</p>	<p>Northern San Joaquin Valley</p>	<p>\$5,000,000</p>
<p>Fiscal Agent and Regional Convener: Central Valley Community Foundation</p>	<p>Central San Joaquin Valley</p>	<p>\$5,000,000</p>
<p>Fiscal Agent: Economic Development Collaborative</p> <p>Regional Convener: REACH</p>	<p>Central Coast</p>	<p>\$5,000,000</p>
<p>Fiscal Agent: Kern Community College District</p> <p>Regional Convener: Kern Coalition, a partnership between Better Bakersfield and Boundless Kern, Community Action Partnership of Kern, Kern Inyo and Mono Central Labor Council, Building Healthy Communities, and Kern Community College District</p>	<p>Kern County</p>	<p>\$5,000,000</p>
<p>Fiscal Agent: California Community Foundation</p> <p>Regional Convener: The Economic Development Corporation of Los Angeles County</p>	<p>Los Angeles County</p>	<p>\$5,000,000</p>
<p>Fiscal Agent: Charitable Ventures of Orange County</p> <p>Regional Convener: Orange County Business Council</p>	<p>Orange County</p>	<p>\$5,000,000</p>



Project Summaries

North State

Applicant:

Fiscal Agent: North State Planning and Development Collective – Chico State Enterprises

Regional Convener: Partnership between Sierra Institute for Community and Environment and North State Planning and Development Collective – Chico State Enterprises

Contact:

Jason Schwenkler

jschwenkler@csuchico.edu

Jonathan Kusel

jkusel@sierrainstitute.us

Award: \$5,000,000

“CERF will impact the North State region by forging strong partnerships and initiatives to ensure equity and inclusivity while bridging regional resources with economic needs and community benefits to improve social and environmental health of the 10-county region.”

Project Description:

In partnership, the Sierra Institute for Community and Environment (the Institute) and the North State Planning and Development Collective (the Collective) at Chico State Enterprises will lead the North State region’s High Road Transition Collaborative (HRTC) and facilitate an inclusive planning and collaborative process resulting in a regional plan. This process will center on climate initiatives, land stewardship, identification of high-growth sectors, and connection to sub-regional initiatives to build capacity and strengthen the region’s economic and workforce backbone.

The Institute and the Collective are committed to building strong partnerships through joint work and accomplishment ensuring sustainability of the North State CERF. The regional plan will support projects and policies that equitably advance regional and community needs. Projects with multiple beneficiaries will sustain the HRTC. The Institute and Collective are committed to engaging in inclusivity and equitable investment.



For decades, rural economic development activities and natural resource and forest management initiatives have not generated a sufficient economic base or high-quality jobs in the region. Coupled with climate change, drought, overly dense forests and the pandemic, the North State Region faces increasingly catastrophic wildfire seasons and land in need of restoration. As a result, the region is faced with acute challenges along with new opportunities for innovation and growth across most sectors, communities and demographics.

Sierra Institute will serve as the regional convener and North State Planning and Development Collective will serve as the fiscal agent. By mutual agreement, the two entities will share leadership in convening the region, building on the strengths of each entity including topical expertise and existing partnerships.



Redwood Coast:

Applicant:

Fiscal Agent: Arcata Economic Development Corporation

Regional Convener: California Center for Rural Policy at CalPoly Humboldt

Contact:

California Center for Rural Policy

cgrp@humboldt.edu

(707) 826-3400

Award: \$5,000,000

" Abundant natural resources across its coastal, riparian, forested, and agricultural terrain, a growing number of projects deploying innovative technologies, committed intra- and inter-regional partnerships and strong leadership from county, municipal, and Tribal governments position Redwood Region RISE to make rapid progress toward our vision of equitable and sustainable economic development."

Project Description:

Redwood Region RISE is positioned to make rapid progress toward our Vision: over the next decade, the region will become a vibrant, regenerative economy catalyzed by the implementation of community-driven innovations and collaborative governance. Our Goals are: Build economic development capacity to maximize opportunities for growth and effective implementation of projects across industries, agencies, and disinvested/BIPOC communities; Create an inclusive and equitable regional economic plan aligned with existing plans and informed by data, community participation and community priorities; Increase diversity of the regional workforce employed in high road occupations by ensuring training and pathways to flourishing-wage careers for people historically under-represented in growth sectors; Identify funding opportunities driven by stakeholder participation in decision-making for priority projects.

