

NOTICE OF AVAILABILITY OF FUNDS

By the Employment Development Department
In coordination with the Governor's Office of Research and Planning and the
Governor's Office of Business of Economic and Development
On behalf of the California Labor and Workforce Development Agency

Community Economic Resilience Fund Program Evaluation Program Year 2022-23

Solicitation for Proposals



November 2022

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Proposal Package Exhibits

The following contains the required exhibits for the Program Year (PY) 2022-23 funding opportunity for the Community Economic Resilience Fund (CERF) Program Evaluation. Select each exhibit link individually and download each prior to saving the solicitation for proposals (SFP) to a personal computer (PC). Applicants should carefully read the SFP for the required elements and follow the Proposal Package Instructions to meet all proposal application requirements.

Required Exhibits

- [SFP Cover/Signature Page \(DOCX\)](#)
- [SFP Exhibit A – Project Narrative \(DOCX\)](#)
- [SFP Exhibit B – Budget Summary \(DOCX\)](#)
- [SFP Exhibit B2 – Budget Narrative \(DOCX\)](#)
- [SFP Exhibit D – Project Work Plan \(DOCX\)](#)

Required Appendices

- Key Personnel Resume(s)
- Partnership Letters (if applicable)

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I. Overview

A. Purpose

The Employment Development Department (EDD), in collaboration with the 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) announces the availability of up to \$3.75 million for **Community Economic Resilience Fund (CERF) Program**¹ Evaluation. The purpose of the evaluation is to provide data-driven, evidence-based responses to the following evaluation broad questions:

1. Whether and how did CERF achieve its objectives?
2. Did CERF have unintended effects (positive and/or negative)? If so, what types?
3. Was CERF cost-effective? How much did impact on outcomes cost?
4. Could the ‘inclusive planning model’ be used to scale-up other State efforts to build more equitable, sustainable, and carbon-neutral economy?

In collaboration with the CERF leadership team and the regional High Road Transition Collaboratives (HRTCs), the Evaluator will lead the design and implementation of the evaluation plan for the planning and implementation phases of CERF. The implementation phase includes multiple rounds of implementation and a pilot phase. The Evaluator should ensure the evaluation follows best practices for rigorous, transparent, and reproducible analysis.

The Evaluator is expected to serve as a **learning partner** and provide data-driven recommendations to inform the decisions of the Inter-Agency Leadership Team and the HRTCs. The outputs of the evaluation, including progress reports and evaluation analysis reports, will inform adaptations, shifts, and recommendations to the work as new lessons emerge with the goal to support real-time feedback and learning.

1. CERF Program Objectives and Overview

CERF is established by Senate Bill 162². The objective of CERF 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. To achieve this objective, CERF includes a focus on **investments that target equitable economic outcomes for workers**. The means by which CERF aims to achieve this objective is through **regional and worker-centered inclusive economic planning**, while aligning with and leveraging state investments (e.g., High Road Training Partnerships, infrastructure investments, community capacity building programs), federal investments (e.g., Economic Development Administration’s Building Back Better Regional Challenge,), and philanthropic and private-sector investments to maximize COVID-19 recovery efforts.

¹ For more information about the [Community Economic Resilience Fund \(CERF\) program](#)

² [SB 162 - California Senate \(20212022\) - Open States](#)

As per SB 162, CERF should aim to fund regional programs and economic development strategies that directly complement state and federal infrastructure investments in multiple sectors, including housing, transportation, advanced energy, broadband, and natural resources. As per ‘High Road’ strategies, CERF should aim to fund strategies that include but are not limited to: (i) improving job quality and job access, including for women and people from underserved and underrepresented populations, (ii) meeting the skill and profitability needs of employers, and (iii) meeting the economic, social, and environmental needs of the community.

The CERF program is designed as a **two-phase grant structure** (Planning Phase and Implementation Phase) that supports bottom-up regional planning processes and invests in projects to advance regional economic and community development. The CERF Planning Phase focuses on five objectives: equity, sustainability, job quality and access, economic competitiveness, and economic resilience. During the **CERF Planning Phase (2022-2024)**, each region³ must establish their own planning tables – termed High Road Transition Collaboratives (HRTCs) - with regional collaboration, partnerships, and key sectors to ensure they build an equitable, inclusive, and sustainable economic plans.

During the Planning Phase, the CERF program will provide up to \$5 million dollar planning grants per HRTC per region in 13 regions for a total of \$65 million in planning grants.⁴ The HRTCs will be composed of an administrative Fiscal Agent, a Regional Convener, and a wide range of diverse partners reflecting the diversity of each region. Planning grants will be administered jointly by the Fiscal Agent and/or Regional Convener.

The HRTCs are expected to implement transparent and inclusive processes to advance long-term prosperity and equity, work directly with Regional Climate Collaboratives⁵, and include balanced representation from diverse stakeholders. These stakeholders include labor, business, community, government, and other stakeholders, including, but not limited to, economic development, philanthropy, education, and workforce partners.⁶ Together, these partners will

³ Regions are defined by the CERF program in a way that prioritizes recovery and transition strategies and are consistent with existing economic development efforts, as well as other state definitions of regional economic and labor markets.

⁴ [The final 13 CERF regions and FAQ](#)

⁵ Regional Climate Collaboratives are community capacity-building programs initially established by Chapter 377 of the Statutes of 2018, pursuant to Part 3.6 (commencing with Section 71130) of [Division 34 of the Public Resources Code](#). See Appendix I: Internet Resources for more information.

⁶ As specified in Section 1 Chapter 5.1 Community Economic Resilience Fund Program 14531 (c) (4). 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. See page.10 of CERF Planning Phase I SFP for details regarding Regional Convener ensuring that the HRTC includes balanced representation.

form their respective regional HRTC to engage in strategic planning for economic resilience and equitable pathways to high road opportunities. The 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 change and economic resilience. The success of HRTCs in building inclusive planning tables depends on various factors, including the following:

- **Meaningful engagement:** The ability of HRTCs in informing, engaging, and empowering diverse communities, especially disinvested communities.
- **Partnerships:** The ability of HRTCs in building effective partnerships that can positively influence the implementation HRTCs' proposed investments and projects.
- **Capacity building:** The ability of HRTCs in developing social infrastructures for inclusive regional planning processes and building cross-regional collaborations.

During the **CERF Implementation Phase (2023-2026)**, CERF will fund an estimated 70 implementation projects on a rolling basis identified during 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 early 2023.

In addition to the above, **\$20 million** has been set aside to specifically fund Tribal communities' efforts to achieve CERF objectives. The tribal community solicitation and criteria will be released in 2023.

See Appendix B for a Glossary of Terms relevant to CERF program and evaluation.

2. Roles & Responsibilities

The Inter-Agency Leadership Team is responsible for the overall success of the CERF program, including its evaluation component. The Inter-Agency Leadership Team was formed to collaborate on a wide range of activities related to the management, design, oversight, and administration of the CERF program. Throughout the life of the program, the CERF Inter-Agency Leadership 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:

- a. **CERF Inter-Agency Leadership Team:** The Inter-Agency Leadership Team shall be responsible for planning, oversight, and decision-making for the CERF program.
- b. **The Labor and Workforce Development Agency (LWDA):** LWDA will provide oversight to ensure that CERF program and evaluation objectives remain in alignment with labor and workforce development objectives.
- c. **The Employment Development Department (EDD):** EDD's Workforce Services Branch (WSB) will be responsible for the management and execution of all grants and contracts,

including the administration of and accountability for CERF's Planning Phase, Implementation Phase, Evaluation, and Technical Assistance grants.

