

Community Economic Resilience Fund (CERF)
Los Angeles Region High Road Transition Collaborative (LA HRTC)
ER-CERF-02 Economic Research and Consultation Services: Industry
Clusters, Regional Benchmark and Accountability Data Tool Request for
Proposal

I. Preface

California Senate Bill 162 (SB 162), approved September 23, 2021, established the Community Economic Resilience Fund Program (CERF). The purpose of the CERF funding is to build an equitable and sustainable economy across California's diverse regions and foster long-term economic resilience in the overall transition to a carbon-neutral economy. The Los Angeles Region High Road Transition Collaborative (LA HRTC) selected the California Community Foundation (CCF) as its Fiscal Agent, and the Los Angeles County Economic Development Corporation (LAEDC) as its Regional Convener. California Community Foundation is soliciting proposals in response to Request for Proposal (RFP) No. ER-CERF-02 Economic Research and Consultation Services: Industry Clusters, Regional Benchmark and Accountability Data Tool supporting the implementation phase of the California Community Economic Resiliency Fund (CERF) program for the Los Angeles Region.

The CERF was created to promote a sustainable and equitable recovery from the economic distress of COVID-19 by supporting new plans and strategies to diversify local economies and develop sustainable industries that create high-quality, broadly accessible jobs for all Californians.

The Community Economic Resilience Fund implements a three-phase grant structure that emphasizes inclusive planning to ensure equitable outcomes for each region's disinvested communities: the Pre-Planning Phase; the Planning Phase; and the Implementation Phase.

Pre-planning Phase: Throughout the pre-planning phase, LA County community partners convened weekly to develop the Los Angeles Region High Road Transition Collaborative (LA HRTC) proposal. **The LA HRTC selected CCF as its Fiscal Agent, and the Los Angeles County Economic Development Corporation (LAEDC) as its Regional Convener.**

The LA HRTC submitted its proposal to the State on July 25, 2022. Please visit the LA County CERF webpage at <https://laedc.org/cerf/> to read the complete LA HRTC Proposal narrative, review meeting notes, and learn more about the partners involved.

The statewide CERF program will provide \$5 million in planning grants for each region (a total of 13 designated regions in the state) to inform regional investment opportunities based on actionable research in partnership and shared decision-making with communities and in consultation with expert institutions, with a focus on the CERF objectives of equity, sustainability, job quality, economic competitiveness, and resilience.

Planning grants can be used for a wide range of planning activities, including capacity-building, community engagement, and research to inform projects eligible for funding during the Implementation Phase. Plans developed during this phase must be submitted to the State and will help identify projects eligible for funding during the Implementation Phase of the program.

In Phase II, the State will fund implementation projects on a rolling basis identified in the planning phase based on criteria such as demonstrated community support, alignment with state climate goals, and demonstration of labor standards and job quality.

Participants interested in applying for Phase II implementation grants must participate during the planning phase or receive a letter of support from the HRTC to be eligible for funding.

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The RFP is comprised of the following parts presented herein as Attachments:

- Attachment 1 – Line-Item Budget (Cost Proposal)
- Attachment 2 – LA HRTC - Conflict of Interest Form
- Attachment 3 – Vendor Information (to be completed by the prime & all subs)
- Attachment 4 – Notice Regarding California Public Records Act
- Attachment 5 – CCF Contractor Check List

II. Project Description

The purpose of the Community Economic Resilience Fund (CERF) Program funding is to build an equitable and sustainable economy across California’s diverse regions and foster long-term economic resilience in the overall transition to a carbon-neutral economy. The CERF Program is intended to:

- Support the development of meaningfully inclusive regional planning processes that produce regional roadmaps for economic development efforts that prioritize the creation of accessible, high-quality jobs in sustainable industries.
- Invest in projects proposed by regional planning tables that align with regional strategies and meet criteria for equity, job quality, and sustainability, among others.
- Align and leverage state investments (e.g., High Road Training Partnerships, community capacity building programs), federal investments (e.g., Infrastructure Investment and Jobs Act), and philanthropic and private-sector investments in regions to maximize economic development efforts.

To achieve this goal, the State will allocate \$5 million in planning grants for each region across thirteen designated economic regions across California to fund the development of region-specific economic development strategies that support the creation of quality jobs and equal access to those jobs. Los Angeles County has been identified as one of those thirteen finalized CERF Regions.