A history of genocide, extractive practices and boom and bust cycles in timber, agriculture and cannabis industries coupled with the ravages of wildfires and pandemic-related shocks have acutely affected the region's disinvested communities. Opportunities including a pending off-shore wind lease, energy microgrids, land trust-based affordable housing, the Noyo Harbor Ocean Science Center, Klamath dam removal project, and cooperative timber operations



demonstrate the region's readiness to accelerate sustainable development and build inclusive blue and green industry clusters.

Arcata Economic Development Corporation is the Fiscal Agent. The California Center for Rural Policy at Cal Poly Humboldt, as Regional Convener, will manage the planning process. CCRP is a research and evaluation center using community-based participatory approaches to involve stakeholders in all phases of project activity and is committed to informing policy, building community, and promoting the health and well-being of people living in rural California.



Sacramento

Applicant:

Fiscal Agent and Regional Convener: Valley Vision, Inc.

Contact:

Isa Avanceña

isa.avancena@valleyvision.org

Award: \$5,000,000

"The Sacramento Region features diverse physical, geographic, cultural, and economic attributes. Profound demographic shifts have brought widening disparities, and the ongoing pandemic and ensuing economic fallout have further exacerbated hardships. The CERF program is a critical investment in our region's economic recovery and resilience, and will demonstrate the collective value and impact our region has when we work together."

Project Description:

The Sacramento Region HRTC will advance an inclusive, transparent, co-owned, and data-informed planning process. This process will support our goal of developing a regional economic recovery and transition plan that emphasizes job quality and access, economic competitiveness and resilience, regional equity, and long-term sustainability. It will also align with state policies across a broad range of objectives, including the need to advance a climate-resilient and carbon-neutral economy. To engage and share decision-making power, the HRTC will prioritize targeting disinvested communities; recognizing unique subregions and creating tailored processes as needed; and creating accessible channels to share input and lived experience, supported by culturally competent communications.

The Sacramento Region — Colusa, El Dorado, Nevada, Placer, Sacramento, Sutter, Yolo, and Yuba counties — features diverse physical, geographic, cultural, and economic attributes. Profound demographic shifts have brought widening disparities, and the ongoing pandemic and ensuing economic fallout have further exacerbated hardships. The healthcare sector has seen the fastest growth, but growth in other sectors, especially tradable industries, is needed to diversify and grow the economy. Promising growth sectors include food and agriculture, forestry management, health and life sciences, and innovative clean mobility, and others.

Valley Vision is the Regional Convener and Fiscal Agent. For 27 years, Valley Vision has served as a trusted nonprofit civic leadership organization in the region, driven by a "triple bottom



line” approach of co-equally advancing social equity, economic prosperity, and environmental sustainability, and with a proven record in bringing diverse groups together to develop long-term solutions to the region’s greatest problems. This history of civic leadership and engagement runs across local, regional and statewide platforms, and across sectors and disciplines. Valley Vision also manages large-scale financial operations, including distributing funds, adhering to state and federal regulations and financial controls, contracting, grant management, and reporting.

Bay Area

Applicant:

Fiscal Agent: Bay Area Good Jobs Partnership for Equity, with the San Francisco Office of Economic and Workforce Development as the Fiscal Lead

Regional Convener: All Home

Contact:

Jay Banfield

jbansfield@allhomeca.org

Award: \$5,000,000

“Given the diversity of the Bay Area community and economy, BA-HRTC intends to honor the local without losing the power of the regional.”

Project Description:

The Bay Area High Road Transition Collaborative (BA-HRTC) re-envision regional economic development centered around equity, high-road employment, and climate resilience, and shaped by workers and community members. BA-HRTC will empower communities to participate in and lead regional development projects; build worker-industry partnerships that elevate worker voice and improve job quality, racial and gender equity, and climate resilience; invest in sub-regional economic planning; emphasize grassroots leadership of workers and disinvested communities; ensure meaningful community engagement; design projects that prioritize racial, economic, and environmental justice; and leverage existing Bay Area economic and workforce development efforts.

