



Sector Investment Coordinator Request for Proposals

Bidders Conference

February 20, 2025



**BAY AREA
JOBS FIRST**
COLLABORATIVE

Agenda

Welcome

Request for proposal (RFP) Overview

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- c. Sector Investment
Coordinator Role
- d. Requirements
- e. Key Deliverables
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- h. Appeals Process
- i. Timeline
- j. FAQ

Anna Tonelli, All Home and Jack Buckhorn, Steering Committee member and Chair of the RFP Procurement Design Working Group

Contracts and Compliance

Holly Moala, Jennifer Salerno, SF OEWD

Question and Answer

Resources and Next Steps

All Home and Jack Buckhorn
Sector Investment Coordinator
Request for proposal (RFP) Overview

BACKGROUND

In 2021, Governor Newsom launched the \$600 million Regional Investment Initiative (formerly CERF and now CA Jobs First) to support California's regions **to create quality jobs and bolster their resilience to climate and global challenges** impacting the state's diverse regional economies

Through CA Jobs First, each of the 13 regions received a \$5 million, two year grant to:

- Establish regional inclusive economic planning entities;
 - Lead research and development activities to inform economic development strategy; and
 - Define the Regional Economic Plans.
-

Last year, the Bay Area Jobs First Collaborative released its Regional Plan outlining the region's needs, priority industries, opportunities, and potential strategies.

We are now in the implementation phase and seeking support to implement the Regional Plan.

BAY AREA JOBS FIRST GOVERNANCE STRUCTURE

Governed by a 21-member Steering Committee that is responsible for the strategic direction of economic development advanced by the Collaborative.

- **All Home** serves as the **Regional Convener**, supporting the coordination of the Steering Committee and its projects.
- **The San Francisco Office for Economic and Workforce Development (SF OEWD)** serves as the **fiscal agent**, managing fiscal and compliance matters for the Steering Committee.

SECTOR INVESTMENT COORDINATOR SUPPORT

- The Steering Committee **will provide oversight.**
- All Home **will serve as the project manager.**
- SF OEWD **will serve as the contract manager.**

SECTOR INVESTMENT COORDINATOR ROLE

Coordinators will help to design and implement investment strategies for sectors identified in the Regional Plan. This work includes:

- Developing and administering “Activation Plans” (investment strategies) for the region’s priority industry sectors;
- Building the capacity of the region to compete for federal, state, and other funding, as well as to attracting investments; and
- Strengthening sector relationships across the Bay Area and beyond to accelerate the implementation of sector strategies.

Coordinators will provide expertise in/ability to subcontract to individuals with expertise in, one or more of the following industries:

1. Advanced Manufacturing
2. Battery Manufacturing
3. Childcare and Early Childhood Education
4. Healthcare
5. Transportation Electrification

REQUIREMENTS FOR RFP APPLICANTS

- **Eligibility:** individuals, nonprofit organizations, companies, private firms, educational institutions, economic development and workforce development boards/collaboratives, local government, and unions.
- **Ineligibility:** Steering Committee organizations that received Catalyst funding; organizations that designed or will score the RFP proposals.
- **Award:** Cap at \$300,000 per sector (exception \$250,000 for Battery Manufacturing); applicants are eligible to apply for multiple sectors!
- **Performance Period:** No sooner than end of March 2025 until September 30, 2026.

KEY DELIVERABLES

1. Develop a **strategy (“Activation Plan”)** by June 30, 2025, for one or more of the five industries outlined in RFP.
2. **Implement** the Activation Plans - strategies, tactics, and tasks - revising as needed.
3. **Host at least four (4) convenings** with key sector stakeholders to solicit input and share information about industry strategies, funding opportunities, and other relevant topics.
4. **Provide or procure technical assistance** for post-Catalyst funding opportunities, Tribal Investment Initiative, and Regional Investment Initiative grant applications and administration.
5. **Present at Steering Committee** bi-weekly meetings as needed/requested.
6. Work with the Bay Area Jobs First Collaborative on **project management and reporting**.