Los Angeles County is home to the largest metropolitan economy in the state, the second largest in the nation, and one of the largest in the world. The Gross County Product (GCP) would rank it among the top 20 national economies in the world, and yet inequity in our economy leaves more residents in LA County living in poverty than in any county in the nation. These residents living in poverty are disproportionately people of color. Latinos, African-Americans, Native Americans and certain Asian Pacific Islander populations are far more likely to be in poverty or working poor than white residents.

Despite the benefits of education, at every level of educational attainment, there are racial and gender wage gaps. Blacks and Native Americans have historically had the lowest labor force participation rates and the highest unemployment rates in LA County.

The COVID-19 Pandemic has revealed deep disparities that impact recovery and exposed the existence of new inequities and unmet needs among LA county residents. Confronting these and other inequities will be central to the work of the LA HRTC.

Prioritizing equity to uplift our most disinvested communities requires identifying how the benefits and burdens of economic development, regional planning, and other relevant processes are distributed in and across communities; identifying and institutionalizing remedies to systemic barriers facing specific

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groups; and identifying present-day disparities of sub-populations and high unemployment areas, while confronting the planning, development, and decision making processes that are driving existing barriers and creating new levels of inequity.

Addressing equity in the LA region requires moving beyond "leveling the playing field" which prioritizes equality over equity. Approaching equity in this way is inadequate to achieve CERF's transformational goals, as groups are not starting at the same place due to historical disinvestment, unprecedented adverse impacts of the pandemic, and the worsening effects of climate change.

We are seeking qualified consultants to conduct a thorough data driven analysis of the LA region, prioritizing the above principles to identify barriers to recovery, engage, and ultimately invest in strategies to support the most disinvested communities in our region to transition toward becoming more sustainable and resilient. This analysis will inform the development of our plan for the LA region and will be integral to the design of our governance structure and outreach and engagement strategies.

Regional Plans are to include two parts. Part 1 presents a snapshot of socio-economic conditions in the region: mapping stakeholders, providing a regional summary, and conducting analyses. Part 2 establishes a forward-looking economic development and transition roadmap using the information obtained in Part 1.

Subregional/Interregional Focus

As the most populous CERF region in California, with more than 10 million residents in Los Angeles County, residing in 88 cities and over 100 unincorporated communities spread across more than 4,000 square miles of urban, suburban, and rural areas, it is important to recognize the distinct subregions of Los Angeles County and consider their unique challenges and opportunities related to CERF goals. We propose to do this by utilizing the eight Service Planning Areas (SPAs) designated by Los Angeles County, (with the intention of dividing at least the South Los Angeles SPA, and others as needed), to conduct research and data analysis.

Our HRTC is committed to geographic equity. Hundreds of census tracts in the LA Region qualify as disinvested communities under the state's definition, and they are spread broadly throughout the more than 4,000 square miles of Los Angeles County.

The long and shameful legacy of disinvestment in certain communities in south and east Los Angeles has received well-deserved local, state, and national attention, but far less attention has been paid to similarly disinvested communities in the San Fernando Valley, San Gabriel Valley, Antelope Valley, and other communities across LA County.

Our collaborative is committed to conducting extensive research, data analysis, and community outreach and engagement to provide a truly data-driven and community-informed process to defining, identifying, and meaningfully engaging all of the disinvested communities in the LA region that encompass the state's definition set forth in the CERF guidelines.

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III. Funding Available

Up to \$150,000 of funding will be available through September 30, 2024. Awarded Applicant may receive up to a 25% advance of funds. The funding source for this RFP is The State of California via Employment Development Department (EDD).

IV. Eligible Organizations

All awarded private and not-for-profit organizations **must not be** suspended or debarred from receiving federal, state, or local funding. CCF will not award contracts to or consent to subcontractors with bidders, contractors, or affiliates that appear on any disqualified, suspended, or debarment list issued by any agency of the federal, state, or local government. Applicants cannot be covered by a prohibition or restriction or excluded from doing business with the government.

Eligible applicants must also comply with all Conflict-of-Interest requirements (Conflict-of-Interest forms must be fully completed by all parties identified in the proposal). Please see Attachment 2 – LA HRTC – Conflict-of-Interest Form.

Applicants must be able to adhere and provide all items on CCF Contractor Checklist (Please see Attachment 5 – CCF Contractor Check List)

V. Contract Term

The contract term for contracts awarded through this RFP will be from contract start date TBD, no later than October 27, 2023. The estimated period of performance for this contract is eight (8) weeks. All expenses must be included in the budget approved by CCF.