Economic growth in the Bay Area has historically outpaced the nation, though the region’s economic prosperity has not been shared by all communities and recovery from COVID-19 is



uneven across the region. While the Bay Area economy includes a variety of robust industries—including information, professional services, education, healthcare, child and elder care, hospitality, manufacturing, construction, transportation, and agriculture—there are significant wage disparities among workers. For economic prosperity to reach all communities, the Bay Area must establish better pathways to high-road jobs and adopt strategies to improve job quality, while supporting the Bay Area’s sub-regional economy.

All Home is the BA-HRTC’s Regional Convener and Bay Area Good Jobs Partnership for Equity is the Fiscal Agent. All Home advances regional solutions that disrupt cycles of poverty and homelessness, redress racial disparities, and create economic mobility opportunities for people with extremely low incomes. The Bay Area Good Jobs Partnership for Equity (BAGJPE), an association of ten workforce development boards across the nine-county Bay Area region, will be the Fiscal Agent.



Eastern Sierra

Applicant:

Fiscal Agent and Regional Convener: Sierra Business Council

Contact:

CERF@sierrabusiness.org

(530) 582-4800 ext 103.

Award: \$5,000,000

"This process will catalyze a shift in our regional economy to new industry, create opportunities for adaptation, build a culture of collaboration, and create newfound prosperity for our residents."

— Erika Harvey, Project Director, Sierra Business Council

Project Description:

Sierra Business Council's (SBC) goal for the Eastern Sierra CERF Region is to develop a regional economic recovery plan and prioritized investment schedule that will generate sustainable high road jobs. SBC will build upon the skills and knowledge of local organizations and on-going regional processes through an inclusive, equitable, transparent, multi-lingual, data-informed planning process. The planning process will advance equity in the region by focusing on regional stakeholders, with special emphasis on historically marginalized groups in disinvested communities. This process will be governed by a diverse High Road Transition Council (HRTC) and a series of topical committees.

With a long history of work in the seven counties within the Eastern Sierra CERF Region, SBC understands how it has been impacted by the economic shifts generated by climate change and wildfire, the COVID-19 pandemic, and the housing crisis. In 2019, the Eastern Sierra had 92,103 jobs. More than half of total jobs were in the Service Industry, a quarter were Government Jobs, and the remaining were Non-Service Jobs.

SBC is the Regional Convenor and Fiscal Agent for the Eastern Sierra Region. SBC is best suited to represent the Eastern Sierra CERF region due to our:

Extensive network of businesses, community organizations, and local governments across the region built over 30 years

Recent experience infusing 100s of millions of dollars in capital and infrastructure investment into rural Sierra communities



Longstanding role in convening solution-focused stakeholder groups to tackle problems and elevating the triple bottom line



Northern San Joaquin Valley

Applicant:

Fiscal Agent: Merced Community College District

Regional Convener: County of Merced, Department of Workforce Investment

Contact:

Erick Serrato

Erick.Serrato@countyofmerced.com

(209)724-2041

Award: \$5,000,000

"The North San Joaquin Valley is a unique place and CERF is a once-in-a-generation opportunity. Never before has a regional coalition of grassroots organizations and economic development stakeholders come together to center prosperity on those who have been historically left-out. Together, we will develop a shared agenda and ensure that the investments that follow build the economies of our three counties in transformative ways."

Project Description:

The North San Joaquin Valley (NSJV) High Road Transition Collaborative (HRTC) was born from the engagement of nearly one hundred community-based, education, and economic and government organizations. This deep network of partners is wholly committed to a new framework of economic development, one that centers marginalized communities and that seeks to build a shared agenda for economic prosperity. The goal of the HRTC is to bring together a broad coalition of stakeholders to identify and champion economic development opportunities that have far-reaching impact on all residents, including the region's most disinvested communities.

The three counties that comprise the region – San Joaquin, Stanislaus, and Merced – are the most northern section of California's heartland. The region is unique in its economic and geographic relationships, with ties to the Bay Area and Silicon Valley, the Sacramento region to its north and Fresno to its south. This wide swatch of urban downtowns, farmland and vineyards, the California Delta, and growing suburbs are home to three major universities, leading logistics and manufacturing companies, and more than 1.6M residents. The region also faces serious, longstanding barriers to economic development, environmental justice, and health equity.