PROPOSAL MATERIALS

One (1) PDF document with:

- Title Page
- Table of Contents
- Proposal Narrative Responses
- Entity Profile
- (2) Reference Letters
- Compliance Questions responses
- Required Forms
 - The Conflict-of-Interest Form
 - Notice Regarding California Public Records Act

One (1) Excel document with:

- Line-Item Budget (required template)

This all must be **RECEIVED** by 5pm on February 28th at the Bay Area Jobs First Collaborative email: bayarea-JFC@allhomeca.org

Evaluation Criteria	Maximum Points
<p>EQUITY</p> <ul style="list-style-type: none"> • Evidence of demonstrated experience in successfully working in partnership with disinvested communities to deliver on projects that also serve members of disinvested communities. • Commitment to equitable partnership and/or subcontractors from disinvested communities. 	15
<p>SATISFIES REQUIREMENTS</p> <ul style="list-style-type: none"> • Identified required expertise and qualifications necessary to perform tasks, including resumes or similar statements of qualifications of all key personnel assigned to the project. • Project intent has been met and all stated scope of work is fulfilled. • Evidence of demonstrated experience within the past 5 years. • Provide a minimum of 2 project references that demonstrate expertise in delivering similar work. 	10
<p>SUBJECT MATTER EXPERTISE</p> <ul style="list-style-type: none"> • Demonstrated experience working on similar projects in the target industry sector(s). • Appropriateness and effectiveness of the proposed methodology to address all tasks. • Expertise in additional areas listed in RFP. 	20
<p>REGION EXPERTISE</p> <ul style="list-style-type: none"> • Demonstrated expertise in conducting relevant work in the Bay Area region. 	15
<p>PROJECT MANAGEMENT</p> <ul style="list-style-type: none"> • Organizational capacity for accomplishing all tasks specified in the Scope of Work (e.g., proposed management structure, organization of proposed team, etc.). • Realistic and timely project milestones and benchmarks for completing the project. • Capability to reallocate resources as needed to meet project schedule. 	25
<p>PROJECT BUDGET</p> <ul style="list-style-type: none"> • Illustrates clear dollars for value. • Reflects the overall project objectives and program goals. • Centers equity and inclusion. 	15
Total	100 points

APPEALS PROCESS

Within two business days of written notification of the results, applicants may file a **Process Appeal, which is an appeal based upon the Collaborative's failure to abide by its established procedures in making funding recommendations.**

Process Appeals contesting the outcome of an RFP and/or a disagreement with, or objection to, the points awarded **is not a sufficient basis for a Process Appeal.**

Process Appeals will be responded to within three (3) business days of receipt.

Please read over page 15 of [the RFP](#) for more information.

Sector Investment Coordinator Procurement Timeline

Date	Milestone
February 4, 2025	RFP Application Opens
February 20, 2025	RFP Bidders Conference
February 28, 2025	Proposals must be <u>received</u> by 5:00pm (Pacific Time). Please submit your materials to the Collaborative at bayarea-JFC@allhomeca.org with the subject line “Sector Investment Coordinator - Proposal”.
March 3- March 14, 2025	Estimated internal review and evaluation of proposals - Scoring Committee of no more than five scorers
March 17 - March 28, 2025	Estimated period of award notifications and appeals process
No sooner than March 31, 2025	Estimated project start date

