***Imperial County***

***Workforce Development Board***

**Request for Proposals**

**Valley Works**

**Lithium Valley Workforce and Economic Development Needs Assessment**

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| Home | Imperial County Workforce Development Board |  |  |

This copy of the RFP incorporates all Amendments:

No. 1, dated: February 16, 2024

No. 2, dated: February 16, 2024

No. 3, dated February 16, 2024

No. 4, dated February 16, 2024

***December 2023***

The Valley Works Lithium Valley Workforce and Economic Development Needs Assessment project is funded 100% by $750,000 in federal grant funds from the U.S. Department of Labor awarded to the County of Imperial by the California Employment Development Department.

The grant financed 0% from non-federal sources.

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| **I.** **Project Overview** |

This overview provides essential information on the purpose of this solicitation; background on Imperial County’s Lithium Valley and a grant awarded to the County for a Workforce and Economic Development Needs Assessment; and objectives of the needs assessment, its resulting report, and corresponding recommendations.

**A. Purpose**

On behalf of the Imperial County Board of Supervisors, the Imperial County Workforce Development Board (ICWDB) has received federal Workforce Innovation and Opportunity Act (WIOA) funding to commission an analysis of anticipated economic change in Imperial County that will result from development of new local industries to extract lithium and other rare minerals and, potentially, utilize these materials in manufacturing of batteries and other consumer products. Utilizing WIOA funding awarded by the California Employment Development Department (EDD), ICWDB is seeking expert services to conduct a Lithium Valley Workforce and Economic Development Needs Assessment, which will result in a report summarizing its findings, along with recommendations for specific actions as the county and its workforce prepare for the likelihood of a dramatic shift in the economy.

**B. Background**

The desired analysis is prompted by economic opportunities associated with Imperial County’s Lithium Valley. Award of federal grant funds and the ICWDB’s establishment of a uniquely talented steering committee have led to the development of this Request for Proposals (RFP) from qualified firms, organizations, or institutions.

***Lithium Valley***

Imperial County’s Salton Sea Known Geothermal Resource Area (KGRA) is rich with Geothermal Brine containing critical minerals like manganese and zinc, but most importantly lithium. Lithium is critical for the production of batteries for electric vehicles and other consumer and commercial electronics. Interest in development of mineral extraction and manufacturing plants has grown exponentially in recent years, with investments coming into the county in the billions. As cited in the Lithium Valley Economic Opportunity Investment Plan, industry professionals estimate that there are more than fifteen (15) million tons of lithium in the KGRA, which will take approximately 50 to 100 years to extract. The emergence of the lithium and rare minerals extraction industry has the potential to usher in numerous ancillary opportunities and industries. This could, in theory, lead to thousands of new jobs in Imperial County, which has historically faced significant economic hardships and uncertainty, while consistently managing unemployment rates in the double digits.

***Award of WIOA Funds***

In late 2022, Imperial County Workforce and Economic Development, which serves as the administrative agency for the ICWDB, applied for and received $750,000 is WIOA Title I 25% Additional Assistance funds from California EDD to commission a Workforce and Economic Needs Assessment pursuant to opportunities in the Lithium Valley. Imperial County’s vision for this critical analysis has been to seek significant input from communities, stakeholders, and individuals throughout the Imperial Valley to ensure that the assessment and resulting recommendations reflect the goals of producing wide ranging economic and workforce benefits for all Imperial County residents.

In July and August 2023, ICWDB led a series of planning sessions to kick off its work on the Needs Assessment project. These sessions benefited from large attendance by representatives from businesses, organizations, and groups representing diverse interests and points of view. In addition to providing a mechanism for input, the sessions offered direction to ICWDB regarding its plans for community outreach and development of an open, competitive solicitation to procure expert support to conduct the Workforce and Economic Needs Assessment.

$650,000 is available to be awarded under this RFP.

***Establishment of the Valley Works Steering Committee***

Based on input provided in initial planning meetings, the ICWDB established a 13-member “Valley Works” Steering Committee, which includes representation from business, government, labor, education, community organizations, and workforce development. The Valley Works brand was established for the Workforce and Economic Needs Assessment as an extension of the Lithium Valley Economic Opportunity Investment Plan, which was adopted by the Imperial County Board of Supervisors in 2022. The steering committee has been instrumental in developing plans for community engagement and in recommending strategies for this Valley Works Lithium Valley Needs Workforce and Economic Needs Assessment RFP.

**C. Objectives**

The successful proposer will develop an in-depth understanding of economic and workforce conditions in Imperial County, the Lithium Valley opportunity, and broad assets and challenges that exist across Imperial County communities. Given this understanding and knowledge, the needs assessment, its resulting report, and corresponding recommendations will:

1. Analyze economic and workforce opportunities presented by the discovery of significant deposits of lithium and other rare minerals at the Salton Sea Known Geothermal Resource Area in Imperial County (e.g., the Lithium Valley opportunity).

2. Assess current workforce capacity and current credentials, training, and occupational skills in Imperial County and the readiness of local institutions, programs, and resources to increase the capabilities of local workers to meet the needs of current and new industries, such as those directly tied to lithium extraction and to secondary industries, including manufacturing, hazardous waste removal, infrastructure, and logistics, associated with the Lithium Valley. Concurrently, assess economic opportunities for the expansion and development of a lithium extraction and processing industry cluster linked to factors, such as, but not limited to, proximity to the border with Mexico, advances in industrial technology, availability of land, and remote work.

3. Identify barriers, such as regulations, to economic and workforce expansion and improvement that exist in the county. These may include factors such as limited access to career technical education training; lack of resources in remote communities; limited access to career services and career pathways that lead to quality jobs; lower than ideal education attainment by workers; lack of infrastructure in various regions of the county; future availability of water for industrial purposes; environmental issues, such as threats at the Salton Sea; quality of life factors, such as the presence of venues and attractions for a diverse population; “flight” from Imperial County among younger residents reaching adulthood; insufficient healthcare resources; and lack of diversification in the current economy.

4. Establish goals and benchmarks for increases in workforce preparation, educational attainment, job specific skills development among workers, workforce participation rates, development of diverse training programs and career pathways, industry diversification, business development and attraction, jobs paying a family supporting wage, equitable distribution of opportunities for economic and job security, and related factors.

5. Develop a series of recommendations and plan of action for implementing workforce and economic development improvements, along with other improvements to local challenges, which are to be expressed in a written report. The report must be useable and recommendations must be implementable by a wide-range of Imperial County workforce and economic development stakeholders, along with public and private investors.

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| **II.** **Project Design and Deliverables** |

The information that follows summarizes minimum services to be provided by the successful proposer; outcomes to achieved in connection with the needs assessment project; and project deliverables.

**A. Services**

Through this RFP, ICWDB is seeking expert services in conducting a Lithium Valley Workforce and Economic Development Needs Assessment and developing a corresponding report, including recommendations, on the results of the assessment. The proposer entity that is selected as a result of this RFP will have profound knowledge of workforce and economic development and significant experience analyzing impacts and developing strategies to increase their effectiveness. Services provided by the successful proposer will address the objectives of this RFP (item I.C), will achieve project outcomes (item II.B), and produce required deliverables (item II.C).

**B. Outcomes**

The successful proposer will produce and/or provide the following as part of the project.

***1. Analysis of Current Economy and Workforce***

a. Analysis of and information on the current workforce in Imperial County.

This should include, at a minimum, demographics, worker migration patterns, education levels, skill sets, and gaps between workers’ skills and those required by predominant Imperial County industries.

b. Analysis of and information on industries that are currently predominant in Imperial County.

This should include, at a minimum, major industries in terms of gross revenues and number of individuals employed; growth or decline of these industries over time; number of businesses in each industry and size of these businesses; locations of these businesses; major occupations in these industries; wages paid by jobs in these industries; and skills needed for entry-level and higher positions.

c. Analysis of and information on existing jobs in Imperial County.

This should include, at a minimum, the job titles in which most Imperial County residents are employed; requirements to qualify for these jobs; where the jobs are located; what the jobs pay; training related to these jobs; number of jobs currently available; length of time businesses wait to fill jobs; and jobs filled by individuals residing outside the County.

d. Analysis of and information on key assets and challenges in Imperial County that do or could affect economic and workforce conditions.

This should include, at a minimum, availability of vocational and workforce skills training programs; graduation rates from local educational institutions; network of support agencies; availability of affordable housing; health and wellness data; environmental issues; infrastructure of all types; young residents leaving the area when they reach adulthood; and geographic location of Imperial County.