The NSJV HRTC will be convened by the Merced County Workforce Development Board and the Merced Community College District will serve as the fiscal agent. Selected through a democratic process, the Workforce Board has a track-record of bringing together diverse stakeholders and is committed to serving as a neutral convener among a deep bench of respected stakeholders, experts, and grassroots organizations. The Workforce Board will be aided in this work through three county-specific organizations charged with engaging their respective communities in the work of the HRTC.



Central San Joaquin Valley

Applicant:

Fiscal Agent and Regional Convener: Central Valley Community Foundation

Contact:

ValleyCERF@centralvalleycf.org

Award: \$5,000,000

“Using just 1% of U.S. farmland, the Central Valley produces 25% of its food – a significant contribution to the health, safety and well-being of our nation. However, our region lags the state and nation by virtually every economic, environmental, and equity measure. Our coalition sees the CERF process as the opportunity of a lifetime – to add the capacity and resources that will help build a regional vision while still serving immediate community needs.”

Project Description:

The Valley CERF coalition shares a vision of a Central San Joaquin Valley that provides equitable, sustainable economic access to all. Through a community-driven process grounded in data that challenges biases and invites diverse viewpoints and experiences, we seek to answer this question, “What will it take to fundamentally transform our region and foster an inclusive, resilient and sustainable economy?” Our goals are (1) build/sustain four, local HRTCs that then inform the Regional Central San Joaquin Valley HRTC; (2) ensure a transparent process that shares power and responsibility; (3) implement an Outreach Plan that centers disinvested communities as “customers” of economic development investments; (4) develop the Economic Recovery and Transition Plan; and (5) participate in the statewide CERF community of practice.

Our region is globally distinctive for its agriculture economy with over 10,000 farming enterprises producing 350 commodities, including 60% of the nation’s fruits and nuts and 30% of its vegetables. Despite this bounty, the region remains one of the most persistently challenged in the United States. Disinvested census tracts are concentrated within this region at 4.5x the statewide rate.

The Valley CERF team includes the Central Valley Community Foundation (Fiscal Agent/Regional Convener); Tulare County WIB, Fresno State, United Way-Fresno/Madera Counties (local conveners); Urban Institute (research partner); California Forward (policy partner); Sierra Resource Conservation District, Yosemite / Sequoia Resource Conservation and Development Council (Climate/Mountain Region Research Partners).



Central Coast

Applicant:

Fiscal Agent: Economic Development Collaborative

Regional Convener: REACH

Contact:

Uplift@reachcentralcoast.org

Award: \$5,000,000

"The Central Coast is home to innovative companies, educational institutions and other assets shaping the future of space, air mobility, clean energy and beyond. By connecting the dots, removing barriers and building accessible career pathways, we can drive not just economic growth, but transformational opportunity for our region's more than 2 million residents."

Project Description:

The Uplift Coalition embraces a shared mission: to uplift our residents as we uplift our regional economy, growing from within to create transformative opportunities for more than 2 million people across an area larger than 10 states over more than 300 miles from Santa Cruz to Ventura.

The Uplift Coalition has engaged widespread regional participation to design a governance structure, build capacity, resource communities, and develop a stakeholder engagement plan to overcome geographic and socioeconomic barriers and realize a collective vision for an equitable and inclusive economy. Our ultimate goal is the creation of thousands of high-quality carbon-neutral jobs that are broadly and equitably accessible to all Central Coast residents.

This region faces persistent and emerging economic challenges: extreme income disparities, an overabundance of low-wage jobs, high costs of living, and acute, often highly uneven, impacts of climate change, the energy transition and the COVID-19 pandemic.

It is also home to a handful of future-oriented industries including space and aeronautics, renewable energy and technology as well as world-class educational institutions, military bases and other economic drivers that can be linked and integrated to harness untapped potential and provide opportunities for residents to advance economically.