- d. **The Governor's Office of Planning and Research (OPR):** OPR will manage the design and operations of the program. In addition, OPR will be responsible for providing technical assistance, intended to support and guide processes and deliverables for Phase I, Phase II, and Evaluation.
- e. **The Governor's Office of Business and Economic Development (GO-Biz):** GO-Biz will provide support with outreach, technical assistance, and capacity building in collaboration with the Evaluation and Technical Assistance providers. Collaboration across regions will be required to collectively create a more resilient statewide economy that brings equal opportunities to every region.

3. Evaluation Objectives

The evaluation should be (i) **relevant** and meaningful by responding to the needs of Inter-Agency Leadership Team and regional partners, (ii) rely on as **rigorous** methods as feasible to examine the quality and quantity of CERF outputs as well as CERF's contribution to improvements in outcomes, and (iii) **responsible** in how personally identifiable information (PII) and/or sensitive data is collected, stored, and potentially shared to balance transparency with protection of confidentiality. The Evaluator should be **resilient** as demonstrated through impartiality while ensuring the analysis and interpretation of analysis are credible, unbiased, and as transparent and reproducible as feasible.

The objective of the evaluation is to provide data-driven, credible, impartial responses to each of the high-level evaluation questions:

1. Whether and how did CERF achieve its objectives?
 - Whether and how did CERF contribute to regional and worker-centered inclusive economic planning?
 - Did CERF support increased investment in originally disinvested communities?
 - Whether and how CERF supported regional engagement with Tribal stakeholders?
 - Did CERF increase investment in CA Tribal communities?
 - Whether and how did CERF contribute to improved, equitable workforce and economic outcomes for workers, including for women and people from originally disinvested communities?
 - Did CERF support job quality with family-sustaining wages, paid-leave, health benefits, worker advancement opportunities, a safety net, collective worker input, predictable schedules, and safe working conditions?
 - Were there differential impacts based on location, race, ethnicity, gender, socio-economic status, nativity status, or other characteristics? What were the impacts to disinvested communities? To CA Tribal communities?
 - Whether and how did CERF contribute to efforts to build an equitable, sustainable, resilient, and carbon-neutral economy?

- Did CERF contribute to meeting the skill needs of employers?
 - Did CERF support economic development that is self-sustaining and aims at a carbon-neutral, climate-resilient economy addressing the needs of the region's communities?
 - Whether and how did CERF align and coordinate with existing State, federal, philanthropic, and private-sector investments in sectors such as housing, transportation, advanced energy, broadband, and natural resources?
2. Were there unintended effects (positive and/or negative) of CERF on HRTC, worker, employer outcomes? (For example, did some CERF investments prioritize investments for increased job quality and access but an increase in carbon emissions?)
 3. Was CERF cost-effective? How much did impact on outcomes cost?
 4. Could the 'inclusive planning model' be used to scale-up other State efforts to build more equitable, sustainable, and carbon-neutral economy?

To answer these questions, the evaluation will examine the CERF Theory of Change – the inputs provided by State (funding, technical support, coordination), the outputs (quality of HRTCs and their regional economic plans), and the outcomes (such as job quality and access for workers; climate-smart industry development; sustainability of HRTC funding). Given the innovative and adaptive status of the CERF program, this is expected to be a **developmental evaluation**, though the final evaluation methods will be based on the Evaluator's Evaluation Design Report. These questions will be further developed in the Evaluation Design Report in collaboration between the Evaluator and CERF Inter-Agency Team and regional partners. For this SFP, the evaluation questions include:

Theory of Change Pillars

A. Inputs

CERF institutional arrangements

- Whether and how did the CERF Inter-Agency Leadership Team (EDD/LWDA, OPR, and Go-Biz) collaborate effectively and efficiently on the management, design, oversight, and administration of the program? How did this institutional arrangement affect governance (such as timing of decisions; consensus-building on investment decisions)?
- What lessons can inform future inter-agency collaborations?

HRTC selection process

- Whether and how did the CERF selection process result in creating HRTCs that represent marginalized, historically underrepresented populations?
- Whether and how did the CERF selection process result in HRTCs with capacity to respond to their responsibilities defined in the CERF SFP?
- **Definitions:** Whether and how the definition of Disinvested Communities has been effective to ensure the inclusion of those in need of investments?

Interagency resources to HRTCs

- Did CERF inputs efficiently and effectively support HRTCs to achieve objectives defined in the CERF SFP?

- Funding: \$5M to establish HRTC – was this amount too small, too big, or sufficient across regions?
- Technical support: Kick off session(s), toolkit(s), external technical assistance provider for capacity building efforts – was the support too much, too little, and just enough across HRTCs? Was the support relevant and meaningful for HRTCs?

B. Outputs

Inclusive representation and decision-making

- Whether and how HRTCs result in balanced representation across labor, business, community, government, tribes, and other stakeholders, including, but not limited to, economic development, philanthropy, education, environmental justice and workforce?
- Whether and how HRTCs result in new perspectives/stakeholders participating in decision-making?
- Whether and how HRTCs employ inclusive table-building strategies during the Planning Phase?
- Whether and how did the HRTCs:
 - Represent the diversity of the region, including geographic diversity?
 - Address needs of disinvested communities?
 - Ensure democratic and transparent decision-making?
 - Ensure they were accountable to residents?

Capacity Building

- What percentage of funding did HRTCs allocate to capacity building? Was this sufficient, too little, or too much?
- Whether and how HRTCs build capacity and social infrastructure (such as formal and informal partnerships)? Who was targeted for this capacity building?

Community Outreach/Engagement

- What percentage of funding did HRTCs allocate to outreach/engagement? Was this sufficient, too little, or too much?
- How does the community's perception of HRTCs/CERF compare to other economic development programs? Measure by equity, sustainability, job quality, economic competitiveness, and resilience.

Economic Plans

- Did HRTCs produce actionable economic plans and investments? This includes data driven problem diagnostic; clearly stated objective(s) with defined indicators and baseline and target values; a coherent Theory of Change; and documented assumptions and risks.
- What percentage of funding did HRTCs allocate to research activities? Did the research activities funded by HRTCs inform Economic Planning?
- Did HRTCs produce inclusive and equitable economic plans?

- Whether and how did HRTC economic plans vary from other economic development programs?
- Whether and how did HRTC economic plans aim to increase investment in disinvested communities?

Inclusive, equitable investments

- Were some HRTCs better prepared for the implementation phase? If so, how? What might this mean for future efforts to improve equity across regions?
- Were CA Tribal communities prepared and engaged to participate in implementation funding opportunities? What insights can this provide for future efforts to improve equity?
- Did CERF result in investment decisions that align with CERF objectives?
 - How did CERF investment decisions vary across rounds of implementation funding and by regions (currently expect four rounds of funding)?
 - What are the main determinants for funding allocations across regions?
 - How did CERF investment decisions vary from other economic development programs?
 - Whether and how the CERF investments align with the HRTC’s economic plans? Whether and how CERF investments targeted disinvested communities?

Financial and administrative sustainability

- Whether and how do HRTCs function as decision-making groups for economic investments following the CERF implementation period?
- Whether and how do HRTCs secure funding beyond CERF funding?

C. Outcomes

Job quality and access

- Whether and how did CERF result in implementation investments targeting improving job quality and access?
 - Did CERF support development of social infrastructure (such as HRTCs and their informal and formal partnerships) for improving job quality and access? How or why not?
 - Did CERF support evolution of low-quality jobs to high quality jobs? How of why not? For whom?
 - Did CERF support creation of new high-quality jobs? How or why not? For whom?
 - Did CERF support changes in trends in job quality and access? How or why not? For whom?

Climate-responsive and sustainable industries

- Whether and how did CERF result in implementation investments targeting improving climate-smart and sustainable industries?