***2. Analysis of Potential Changes to the Economy and Workforce Resulting from the Lithium Valley Opportunity and Other Factors***

Analysis and information should include, as applicable, examples or summaries from other locations (e.g., counties, cities, or regions) dealing with the potential for significant economic and workforce changes.

a. Analysis of and information on economic opportunities likely to result from the Lithium Valley opportunity.

This should include, at a minimum, the overall economic impact of the Lithium Valley opportunity to Imperial County over the next decade; effects on family income; impact on land value; and other potential effects on the overall economy of the County.

b. Analysis of and information on workforce opportunities, jobs, and skills tied to lithium and rare mineral extraction.

This should include, at a minimum, a detailed description of the jobs that will be directly produced by lithium and other rare mineral extraction in the Lithium Valey and the skills needed by workers that will perform these jobs.

c. Analysis of and information on “secondary industries” that could be established in Imperial County given the Lithium Valley opportunity and other factors.

This should include, at a minimum, description of other industries, such as manufacturing and transportation and logistics, which may follow growth in Lithium Valley; requirements for such industries to establish operations in Imperial County; occupations associated with these industries; and skills needed by workers.

d. Analysis of and information on workforce and economic development needs prompted by the Lithium Valley opportunity, the establishment of secondary industries in the County, and the economic multiplier effect on other industries.

This should include, at a minimum, a summary of considerations and priorities for federal, state, Imperial County, and municipal governments; private industry; the public workforce development system; K-12 school systems; post-secondary education; economic development agencies; support services agencies; and others with a stake in the improvement of workforce and economic development efforts in the County.

e. Analysis of and information on factors that may limit economic expansion in Imperial County.

This should include, at a minimum, a summary of considerations and priorities addressing availability of vocational and workforce skills training programs; capacity and graduation rates from local educational institutions; network of support agencies; availability of housing; health and wellness data; environmental issues; infrastructure of all types; young residents leaving the area when they reach adulthood; the geographic location of Imperial County; and regulations.

***3. Recommendations to Prepare for Economic and Workforce Changes***

Recommendations should include, as applicable, examples or summaries from other locations (e.g., counties, cities, or regions) that have successfully prepared for substantial economic and workforce changes.

a. Recommendations for education, training, work experience, and skills development directly tied to the Lithium Valley opportunity and other industries.

This should include, at a minimum, a list of occupations and related skills needed for plant operations, mineral extraction, and other site-specific functions. In addition to skills addressed in coursework recently developed by Imperial Valley College, identify other skills needed to support the development, establishment, and growth of jobs in the Lithium Valley. The same information should be provided for secondary industries and for other emerging or promising industries.

b. Recommendations to create a workforce capable of attracting new industries and businesses.

This should include, at a minimum, the skills most valuable to businesses in general; skills with the greatest application across a wide range of industries and businesses; and skills with transferability between existing Imperial County industries and those that are emerging or have potential for locating in the area.

c. Recommendations to address existing and potential gaps in workforce skills throughout Imperial County.

This should include, at a minimum, strategies and modalities for increasing skills in the workforce; increasing rates of educational attainment; ensuring that training content remains relevant and up-to-date; increasing workforce participation rates; and roles of K-12 education, post-secondary education, private vocational training providers, business, organized labor, economic development, the public workforce system, and others.

d. Recommendations to address other factors that may limit economic expansion in Imperial County.

This should include, at a minimum, recommendations to address challenges such as the following, as they relate to workforce and economic development needs of Imperial County: availability of housing; health and wellness issues; environmental issues; infrastructure of all types; young residents leaving the area when they reach adulthood; the geographic location of Imperial County; and regulations.

e. A “road map” for transforming recommendations into a plan of action for Imperial County.

This should include, at a minimum, recommendations for a sequenced plan of action, with details on the roles of private industry, government, education, workforce development, economic development, labor, community-based agencies, and other stakeholders.

**C. Deliverables**

The successful proposer will deliver the following to ICWDB:

1. A needs assessment completed in accordance with a plan developed by the proposer and agreed to by the ICWDB.

2. A report summarizing the results of the assessment and the outcomes outlined above.

3. Recommendations for a “plan of action” by Imperial County, ICWDB, and workforce and economic development stakeholders throughout the county. Recommendations providing this “road map” will be embedded in the report.

4. A presentation to the ICWDB and other local workforce and economic development stakeholders on the results of the Valley Works Lithium Valley Workforce and Economic Needs Assessment, along with a plan for promoting the Need Assessments report and its recommendations to communities, organizations, and individuals throughout Imperial County.

The ICWDB retains the right to negotiate deliverables with the successful proposer. ICWDB aims to foster collaboration with the selected contractor to achieve the most effective and innovative solutions for Imperial County.

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| **III.** **Proposal Requirements** **and Required Proposal Content** |

Described below are proposer eligibility requirements; term of the project; requirements for registration with the federal system for award management; required proposal content; and proposal formatting requirements.

**A. Eligible Proposers**

The ICWDB is seeking the services of a private firm, non-profit entity, or public institution with substantial experience and expertise in conducting assessments and developing recommendations and reports of the type described above.

The ICWDB welcomes joint venture proposals or partnerships representing two or more organizations. Such proposals must identify a lead entity as fiscal agent for the project. In cases where a proposal is submitted on behalf of a partnership, a *Partnership Agreement Letter* for each partner must be submitted. At a minimum, the *Partnership Agreement Letter* must describe each partner's role and expected contribution to the project.

If a joint venture or partnership proposal is recommended for funding, Imperial County will execute a contract with the designated lead agency. The lead agency will be responsible for entering into subcontracts with its partners. Such subcontracts must meet all requirements of WIOA and of the contract executed between Imperial County and the lead agency.

**B. Project Term**

The period of performance for the Lithium Valley Workforce and Economic Development Needs Assessment project funded under this RFP will be approximately 14 months, with an anticipated start date of May 1, 2024, and a firm end date of June 30, 2025. The 14-month term of the project includes all necessary implementation and start-up activities. No obligation of funds will be allowed before or beyond the grant period of performance. Any funds not expended during the grant agreement period shall be returned to the ICWDB, which will be returned to EDD.

**C. Registration with the Federal System for Award Management**

Proposers must register with the federal System for Award Management (SAM) to apply for and receive funding through this RFP. Registration with the SAM must be reviewed and updated every 12 months for an organization’s information to remain current, accurate, and complete in the SAM database. A recipient of federal funding, such as the funding available through this RFP, must maintain active SAM registration with current information during any period the organization has an application under consideration or an active federal award, including federal funding distributed through ICWDB. Applicants must ensure that this information is updated before applying for funding. Proposals received with an inactive registration will not be evaluated and will, therefore, be disqualified.

Note: The registration and/or renewal process can take several weeks to complete and requires privileged information, including financial and banking information, which may take time to obtain. Proposers must have all information up to date and accessible through the SAM before submitting a proposal. Visit the [SAM website](https://sam.gov/content/entity-registration) for more information about registration requirements.

**D. Required Content of Proposals**

Required content of proposals submitted in response to this RFP specified in Technical Appendix A.

**E. Proposal Formatting Requirements**

The format for required content, which is summarized in Technical Appendix A, is dictated by document type, which are fill-in-the-blank. The exception to this structure is the Proposal Narrative (Form B), for which the formatting requirement is as follows: the narrative must not exceed 20 pages, and proposers must use a 12-point font, single line spacing, and 1 inch margins.

Note that Partnership Agreement Letters, which apply only to proposals representing joint ventures or partnerships, may be formatted at the discretion of proposers. As indicated in Technical Appendix A, these letters are to be submitted in Adobe PDF format. Staff resumes must be included in the proposal. They may also be formatted in accordance with proposer preferences. They are to be submitted in Adobe PDF format.

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| **IV. Funding and Budget Requirements** |

Following is information on funding for the project; allowable use of project funds; and administrative cost limits and indirect costs.

**A. Project Funding**

A total of $650,000 in WIOA Title I Governor’s Discretionary Grants funding is available through this RFP. The funds awarded through this RFP must achieve the objectives of and produce the deliverables specified in this RFP. The proposer will primarily use funds to appoint staff and for project-related staff travel. Available funding is based on a grant awarded by the California EDD to ICWDB specifically for the purposes outlined in this RFP.