**VI. Scope of Work – ER-CERF-02 Economic Research and Consultation Services:
Industry Clusters, Regional Benchmark and Accountability Data Tool**

The CERF Program requires research that provides a snapshot of current major industries (regional benchmarking) as well as industry cluster trends and projections (including job growth). An in-depth analysis of potential high growth, key, sustainable industry clusters must be provided. These clusters will be identified based on the region’s comparative advantages, business establishments, market trends, workforce, infrastructure assets, policy trends, aligned state/federal investments, venture capital investment, supply chain, and innovation ecosystem. Additionally, major sources of GHG emissions, air and water pollution, and toxic or hazardous waste from existing or proposed clusters are to be identified.

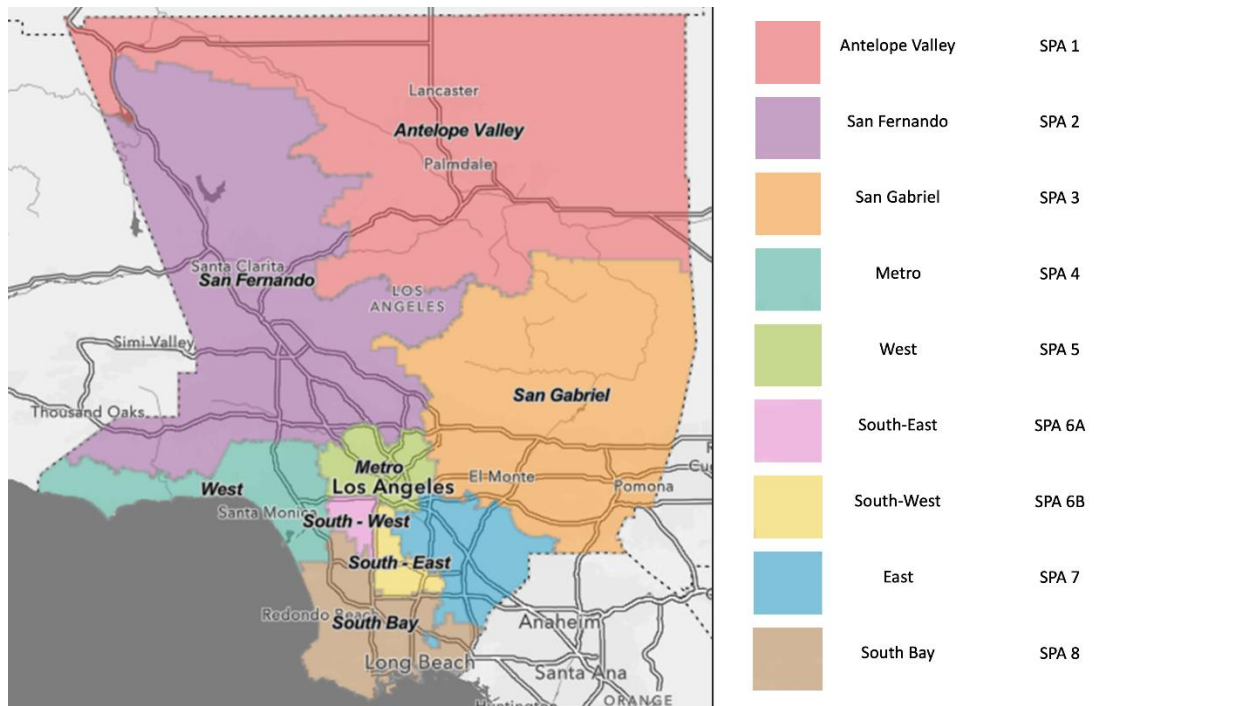
The Los Angeles HRTC is seeking a qualified consultant to develop a countywide **Regional Benchmark and Accountability Data Tool** with a dynamic geographic overlay of all nine subregions identified by the HRTC (Los Angeles County Service Planning Areas (SPA) 1 through SPA 8, with SPA 6 split into part 6-a and part 6-b. See map.). The data tool will be used by industry, education and community-based organizations (CBOs) in the HRTC to understand their constituent challenges, unmet needs and barriers

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to recovery, in order to draw conclusions, make predictions, and drive informed decision making.

As part of the **Industry Clusters** analysis, an assessment of the impacts of climate change on targeted emerging industries, sectors, or clusters and how these impacts might hinder success of the proposed plans and transition strategies (e.g., damage to critical infrastructure, cost of pollution control, loss of productivity, loss of population) will be included.

Any proposed analysis of these high-growth, sustainable industry clusters would need to address economic conditions experienced by the various demographic groups residing in the region and demonstrate a plan as to how best to capture missing gaps as well as partners necessary to assist with outreach and survey efforts to the different ethnic groups.