Regional Convener: REACH, in the geographical center of the region, has significant experience convening diverse groups of stakeholders to address regional issues



Kern County

Applicant:

Fiscal Agent: Kern Community College District

Regional Convener: Kern Coalition, a partnership between Better Bakersfield and Boundless Kern, Community Action Partnership of Kern, Kern Inyo and Mono Central Labor Council, Building Healthy Communities, and Kern Community College District

Contact:

Dr. Jessica Grimes

jessica.grimes@kccd.edu,

Norma Rojas Mora

norma.rojas@bakersfieldcollege.edu.

Award: \$5,000,000

"It is inspiring to be part of a process that has included rural, mountain, and desert community voices as we develop an economic recovery plan that works for all of Kern County."

- Kern Coalition

Project Description:

The Kern Coalition is an intersegmental partnership of labor, community, workforce development, economic development, environmental and social justice groups that have pledged to engage the broader community, disinvested communities, key stakeholders, and community members. The CERF structure democratizes and centers diverse voices to meaningfully engage, participate, develop, and direct the implementation of the Phase 1 work to develop the Kern Regional Economic and Recovery Transition Plan, a sustainable economic development strategy leading to equity and shared prosperity.

Achieving a sustainable and equitable economic recovery at the same time as the shift to a carbon neutral economy is underway - offers unprecedented challenges and opportunities. The Kern Coalition of key stakeholders, disinvested communities, CBOs, city and county governments, and public entities, including economic development, philanthropy, education, and workforce partners are committed to inclusive and transparent processes that improve equity and prosperity, increase access to quality jobs in sustainable industries, and improve environmental and social determinants of health.



The Kern Coalition is a five-entity strong Regional Convener comprised of Building Healthy Communities (BHC), Better Bakersfield and Boundless Kern (B3K), Community Action Partnership of Kern (CAPK), the Kern Community College District (KCCD), and the Kern Inyo Mono Central Labor Council (KIM CLC). The Kern Community College District (KCCD) will serve as the fiscal agent. Together, they have committed to collaborate in developing a sustainable and equitable economic recovery plan.



Los Angeles County

Applicant:

Fiscal Agent: California Community Foundation

Regional Convener: The Economic Development Corporation of Los Angeles County

Contact:

Stephen Cheung

CERF@laedc.org

Award: \$5,000,000

"The fabric of LA's future must be woven with equity, industry, sustainability and resilience – a highroad approach to economic development that supports diverse entrepreneurship and the creation of quality jobs and equal access to those jobs."

Project Description:

The Los Angeles Region High Road Transition Collaborative (LA HRTC) is committed to building an equitable and sustainable economy that fosters long-term economic resilience in the transition to a carbon neutral economy. Our vision is of an LA region where disinvested communities become our first priority for investment. We fully support the state's vision for CERF, including each of the CERF objectives of equity, sustainability, job quality, economic competitiveness and resilience, with a primary focus on equity as the key to achieving CERF goals.

The LA HRTC Outreach Plan uses an "uplift all voices approach" anchored in affinity-based subgroups made up of disinvested communities to ensure that all constituents have an equitable opportunity to participate in the planning process.

LA County has more residents living in poverty than any other American county, the majority of whom are persons of color. In addition, the LA region and its economy experienced profound impacts from the pandemic and has been slower to recover than the rest of the state. These COVID-related burdens have fallen disproportionately on the region's disinvested communities.

California Community Foundation (CCF) will serve as the Fiscal Agent and the Economic Development Corporation of Los Angeles County (LAEDC) as the Regional Convener.

LAEDC is uniquely suited to serve in the role of Convener having served as the trusted convener for many regional efforts that bring together cross-sector partners to plan for equitable



economic growth. LAEDC regularly produces research on regional economic needs, challenges, and opportunities, including detailed analyses of the region's major industry clusters and labor markets.



Orange County

Applicant:

Fiscal Agent: Charitable Ventures of Orange County
Regional Convener: Orange County Business Council

Contact:

Jesse Ben-Ron
jbenron@ocbc.org

Award: \$5,000,000

"Orange County is a microcosm of all great things about California, multi-culturalism, beaches, sunny weather, and educated workforce that drives a powerful economy, but also its ills, such as severe economic inequality and higher and higher housing costs that squeeze middle and low-income residents."

Project Description:

Orange County High Road Transition Collaborative will be the first cross sector collaborative in the region with the mission of driving equitable, sustainable, and resilient economic development. Our vision is to realize an economy that can support residents in disinvested communities with pathways to move up the economic ladder and grow quality jobs in industry sectors that can withstand economic downturns and expedite California's green energy revolution, moving forward together with a collective and diverse decision-making body.