**B. Allowable Use of Project Funds**

The funds awarded through this RFP must be used to achieve the objectives of this RFP. The proper and improper use of these grant funds is governed by: (1) WIOA and its associated federal regulations; (2) state and federal directives guidance publications; and (3) the Federal Office of Management and Budget (OMB) Uniform Guidance for Grants and Agreements. Refer to Technical Appendices B and C for information on WIOA allowable costs and details on administrative costs. Funds awarded under this RFP cannot be used to purchase real property or to construct buildings.

**C. Administrative Cost Limits and Indirect Costs**

Under this funding opportunity, the administrative portion of indirect costs charged to this grant and the total direct administrative charges may not exceed the maximum WIOA allowable 10% administrative costs. For proposer’s charging indirect costs, indicate how indirect costs are determined (Negotiated Indirect Cost Rate Agreement (NICRA), Cost Allocation Plan (CAP), or De Minimis. Indirect Cost Rate must be negotiated and approved by Cognizant Agency, per Appendices III or IV to Uniform Guidance, 2CFR200, and a copy of the Negotiated Indirect Cost Rate Agreement (NICRA) must be submitted prior to contract execution. Please refer to Appendix D for the definition of administrative costs and California Employment Development Department Directive WSD18-15 for more information on indirect costs.

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| **V. Proposal Submission** |

Information on proposal submission includes significant dates and deadlines; notice of intent to apply; submission format; proposers’ questions; ex parte communication; and electronic submission of proposals.

**A. Significant Dates and Deadlines**

Dates and deadlines affecting proposals submitted in response to the RFP include the following:

|  |  |
| --- | --- |
| ***Event/Action*** | ***Date*** |
| Publication of RFP on ICWDB website | December 20, 2023 |
| RFP question and answer (Q&A) process opens | December 20, 2023 |
| Registration for Proposers’ Informational Webinar opens | December 21, 2023 |
| Registration for Proposers’ Informational Webinar closes | January 4, 2024 |
| ICWDB’s first RFP Q&A response published | January 5, 2024 |
| Informational Proposers’ Webinar (optional) | January 8, 2024 |
| ICWDB’s second RFP Q&A response published | January 19, 2024 |
| Notice of Intent to Apply Due (optional) | February 1, 2024 |
| ICWDB’s third RFP Q&A response published | February 2, 2024 |
| ICWDB’s fourth RFP Q&A response published | February 16, 2024 |
| RFP Q&A process closes | February 19, 2024 |
| ICWDB’s fifth RFP Q&A response published | February 23, 2024 |
| **Proposals due via email by 5:00 p.m. PST** | **March 1, 2024** |
| Review and evaluation of proposals completed | March 15, 2024 |
| Announcement of proposer recommended for funding | March 18, 2024 |
| Deadline to appeal funding recommendation | March 25, 2024 |
| Appeals process completed | March 29, 2024 |
| Estimated project start date | May 1, 2024 |

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

**B. Notice of Intent to Apply**

Proposers are strongly encouraged to notify the ICWDB of their intent to apply for this funding opportunity by sending a short email message with the applicant organization’s name and address to [JeffreyBurquist@co.imperial.ca.us](mailto:JeffreyBurquist@co.imperial.ca.us) by 5:00 p.m. PST on February 1, 2024. The subject line should reflect “Intent to Apply: Valley Works Needs Assessment” Proposers that do not provide this email notification may still apply for funding. These non-binding notifications will help the ICWDB prepare for implementation of an efficient process for reviewing proposals received in response to this RFP.

**C. Submission Format**

Proposers must electronically submit the proposal package as described under item V.F, below.” The proposal package must include the Cover/Signature page with a scanned original signature in PDF format. All other forms must be submitted in Microsoft Word, with required hyperlinks, as appropriate. Partnership Agreement Letters and resumes should be submitted in PDF format.

The complete proposal package must consist of:

|  |  |  |
| --- | --- | --- |
| ***Form*** | ***Document***  ***Type*** | ***Naming Convention*** |
| Form A | Adobe PDF | [Proposer’s Name] Form A: VW Cover/Signature Page with scanned original signature |
| Form B | MS Word | [Proposer’s Name] Form B: VW Proposal Narrative |
| Form C | MS Word | [Proposer’s Name] Form C: VW Proposal Budget |
| Form D | MS Word | [Proposer’s Name] Form D: VW Proposal Budget Narrative |
| Form E | MS Word | [Proposer’s Name] Form E: VW Proposer’s Work Plan |
| Form F | MS Word | [Proposer’s Name] Form F: VW Proposer’s References |
| Form G | MS Word | [Proposer’s Name] Form G: VW Proposer’s Work Samples |
| N/A | Adobe PDF | [Proposer’s Name] VW RFP Staff Resumes |
| N/A | Adobe PDF | [Proposer’s Name] VW RFP Partnership Agreement Letters (as applicable) |

Much of this information is reiterated in Technical Appendix A.

**D. Proposers’ Questions**

ICWDB anticipates that potential proposers may have questions about the RFP and preparation of proposals. To address such questions, ICWDB will implement the following:

Informational Webinar: An optional informational webinar to review application requirements and is scheduled for January 8, 2024, at 10:00 a.m. PST. To register for the informational RFP webinar, potential proposers should email [JeffreyBurquist@co.imperial.ca.us](mailto:JeffreyBurquist@co.imperial.ca.us) with the subject line “RFP Webinar Registration.” The body of the email should indicate the organization’s name and individuals who will be participating. Registration for the webinar opens on December 21, 2023, and closes on January 4, 2024.

An Open Question and Answer Process: Beginning on December 20, 2023, potential proposers may submit questions in writing to the ICWDB about this RFP. Questions should be submitted in writing to [JeffreyBurquist@co.imperial.ca.us](mailto:JeffreyBurquist@co.imperial.ca.us), with “RFP Question(s)” written in the subject line. ICWDB will respond to questions by publishing a question and answer summary on its website (ivworkforce.com) on the following dates: January 5, 2024, January 19, 2024, February 2, 2024, February 16, 2024, and February 23, 2024. The last day to submit questions about the RFP is February 19, 2024.

**E. Prohibition on Ex Parte Communications**

Ex parte communication regarding this RFP is strictly prohibited by the ICWDB. Such instances include any communication concerning this procurement with members of ICWDB, members of the Imperial County Board of Supervisors, employees of the County of Imperial, or members of the Valley Works Steering Committee, which was instrumental in the development of the RFP. Proof of prohibited ex parte communication is grounds for ineligibility to participate in or receive funding resulting from this RFP.

It should also be noted that organizations represented on the Valley Works Steering Committee are ineligible to receive funding resulting from this RFP.

**F. Electronic Submission of the Proposal**

Proposers must submit a complete proposal package with all required content by email as a ZIP file to [JeffreyBurquist@co.imperial.ca.us](mailto:JeffreyBurquist@co.imperial.ca.us) by 5:00 p.m. PST on March 1, 2024. The subject line must state “[Proposer’s Name] Lithium Valley Needs Assessment Proposal.” Proposers must ensure that the Cover/Signature Page (Form A) is signed by an individual with authority to legally bind the proposer organization.

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| **VI. Contract Award** |

Provided below is a summary of processes for proposal review, rating, ranking, and recommendations; appeals; and award notification.

**A. Proposal Review, Rating, Ranking, and Recommendations**

After the proposal submission deadline, ICWDB representatives will vet proposals based on the minimum qualifications established in this RFP, and administer a competitive evaluation for all proposals that meet the minimum qualifications.

ICWDB will appoint an RFP Evaluation Committee, which will review, rate, and rank proposals based on the criteria outlined in this RFP. The scoring value of each section of the RFP is as follows:

|  |  |
| --- | --- |
| **Proposal Element** | **Maximum**  **Points** |
| RFP Form B, Proposal Narrative Part 1: Capabilities and Experience; RFP Form F, References; and RFP Form G, Work Samples. | 30 |
| RFP Form B, Proposal Narrative Part 2: Approach to Conducting the Needs Assessment, Developing the Report, and Providing Recommendations | 30 |
| RFP Form B, Proposal Narrative Part 3: Final Product – Report on Lithium Valley Needs Assessment and Recommendations for Action | 30 |
| RFP Forms C and D, Budget and Budget Narrative | 5 |
| RFP Form E, Work Plan | 5 |
| **TOTAL** | **100** |

The ICWDB and the RFP Evaluation Committee retains the right to conduct applicant interviews, at their discretion, following the evaluation proceedings. Only one proposal will be recommended for funding. Following the committee’s recommendation to fund a proposal, ICWDB will notify all proposers regarding the status of all submitted proposals.