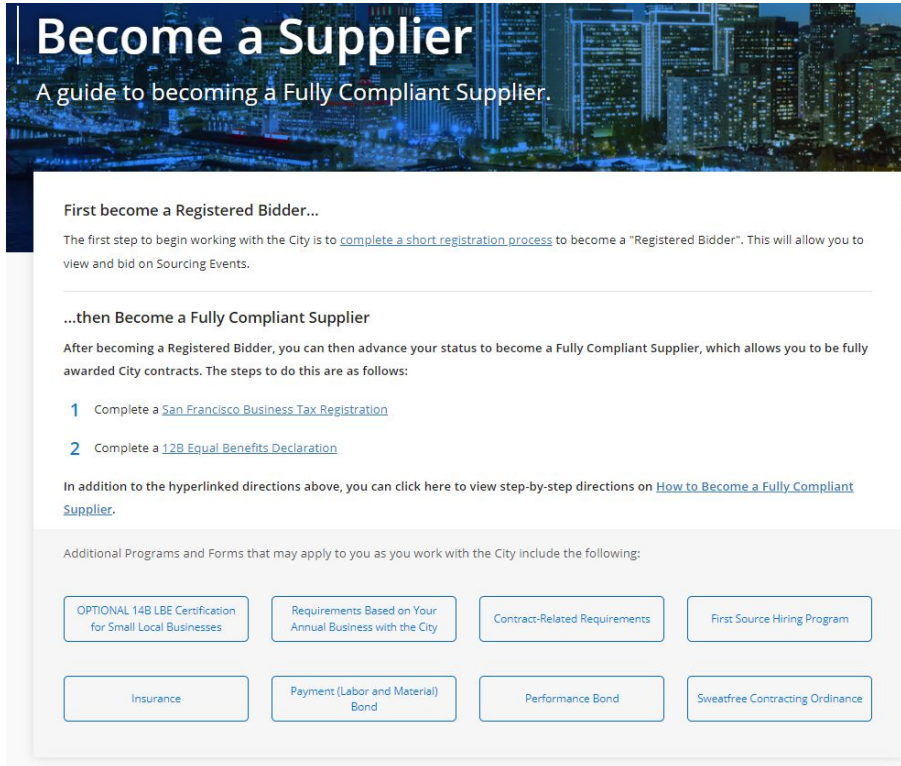
San Francisco Office for Workforce and
Economic Development (SF OEWD)
Contracts and Compliance

Supplier Compliance Requirement Instructions

- **City Supplier Registration**
- **Business Tax Compliance**
- **Equal Benefits (formerly 12B) Compliance**
- **Secretary of State (SoS)**
- **Office of Attorney General (OAG)**

Register to become a City Supplier

<https://sfcitypartner.sfgov.org/pages/become-a-supplier.aspx>



Become a Supplier

A guide to becoming a Fully Compliant Supplier.

First become a Registered Bidder...

The first step to begin working with the City is to [complete a short registration process](#) to become a "Registered Bidder". This will allow you to view and bid on Sourcing Events.

...then Become a Fully Compliant Supplier

After becoming a Registered Bidder, you can then advance your status to become a Fully Compliant Supplier, which allows you to be fully awarded City contracts. The steps to do this are as follows:

- 1 Complete a [San Francisco Business Tax Registration](#)
- 2 Complete a [12B Equal Benefits Declaration](#)

In addition to the hyperlinked directions above, you can click here to view step-by-step directions on [How to Become a Fully Compliant Supplier](#).

Additional Programs and Forms that may apply to you as you work with the City include the following:

- OPTIONAL 14B LBE Certification for Small Local Businesses
- Requirements Based on Your Annual Business with the City
- Contract-Related Requirements
- First Source Hiring Program
- Insurance
- Payment (Labor and Material) Bond
- Performance Bond
- Sweatfree Contracting Ordinance

Supplier Instructions - sfcitypartner.sfgov.org

First become a Registered Bidder...

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OPTIONAL 14B LBE Certification
for Small Local Businesses

Requirements Based on Your
Annual Business with the City

Contract-Related Requirements

First Source Hiring Program

Supplier Instructions – Business Tax

Business Registration is required for all entities that conduct business in SF and determines your tax responsibilities.

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Supplier Instructions – Business Tax

Please visit

<https://newbusiness.sfgov.org/vendor>

where you will complete a short form to determine

- **Whether your business needs to register**
- **Register your business and link your business account to your Bidder/Supplier ID**
- **Declare that you do not need to register as a business in San Francisco**

CCSF Supplier - Application Form

In-Lieu of Business Registration

I declare that my business does not need to register with the City and County of San Francisco's Office of the Treasurer & Tax Collector because it does not meet any of the following:

- Maintain a fixed place of business within San Francisco.
- Perform work or render services within San Francisco for all or part of any seven days during one tax year.
- Solicit business within San Francisco for all or part of any seven days during one tax year.
- Exercise corporate or franchise powers within San Francisco.
- Own or lease real or personal property within San Francisco for business purposes.
- Regularly maintain a stock of tangible personal property in San Francisco for sale in the ordinary course of business.
- Employ or loan capital on property within San Francisco.
- Liquidate businesses when the liquidators hold themselves out to the public as conducting such business.
- Use streets in San Francisco for business purposes for any part of seven (7) days during the tax year.
- Have more than \$500,000 in total gross receipts allocated to the City during the tax year.