- Did CERF support development of social infrastructure (such as HRTCs and their informal and formal partnerships) for improving climate-responsive and sustainable industries? How or why not?
- Did CERF support the evolution of existing industries to become climate-smart, sustainable industries? How or why not?
- Did CERF support creation of new climate-smart, sustainable industry jobs? How or why not?
- Were CERF projects responsive to the State’s climate goals? How or why not?
- Did CERF support changes in trends in climate-responsive and sustainable industries? How or why not?

Economic activity, competitiveness, and resilience

- Whether and how CERF planning activities and projects result in implementation investments targeting improving economic activity?
 - Did CERF support development of social infrastructure (such as HRTCs and their informal and formal partnerships) for improving economic activity? How or why not?
 - Did CERF support increased investment in disinvested communities? Was this support equitable?
 - Did CERF support the development or attraction of businesses and jobs to the region? Was this support equitable?
 - Did CERF support development or attraction of businesses and jobs to CA Tribal communities?
 - Did CERF support changes in trends in economic activity?

Community resilience

- Whether and how did CERF activities result in implementation investments targeting improving community resilience?
 - Whether and how did CERF planning activities build social or community infrastructure (such as HRTCs and their informal and formal partnerships) for improving community resilience?
 - Whether and how CERF resulted in providing or improving upward economic mobility opportunities for diverse communities, especially disinvested communities. Were results equitable?

4. Evaluation Deliverables

General Notes

- a. All deliverables will be prepared in English. However, there are some deliverables – such as briefs, presentations, questionnaires, and informed consents – where the Evaluator will need to assess participant and stakeholder population language needs and determine when translation is required (Spanish, Tagalog, Cantonese, Mandarin, Vietnamese, etc.).

- b. The Evaluator will work with the Inter-Agency Leadership Team to identify the most appropriate data-sharing mechanism for providing user-friendly access to performance monitoring metrics and evaluation analysis.
- c. The Evaluator must meet all State accessibility guidelines to ensure all content can be reached by the largest possible audience.⁷
- d. Collaboration with the State: Awardees must budget for and plan to host at least two convenings per year throughout the grant period to bring together state partners and awardees. Timing will be determined by state partners and subrecipients. The purpose of the convenings is to develop a nuanced, big picture perspective. Agendas and programs for convenings will be developed in coordination with the State, including the Inter-Agency Leadership Team, in order to include support on topics related to the CERF evaluation planning and implementation.
 - a) In the first year, the first convening will be an Evaluation Kick-off Meeting.
 - b) In the last year, the last convening will be an Evaluation Final Dissemination and Learning Meeting.

Continuous Deliverables

- a. Participate in partner meetings:
 - Meet regularly with the inter-agency team and regional partners to provide them with data-driven feedback. Feedback should assess the program's progress and discuss solutions to any challenges being experienced.
 - Participate in CERF trainings.
 - Convene partners on evaluation activities at least once annually.
- b. Identify and deliver capacity building activities:
 - Coordinate training (i.e., COPs) and technical assistance on relevant topics for the program awardees and other relevant stakeholders, either as necessary or as requested by the State. These trainings can cover various related topics, including: performance data-tracking tools and techniques and evaluation methods.
- c. Provide support to HRTC-led research and data activities, including designing CERF performance metrics.
- d. Produce a quarterly Progress Report, including analysis and reporting on CERF Performance Metrics:
 - This should ensure continuous monitoring of program implementation, which is intended to assess alignment with and/or deviations from established designs during implementation.
 - The work may include writing narratives and/or infographics about HRTCs and CERF outcomes, through photographing, interviewing, other method of information gathering and storytelling.

⁷ California Government Code Sections 7405 and 11135, as well as the Web Content Accessibility Guidelines 2.0. This includes making all documents posted on public websites accessible/Section 508 compliant.

- The Evaluator must work with the CERF Inter-Agency Leadership Team to determine how progress report data and other analysis can be shared transparently and be made as reproducible as possible.
- e. Provide support in response to legislature requests
- Produce the annual reporting for the [Joint Legislative Budget Committee](#).
 - Co-produce the supplemental annual reporting to the legislature.
 - Develop talking points, presentations, and short policy briefs, as necessary.
 - Participate in legislative hearings, as necessary.

See Appendix C: Evaluator Administrator Responsibilities for more details on Administrative requirements and responsibilities.

Specific Deliverables

1. Evaluation Design Report and Related Materials– Report must define: (i) Theory of Change, (ii) evaluation questions, (iii) methods including community engagement, (iv) data collection strategy, (v) analysis plan, (vi) dissemination strategy, (vii) study limitations, (viii) Institutional Review Board (IRB) and ethical review process, (ix) work plan and milestones, and (x) budget. Final deliverable expected within first nine months of POP.

- 1.1. The Evaluation Design Report will cover both the planning and implementation phases of CERF, recognizing that throughout the evaluation POP the Evaluator will likely transition into implementation evaluation while still working on planning evaluation.
- 1.2. Includes review of selected HRTC proposals to inform evaluation planning. In addition, includes a review of all existing data, data needs, and methodologies to inform evaluation planning.
- 1.3. Includes community engagement (study participant community representatives, Inter-Agency Team, HRTCs) to ensure the evaluation design and implementation plan aligns with the needs of the various communities served by CERF. This includes community consultation on the CERF Theory of Change and evaluation questions and dissemination strategy.
- 1.4. Includes assessment of existing data for analysis and defining new quantitative and qualitative data collection requirements, metrics, and methodologies to meet evaluation objectives.
- 1.5. Includes development of any questionnaire(s), informed consent statement(s), Memorandum and Understandings (MOUs), Data Management Plans (if collecting personally identifiable information (PII) and/or sensitive data directly from human subjects), plans for any necessary IRB and/or Ethics Committee clearance.
 - 1.5.1 Ensure alignment of evaluation protocols and informed consents with United States Federal Policy for Protection of Human Subjects (Common Rule 2018).

- 1.6. Includes assessment of need for participant compensation and/or incentives to ensure sufficient representation rates for evaluation sample.
 - 1.7. Includes best practices in research transparency and reproducibility, including consideration of study registration, pre-analysis plan, reproducible workflow, and data sharing feasibility.
 - 1.8. Evaluator will assess language needs of regional stakeholders and determine if an Evaluation Design Brief in additional languages (Spanish, Tagalog, Mandarin, Cantonese, Vietnamese, other) is needed.
 - 1.9. Present to the CERF Inter-Agency Leadership Team and HRTCs for review/comment. The Evaluator is responsible for documenting comments and evaluator responses to comments.
 - 1.10. The Evaluation Design Report must be considered a 'living document' that is updated as necessary throughout the POP to reflect necessary course corrections to evaluation design, data collection, and other factors.
- 2. Evidence Brief for Best Practices in Inclusive Planning** – Produce evidence brief on best practices for developing inclusive planning tables, which includes defining the governance structure and informing and engaging diverse stakeholder's especially underserved communities. (No more than 10 pages). These strategies and best practices should enhance the state's capacity for guiding future processes or replicating successful approaches considering regional differences. Summarize strategies for improving cross-regional collaborations and partnerships in the context of the CERF program. Final deliverables expected within first six months of POP.
- 3. CERF Performance Metrics and Scorecard** - Recommended performance metrics that align with the program performance measures, goals, and objectives. Final deliverable expected within first six months of POP.
- 3.1. Must include defined metrics, measurement methodologies and tools, and reporting timelines.
- 4. Data Collection and Management (multiple rounds)** – Lead data collection based on approved Evaluation Design and Questionnaire
- 4.1. The Evaluator will be responsible for leading any required primary data collection and extraction of existing data for analysis and reporting.
 - 4.1.1. The Evaluator is responsible for all quality control over primary data collection, including pre-testing and pilot testing prior to data collection.
 - 4.2. Data collection dates should depend on the evaluation questions that will be answered with the data collection and may vary over time.
 - 4.3. The Evaluator will need to carefully consider the two separate phases – Planning Phase and Implementation Phase – of CERF and determine data collection, analysis, and reporting timing based on the status of CERF activities and the CERF

Theory of Change. This means some data collection may be only on Planning, only on Implementation, or across both.