**B. Appeals Process**

After the entire RFP rating process is completed, a notice of funding will be issued to all proposers providing notification of agency funding or non-funding status. All proposers will have five (5) working days after the notice date to file an appeal.

All appeals must be in writing and sent by email to [JeffreyBurquist@co.imperial.ca.us](mailto:JeffreyBurquist@co.imperial.ca.us). An appeal must include the nature of the appeal and the requested resolution. ICWDB staff will review all submitted appeals and will present them to the ICWDB for a final decision.

**C. Award Notification and Contract Execution**

Following the conclusion on the appeals process, ICWDB officials will notify the recommended proposer of the Imperial County’s intent to make an award to and enter into a contract with the proposer as a result of this RFP. Execution of a contract will require formal approval of the ICWDB and the Imperial County Board of Supervisors, along with completion and submission of signed compliance documents required by WIOA, State of California, and Imperial County.

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| **VII. Administrative Requirements** |

Information that follows includes: monitoring and audits; record retention; reporting; project closeout; compliance; intellectual property rights/creative common attribution license; and public communication-certain information requirements.

**A. Monitoring and Audits**

During the grant/contract period, grant recipients/contractors will be monitored and/or audited by ICWDB in accordance with existing policies, procedures, and requirements governing the use of federal funds. Grant recipients/contractors are expected to be responsive to all reviewers’ requests, provide reasonable and timely access to records and staff, facilitate access to subcontractors, and communicate with reviewers in a timely manner. Complete and accurate reporting is essential during the monitoring process. Grant recipients that expend over $750,000 in federal funds from any source must complete a single or program-specific audit for the fiscal year per the Single Audit Act for State and Local Agencies, 1996 Amendments, Public Law 104-156. For additional details, refer to California Employment Development Department Directive [WSD20-03,](https://edd.ca.gov/Jobs_and_Training/Active_Directives.htm) Subject: Audit Requirements (October 13, 2020).

**B. Record Retention**

Grant recipients/contractors and subcontractors, if applicable, will be required to maintain the project and fiscal records sufficient to allow federal, state, and local reviewers to evaluate the project’s effectiveness and proper use of funds. The record-keeping system must include both original and summary (computer-generated) data sources. Subrecipients will retain all records pertinent to the grant contractor for a period of five years from the date of the final payment of the contract.

**C. Reporting**

The grant recipient/contractor is expected to maintain contact with the ICWDB throughout the program and provide updated reports as requested. The grant recipient/contractor is required to submit monthly progress reports, along with its respective invoices, to the ICWDB to ensure the goals and objectives of this project are being met. Additionally, reporting requirements and timelines will be discussed during contract development.

**D. Project Closeout**

Following the Uniform Guidance, 2 CFR 200.344 Closeout, federal award recipients are required to submit, no later than 120 calendar days after the end date of the period of performance, all financial, performance, and other reports as required by the terms and conditions of the Federal award and per the guidance established by the State of California.

**E. Compliance**

All funds under this contract are subject to related state and federal statutory and regulatory requirements. These requirements are detailed in governing documents, including the WIOA and its associated federal regulations, OMB Circulars, and Title 29 of the Code of Federal Regulations.

**F. Intellectual Property Rights/Creative Common Attribution License**

Recipients of a federal award, such as funds under the contract to be executed as a result of this RFP, obtain the title to intangible property once it has been acquired. The recipient must use the property for the originally authorized purpose and must not encumber the property without approval from the United State Department of Labor (DOL). Further, the DOL has the right to obtain, reproduce, publish, or otherwise use the data produced under a federal award, and authorize others to receive, reproduce, publish, or otherwise use such data for federal purposes (Uniform Guidance Section 200.315[a],[d]). In addition, the DOL requires intellectual property developed under a competitive federal award process to be licensed under a Creative Commons Attribution license. This license allows subsequent users to copy, distribute, transmit and adapt the copyrighted work and requires such users to attribute the work in the manner specified by the recipient (DOL Exceptions 2 CFR Section 2900.13). Refer to State of California Employment Development Department Directive Property – Purchasing, Inventory, and Disposal ([WSD16-10](https://edd.ca.gov/Jobs_and_Training/Active_Directives.htm)) (November 10, 2016) for more information.

**G. Public Communication-Certain Information Requirements**

Pursuant to P.L. 117-103, Division H, Title V, Section 505, when issuing statements, press releases, requests for proposals, bid solicitations, and other documents describing projects or programs funded in whole or in part with Federal money, all non-Federal entities receiving Federal funds shall clearly state: the percentage of the total costs of the program or project which will be financed with Federal money; the dollar amount of federal funds for the project or program; and the percentage and dollar amount of the total costs of the project or program that will be financed by non-governmental sources. The requirements of this term are separate from those in 2 CFR Part 200, and, when applicable, both must be complied with.

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| **VIII. Technical Appendices** |

The Technical Appendices to this RFP consist of:

* Appendix A: Proposal Package Instructions
* Appendix B: Allowable Costs and Costs Matrix
* Appendix C: WIOA Administrative Costs

Technical Appendices begin on the following page.

**TECHNICAL APPENDIX A**

**PROPOSAL PACKAGE CONTENTS**

A complete proposal package will consist of the following content:

**1. Proposal Cover/Signature Page (Form A)**

* Format: Adobe PDF
* Refer to RFP item X.A.

**2. Proposal Narrative (Form B)**

* Format: Microsoft Word
* Refer to RFP item X.B.

**3. Proposal Budget (Form C)**

* Format: Microsoft Word
* Refer to RFP item X.C.

**4. Proposal Budget Narrative (Form D**)

* Format: Microsoft Word
* Refer to RFP item X.D.

**5. Proposer’s Work Plan (Form E)**

* Format: Microsoft Word
* Refer to RFP item X.E.

**6. Proposer’s References (Form F)**

* Format: Microsoft Word
* Refer to RFP item X.F.

**7. Proposer’s Work Samples (Form G)**

* Format: Microsoft Word
* Refer to RFP item X.G.

**8. Resumes of Project Team (required)**

* Format: PDF
* **Attach resumes for all staff identified in Form C, Proposal Budget**

**9. Partnership Agreement Letters (if applicable)**

* Format: Adobe PDF
* Refer to RFP item III.A. These letters are applicable only to joint venture or partnership proposals.

**TECHNICAL APPENDIX B**

**ALLOWABLE COSTS AND COST MATRIX**

An entity that receives funds under Title I of the Workforce Innovation and Opportunity Act (WIOA) is required to comply with the Office of Management and Budget Uniform Administrative Requirements, Cost Principles, and Audit Requirements Final Rule (Uniform Guidance) (2 CFR Part 200) and Department of Labor (DOL) exceptions (2 CFR Part 2900). In general, to be an allowable charge under WIOA, a cost must meet the following criteria:

* Be necessary and reasonable for the performance of the award
* Be allocable to the award
* Conform to any limitations or exclusions outlined in the award
* Be consistent with policies and procedures that apply uniformly to both federally financed and other activities of the non-federal entity
* Be accorded consistent treatment
* Be determined in accordance with generally accepted accounting principles
* Not be used to meet cost-sharing or leveraging funds requirements of any other federally financed program (without prior approval from the State)
* Be adequately documented

Below is a high-level cost items matrix with six columns. The first four columns identify cost items and various entity types. The remaining two columns are reserved for the specific Uniform Guidance sections and DOL exceptions (if applicable). It should be noted that the matrix is intended to be used as an initial tool or quick reference guide rather than a final authority for deciding whether a cost would be considered allowable.