The chosen consultant is expected to gather subregional input from diverse stakeholders (industry, education, CBOs, etc.). Existing data and regional impacts, analysis, and recommendations are to be disaggregated for the following regional county assessment components:

- Economy and economic development
- Labor market and industry cluster analysis
- Public health
- Climate and environmental impacts
- Ethnic, gender, & tribal studies data analysis

Numerous organizations produce existing industry cluster-based work specific to Los Angeles County that is publicly available. To avoid redundancy, please identify existing research available that is germane to this scope of work and outline how you intend to leverage this work wherever possible.

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For reporting and transparency purposes, the awardee will also be required to provide monthly updates that include a summary of any conducted interviews with individuals or organizations.

VII. Key Deliverables

During the eight-week research period, the chosen consultant may be required to attend stakeholder meetings to compile data and gather into a report for other stakeholder groups to disaggregate and use to make informed decisions. At the end of the research period, consultants will be required to submit a final report based on their findings in compliance with instructions from the state of California, the fiscal agent, and the regional convenor.

Based on the requirements in this RFP, please use the following roadmap components to provide estimated time frames to each of the following so we can understand your rate of efficiency.

- Present the research/analysis work plan and approach to complete the State’s content requirements;
- Outline the final research report and any products;
- Summarize progress and remaining gaps and show how gaps will be filled;
- Provide the quantitative and qualitative outputs generated thus far;
- Describe the use of research in community engagement efforts; and
- Specify the next steps, with considerations or implications based on the work already undertaken.

VIII. RFP Timeline Overview

All complete proposals received by the submission deadline will be submitted for review. Proposals will be scored independently based on the criteria outlined in the *Review* section of this RFP. Final funding recommendations for this RFP will be based on the overall score of the proposal.

RFP Timeline	
ITEM	DATE
RFP Release	August 10, 2023
Proposal Conference	August 16, 2023; 3 PM
Written Questions Deadline	August 25, 2023; 5 PM (PT)
Submission Deadline	Tuesday, September 5, 2023; 3 PM (PT)
Process Appeal Deadline	Thursday, September 7, 2023; 5 PM (PT)
Review/Approval	September 8 – 15, 2023
Notification of Award	September 20, 2023
Contract Start	TBD, no later than October 20, 2023

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IX. Due Date – Submission

Proposals submitted in response to this RFP will be due in accordance with the following dates: All proposals must be received by electronic delivery no later than **3:00 PM (Pacific Time), September 5, 2023** at CCF-CERF@calfund.org with the subject line “**ER-CERF-02 Economic Research and Consultation Services: Industry Clusters, Regional Benchmark and Accountability Data Tool RFP**” Applications will not be accepted via facsimile or paper submission.

Proposal amendments and/or addendum submitted to CCF after the proposal deadline will be returned without review. However, CCF reserves the right to request clarification of unclear or ambiguous statements made in proposals.

X. Proposal Conference

The purpose of the conference is to provide new or updated solicitation information, provide clarification regarding the RFP package, and answer general questions regarding proposal preparation. All Prospective applicants are encouraged to attend the Proposal Conference. However, attendance is not mandatory.

XI. Application Questions

Applicants are encouraged, but not required, to submit questions in writing no later than **5:00 PM (Pacific Time), August 25, 2023**. You may direct your questions regarding this RFP to CCF-CERF@calfund.org with the subject line “**ER-CERF-02 Economic Research and Consultation Services: Industry Clusters, Regional Benchmark and Accountability Data Tool RFP – Question(s)**” Please include your name and title, the name of your organization and the best telephone number to reach you, if a CCF representative needs to speak with you for further clarification. CCF will post written responses to all received questions on the CCF website no later than (5) business days from the Written Questions deadline. Applicants are responsible for checking the CCF website to obtain current information and responses.

XII. Review – Scoring Criteria

1. Proposals will be ranked in accordance with the Evaluation Criteria described below.
2. Applicants may or may not be invited for an interview.
3. The HRTC does not reimburse applicants for any cost of proposal preparation (including but not limited to parking, printing, postage, travel, etc.), even in the event of RFP cancellation.
4. Communication between the applicant and any member of the Proposal Review Committee involved in the selection process is prohibited, except when and in the manner expressly authorized in this RFP. Violation of this restriction is grounds for disqualification.
5. The HRTC shall award the contract for this RFP to the firm that it deems to have provided the best value to the HRTC or the firm the HRTC deems to be the best qualified for contract award (or both).

