

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

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

Section I: Project Planning

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

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

The collective vision of the Bay Area High Road Transition Collaborative (BA-HRTC) in the planning phase of CERF is to **re-envision regional economic development planning**, centered around the values of **equity, high-road employment, sustainability and climate resilience**, and **shaped by workers and impacted community/members themselves**.

Goals in the planning phase include the following:

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

BA-HRTC Fiscal Agent and Regional Convener

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

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

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

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

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

Experience and Ability to Convene BA-HRTC

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

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

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

Economic Development Dynamics of the Bay Area

Major Industries¹

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

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

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

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

¹ Vital Signs, Jobs By Industry.

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

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

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

Challenges and Opportunities Related to Shared Economic Growth and Prosperity²

Opportunities:

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

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

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

Challenges:

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

Management of Subregional/Interregional Efforts and Connection to Regional Strategy

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

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

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

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

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

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

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

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

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

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

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

Preliminary Metrics of Success

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

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

Sustainability Strategy: Planning Phase to Implementation Phase

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

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

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

Addressing Geographic Equity and Participation and Decision Making by Disinvested Communities

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

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

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

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

Activity: Stand up project staffing and infrastructure.

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

Milestone: Infrastructure positions filled.

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

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

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

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

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

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

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

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

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

Activity: Public Input Process

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

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

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

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

Activity: Data Gathering and Analysis

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

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

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

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

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

Activity: Economic Development and Transition Roadmap

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

Milestone: Regional Plan Part 2 completed:

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

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

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

Descriptions of potential challenges and proposed solutions to developing the HRTC

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

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

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

Section II: Community Engagement and Governance Structure

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

1. Introduction

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

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

The goal of community engagement should be not only to solicit input, but also to build the capacity, leadership, and knowledge of community members as they develop their own recommendations. Part of this requires giving community members meaningful decision-making authority so that they are not passive participants, but rather active agents in shaping the vision for the future of their community and the region.

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

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

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

2. Stakeholder Groups to Be Engaged

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

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

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

3. Outreach and Engagement Strategies, Models, and Activities

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

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

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

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

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

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

b. Using Proven Engagement Models

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

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

c. Building Capacity of Organizations and Groups for Ongoing Participation

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

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

d. Removing Barriers to Participation

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

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

4. Timeline and Budget

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

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

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

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

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

5. Reporting and Communication with Community

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

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

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

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

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

1. Overview – Purpose and Scope of this Letter

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

2. Purpose and Principles of the Partnership

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

Purpose: Our collective goal in the planning phase of CERF is to re-envision regional economic development planning, centered around the values of equity, high-road employment, sustainability and climate resilience, and shaped by workers and impacted community members themselves.

Principles:

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

3. Description of Partners in the Initial HRTC

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

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

4. Proposed Governance Structure of the BA-HRTC

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

a. Steering Committee

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

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

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

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

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

b. Planning Research and Engagement Committee

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

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

All Home will convene and staff this Committee.

c. Subregional Tables

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

Initial proposed tables (subject to change):

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

d. Possible Overlay of Affinity Tables or Sectoral Tables

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

e. Relationship of Governance Structure to Outreach/Engagement Work

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

5. Decision-Making Processes

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

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

6. Agreements

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

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