- 4.4. Align questionnaire(s)/survey instrument(s) with Evaluation Design Report and alignment with evaluation questions and analysis plan.
 - 4.4.1. The Evaluator should aim for a reasonable burden of time for the data collection from any individual. Any interviews more than 30 minutes should be considered carefully and align with best practices for ensuring data quality and study participant's needs.
- 4.5. Ensure language needs of target population are met. While survey instruments may be created in English, Evaluator must assess translation and back translation needs given the expected participant population.
- 4.6. Ensure alignment with evaluation protocols, informed consent, Data Management Plan to ensure evaluation is conducted in ethical and responsible manner.
- 4.7. Ensure quality assurance process is established to assess and maintain high quality data during collection and entry.
- 4.8. Ensure data collection and management maintains required levels of protection of privacy and confidentiality as per agreed informed consent statements.
- 4.9. Ensure appropriate and secure distribution of any necessary compensation and/or incentives to study participants as per the Evaluation Design Report.

5. Analysis Report (multiple rounds) – Conduct analysis and reporting as per the agreed Evaluation Design Report and in alignment with the data collection timing and theory of change.

- 5.1. The Evaluator will need to carefully consider the two separate phases – Planning Phase and Implementation Phase – of CERF and determine data collection, analysis, and reporting timing based on the status of CERF activities and the CERF Theory of Change. This means some analysis reports may be only on Planning, only on Implementation, or across both.
- 5.2. Present findings to the CERF Inter-Agency Leadership Team and HRTCs for review/comment. The Evaluator is responsible for documenting comments and Evaluator responses to comments.
- 5.3. Ensure an analysis brief (no more than 5 pages) is produced to accompany the full Analysis Report.
- 5.4. Evaluator will assess language needs of regional stakeholders and determine if brief in additional languages is needed.
- 5.5. Assess feasibility of de-identifying data that underlies analysis report to support access to data (public or restricted-access use) for transparency and reproducibility and additional analysis.

5.5.1. Evaluator must follow all applicable laws pertaining to information privacy.⁸

5.6. The Evaluator will lead dissemination efforts, including internal and external presentations (i.e., community engagement to share findings from the evaluation with the participant populations and those populations targeted by CERF activities).

The actual deliverables schedule will be based on the final approved Evaluation Design Report, the CERF Theory of Change, and the status of CERF planning and implementation activities. The Final Analysis Report must be completed by September 2026.

⁸ This should align with efforts to work toward California's Open Data Policy, while also maintaining protection of confidentiality and privacy following Article 1 of the California Constitution, the Information Practices Act of 1977, the Information Practices Act (Civil Code Section 1798 et seq.), the Public Records Act (Government Code Section 6250 et seq.), Government Code Sections 11015.5 and 11019.9, and other applicable laws pertaining to information privacy.

B. Eligibility

Proposals will be accepted from all eligible applicants. Proposals must meet the minimum requirements established in this solicitation in order to be scored during the competitive evaluation process. The most competitive proposals will be those that incorporate the evaluation goals and objectives in a way that demonstrates an ability to encourage innovation through sustainable processes and/or business models, employing strategies that strengthen cross-cutting relationships and the program's ability to conduct system-wide evaluations.

1. Applicants

Proposals must be from organizations that possess the capacity, relationships, and expertise to conduct evaluation services on a statewide scale. Demonstrated experience conducting similar evaluation is required.

The types of entities that are eligible to serve as the Evaluator include, but are not limited to:

- Non-profit organizations, foundations, philanthropies, and research organizations
- Community-based organizations
- Institutions of higher education or consortiums of these institutions
- Education and Training Providers
- Business-related non-profit and for-profit organizations
- Labor organizations and workforce intermediaries

Individuals are not eligible to apply. The partners who individually or as part of a team have signed Collective Partnership Agreement Letters to join one of the HRTCs are not eligible to apply, unless they can demonstrate the ability to mitigate actual and perceived conflict of interest. The applicants must be based in the United States.

2. Evaluator Qualifications and Key Personnel

To meet the objectives of this evaluation, the state requests the Evaluator to provide a summary outlining their proposed staff, that staff's ability to meet the established qualifications (listed below), and their proposed assignment of the Key Personnel roles. Individual staff members may assume multiple roles as long as they meet all of the corresponding qualifications, but the Evaluator will need to provide a clear justification of how each proposed staff member meets those qualifications and how their proposed level of effort will meet the objectives of the evaluation. Approval from the CERF Inter-Agency Leadership Team will be required whenever Evaluators replace Key Personnel.

Key Personnel

- Project Manager responsible for day-to-day oversight of the evaluation activities
- Principal Investigator/Co-Principal Investigator(s) responsible for providing sector expertise (labor, workforce, economic development, resilience)
- Principal Investigator/Co-Principal Investigator responsible for providing inclusive planning and community engagement expertise
- Principal Investigator/Co-Principal Investigator responsible for evaluation methods expertise

The Evaluator must comprise a team that can demonstrate the ability to respond to all of the required qualifications below:

Required Project Manager Qualifications

- Six or more years of data and evaluation-oriented experience which must have included responsibility for the determination of design and implementation for one research and/or evaluation project.
- Ability to demonstrate strong project management skills and experience managing complex multidisciplinary research and/or evaluation projects.
- Experience coordinating evaluation planning and implementation alongside project planning and implementation to meet needs of government and other decision-makers.

Required Evaluator Qualifications

Individual staff members may meet the qualifications for more than one role or area of expertise. However, each applicant must demonstrate the ability of their team to respond, as a whole, to the requirements listed here.

- a. Sector expertise – labor, workforce development, economic development, inclusive planning. One or more team members must have demonstrated:
 - Knowledge of economic and workforce development issues and strategies with focus on California.
 - Knowledge of best practices in economic and labor market outcome indicator definition and measurement.
 - Knowledge of and experience with creating theories of change for sustainable economic development and workforce development programs.
 - Knowledge of inclusive collaborative and participatory processes, along with experience working with diverse stakeholders for instruction and evaluation outcomes of economic development planning, specially disinvested communities.
- b. Evaluation methods and statistical analysis expertise. One or more team members must have demonstrated:
 - Graduate degree or related experience in a social science (such as economics, public policy, urban planning, political science, statistics, or other related field).
 - Experience designing program evaluation using most rigorous methods feasible, such as random assignment and sampling, regression discontinuity, interrupted time series, differences-in-differences, matching, or other relevant methods.
 - Knowledge of statistics and econometrics, including experience with statistical analysis, power calculations, and sampling procedures.
 - Experience ensuring an equity lens on analysis through appropriate sampling, survey design, data analyses and reporting of differential impacts across groups (sex, race and ethnicity, income, and other relevant characteristics).
- c. Equity Lens. One or more team members must have demonstrated:

- Ability to represent regional and community interests on the evaluation team, i.e. selecting Co-Principal Investigators from CERF target regions and/or populations.
- d. Responsible and ethical data collection and survey management expertise. One or more team members must have demonstrated:
- Training on protection of human subjects and confidential data management.
 - Experience with the design and implementation of quantitative data collection methods, including questionnaire design, field sampling, efficient and secure data collection methods.
 - Experience in designing, sampling, administering, and analyzing qualitative data collection according to industry best practices, such as focus groups and key informant interviews.
 - Experience with responsible data management (collection, storage, transfer, de-identification, access).