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Evaluation Criteria	Max Points Possible
<p>SATISFIES REQUIREMENTS</p> <ul style="list-style-type: none"> ● Identified required expertise and qualifications necessary to perform task, including resumes or similar statement of qualifications of all key personnels assigned to the project. ● Project intent has been met and all stated scope of work is fulfilled. ● Provide evidence of commitment to equitable partnership and/or subcontractors from minority or disinvested communities. This can be demonstrated through a reference letter. ● Demonstrate that in the planning and execution of the scope of work, a plan is in place to ensure equitable representation. 	30 points
<p>TECHNICAL INNOVATION</p> <ul style="list-style-type: none"> ● Demonstrated expertise in county-specific economic analysis activities related to all tasks. ● Appropriateness and effectiveness of the proposed methodology to address all tasks. ● Expertise in additional areas listed in RFP. ● Creative/innovative approach. 	30 points
<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.). ● Project milestones and benchmarks for completing the project. ● Capability to reallocate resources as needed to meet project schedule. ● Ability to be 'on call' with reasonable notice. 	10 points
<p>PROJECT COST</p> <ul style="list-style-type: none"> ● Realistic rate for services to be performed. 	30 points
<p>Reference Letters (Optional)</p> <ul style="list-style-type: none"> ● No more than three reference letters may be provided. Letters must include the name(s), email(s) and phone number(s) of contact persons within the firms. 	Yes/No
TOTAL	100 points

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XIII. No Commitment to Award

Issuance of this RFP and receipt of proposals is not a commitment to award a contract. CCF expressly reserves the right to postpone proposal opening or award for its own convenience, to accept or reject any or all proposals received in response to this RFP, to negotiate with more than one Applicant concurrently, or to cancel all or part of this RFP.

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Proposal Submittal – Application

Email (1) PDF copy of your Technical Proposal to CCF-CERF@calfund.org
Upload your proposed budget as a separate Excel workbook file using the HRTC Line-Item Budget PRIME Template included in this RFP. The workbook contains a pricing sheet that you must complete for the prime and any sub consultants. There is a separate tab for each sub-consultant.

You **MUST** submit your proposal to CCF-CERF@calfund.org. No other means of submission shall be accepted by the HRTC. Again, allow sufficient time before the due Date/Time.

All proposals shall contain the following information, at a minimum:

1. Title Page

Provide the following on the Title Page:

- RFP Name: (ER-CERF-01 Economic Research and Consultation Services) Request for Proposal
- Title of the Project
- Name and Address of Firm
- Phone Number of Firm - Do not include non-business (personal) phone numbers or address in as this information may become public under the California Public Records Act (Please see Attachment 4 – Notice Regarding California Public Records Act)
- Prime Contact Person
- Email Address of the Prime Contact Person
- Signature of the Individual Authorized/Obligated to Commit the Firm to this Project Cover letter should be addressed to the attention of the Contract Administrator

2. Table of Contents

- A clear identification of the materials by section and page numbers.

3. Technical Approach

- A statement and discussion of the project objectives, concerns, and key issues.
- The technical approach for performing the tasks must include a detailed Scope of Work along with the process for executing the requirements and objectives of the project.
- A discussion of the difficulties expected or anticipated in performing the tasks, along with a discussion of how the consultant proposes to overcome or mitigate against those difficulties.
- A detailed schedule for completion of the work, including performance and delivery schedules indicating phases or segments of the project, milestones, and significant events.
- A statement of the extent to which the consultant’s proposed approach and Scope of Work will meet or exceed the stated objectives discussed in this RFP. Furthermore, a discussion of how the consultant would modify the project, and/or schedule to better meet these objectives.

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4. Line -Item Budget (Cost Proposal)

- Proposals must include a Line-Item Budget in the format and detail shown in Attachment 1 – Line-Item Budget (Cost Proposal). The same detailed budget is required of each subcontractor.

5. Profile Form

- A statement indicating if the firm is local or national and a summary of representative experience relevant to the work described in the Scope of Work for this RFP.
- The location and telephone number of the office from which the work is to be done.
- Identification of the individuals who will perform the work, including officers, project manager and key staff. State the time commitment and include resumes for key individuals. Do not include social security numbers, non-business (personal) phone numbers or address in a resume as this information may become public under the California Public Records Act (see Attachment 9).

6. Reference Letters (Optional)

- No more than three reference letters may be provided. Letters must include the name(s), email(s) and phone number(s) of contact persons within the firms. References should not include any HRTC staff.