The legend key below and the definitions are intended to help the user understand whether a cost item is allowable.

|  |  |
| --- | --- |
| **Legend Key** | **Legend Key Definition** |
| A | Allowable |
| AP | Allowable with Prior Approval |
| AC | Allowable with Conditions |
| U | Unallowable |
| NS | Not Specified in the Uniform Guidance |

Users should delve further into the various information sources if a cost item is denoted with two or more legend keys, as they may provide the additional necessary clarity. If this effort does not provide the essential information, ICWDB should be contacted. The “NS” legend key means that information may not be readily available. In this event, other information sources should be sought before contacting ICWDB . The “AP” legend key means that, in some instances, prior written approval will be required. In this event, the user should adhere to the Uniform Guidance Section 200.407, DOL exceptions Section 2900.16.

|  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | | **Educational Institutions** | | **Non-Profit Organizations** | | **State, Local, and Indian**  **Tribal Governments** | | | **Uniform Guidance Section** | **DOL**  **Exception Section** |
| Advertising and public relations | A/U | | A/U | | A/U | | | [200.421](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1421) | |  |
| Advisory councils | AC/U | | AC/U | | AC/U | | | [200.422](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1422) | |  |
| Alcoholic  beverages | U | | U | | U | | | [200.423](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1423) | |  |
| Alumni/ae activities | U | | NS | | NS | | | [200.424](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1424) | |  |
| Audit services | AC/U | | AC/U | | AC/U | | | [200.425](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1425) | |  |
| Bad debts | U | | U | | U | | | [200.426](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1426) | |  |
| Bonding costs | A | | A | | A | | | [200.427](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1427) | |  |
| Collection of improper  payments | A | | A | | A | | | [200.428](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1428) | |  |
| Commencement and convocation  costs | AC/U | | NS | | NS | | | [200.429](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1429) | |  |
| Compensation – personal services | A/U | | A/U | | A/U | | | [200.430](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1430) | |  |
| Compensation –  fringe benefits | A /U | | A /U | | A /U | | | [200.431](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1431) | |  |
| Conferences | A | | A | | A | | | [200.432](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1432) | |  |
| Contingency  provisions | AC/U | | AC/U | | AC/U | | | [200.433](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1433) | | [2900.18](http://www.ecfr.gov/cgi-bin/text-idx?SID=4c7e4586d6f95eb7cada89ad8ba8d225&mc=true&node=se2.1.2900_118&rgn=div8) |
| Contributions and donations | U | | U | | U | | | [200.434](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1434) | |  |
| Defense and  prosecution of criminal and civil proceedings, claims, appeals, and patent  infringement | AC/U | | AC/U | | AC/U | | | [200.435](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1435) | |  |
|
| Depreciation | AC | | AC | | AC | | | [200.436](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1436) | |  |
| Employee health and welfare costs | A | | A | | A | | | [200.437](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1437) | |  |
| Entertainment  costs | U/AP | | U/AP | | U/AP | | | [200.438](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1438) | |  |
| Equipment and  other capital expenditures | AP/U | | AP/U | | AP/U | | | [200.439](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1439) | |  |
| Exchange rates | AP | | AP | | AP | | | [200.440](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1440) | |  |
| Fines, penalties,  damages, and other settlements | U/AP | | U/AP | | U/AP | | | [200.441](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1441) | |  |
| Fundraising and  investment management costs | U/AP/A | | U/AP/A | | U/AP/A | | | [200.442](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1442) | |  |
| Gains and losses  on disposition of depreciable assets | AC | | AC | | AC | | | [200.443](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1443) | |  |
| General cost of  government | NS | | NS | | U/A | | | [200.444](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1444) | |  |
| Goods or services  for personal use | U/AP | | U/AP | | U/AP | | | [200.445](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1445) | |  |
| Idle facilities and idle  capacity | AC/U | | AC/U | | AC/U | | | [200.446](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1446) | |  |
| Insurance and indemnification | AC/U | | AC/U | | AC/U | | | [200.447](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1447) | |  |
| Intellectual  property | A/U | | A/U | | A/U | | | [200.448](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1448) | |  |
| Interest | AC/U | | AC/U | | AC/U | | | [200.449](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1449) | |  |
| Lobbying | U | | U | | U | | | [200.450](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1450) | |  |
| Losses on other awards or  contracts | U | | U | | U | | | [200.451](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1451) | |  |
| Termination costs | | AC/U | | AC/U | | AC/U | [200.471](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1471) | | |  |
| Training and  education costs | | A | | A | | A | [200.472](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1472) | | |  |
| Transportation costs | | A | | A | | A | [200.473](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1473) | | |  |
| Travel costs | | AC | | AC | | AP | [200.474](http://www.ecfr.gov/cgi-bin/text-idx?SID=6ec4361e10cf3783f38e927f2dde92c0&mc=true&node=pt2.1.200&rgn=div5&se2.1.200_1474) | | |  |

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| **IX. Informational Appendices** |

As part of this RFP, ICWDB is providing potential bidders with various information that may support their development of thoughtful, well informed plans and approaches to address the objectives of the Valley Works Lithium Valley Workforce and Economic Development Needs Assessment project. This information, including reports and news articles accessible through hyperlinks, is intended to be illustrative rather than comprehensive. As such, the informational appendices are provided as a resource to help inform the overall research and planning that organizations may use to support proposal development.

**A. Imperial County Demographics**

The county’s demographics are unique within the state and the nation. Imperial County’s proximity to the Mexican border has long influenced a diverse large multicultural community.

**B. Economic Profile of Imperial County**

The county economy is, principally, based on agriculture, but has diversified in recent decades. Still lacking are a strong manufacturing base, sizable transportation and logistics hubs, and other industries that characterize California’s overall economy.

**C. Workforce Development System and Resources**

The public workforce system, funded in part by WIOA, drives coordination among workforce development stakeholders throughout the Imperial Valley. In accordance with federal requirements, every four years, the mandated and optional workforce system partners work together to develop a WIOA-centered workforce development plan for the Imperial County Local Workforce Development Area.

**D. Public Education Resources**

Imperial County is home to a campus of San Diego State University, Imperial Valley College, Imperial Valley Regional Occupational Program, Imperial County Office of Education, and 16 independent school districts. These public agencies and the campuses within the systems are vital to educating and training current and future workers in Imperial County.

**E. Imperial County Assets and Challenges**

Imperial County considers it residents its chief assets. The county is among the most bilingual and bicultural in the nation. Other assets include land and housing affordability compared to the other parts of California. However, an array of challenges may impede economic growth and development of the workforce. Among these are housing availability, hunger, water, environmental issues (e.g. air quality), infrastructure, poverty, educational attainment, insufficient public transportation, and colonia designations.

**F. Unique Geography and Location**

Imperial County is uniquely situated at the Southernmost portion of California and in the state’s only rural county which borders two of California’s most populous counties (Riverside and San Diego), along with Arizona and Mexico. Its location enables workers from various adjacent areas to come into the county to work on a daily or short-term basis.

**G. Lithium Valley Opportunity**

The discovery of lithium and other rare minerals with industrial applications at the Salton Sea Known Geothermal Resource Area (KGRA) is a potential economic game changer for Imperial County. The most important use of lithium is in rechargeable batteries for mobile phones, laptops, digital cameras, and electric vehicles. All of these applications are growing. While its appears highly likely that a few hundred jobs in direct lithium extraction will be created in the KGRA, the extent to which Imperial County will benefit from secondary jobs, such as manufacturing using lithium, remains unclear.

**H. Business and Industry Projections**

Currently, there are three major businesses with high value investments in the KGRA: EnergySource Minerals, Controlled Thermal Resources, and Berkshire Hathaway Energy Renewables (BHE Renewables). EnergySource has greenlit its commercial lithium project ATLiS, aiming to start production by 2026. Controlled Thermal Resources is beginning the permitting process for full-scale start-up and BHE Renewables is exploring methods for cost effective mineral extraction.

**I. Lithium Valley Initiatives**

Reports, studies, tax incentives, community outreach, business attraction, development of skills training, and much more have already resulted from the Lithium Valley opportunity. Private industry, government at all levels, economic development agencies, and community organizations are among those mobilizing efforts to benefit from this opportunity. The Valley Works Lithium Valley Workforce and Economic Development Needs Assessment must take into account myriad current and planned initiatives and identify how and where they can be leveraged and, possibly, made more efficient and effective.

**J. Community Input and Priorities**

In anticipation of the release of this RFP, the Valley Works Steering Committee organized a series of community conversations in the Salton Sea area and throughout Imperial County to discuss their priorities in terms of jobs and the local economy. Community groups and businesses developing lithium extraction capabilities have also engaged the community in various topics surrounding the Lithium Valley Opportunity.

**INFORMATIONAL APPENDIX A**

**IMPERIAL COUNTY DEMOGRAPHICS**

Informational resources on demographics for Imperial County, California include the following:

1. [Imperial County Economy Overview](https://www.ivworkforce.com/funding-opportunities)

A report prepared by Lightcast providing an overview of the Imperial County Economy with data related to demographics/social metrics, jobs, and much more,

2. <https://www.census.gov/quickfacts/fact/table/imperialcountycalifornia/PST045222>

Overview of population by age, sex, race and Hispanic origin, housing, families and living arrangements, computer and internet use, education, health, businesses, and geography.