Preferred Qualifications. One or more team members have demonstrated:

- Knowledge and understanding of the regional dynamics in California.
- Previous experience of working with or in regions in California.
- Previous experience in working with governmental organizations, through contracts or other formal processes.
- Experience producing cost-effectiveness and cost-benefit analysis of social programs
- Knowledge of threats to credibility of social science including p-hacking, selective reporting, publication bias, lack of reproducibility.
- Experience with best practices in research transparency and reproducibility, including pre-specification, standardized reporting, responsible data management and data de-identification, and reproducible workflow.
- Experience producing policy-relevant analysis in Dynamic Documents or other tools that facilitate transparency of analysis decisions.

3. Participants

The EDD is awarding 13 planning grants, as advertised in the CERF Planning Grants SFP PY 22-23 and according to the criteria established therein. The Evaluator is required to work in collaboration with CERF program awardees and must have the knowledge, experience, resources, and partnerships necessary to effectively accommodate each of the diverse target populations described in Section II.A of the Planning Phase SFP.

C. Funding

Funding timelines and corresponding decisions are based on the availability of funds. Estimated amounts and dates are not final and are subject to change.

1. Award Amount

A total of \$3.75 million from State General Funds is being made available through the criteria set forth in this SFP. The EDD anticipates one award will be granted.

Upon performance review, this award may be extended for an additional 12 month period of performance and include additional funding to complete the full scope of the evaluation.

See Appendix G: Criteria to Extend Evaluator Contract for more details on Evaluator extensions.

See Appendix F: Allowable Costs and Cost Items for more details on allowable expenses.

Note – The proposed funding is based on the anticipated availability of relevant funds. Should funding availability change, the EDD reserves the right to make any necessary adjustments.

2. Period of Performance

The Period of Performance (POP) for the CERF Evaluator under this SFP will be 36 months, with an anticipated start date of March 2023.

A contract extension from January 2026 to December 2026 may be executed in order to cover the full expected evaluation timeline based on:

- Overall Evaluator performance
- The status of CERF project implementation
- The requirements of the evaluation

The full CERF program evaluation timeline is expected to be from March 2023 to December 2026.

The obligation of funds will not be allowed before or beyond the grant's POP. Any grant funds not expended during the grant agreement period shall be returned to The State.

D. Budgeting Requirements

Applicants may apply for any amount within the allowable award range, up to \$3.75 million. Performance measures should take into account factors specific to the service area, the target population, and the reasonable cost of the proposed services.

See Appendix A: Submission Instructions and refer to the Proposal Instructions when completing all forms.

If the State chooses to extend its contract with the Evaluator, both will work together to define the scope and budget of the contract for the additional 12 months. If approved, this 12-month extension will focus on evaluating the CERF Phase II target outcomes, including:

- Job creation
- Average increases in wages
- Job retention
- Number of individuals impacted through services
- Other factors related to workforce development and the evaluation close-out report

1. Administrative Cost Limits

A maximum of ten percent of the total requested grant amount can be allocated to cover indirect and/or administrative costs. Please refer to Appendix F for a detailed definition of administrative costs.

2. Allowable Use of Funds

The funds awarded in this SFP must be used by the Evaluator to obtain and retain competitive, integrated staffing with the tools and resources to:

- Hire and appoint project-specific staff
- Train program and partner staff
- Travel for meetings, training, or other events
- Contract additional support services

Funds awarded under this SFP cannot be used to purchase real estate property or to construct buildings. For additional information on allowable costs see Appendix D and F.

3. Cost Sharing

The CERF Evaluation will be awarded at a 100% grant rate for a maximum amount of \$3.75 million. Therefore, no match is required.

4. Travel reimbursements

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

5. Subcontractor Procurement

Subcontractor procurement processes must adhere to state and local requirements. Any sub-agreements and contracts done at the direction of the EDD, as directed by the CERF Inter-Agency Leadership Team, are subject to the EDD's approval.

Procurement requirements: If a purchase is over \$2,500, Fiscal Agents must obtain three competitive quotes for purchases to justify that the cost of the equipment is reasonable. Fiscal Agents are required to obtain and keep them on file in the event they are monitored. This pertains to individual unit purchases over \$2,500 as well as purchase orders. For example, if you were buying ten laptops at \$500 each this would be a purchase order of \$5,000 and requires three competitive quotes.

Sole source procurement: If the purchase is a sole source purchase (only one vendor capable of providing an item or service, therefore it is not possible to obtain competitive bids), justification must be provided on why this cannot be competitively procured along with why the provider was selected.

All sole source purchases (regardless of price) will require a Proprietary Letter. This is a letter from the entity explaining their rights to their specialized good or services. Fiscal Agents are required to obtain and keep it on file in the event they are monitored.

6. Registration with the System for Award Management

Applicants must remain actively registered with the System for Award Management (SAM) throughout the application and award administration processes in order to receive continuous funding from this grant. SAM registration should be reviewed and updated regularly in order to ensure the Evaluator's profile information remains current, accurate, and complete. Proposals received with an inactive registration will be disqualified and may not be evaluated.

Note – The process of SAM registration and/or renewal can take several weeks to complete and requires privileged information, including financial and banking information, which may take additional time to obtain. It is the applicant's responsibility to have all information up-to-date and accessible through the SAM⁹ prior to submitting an application.

⁹ Visit the [SAM website](#) for more information about registration requirements.

II. 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 Submission Instructions in Appendix A for guidance on how to properly complete, format, and submit all elements of the Application Package. A maximum of 15 pages (12-point Arial font, single-spaced) will be accepted for the project narrative (Exhibit A). Applicants have the flexibility to decide how they want to distribute the 15 pages over the narrative requirements.

One application package will be accepted from each applicant. Do not submit more than one proposal.

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 their knowledge and background in the field. The data should reflect the applicant's comprehensive understanding of the evaluation needs specific to the identified CERF Program goals and objectives. 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 their experience serving California target populations. Appendix H suggests several data sources and tools, which applicants and successful grantees may use. Appendix I lists several useful Internet Resources available to applicants.

A. Required Proposal Content

Applicants must follow all proposal requirements and submit all required forms to be read and scored. Proposals that do not meet the minimum requirements will not be scored or considered for funding.

1. Project Narrative

The Proposal Narrative will include the following elements:

- **Evaluation Approach:** Describe the process the applicant proposes to ensure the evaluation design and implementation meet the objectives listed above. This includes the proposed process to:
 - Lead the evaluation to guide diverse stakeholders towards data-driven, actionable decisions.
 - Respond to the methodological requirements of the evaluation, including proposed preliminary metrics of success for the HRTCs for both planning and implementation phase in line with CERF priorities and objectives.

- Describe process for establishing rigorous data sources, including relying on existing data and primary data collection.
- Engage effectively and respectfully with HRTCs for purposes of community engagement, knowledge sharing, and learning.
- Engage effectively and respectfully with CERF target populations and represent the community needs in study design and implementation.
- Ensure timely, evidence-based analysis and guidance to stakeholders through two phases of CERF.
- **Staffing:** Summarize and justify how the proposed Key Personnel and organization meets all the required qualifications, as well as preferred qualifications as applicable. Please reference and refer to the Resume (included as an Attachment).
- **Partnerships:** Describe any complementary partners and possible areas of collaboration or integration.
- **Risk Assessment and Mitigation:** Describe the expected risks and risk mitigation strategy for navigating the complexity of the CERF evaluation, including:
 - Consideration of two distinct phases of CERF – Planning and Implementation.
 - Confounding factors that may affect outcomes that are outside the control of CERF. For example, significant events such as a global pandemic, wildfire, or earthquake may affect CERF project and evaluation planning, implementation, and outcomes.
- **Work Plan:** Describe the Proposed Work Plan, including the following:
 - Detailed descriptions and justification of proposed activities that reflect CERF Objectives for both planning and implementation phase.
 - Target timelines.
 - Descriptions of potential challenges and proposed solutions to conducting the evaluation.