7. Required Forms

- The Conflict-of-Interest Form (Attachment 2 – LA HRTC - Conflict-of-Interest Form) must be fully completed by all parties to the proposal (prime and all sub-contractors).
- All applicants must ensure that they have fully completed a Vendor Information Form (Attachment 3 – Vendor Information) to be completed by the prime consultant and all sub- sub-contractors).
- All applicants must fully complete the Notice Regarding California Public Records Act (Attachment 4 – Notice Regarding California Public Records Act) regardless of whether applicant is requesting to exempt proposal from disclosure under the California Public Records Act.

The selected consultant will be required to complete a Federal Form W-9 (for payment purposes). Also, must be able to provide all items as detailed in Attachment 5 – CCF Contractor Check List

Additional Information: Contract Terms

XIV. Budget

Applicants are required to submit a budget for the term of the contract, which will allow them to operate at an optimal level. Applicants must submit a complete budget for the total cost of the proposed project. The estimated period of performance for this contract is eight (8) weeks. All expenses must be included in the budget approved by CCF.

CCF uses the Line-Item Budget to assess the fairness and reasonableness of an applicant's costs. Once CCF awards a contract, the negotiated Line-Item Budget serves as the basis for reimbursing the applicant.

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Upload your Line-item budget as a separate Excel workbook file in (from the rest of your Technical Proposal) using Attachment 1 – Line-Item Budget (Cost Proposal) template available on-line.

Disclaimer – Each applicant is responsible for all mathematical calculations and information provided on the Line-Item Budget template.

XV. Timeliness Standards

The Applicant is expected to demonstrate the ability to begin project operations by the contract start date TBD, no later than October 20, 2023 and to fully utilize grant funds within the proposed contract term. Proposals must demonstrate a plan for rapid implementation. The Applicant is expected to initiate the approved project(s) promptly under the requirements of this RFP and the state and local regulations governing the awarded funding.

XVI. Proposed Contract

The Applicant, if selected through this RFP and subsequently selected for the award, shall be required to enter a written agreement with CCF. The proposed contract may include, but is not limited to, all pertinent terms and conditions outlined in this RFP, including those added by addendum, and to reflect the Applicant's offer or the outcome of the contract negotiations, if any, conducted with the Applicant. Applicants unable or unwilling to comply with CCF policies and procedures will not be considered for funding under this RFP.

Corrective actions may be imposed on a provider for non-compliance with regulations, contract requirements, and other applicable professional standards. Should a provider fail for any reason to comply with the contractual obligations of their contract, CCF reserves the right to take remedial action at its discretion. CCF, at its sole discretion, may impose remedial actions for cause including but not limited to the following: Notice of Noncompliance, Withholding of Payment, and/or Termination.

XVII. RFP Addendum/Clarifications

If it becomes necessary to revise any part of this RFP after the RFP is released, a written addendum will be posted on the CCF website at [insert CCF CERF website here]. It is the responsibility of the Applicant to review any publicly available addendum or information on the CCF website prior to submission of the proposal.

XVIII. Appeals Process

After the Quality Review Evaluation is completed, CCF will notify all applicants of its Quality Review Results. **Within two business days of written notification of the Quality Review Results**, applicants may file a Process Appeal, which is an appeal based upon CCF's failure to abide by its established procedures in making funding recommendations. Process Appeals

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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.

The Process Appeal must be in writing and shall be limited to two (2) typed pages. The appeal must clearly state the factual grounds on which the appeal is based. All Process Appeal requests must be on an organization's letterhead and entitled "ER-CERF-02 Economic Research and Consultation Services: Industry Clusters, Regional Benchmark and Accountability Data Tool RFP – Process Appeal" Please do not include cover letters with the appeal request.

Process Appeals will be presented to the President/CEO or her/his designee. A Process Appeal must meet all the following criteria to be considered:

1. The request for the appeal must be submitted by the date and time specified by the RFP.
 2. The person or entity requesting the appeal must assert in appropriate detail with factual reasons that CCF materially failed to follow procedures specified in its RFP document.
 3. The request for the appeal must set forth sufficient detail to demonstrate that, but for CCF's alleged failure, the applicant would have been a successful applicant.
 4. All Process Appeals must be in writing and emailed, within two (2) days of receiving a decision, to at CCF-CERF@calfund.org. On subject line of email submission please write "ER-CERF-01 Economic Research and Consultation Services RFP – Process Appeal"
- Appeals will not be accepted via facsimile or paper submission.