If the Office of The Treasurer & Tax Collector determines that I am conducting business in San Francisco, the City may either cancel the contract or withhold payment ten days after written notification by the Tax Collector. I declare (or certify) under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that I am authorized to bind this entity contractually.

Full Name:	<input type="text"/>	Email Address:	<input type="text"/>
Name of Company	<input type="text"/>	Supplier/Bidder ID Number	<input type="text"/>
Mailing Address	<input type="text"/>	City, State, ZIP	<input type="text"/>
Tax ID Number	<input type="text"/>	Telephone Number	<input type="text"/>

[Continue](#)

Supplier Instructions – Equal Benefits

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Equal Benefits Program

- **Before you can do business with the City and County of San Francisco, you must offer employees domestic partner benefits and submit the Equal Benefits Declaration, proof of employee count, and domestic partner benefit summary.**

The Equal Benefits Program code used to be in Chapter 12B of the Administrative Code. It is now located in Articles 131 and 132 of the Labor and Employment Code.

https://www.sf.gov/sites/default/files/2024-03/san_francisco-ca-1.pdf



Equal Benefits Compliance Requirements

3 Documents Needed to Achieve Compliance

1. Complete an online Equal Benefits Declaration in the S.F. City Partner Portal <https://sfcitypartner.sfgov.org/>. If you do not have a username and password, contact the DTIS Help Desk: dtis.helpdesk@sfgov.org.

2. Provide proof of employee count (A formal document that verifies the total number of employees) Examples: IRS Form W-3 or IRS 941. For zero employees with no annual filing a self certification form is required. (Contact CMD for more information).

3. Provide a copy of a Memorandum to Employees that summarizes benefits claimed in the declaration. (Template link located in declaration)



Complying with the Equal Benefits Program

Contact the Equal Benefits Unit

415-581-2310 8:00 a.m. to 5:00 p.m.

cmd.equalbenefits@sfgov.org

<https://www.sf.gov/equal-benefits-program>

California Secretary of State (SoS)

<https://bizfileonline.sos.ca.gov/search/business>

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Business Search

The California Business Search provides access to available information for **corporations, limited liability companies and limited partnerships** of record with the California Secretary of State, with **free PDF copies** of over 17 million imaged business entity documents, including the most recent imaged Statements of Information filed for Corporations and Limited Liability Companies.

Currently, information for Limited Liability Partnerships (e.g. law firms, architecture firms, engineering firms, public accountancy firms, and land survey firms), General Partnerships, and other entity types are **not contained** in the California Business Search. If you wish to obtain information about LLPs and GPs, submit a Business Entities Order paper form to request copies of filings for these entity types. Note: This search is not intended to serve as a name reservation search. To reserve an entity name, select Forms on the left panel and select Entity Name Reservation ? Corporation, LLC, LP.

Basic Search

- A Basic search can be performed using an entity name or entity number. When conducting a search by an entity number, where applicable, **remove "C"** from the entity number. Note, a **basic search** will search **only ACTIVE entities** (Corporations, Limited Liability Companies, Limited Partnerships, Cooperatives, Name Reservations, Foreign Name Reservations, Unincorporated Common Interest Developments, and Out of State Associations). The basic search performs a contains ?keyword? search. The Advanced search allows for a ?starts with? filter. To search entities that have a status other than active or to refine search criteria, use the **Advanced** search feature.

Advanced Search

- An Advanced search is required when searching for publicly traded disclosure information or a status other than active.
- An Advanced search allows for searching by specific entity types (e.g., Nonprofit Mutual Benefit Corporation) or by entity groups (e.g., All Corporations) as well as searching by ?begins with? specific search criteria.