B. Application Package Exhibits:

1. Exhibit B: Proposed Budget

The Proposed Budget should be easy to read and provide a clear understanding of how the Evaluator plans 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 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 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, and benefits), contracts, etc.

3. 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 the narrative. The Evaluator is

responsible for outlining potential activities based on the goals and objectives of this SFP (i.e. CERF Evaluation).

The Proposed Work Plan must reflect target timelines for all activities as part of this SFP.

C. Application Package Appendices

1. Resume(s)

- Must provide resumes for Key Personnel and define which Key Personnel position the resume responds to, including:
 - Project Manager responsible for day-to-day oversight of the evaluation activities
 - Principal Investigator/Co-Principal Investigator(s) responsible for providing sector expertise (labor, workforce, economic development, resilience)
 - Principal Investigator/Co-Principal Investigator responsible for providing inclusive planning and community engagement expertise.
 - Principal Investigator/Co-Principal Investigator responsible for evaluation methods expertise
- Staff resumes should reflect how the proposed staff respond to Required and/or Preferred Qualifications detailed above.
- Staff resumes cannot exceed two pages per resume (single-space, 12-point font).

2. Partnership Letter(s) (If Applicable)

Partnerships are encouraged to establish a stronger network for evaluation activities. Therefore, the applicant must demonstrate in the Project Narrative that they have the capability to deliver the evaluation and should identify any partners if necessary. SFP proposals proposing partnerships must submit Partnership Agreement Letters and describe the roles and expected contributions of the partners.

At a minimum, each proposed partner must include the following:

- Description of the type of entity and its role in the developmental evaluation.
- Description of the entity's knowledge, experience, and reason to be in the evaluation.
- Evaluation partner organization, contact person, their role, and email address or phone number.
- Date.

Additional partnerships that will ensure the most successful outcomes for participants are highly recommended. Applicants are encouraged to be innovative and explore partnerships that have the greatest potential to enhance service provision and employment opportunities under current conditions.

The team of independent reviewers will determine if the project team has the capacity and expertise in providing evaluation and will select the most qualified applicant.

D. Dates and Deadline

CERF Evaluation Application Package Timeline

Event	Date
CERF Evaluation SFP release	Monday, November 7, 2022
*Last date to email questions to EDD	Monday, November 14, 2022 by noon PT
Deadline to preregister for the webinar	Monday, November 14, 2022 by 3 p.m. PT
Informational Webinar	Thursday, November 17, 2022
Notice of Intent to Apply	Tuesday, November 22, 2022 by noon PT
Proposals due	Tuesday, December 6, 2022 by 3 p.m. PT
Proposal review and evaluation	December 12 – December 13, 2022
Deadline to appeal	Wednesday, December 14, 2022 by 3 p.m. PT
Award announcements	January 2023
Estimated project start date	March 2023

Note – All dates after the final proposal submission deadline are approximate and may be adjusted as conditions dictate, without addendum to this SFP.

*See section 3 Questions and Answers.

1. Delivery

Applicants must submit a complete Application Package with all required elements to WSBCERF@edd.ca.gov and by Tuesday, December 6, 2022 by 3:00 p.m. PT. Refer to Proposal Instructions for further guidelines on electronic submission.

1a. Electronic

Applicants must submit a copy of all required proposal elements to WSBCERF@edd.ca.gov.

2. Notice of Intent

Potential applicants are strongly encouraged to notify the EDD of their intent to apply for this funding opportunity by emailing WSBCERF@edd.ca.gov by noon on Tuesday, November 22, 2022 confirming your interest in applying. Applicants that do not provide this email notification may still apply for funding. These non-binding notifications will help inform the EDD to develop a more efficient process for reviewing grant applications in this competition. Please send the email with the following details:

- **Subject Line Title:** Notice of Intent - Community Economic Resilience Fund Program Evaluation
- Organization’s Name, Contact Person, Title, Phone Number, and Email Address.

3. Questions and Answers

Direct any questions regarding this SFP to WSBCERF@edd.ca.gov. An informational webinar is scheduled on Thursday, November 17, 2022, at 10 a.m. PT to review application requirements and answer questions regarding this SFP. For meeting information, please send an email request to WSBCERF@edd.ca.gov by 12 noon on Monday, November 14, 2022. The EDD will not be providing a

recording of the informational conference. Instead, the EDD will email all attendees the questions and answers that were received by the deadline, and a summary of the informational webinar. A full list of questions and answers will be compiled and posted on the [EDD website](#) after the informational teleconference.

The EDD will continue answering questions up until the SFP submission deadline of Tuesday, December 6, 2022. Response times may vary based on the level of research require.

III. Award and Contracting Process

After the deadline, the representatives from the EDD will review the Application Packages that meet the minimum qualifications. Funding decisions are based on scoring rubric and performance history. The team will notify all applicants regarding the status of submitted Application Packages. A summary of the project 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 set forth in this SFP. For those organizations that have participated in past grant programs with EDD’s Workforce Services Branch (WSB), 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 Inter-Agency Leadership Team will make final funding decisions based on the ranked scores and other factors such as the applicant’s past performance.

The project selected for funding is contingent on the revision and approval of the contract exhibits. Project exhibits are not automatically approved. The awardee may be required to revise the project exhibits to comply with general fund mandates during the approval contract negotiation process. The EDD Project Management Group will provide guidance should revisions be necessary. EDD reserves the right to rescind any offer of funding if the applicant does not comply with the revision process.

Additionally, the EDD and LWDA may opt to conduct interviews with the top three qualified Respondents. The EDD has allowed time in the schedule for this purpose. All interview questions will be directed to the applicant. The purpose of the interview will be to assess if the applicant is a good fit for the goals and objectives of the CERF Evaluation.

The scoring value of each section of the SFP is as follows:

CERF Scoring Rubric

Narrative Criteria	Maximum Points
Section I – Evaluation Design and Implementation	35
Section II – Key Personnel and Qualification Requirements	30
Section III – Risk Assessment and Mitigation	20
Section IV – Work Plan	5
Section V – Budget	10
Total Maximum	100

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 January 2023. An award offer does not constitute approval of the Application Package as submitted. The Evaluator is required to enter into negotiations with EDD to finalize program components, staffing levels, and administrative systems in place. 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

The EDD will contact the subrecipient to finalize contract details. The EDD may request that the contract incorporates changes to the original Application Package. After any necessary negotiations, EDD will mail the finalized contract to the subrecipient for signature. The State expects contract negotiations to begin in January 2023 with a projected start date of March 01, 2023. 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. Appeal Process

An Application Package may be disqualified for not meeting the application requirements (i.e. scope of work). Please read the SFP carefully and consult the Submission Instructions in Appendix A for detailed instructions on how to properly complete and submit all Application Package elements and 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 requirements are those conditions that must be met in order for the proposal to be forwarded for evaluation and scoring. See Application Package Requirements and Submission Instructions in Appendix A.

The 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 writing. 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 appeal, including citations to the SFP and pertinent documents.
- A statement of the relief sought.

- A scanned copy of the statement with an original wet signature of the authorized signatory authority of the organization.
- Appeals must be submitted in PDF format to WSBCERF@edd.ca.gov.