3. <https://data.census.gov/profile/Imperial_County,_California?g=050XX00US06025>

U.S. Census Bureau website covering a wide range of data for Imperial County

In addition to reviewing the foregoing resources, potential proposers are encouraged to research and evaluate other resources to increase their knowledge of local demographics and to inform their proposed activities, strategies, and approaches.

**INFORMATIONAL APPENDIX B**

**ECONOMIC PROFILE OF IMPERIAL COUNTY**

Informational resources on the economy in Imperial County, California include the following:

1. <https://www.imperial.edu/ivc/files/Institutional_Research/Labor_Market_Reports/SDI_Imperial-Regional-Profile_22-23.pdf>

Imperial County Regional Profile highlighting demographics, industries, and occupations in Imperial County (Exhibit 1). The community college system’s San Diego and Imperial Center of Excellence (COE) produced this brief to help stakeholders develop strategic plans to support occupational demand and workforce needs of employers in Imperial County.

2. <https://www.ivedc.com/assets/reports/Building_Lithium_Valley_New_Energy_Nexus.pdf>

While this 2020 Imperial Valley Economic Development Corporation (IVEDC) report deals with larger aspects of the Lithium Valley economy, a subsection on page 18 discusses the broader Imperial Valley economy.

3. <https://www.ivedc.com/region>

This data from IVEDC provides snapshots on the regional workforce, utilities, land, location, incentives, and industries.

4. <https://agcom.imperialcounty.org/wp-content/uploads/2023/10/2022-Crop-Report-Updated.pdf>

Imperial County Agricultural Crop and Livestock Report 2022

In addition to reviewing the foregoing resources, potential proposers are encouraged to research and evaluate other resources to increase their knowledge about the Imperial County economy and to inform their proposed activities, strategies, and approaches.

**INFORMATIONAL APPENDIX C**

**WORKFORCE DEVELOPMENT SYSTEM AND RESOURCES**

Informational resources on public workforce development delivery system in Imperial County, California include the following:

1. [WIOA Partner MOU](https://www.ivworkforce.com/funding-opportunities)

Current Mandated Partner Memorandum of Understanding (MOU), as required by WIOA. Pages 10 to 20 of the MOU provide an overview of services and training offered by each partner.

2. <https://www.ivrop.org/student-services/strong-workforce/>

Overview of Imperial Valley Regional Occupation Program (IVROP) Strong Workforce Program (SWP) offerings. The goal of the SWP is to increase levels of college and career readiness among students which will support their successful transition from secondary education to post-secondary education and, ultimately, to career.

3. <https://www.ivrop.org/adult-services/training/wioa-adult-vocational-training-program/>

Overview of IVROP vocational training programs.

4. <https://cetweb.edu/programs>

Overview of the Center for Employment Training (CET) training programs.

5. <https://beyondbordersnews.com/imperial-valley-college-launches-training-program-for-lithium-industry-and-geothermal-energy/>

Article on Imperial Valley College’s launch of a training program for the Lithium and Geothermal Industry. Offered are one-year short-term certificate programs with a focus on Lithium, but skills will also be applicable across other industries.

6. <https://newscenter.sdsu.edu/sdsu_newscenter/news_story.aspx?sid=78843>

Newsletter article from San Diego State University (SDSU) new academic programs and the Lithium Valley.

7. <https://newscenter.sdsu.edu/sdsu_newscenter/news_story.aspx?sid=78807>

Newsletter article on State budget commitment of $80 Million for STEM Education Research in Imperial County.

8. <https://www.imperial.edu/academics/plant-operator-faq/>

Information on Imperial Valley College’s Lithium Valley-related Plant Operator Course.

9. <https://imperialvalley.sdsu.edu/academics>

Summary of SDSU Imperial Valley Campus Academics, Undergraduate Degrees, Certificate Programs, and Graduate Degrees.

10. <https://etiedusandiego.org/about-sdetc/>

Overview of Electrical Training Institute San Diego and Imperial Counties.

11. <https://drive.google.com/file/d/1FLZ8OYNBADqq75QZ9kCmjL33shtW6Qgf/view>

List of all of Imperial County’s Career Technical Education (CTE) Programs at each high school in Imperial County.

12. <https://www.caschooldashboard.org/>

The California School Dashboard provides parents and educators with meaningful information on school and district progress so they can participate in decisions to improve student learning.

13. <https://www.ivworkforce.com/>

Imperial County Workforce Development Board website, which provides information on workforce development resources for job seekers and businesses.

Please note that some of the workforce development resources above are provided by local education agencies, which are the subject of this RFP’s Informational Appendix D, Public Education Resources.

In addition to reviewing the foregoing resources, potential proposers are encouraged to research and evaluate other resources to increase their knowledge about the local workforce development system and to inform their proposed activities, strategies, and approaches.

**INFORMATIONAL APPENDIX D**

**PUBLIC EDUCATION RESOURCES**

Informational resources on the public education system and agencies in Imperial County, California include the following:

1. <https://imperialvalley.sdsu.edu/>

San Diego State University Imperial Valley Campus website.

2. <https://www.imperial.edu/>

Imperial Valley College website

3. <https://www.ivrop.org/>

Imperial Valley Regional Occupational Program website.

4. <https://www.icoe.org/>

Imperial County Office of Education (ICOE) website

5. <https://www.icoe.org/about-icoe/school-districts>

Links to local school districts and educational institution sites on ICOE website.

In addition to reviewing the foregoing resources, potential proposers are encouraged to research and evaluate other resources to increase their knowledge of the local public education system and to inform their proposed activities, strategies, and approaches.

**INFORMATIONAL APPENDIX E**

**IMPERIAL COUNTY ASSETS AND CHALLENGES**

Informational resources on various assets and challenges associated with Imperial County, California include the following:

1. <https://p2p.californiacompetes.org/p2p/regions?region=imperial-region>

Educational system resources providing postsecondary education, workforce development, and prosperity data for Imperial County.

2. <https://calmatters.org/environment/2021/02/california-desert-lithium-valley/>

Lithium Valley article focused on environmental issues and health challenges faced by low-income residents.

3. <http://www.imperialcountyced.com/colonias/>

Description of “colonias” and a list of the 9 colonias (Bombay Beach, Salton Sea, and Niland) in Imperial County. Maps of locations are included.

4. <https://www.southernbordercerf.org/>

The Southern Border CERF Collaborative is a growing group of organizations that originally formed to collaborate on a bi-county proposal for the [Community Economic Resilience Fund (CERF)](https://edd.ca.gov/siteassets/files/jobs_and_training/notices/docs/wssfp21-06.pdf).

5. <https://desertreport.org/the-lithium-industry-in-imperial-county/>

Article on the importance of health impact assessments.

6. <https://airport.imperialcounty.org/>

The Imperial County Airport is a county-owned public-use airport in Imperial County, California, United States. Also known as “Boley Field”, it is mostly used for general aviation, but has scheduled passenger service from one commercial airline. Service is subsidized by the Essential Air Service program.

7. <https://www.ivfoodbank.com/>

The Imperial Valley Food Bank aims to ensure all residents have access to adequate amounts of nutritionally valuable food.

8. <https://www.cityofimperial.org/mid-winter-fair>

The California Mid-Winter Fair and Fiesta is Imperial County’s largest and most comprehensive annual event.

9. <https://www.elcentroairshow.com/>

The Blue Angels Air Show is an annual event, one of the largest single-day events in the Imperial Valley.

In addition to reviewing the foregoing resources, potential proposers are encouraged to research and evaluate other resources to increase their knowledge of local assets and challenges and to inform their proposed activities, strategies, and approaches.

**INFORMATIONAL APPENDIX F**

**UNIQUE GEOGRAPHY AND LOCATION**

Informational resources on Imperial County, California’s unique geographic location include the following:

1. [Great Map of Imperial County](https://www.ivworkforce.com/funding-opportunities)

A road map of Imperial County and adjacent areas showing Interstate 8, highways, and connections to surrounding counties, AZ, NV, and Mexico

2. <https://www.ivedc.com/region/industries/transportation-and-logistics>

Strategic Location Transportation and Logistics Map

3. <https://www.cpuc.ca.gov/industries-and-topics/rail-safety/railroad-operations-and-safety/rail-operations-regulated-california-railroads>

Regulated California Railroads

4. <https://www.accuweather.com/en/us/imperial/92251/december-weather/337091>

Monthly weather – Imperial County

In addition to reviewing the foregoing resources, potential proposers are encouraged to research and evaluate other resources to increase their knowledge regarding Imperial County’s geography and to inform their proposed activities, strategies, and approaches.