Orange County has one of the most diverse and powerful economies in the United States. Orange County's largest employment sectors are construction, tourism, and health services, and is a leader in sectors such as dental laboratories, computer storage device manufacturing, surgical and medical instrument manufacturing, and biomass electric power generation. While growing, OC suffers from significant income inequality. Real wages for top earners increased by 24% between 1979 and 2016, but wages for low earners decreased by 26%. Lower-paying jobs are expected to account for the majority of county job growth. Retail, hospitality, and tourism employ entry-level workers at wages insufficient for the county's cost-of-living. Poverty is disproportionately concentrated in immigrant communities in northern and central OC. This initiative will recognize these long-standing hardships and design strategies and policies aimed at supporting these residents.

This grant's fiscal agent will be Charitable Ventures, a 501(c)(3) community-based organization that offers incubation, social impact consulting, regional collaboration supports, and grant



administration to help other community-based organizations maximize impact. The Orange County Business Council (OCBC) will serve as the HRTC Regional Convenor. OCBC's mission is to enhance Orange County's economic development so that the region's vibrant economy continues to expand, bringing the benefits of prosperity to every person in Orange County. OCBC and its predecessor organizations have promoted economic development in the region for over 125 years.

CERF Phase I Planning Grant (October 1, 2022 - September 30, 2024)

Budget Item	Total
OEWD:	
Staff Salary - 1823 Contracts Analyst	\$255,476
Staff Fringe - 1823 Contracts Analyst	\$102,190
Indirect Costs (FMDC @ 10%)	\$60,000
Total OEWD Costs	\$417,666
Contractual:	
Research	\$500,000
Data, Planning, and Communication Tools	\$100,000
Community Engagement	\$2,465,000
Participant Compensation	\$304,934
Program Coordination	\$1,212,400
Total Contractual:	\$4,582,334
Total Budget	\$5,000,000

CERF Phase I Planning Grant (October 1, 2022 - September 30, 2024)

Budget Item	Total	
OEWD:		
Staff Salary - 1823 Contracts Analyst	\$255,476	
Staff Fringe - 1823 Contracts Analyst	\$102,190	
Indirect Costs (FMDC @ 10%)	\$60,000	
Total OEWD Costs	\$417,666	
Contractual:		
Research	\$500,000	UCBL, BAC, others
Data, Planning, and Communication Tools	\$100,000	UCBL, BAC, others
Community Engagement	\$2,465,000	Canal Alliance, SFCLOUT, SFF (for subs)
Participant Compensation	\$304,934	TBD - SFF?
Program Coordination	\$1,212,400	All Home
Total Contractual:	\$4,582,334	
Total Budget	\$5,000,000	

President, District 10
BOARD of SUPERVISORS



City Hall
1 Dr. Carlton B. Goodlett Place, Room 244
San Francisco, CA 94102-4689
Tel. No. 554-6516
Fax No. 554-7674
TDD/TTY No. 544-6546

Shamann Walton

PRESIDENTIAL ACTION

Date: 1/3/23

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. 221267 Mandelman

(Primary Sponsor)

Title. Accept and Expend Grant and Amendment of Annual Salary Ordinance -
Retroactive - California Employment Development Department - Community
Economic Resilience Fund Planning Grant - \$5,000,000

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:

(Date)

(Committee)

Meeting

Start Time: End Time:

Temporary Assignment: Partial Full Meeting

Shamann Walton, President
Board of Supervisors

TO: Angela Calvillo, Clerk of the Board of Supervisors
FROM: Crezia Tano, Chief Operating Officer
Office of Economic and Workforce Development
DATE: December 02, 2022
SUBJECT: Accept and Expend Ordinance
GRANT TITLE: Community Economic Resilience Fund Planning Grant

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)

N/A Contracts, Leases/Agreements (if applicable)

X Other (Explain): Notice of Funds Availability

Special Timeline Requirements:

Start date to be determined

Departmental representative to receive a copy of the adopted ordinance:

Name: Crezia Tano

Phone/Email: crezia.tano@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).