The EDD will respond to appeals via email. The review will be limited to determining whether the proposal met the application requirements of the SFP.

IV. Administrative 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.

A. Monitoring and Audits

During the performance period, subrecipients will be monitored and/or audited by the State in accordance with existing policies, procedures, and requirements governing the use of the State General Funds. 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 and accurate manner.

B. Record Retention

Awardees will be required to maintain their project and fiscal records, sufficient to allow Federal, State, and local reviewers to evaluate the project's effectiveness and ensure the proper use of funds. The record-keeping system utilized must include both original and summary (computer-generated) data sources. Subrecipients will retain all records pertinent to this contract for a period of five years from the date of the final payment of this contract.

C. Reporting

Awardees will be required to submit monthly and quarterly narrative progress reports on the status of the projects. Additionally, reporting requirements and timelines will be discussed during contract negotiations.

D. Closeout

Closeout refers to the 60-day period after the completion of either a grant or subgrant agreement, indicated by either the end of the project term or the exhaustion of available funding. During this 60-day period, the grantee or subrecipient will submit a closeout package to the EDD. The EDD will then confirm that all applicable administrative actions and work required by the grant or subgrant agreement has been completed by the subrecipient. The closeout period is a critical piece in the cycle of a grant or subgrant agreement, used by the grantee or subrecipient to liquidate remaining obligations and to prepare and transmit their final fiscal and program documentation. Closeout documents and an end-of-project narrative-based closeout report will be required 60 days after completion of the agreement. Applicants should include costs associated with closeout activities in their budget plan.

E. Compliance

All funds are subject to related State General Fund regulatory requirements. All funds are subject to their related state statutory and regulatory requirements. The Evaluator is responsible for conducting a risk assessment 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 or contract as a result of this award should

reflect its assessed risk and include monitoring, identification of deficiencies, and follow-up to ensure appropriate remediation.

F. Evaluation

A statewide activity assessment allows the state to determine the effectiveness of employed General Funds in identifying and addressing statewide needs. As a result, the EDD may pursue a statewide evaluation of the project awarded through this SFP. If a statewide evaluation takes place, the subrecipient will be required to participate in that evaluation by providing requested data and information. Therefore, the awarded subrecipient is expected to document lessons learned and best practices ascertained over the lifetime of this project.

G. Protection of Confidentiality

The EDD mandates the protection of evaluation data collected under this SFP against loss and against unauthorized access, use, disclosure, modification, or destruction.

Appendices

Appendix A: Submission Instructions

Applicants must follow the specific instructions indicated below and complete all requested exhibits included in the SFP announcement.

The Project Narrative and all Exhibits must be completed in Arial 12-point font. The Cover/Signature Page, required SFP exhibits, and mandatory appendices are not included in the 15 page limit, which applies only to the narrative. If you have any questions regarding the proposal package after having carefully reviewed the SFP and Appendices, please email the 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 proposal package. This may also be used as a checklist to help ensure submission of a complete grant package.

1. Cover/Signature Page	
2. Project Narrative – Exhibit A (must include the following sections)	
I. Evaluation Design and Implementation Process	
II. Key Personnel and Qualification Requirements	
III. Risk Assessment and Mitigation	
IV. Work Plan	
V. Budget	
3. Required Exhibits:	
Exhibit B – Proposed Budget Summary	
Exhibit B2 – Proposed Budget Narrative	
Exhibit D – Work Plan	
4. Required Appendices	
Key Personnel Resume(s)	
Partnership Letters (If Applicable)	

Cover/Signature Page

The Cover/Signature page must be completed in its entirety with the authorized signatory’s electronic signature. A PDF Cover/Signature is required when submitting the Proposal Application Package. 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 22-23 CoverPage. For example, "CommunityOrg CERF PY 22-23 CoverPage."

Project 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, CommunityOrg CERF PY 22-23 ExA for Exhibit A. 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 naming convention: [Applicant Name] [Grant Initialism] PY XX-XX [Exhibit]. For example, CommunityOrgXYZ CERF PY 22-23 ExB for Exhibit B. 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 Key Personnel Resume]. For example, CommunityOrg CERF PY 22-23 Appendices 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.

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 needed economic transitions in a given region and the tools and resources to plan for a region’s economic future in an inclusive way.

Regional Convener – The Regional Convener is the lead organization tasked with organizing an inclusive group of regional stakeholders to form the Collaborative, implement the planning grant in its region, and submit the CERF SOP.

Coordinator – Person hired or contracted by the Regional Convener to facilitate the High Road Transition Collaborative

Disinvested Communities – CERF defines ‘disinvested communities’ as the following:

1. Census tracts identified as ‘disadvantaged’ by the California Environmental Protection Agency; OR
2. 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
3. ‘High poverty area’ and ‘High unemployment area’ as designated by the California Governor’s Office of Business and Economic Development (GO-Biz) California Competes Tax Credit Program ; OR
4. California Native American Tribes as defined by the Native American Heritage Commission (NAHC) - (or other framework for social/economic marginalization)

Economic Resilience – Economic resilience refers to the ability to recover, withstand, and avoid economic shocks. This includes foreseeing, adapting, and leveraging changing conditions to a region’s economic advantage.

Equity – Sharing the benefits of the economic development plan equitably across all affected communities, both urban and rural, with targeted efforts to reach historically excluded populations and members of disinvested communities.

Evidence Brief – A summary of the available evidence on what works, what doesn’t, and evidence gaps that can inform program selection, design, and implementation. The selection criteria and definition for ‘evidence’ should be agreed with stakeholder prior to initiating to ensure the appropriate scope of evidence review.

Development Evaluation – Is an evaluation approach that can assist social innovators develop social change initiatives in complex or uncertain environments. DE originators liken their approach to the role of research & development in the private sector product development process because it facilitates real-time, or close to real-time, feedback to program staff thus facilitating a continuous development loop. More detail available here – [Developmental Evaluation](#)

Fiscal Agent – The organization responsible for disbursement of funds from the state.

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 community.”¹⁰

High Road Transition – Combines high road principles and the idea of “just transition” to conceptualize a roadmap for California’s economic recovery that emphasizes economic diversification, industrial planning, regional partnerships, social safety net, and workforce development. The implementation of these five elements must be guided by principles of sustainability; job quality; economic competitiveness; equity and shared prosperity; and inclusivity, transparency, and accountability.¹¹

High Road Transition Collaboratives – (HRTCs or Collaboratives): Inclusive regional planning groups that consist of balanced and meaningful representation from labor, business, community, government, tribal, economic development, philanthropy, education, workforce, and other partners. Like a “team of teams,” the Collaboratives incorporate existing local planning efforts and organizations from across the region.

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.

Implementation Phase – Phase II of the CERF program; applicants will advance projects throughout the region that advance globally competitive and sustainable industries with accessible and high-quality jobs.

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. An industry cluster is a group

¹⁰ [California Unemployment Insurance Code definition](#)

¹¹ Office of Planning and Research. Just Transition Roadmap, Working Draft. (page 3)

of employers closely linked by common product or services, workforce needs, similar technologies, and supply chains in a given regional economy or labor market.”¹²

Industry cluster analysis – A snapshot 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.

Inter-Agency Leadership Team – Comprised of the Labor and Workforce Development Agency, the Governor’s Office of Planning and Research, and the Governor’s Office of Business and Economic Development. The team is responsible for planning, oversight, and decision-making, 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 safe.¹³

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.

Planning Phase – Phase I of the CERF program; applicants establish inclusive, diverse, transparent, and accountable High Road Transition Collaboratives to develop localized integrated resiliency and transition plans. Currently expected to begin November 2022 and end September 2024.

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 I.