**INFORMATIONAL APPENDIX G**

**LITHIUM VALLEY OPPORTUNITY**

Informational resources on the Lithium Valley economic opportunity include the following:

1. <https://lithiumvalley.imperialcounty.org/oportunities/>

Goals for economic development in an effort to increase opportunity for residents and other lithium valley investment plans.

2. <https://abc7news.com/biden-newsom-lithium-mineral-mining-in-california-imperial-valley-salton-sea/11590753/>

Article on Governor’s visit to Lithium Valley.

3. <https://www.lexology.com/library/detail.aspx?g=e9faa58c-b404-4731-8071-d23c11ba0e16>

Topics include: Lithium Key to National Security and Economic Prosperity; Salton Sea Known Geothermal Resource Area; Intersection of State Priorities; Assembly Bill 1657 and the Future of Lithium Valley; Lithium Valley Commission Report; and Support for Further Development of Geothermal Power Facilities and Benefits to the Electric Grid.

4. <https://www.cnbc.com/2022/05/04/the-salton-sea-could-produce-the-worlds-greenest-lithium.html>

Article on Salton Sea lithium opportunity.

5. <https://www.gov.ca.gov/2023/03/20/governor-newsom-visits-lithium-valley-to-highlight-momentum-on-becoming-global-source-for-battery-production/>

Press release on Governor’s visit to the Lithium Valley.

6. <https://www.energy.ca.gov/data-reports/california-power-generation-and-power-sources/geothermal-energy/lithium-valley/lithium>

Links to Meetings, Notices and Documents regarding Lithium Valley Commission.

In addition to reviewing the foregoing resources, potential proposers are encouraged to research and evaluate other resources to increase their knowledge of the Lithium Valley Opportunity and to inform their proposed activities, strategies, and approaches

7. <https://www.forbes.com/sites/michaelbernick/2023/12/12/the-jobs-perplex-of-the-lithium-valley/?sh=536d75a77875>

Forbes article (December 12, 2023) on job opportunities associated with the Lithium Valley.

Following is a link to the report of Blue Ribbon Commission on Lithium Extraction (December 2022). The report recommends accelerating transmission planning; improving permitting; and securing funding for infrastructure investments and economic development incentives to support industry growth and job training.

[Blue Ribbon Commission Lithium Extraction California Report](https://www.ivworkforce.com/funding-opportunities)

The report’s 15 recommendation are:

1. Establish a Lithium Valley priority permitting process that includes additional resources for agency action on applications for geothermal, Direct Lithium Extraction (DLE), and related manufacturing, production, or assembly projects identified by the state as essential to the development and growth of Lithium Valley.
2. Accelerate state planning for investment and upgrades in transmission for geothermal power plants in Imperial Valley to be online in 2024 and over the next decade.
3. Establish the Southeast California Economic Zone, which includes Imperial County and Eastern Coachella and Palo Verde Valleys. This regional economic zone should be recognized by federal, state, and local governments, and eligible to compete for funding and investments.
4. The State should increase funding—and identify alternative funding sources—for research and development, start-up companies, and expansion of lithium battery and battery component manufacturing and recycling, especially cathode production using lithium produced through environmentally preferable methods.
5. Federal, state, and local governments should foster collaboration across the supply chain of lithium related technologies by creating networks, meetings, and other forums that regularly bring business, research, Tribes, communities, and government agencies together to identify short- and long-term economic opportunities.
6. The State and County should establish a business service center in Imperial County to facilitate access to business development incentive programs to benefit residents of disadvantaged communities, Tribal members, small businesses, and entrepreneurs.
7. Support development of a circular lithium economy based in California, with environmentally responsible sourcing of raw materials, life cycle analysis, requirements for product design that support recovery, reuse and recycling of materials, and development of effective recovery infrastructure, built with the assistance of public-private coalitions and effective community engagement.
8. The State should fund a health impact analysis (e.g., assessment or study) for Eastern Coachella Valley, to be carried out by an academic institution or public agency, relating to increased development in the Salton Sea KGRA of geothermal power plants and DLE facilities and related processing, production, and manufacturing activities.
9. Provide resources for local and state agencies and Tribes to seek and leverage proactively existing federal funding opportunities to invest in infrastructure in the Salton Sea region, including funding made available through the Infrastructure Investment and Jobs Act of 2021 (H.R. 3684) and the Inflation Reduction Act of 2022 (H.R. 5376).
10. Require and fund the Imperial Irrigation District (IID) to conduct a water study of projected cumulative infrastructure development of geothermal power plants and DLE facilities and related water use, sources, local beneficial uses, and availability. The State or other entity should also evaluate water quality.
11. The State should fund (and identify additional funding sources), and the industry should inform, the creation of curriculums, courses, and certification programs in science, technology, engineering, and mathematics (STEM) at schools and colleges to advance critical knowledge and skills across all grade levels, with a focus on the infrastructure and communities closest to geothermal power plants and DLE facilities.
12. Federal, state, and local government should invest in repairs, improvements to critical infrastructure and housing needed to support the success of lithium recovery, lithium processing, and lithium-dependent product manufacturing and recycling in the Salton Sea region, with a focus on the infrastructure and communities closest to geothermal power plants and DLE facilities. Investment decisions should consider community and Tribal priorities and include opportunities for participatory budgeting that includes public process and community and Tribal involvement.
13. Provide capacity building funds, such as grants, and other resources (e.g., childcare for parents to attend meetings) for Tribes and community members to engage with federal, state, and local permitting agencies.
14. Establish standards for state and local permitting agencies to provide communities and Tribes with plain language written communications about geothermal power plant and DLE facility applications, the permitting processes to review the applications, and post-approval monitoring and enforcement. Information provided should also include education about the materials and processes used in DLE and lithium processing facilities, the final and intermediate products created, and any waste streams that must be managed.
15. Develop best practice guidance for CEQA (California Environmental Quality Act) lead agencies when initiating communications and consultation with Tribes (e.g., making multiple attempts through different methods, such as mail, email, telephone); providing reasonable time for Tribal governments to evaluate written materials; and recognizing the specific cultural, historical, public health, and ecological context of the Salton Sea region.

**INFORMATIONAL APPENDIX H**

**BUSINESS AND INDUSTRY PROJECTIONS**

Informational resources on Lithium Valley-related business and industry projections include the following:

1. <https://www.desertsun.com/story/news/environment/2021/07/02/general-motors-partners-salton-sea-lithium-production-electric-vehicles/7841300002/>

Article on General Motors partnership with CTR on Salton Sea lithium.

2. <https://www.stellantis.com/en/news/press-releases/2023/august/stellantis-invests-in-ctr-to-strengthen-low-emission-us-lithium-production>

Stellantis invests over $100 million to advance the development of geothermal lithium project

3. <https://www.spglobal.com/commodityinsights/en/market-insights/latest-news/energy-transition/041922-newly-launched-statevolt-to-build-us-battery-plant-signs-lithium-deal-with-ctr>

Statevolt to construct a 54 GWh lithium battery gigafactory in Imperial Valley.

4. <https://kyma.com/news/top-stories/2022/04/21/4-billion-gigafactory-coming-to-imperial-valley-produced-by-founder-of-statevolt/>

Statevolt gigafactory expected to be built by 2025 and bring 2,000 jobs to Imperial County.

5. <https://www.desertsun.com/story/news/2022/09/23/foreign-investors-manufacturers-eye-imperial-county-lithium-production/10430266002/>

Article on investment interest in Imperial County lithium.

Resources from businesses with a presence in the Lithium Valley include:

***Controlled Thermal Resources (CTR)***

1. <https://www.cthermal.com/projects>

Controlled Thermal Resources Clean Energy projects and campus.

2. <https://www.cthermal.com/latest-news/ctr-selects-aquatech-for-its-us-1-billion-lithium-hydroxide-facility-in-california>

CTR selects Aquatech for its $1 billion Lithium Hydroxide Facility in California.

***EnergySource***

1. <https://www.esminerals.com/atlis>

Information on Project ATLiS.