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APPLICATION CONDITIONS AND RESERVATIONS

- A. All costs of responding to this RFP shall be borne solely by the Applicant. CCF shall not be liable for any expenses incurred by the Applicant in the preparation and/or submission of the information requested in this RFP. The Applicant shall not include any such expenses as part of their itemized budget in their RFP.
- B. During this RFP, Applicants may revise and re-submit their responses before the submission deadline.
- C. Responses may be withdrawn by written request of the authorized signatory on Applicant's organization letterhead at any time.
- D. CCF reserves the right to verify information provided in each response. If an insufficient number of responses are received, CCF reserves the right to re-issue an RFP, execute a sole- source contract, or take any other action deemed appropriate by CCF.
- E. CCF reserves the sole right to decline any submission in response to this RFP, if it is deemed inappropriate or incomplete, it fails to comply with any instruction contained in this RFP or is not in the best interest of CCF.
- F. CCF reserves the right to withdraw this Request for Proposal at any time without prior notice. Further, CCF makes no representation that any contract will be awarded to any applicant responding to this RFP. CCF reserves the right to reject any or all submissions.
- G. It is improper for any CCF employee to solicit consideration, in any form, from an Applicant with the implication, suggestion or statement that the Applicant will obtain any type of favorable treatment arising out of this RFP or that the Applicant's failure to provide such consideration may negatively affect the Applicant. An Applicant shall not offer or give, either directly or through an intermediary, consideration, in any form, to a CCF employee for the purpose of securing any type of favorable treatment that may arise from the RFP. An Applicant shall immediately report any attempt by a CCF employee to solicit such improper consideration for any reason whatsoever. The report shall be made to the Executive Director of CCF. Among other items, such improper consideration may take the form of cash, discounts, and service, the provision of travel or entertainment, or tangible gifts.
- H. Please be advised that, CCF may only consider minor modifications that clarify clauses in its existing contract template, and shall not entertain making major/substantive changes to or removing any clause, specifically:
 - Invoicing for Payment
 - Invoicing Format and Content
 - Penalty
 - Work Products and Related Work Materials
 - Ownership, Confidentiality, and Use of Work Products
 - Indemnity
 - Insurance
- I. Negotiate with any, all or none of the applicants. If CCF is unable to negotiate final contract terms and conditions that are acceptable to CCF, CCF reserves the right to award the contract to

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another applicant.

- J. Award a contract to other than the lowest priced proposal.
- K. Award a contract without interviews, discussions, or negotiations.
- L. Only award a contract or any portion thereof to a firm that possesses a valid business license. Firms must possess the license from any city or state by the RFP due date. CCF must be provided with a copy of this license, if requested; and
- M. Only award a contract or any portion thereof to a firm that passes any references checks.

LA HRTC - CONFLICT OF INTEREST FORM

SECTION I: INSTRUCTIONS

All persons or firms seeking contracts must complete and submit a LA HRTC Conflict of Interest Form along with the proposal. This requirement also applies to any proposed subconsultant(s). Failure to comply with this requirement may cause your proposal to be declared non-responsive.

Any questions regarding the information required to be disclosed in this form should be directed to California Community Foundation (CCF), especially if you answer “yes” to any question in this form, as doing so **MAY** also disqualify your firm from submitting an offer on this proposal.

Name of Firm: _____

Name of Preparer: _____

Project Title: _____

RFP Number: _____ Date Submitted: _____

SECTION II: QUESTIONS

1. Have you or any members of your firm been an employee of California Community Foundation (CCF) or Los Angeles County Economic Development Corporation (LAEDC) within the last twelve (12) months?

YES NO

If “yes,” please list name, position, and dates of service:

Name	Position	Dates of Service
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

2. Are you or any managers, partners, or officers of your firm related by blood or marriage/domestic partnership to California Community Foundation (CCF) or Los Angeles County Economic Development Corporation (LAEDC)?

YES NO

If “yes,” please list name and the nature of the relationship:

Name	Relationship
_____	_____
_____	_____

SECTION III: VALIDATION STATEMENT

This Validation Statement must be completed and signed by at least one General Partner, Owner, Principal, or Officer authorized to legally commit the proposer.

DECLARATION

I, (printed full name) _____, hereby declare that I am the (position or title) _____ of (firm name) _____, and that I am duly authorized to execute this Validation Statement on behalf of this entity. I hereby state that this LA HRTC Conflict of Interest Form dated _____ is correct and current as submitted. I acknowledge that any false, deceptive, or fraudulent statements on this Validation Statement will result in rejection of my contract proposal.

Signature of Person Certifying for Proposer
(original signature required)

Date

NOTICE

A materially false statement, omission, or fraudulent inducement made in connection with this LA HRTC Conflict of Interest Form is sufficient cause for rejection of the contract proposal or revocation of a prior contract award.