¹² [California Unemployment Insurance Code definition](#)

¹³ [Evaluation of the H RTP Initiative - UCLA](#)

Appendix C: Evaluator Administrative Responsibilities

1. 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 Federal and state regulatory requirements, and the direction of the EDD.
2. Program Ledgers, Monthly Reporting, and Invoicing – Contemporaneously maintain a separate ledger for each program that shows the total amount of funds available for each program, and monthly program deductions (e.g., payments to subcontractors, participant compensation) using an approved web-based accounting platform. At a minimum, each ledger entry should 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 submit financial reports on a monthly basis for reimbursements, or as requested, in formats prescribed by the EDD.
3. Sub-Contract Administration and Disbursement of Funds – Enter into sub-agreements with vendors and other third-parties to support the identified needs. Any sub-agreements done at the direction of EDD, as directed by the CERF Inter-Agency Leadership Team, are subject to EDD approval. Disburse funds in satisfaction of payment obligations under each sub-agreement.
4. Equipment and Personnel – Purchase and/or maintain equipment and employ personnel necessary to complete the Fiscal Agent's responsibilities as outlined in the 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. Changes to key personnel are subject to EDD approval prior to any appointment to the evaluation team.
5. Audits – Cooperate with the 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.
6. Public Records – Cooperate with the EDD in responding to any requests under the Public Records Act for records related to the fiscal agency.
7. Other Services – Provide other, similar financial or contract management services on an as-needed basis (e.g., conducting competitive bidding) to ensure the smooth administration of the funds as required by funding requirements and direction by the EDD.

Appendix D: Administrative Costs

As stated by the EDD, the following general funds 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 general funds, 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:
 - 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 general funds 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
 - 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 sub-recipients 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 on items 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.
- 5. Where possible, entities identified on items must make efforts to streamline:
 - a. services in items of relevant section to reduce administrative costs by minimizing duplication and effectively using information technology to improve services

Appendix E: 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 F: 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 both federally-financed and other activities of the non-federal entity
- Be accorded consistent treatment
- Be determined in accordance with generally accepted accounting principles
- Not be used to meet cost sharing or matching requirements of any other federally-financed program (without prior approval from the state)
- 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:

- **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.
- **Participant Compensation:** Participant compensation that is an exchange of payment for services rendered in the development of the evaluation and participation is appropriately documented with deliverables such as interviews, survey participation, or story-telling. Compensation up to \$50 per participation is allowed.

Appendix G: Criteria to Extend Evaluator Contract

Below is a sample table that might be used to determine how the Evaluator would be considered for a contract extension. The questions under the criteria portion are yes or no questions. If the Evaluator receives:

- Yes on all of the questions per column, they would score exceptional in that column.
- Yes for up to half of the questions per column, this would be considered satisfactory.
- Yes 0 – 1 times in a column would be considered poor. However, if there are only 2 questions in a column, a score of 1 would then be considered satisfactory.

A Justification column has been added to provide comments if necessary to determine an upgraded or low-rated score.

After all columns are completed, add the scores (Sections 1 – 14) and note the total score in the Evaluator Total box at the end of the table. Scoring will be completed by all partners six months prior to the end of the current grant term. The Evaluator must score an average of no less than 85 points before a renewal contract will be considered. The EDD may require changes to documents such as exhibits, budgets and workplans as necessary during a new contract negotiation if applicable.

CRITERIA	JUSTIFICATION	POINTS
Section 1:		Possible Points: 5
Did the Evaluator meet frequently with EDD, OPR and GO-Biz to develop data collection strategies? Was the Evaluator successful in determining the data to be collected? Was the Evaluator successful in the methods used to collect the data? Was the analysis of the data valid and understandable?		5 = exceptional; 3 = satisfactory; 0 = poor
Section 2:		Possible Points: 5
Did the Evaluator meet frequently with EDD, OPR and GO-Biz to provide feedback, assess progress and report challenges? Was the Evaluator successful in determining the challenges? Were the methods successful to assess progress? Was the analysis of the data successful?		5 = exceptional; 3 = satisfactory; 0 = poor
Section 3:		Possible Points: 10
Did the Evaluator participate in training opportunities? Did the Evaluator participate in mandatory meetings?		10 = exceptional; 5 = satisfactory; 0 = poor
Section 4:		Possible Points: 10
Did the Evaluator coordinate and provide a number of trainings for the program awardees and relevant stakeholders? Were the training topics relevant to the program success? Were the topics of the trainings effective?		10 = exceptional; 5 = satisfactory; 0 = poor
Section 5:		Possible Points: 5
Were the methods the Evaluator used successful in sharing best practices in guiding them in developing inclusive planning tables? Did the Evaluator engage a diverse group of stakeholders?		5 = exceptional; 3 = satisfactory; 0 = poor
Section 6:		Possible Points: 5

CRITERIA	JUSTIFICATION	POINTS
Was the Evaluator successful in developing a web-based tool or website? Is the tool user-friendly? Does the tool allow for collaboration and interaction?		5 = exceptional; 3 = satisfactory; 0 = poor
Section 7:		Possible Points: 10
Did the Evaluator provide expert opinions for developing performance metrics? Do the performance metrics align with the program performance measures, goals and objectives?		10 = exceptional; 5 = satisfactory; 0 = poor
Section 8:		Possible Points: 5
Has the Evaluator provided monthly and quarterly reports as expected? Have the reports been submitted timely? Has the information been valuable and relevant to the program?		5 = exceptional; 3 = satisfactory; 0 = poor
Section 9:		Possible Points: 10
Was the annual report for the Joint Legislative Budget Committee completed? Was the report timely? Was the information relevant to the program?		10 = exceptional; 5 = satisfactory; 0 = poor
Section 10:		Possible Points: 10
Did the Evaluator work with the partnership to develop the supplemental annual report to the legislature? Was report completed? Was the report timely? Was the information relevant to the program (i.e. entail key findings on regional trends in sustainable economic recovery and common challenges in the development and implementation of high road transition strategies?)		10 = exceptional; 5 = satisfactory; 0 = poor
Section 11:		Possible Points: 5
Were talking points developed as expected? Were briefs developed as expected? Was the information developed relevant to the program?		5 = exceptional; 3 = satisfactory; 0 = poor
Section 12:		Possible Points: 5
Did the Evaluator participate in legislative hearings? Did this occur frequently? Was the Evaluator's information relevant to the program?		5 = exceptional; 3 = satisfactory; 0 = poor
Section 13:		Possible Points: 5
Did the Evaluator coordinate and facilitate meetings, trainings and activities attended by the state and program awardees? Were the training topics relevant? Were the training topics effective?		5 = exceptional; 3 = satisfactory; 0 = poor
Section 14:		Possible Points: 10
Did the Evaluator effectively provide guidance for organizing inclusive planning tables? Were the methods used to engage these communities effective? Did the Evaluator help to make a difference?		10 = exceptional; 5 = satisfactory; 0 = poor
		Possible Points: 100
Add Sections 1-14 and fill in the Evaluator Total box		Evaluator Total:

Appendix H: Data Tools

This section introduces several tools and resources the applicants may use to prepare their applications. The State expects the applicants to use their judgment on applying appropriate tools, data sources, and methodologies.

[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.

[CalEnviroScreen](#): CalEnviroScreen is a screening methodology that helps identify California communities that are disproportionately burdened by multiple sources of pollution.

[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.

[Climate and Economic Justice Screening Tool](#): This tool helps Federal agencies identify disadvantaged communities that are marginalized, disinvested, and overburdened by pollution.

[CCHVIs](#): This tool is an interactive data visualization platform for the Climate Change & Health Vulnerability Indicators for California (CCHVIs).

Appendix I: 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.