Disclaimer: Search results are limited to the 500 entities closest matching the entered search criteria. If your desired search result is not found within the 500 entities provided, please refine the search criteria using the Advanced search function for additional results/entities. The California Business Search is updated as documents are approved. The data provided is not a complete or certified record.

Although every attempt has been made to ensure that the information contained in the database is accurate, the Secretary of State's office is not responsible for any loss, consequence, or damage resulting directly or indirectly from reliance on the accuracy, reliability, or timeliness of the information that is provided. All such information is provided "as is." To order certified copies or certificates of status, (1) locate an entity using the search; (2) select Request Certificate in the right-hand detail drawer; and (3) complete your request online.

Search by name or file number



Advanced ▾

California Office of the Attorney General (OAG)

<https://rct.doj.ca.gov/Verification/Web/Search.aspx?facility=Y>

State of California
Department of Justice



Office of the
Attorney General

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Registry Search Tool

Search the Files of the Registry of Charitable Trusts

The Registry Search Tool allows you to query the Registry's database and verify whether a charitable organization or fundraiser has complied with the Attorney General's registration and reporting requirements. You may also review and download records and public filings that a charitable organization or fundraiser has submitted to the Attorney General's Registry of Charitable Trusts. This includes copies of annual registration renewal forms (Form RRF-1), IRS Forms 990, raffle reports and fundraising reports that are in the Registry's database. Information is retrieved from the database in real-time but data and statuses may change intraday as filings are processed.

Potential donors are encouraged to research organizations using this query tool and those available from the [Secretary of State](#), [Franchise Tax Board](#) and [IRS](#) to determine an organization's tax-exempt status and compliance status with all appropriate state and federal agencies. Each agency maintains their own database and independently determines the disposition of organizations relative to their statutory oversight. Each should be considered carefully and collectively to gain the most complete assessment possible. Donors may also benefit from reviewing our [Resources](#) and [Donation Tips](#).

State Charity Registration Number:

SOS/FTB Corporate/Organization Number (numbers only):

FEIN (numbers only):

Organization Name:

DBA:

Program Type:

Record Type:

Registry Status:

County:

City:

State:

ZIP Code:

Note: On the organization details page, under **Filings & Correspondence**, if incorrect documents seem to open when you try to download or view them, try clearing your browser's cache and then also refreshing that page. The order of the documents may change, but those two steps should clear up most issues with the links.

[Registry Status Definitions & Search Tips](#) [Downloadable Lists of Charities](#) [Charities Home Page](#)

For more information on how to cure your delinquent status, visit:
<https://oag.ca.gov/charities/delinquency>



SAN FRANCISCO

OFFICE OF ECONOMIC &
WORKFORCE DEVELOPMENT

Email our team: owd.procurement@sfgov.org

Question and Answer

Initial FAQ

Sector Investment Coordinator RFP

- **Question: I want to apply for multiple sectors; is it possible to be awarded funding for only one?**
 - If you submitted a proposal for multiple sectors, you may only be offered funding for a subset of the applied for sectors.
- **Question: I would like to apply for multiple sectors – do I have to submit a separate application for each sector?**
 - No, but please speak to your qualifications for all sectors you are applying for in your application.
- **Question: My firm would like to apply for multiple sectors – a 400-word count feels too little. Are we able to write more?**
 - For those applying for multiple sectors, please disregard the 400-word count and write what you feel is necessary to convey your qualifications for the RFP.
- **Question I am applying for the Battery Manufacturing Sector for which an Activation Plan has already been written. Is it possible to see plan to inform my proposal?**
 - Yes. Please see the Activation Plan [here](#).

RESOURCES and NEXT STEPS

- ★ RFP webpage:
<https://www.allhomeca.org/sector-investment-coordinators-rfp/>
- ★ Activation Plan for Battery Manufacturing:
https://drive.google.com/file/d/1rhKffigTcaWX7urtZtP-4_s4rbDSXv3d/view
- ★ Bay Area Jobs First Collaborative contact:
bayarea-JFC@allhomeca.org
- ★ Proposals must be **received by February 28, 5pm PST!**



GOOD LUCK!!



**BAY AREA
JOBS FIRST
COLLABORATIVE**