CONTRACTOR/VENDOR FORM

- New Contractor/Vendor
- Update Contractor/Vendor Record

NEW VENDOR INFORMATION

Vendor Name (as it appears on the W-9): _____

Vendor doing Business As (DBA): _____

Vendor EIN/Tax ID/SS#: _____

Mailing Address: _____

City/State/Zip: _____

Telephone: _____

EFT Notification Email: _____

EFT Contact Name: _____

Purchase Order Notification Email: _____

Purchase Order Contact Name: _____

Vendor requires 1099?

Yes No

UPDATING VENDOR INFORMATION

Previous Vendor Information		New Vendor Information	
Vendor Name:		Vendor Name:	
Vendor DBA:		Vendor DBA:	
Street Address:		Street Address:	
City/State/Zip:		City/State/Zip:	
Telephone:		Telephone:	
EFT Email:		EFT Email:	
EFT Contact Name:		EFT Contact Name:	
PO Email:		PO Email:	
PO Contact Name:		PO Contact Name:	

Requested By: _____ Signature: _____ Date _____

For Internal Use

Completed By: _____ Date: _____

Notice Regarding California Public Records Act

Section 1 - Summary

A proposal submitted in response to this RFP will be subject to public disclosure pursuant to the California Public Records Act, Cal. Gov. Code section 6250 et. seq., (the "Act"). The Act provides generally that all records relating to a public agency's business are open to public inspection and copying, unless specifically exempt from public disclosure under one of several exemptions set forth in the Act. If you believe that any portion of your proposal is exempt from disclosure under the California Public Records Act, **you must: 1). Mark such portion "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY," within your proposal; 2). Complete Section 2 below, and 3). Include this Attachment 9 in your submittal**, or your proposal will be subject to public disclosure under the Act. Proposals marked "TRADE SECRET," "CONFIDENTIAL," OR "PROPRIETARY" in their entirety will not be honored, and CCF will not deny public disclosure of proposals so marked. By submitting a proposal with specific material marked "TRADE SECRET," "CONFIDENTIAL," or "PROPRIETARY," you represent you have a good faith belief that the material is exempt from disclosure under the Act; however, such designations will not necessarily be conclusive. You may be required to further justify in writing why such material should not, upon request, be disclosed by CCF under the Act. Fee and pricing proposals are not considered "TRADE SECRETS", "CONFIDENTIAL", or "PROPRIETARY".

If CCF denies disclosure, then by submitting your proposal you agree to reimburse CCF for, and to indemnify, defend, and hold harmless CCF, its officers, fiduciaries, employees, and agents from and against any and all claims, damages, losses, liabilities, suits, judgments, fines, penalties, costs, and expenses including, without limitation, attorneys' fees, expenses and court costs of any nature whatsoever (collectively, "Claims") arising from, in connection with, or relating to CCF's non-disclosure. By submitting your proposal, you also agree to defend, indemnify, and hold harmless CCF from and against any and all Claims arising from, in connection with, or relating to CCF's public disclosure of any such designated portions of your proposal if CCF reasonably determines disclosure is deemed required by law, or if disclosure is ordered by a court of competent jurisdiction.

Section 2 - Exemption Request

Page Number of Proposal	Brief Explanation for the Exemption Under the Act and any Other Comments



California Community Foundation Contractor Check List

Required Contractor Qualifications

The following documentation is required for any entity the Foundation will be paying for services, whether classified as an Individual/Sole Proprietor, LLC, or Corporation.

- 1) Copies of any required business license or tax registrations specific to your business location. Documentation should be recent (1 year).
 - Guidance re: State of California [business registrations](#)
 - Guidance re: Los Angeles County [business licenses](#)
 - Guidance re: City of Los Angeles [Business Tax Registration Certification](#)
- 2) Documentation of contracts with other entities to provide the same or similar services
 - Options include but are not limited to: client list, list of references, etc.
 - Documentation should be recent (1-3 years)
- 3) Documentation of the same or similar services being publicly advertised and available
 - Options include but are not limited to: website, email blast, other media
- 4) W-9 (<https://www.irs.gov/pub/irs-pdf/fw9.pdf>)
- 5) Contact information, including physical address, phone, and email
- 6) Proposed scope of work
- 7) Term for services
- 8) Pricing for services

Please submit the above documentation to your Foundation contact or to grantsmanager@calfund.org.

Please initial to confirm you have read and acknowledge the above items must be received prior to the Foundation issuing payment: _____