2. <https://www.prnewswire.com/news-releases/energysource-minerals-esm-announces-contract-with-ford-for-geothermal-lithium-301830259.html>

Energy Source announces a binding lithium supply contract with Ford Motor Company.

***Berkshire Hathaway Energy***

1. To test lithium recovery processes, BHE Renewables has built a Lithium Recovery Demonstration facility (LRD) that is 1/10 scale of a commercial lithium recovery facility. The LRD Facility tests lithium recovery from the geothermal brine that is produced by BHE Renewables subsidiary company, CalEnergy. CalEnergy owns and operates 10 geothermal plants in Calipatria, California that produce 345 megawatts of geothermal energy.

2. For more information about BHE Renewables visit: <https://www.bherenewables.com/>

In addition to reviewing the foregoing resources, potential proposers are encouraged to research and evaluate other resources to increase their knowledge regarding lithium-related and other business and industry projections for Imperial County and to inform their proposed activities, strategies, and approaches.

**INFORMATIONAL APPENDIX I**

**LITHIUM VALLEY INITIATIVES**

Informational resources on initiatives in Imperial County, California that are focused on or related to opportunities in the Lithium Valley include the following:

1. <https://legiscan.com/CA/text/AB2903/id/2524283>

California Assembly Bill 2903 dealing with Salton Sea geothermal resources area: Equitable Access Program.

2. <https://imperial.granicus.com/MetaViewer.php?view_id=2&clip_id=2151&meta_id=359802>

Board of Supervisors support for Assembly Bill 2903

3. <https://lithiumvalley.imperialcounty.org/wp-content/uploads/2022/02/LithiumValleyInvestmentPlanLVIP-FINAL-Watermark.pdf>

Imperial County Lithium Valley Economic Opportunity Investment Plan

4. <https://electrek.co/2023/02/08/california-lithium-valley-project-ev-battery-millions-tax-breaks-imperial-county/>

Article on tax incentives.

5. <https://calexicochronicle.com/2023/02/07/imperial-county-offers-tax-rebates-to-lithium-industry/#:~:text=The%20county's%20incentive%20program%20offers,ton%20of%20lithium%20produced%20locally>.

Information on county incentive program offering tax rebates on lithium produced locally.

6. <https://www.ivpressonline.com/featured/state-approves-sales-and-use-tax-exclusion-incentives-for-lithium-manufacturers-in-imperial-county/article_654e1e2c-28df-11ee-97af-03fc855a40a4.html>

Information on California’s approval of sales and use tax exclusion incentives for lithium manufacturers in Imperial County.

7. <https://calexicochronicle.com/2022/06/21/imperial-county-supports-proposed-lithium-flat-tax/>

Information on proposed lithium flat tax.

8. <https://newscenter.sdsu.edu/sdsu_newscenter/news_story.aspx?sid=78807>

Information on funding for Imperial County STEM Research Facility.

9. <https://www.imperial.edu/academics/plant-operator-faq/>

Information on IVC’s new training programs linked to Lithium Valley employment.

In addition to reviewing the foregoing resources, potential proposers are encouraged to research and evaluate other resources to increase their knowledge of Lithium Valley initiatives and to inform their proposed activities, strategies, and approaches.

**INFORMATIONAL APPENDIX J**

**COMMUNITY INPUT AND PRIORITIES**

Taken from a series of community conversations, the following are major themes expressed by Imperial County residents concerning jobs and the local economy, including, but not limited to, issues dealing with the Lithium Valley opportunity.

* There is a willingness among individuals of all ages to access training and job skills preparation services of all types to qualify for well-paid jobs in Imperial County, including those directly connected to the Lithium Valley and those that are not.
* Workers are hopeful that the emergence of lithium extraction as a base industry in Imperial County will lead to jobs in secondary industries such as manufacturing, warehousing, and transportation. In addition, residents are interested in a broad array of jobs (e.g., construction, technology, healthcare) that may significantly grow in response to the presence of new industries and location of major businesses in Imperial County.
* Jobs resulting from large scale extraction of lithium and other rare minerals at the Salton Sea should benefit not only communities and individuals adjacent to the Lithium Valley, but communities throughout Imperial County. Such benefits should include not only jobs, but improvements to infrastructure, services, and various “quality of life” issues.
* Lithium extraction and related processes at the Salton Sea operations must meet with strict environmental standards, including any identified in connection with a pending environmental impact report. Additional environmental concerns exist regarding the transportation of materials and manufacturing of lithium-based products in the Imperial Valley. The emergence of environmental concerns surrounding the Lithium Valley opportunity adds to existing concerns about air, water, and other environmental pollution and hazards at the Salton Sea and throughout Imperial County.
* Residents want to be kept aware of the progress of Lithium Valley businesses and those other developments in the economy so that they can make informed decisions about training and education to prepare for jobs.
* Many immigrants from Mexico who have settled in Imperial County have significant training, degrees, and credentials. Additional support is needed by such individuals in attaining recognition of credentials earned outside the U.S.
* Communities, including those at the Salton Sea, which are remote from the county’s main population centers, need access to education, job training, and related services. Residents of these communities believe that the solution lies in a combination of locating services in remote areas and in improving public transportation between these areas and the population centers where most training and services currently exist.
* Based on commonly held perceptions that job and career opportunities are limited in Imperial County, there is a regular exodus of young people from the county. After completing high school, many young individuals go elsewhere to study or begin work and drain the county of its most vital resource: young talent.
* Youth in Imperial County feel alienated from job opportunities. In planning for future workforce and economic development strategies, greater youth engagement is critical.
* With the potential for economic expansion in the county, many residents are interested in entrepreneurial opportunities, including training on starting and maintaining a successful business and in support for business startups.
* Strong educational programs and services exist in county, including Imperial Valley College and San Diego State University’s campuses in Calexico and Brawley.
* To ensure that adequate training programs and services are available to meet current and future needs, use of work-based training models, including apprenticeships, on-the-job training, and paid internships should be expanded.
* To create additional and more diverse employment opportunities for residents, it is critical that workforce development, education, economic development, and support resources be coordinated.
* Training institutions need to continue to develop new content and update existing content for programs and courses that prepare students for in-demand jobs.
* Education and training providers should consider implementing and/or expanding training programs providing skills for remote work.
* Basic education skills, digital literacy skills, networking skills, and other foundational employment skills should be available to all county residents.
* To support job growth, more and better services are needed, including housing, transportation, and broadband.
* Imperial County imports a high number of workers from adjacent counties and communities. Greater emphasis should be placed on local hiring.

|  |
| --- |
| **X. Proposal Forms** |

The following forms must be used by proposers in preparing their proposal responses to this RFP. Refer to Technical Appendix A for a complete list of required proposal content.

**A. Proposal Cover/Signature Page**

The proposal cover/signature page serves as the introductory section for your proposal. The section includes details such as Project Title, Proposer Organization Name, Contact Information, and the Proposed Budget.

**B. Proposal Narrative**

The proposal narrative gives the proposer the opportunity to provide detailed descriptions of its capabilities and experience; approach to conducting the needs assessment; and the content and features of the final product: the needs assessment report and recommendations.

In the proposal rating process, the proposal narrative (Form B) is worth up to 90 points out of 100 points available under this RFP. Please see RFP item VI.A for a complete description of points available through the RFP rating process.

Use RFP Form B to complete your proposal narrative. Key in your responses directly following each question on Form B. The narrative must not exceed 20 pages. Use a 12-point font, single line spacing, and 1 inch margins.

**C. Proposal Budget**

Provide a comprehensive summary of proposed expenditures for staff costs, travel costs, and other costs related to completing the work and services proposed.

**D. Proposal Budget Narrative**

Provide a brief overview of the budget, highlighting key aspects such as distribution of costs and how each budget category contributes to the overall success of the project. Additional rows may be added as necessary.

**E. Proposer’s Work Plan**

Using the spaces provided in Form E, provide a concise descriptions of activities and deliverables that will be completed throughout the 14-month period of the contract. The list should complement and correspond to information provided in the proposal narrative (Form B)

**F. Proposer’s References**

A minimum of three (3) references from past customers should be provided in the following format.

**G. Proposer’s Work Samples**

Proposers must provide hyperlinks to work samples (e.g., needs assessments, analyses, reports, recommendations) for 2 to 4 past projects that are reasonably similar to the objectives, outcomes, and deliverables associated with services sought through this RFP.

Note: For proposals representing a joint venture or partnership, please note that, in addition, to forms A through G, proposals must be accompanied by a *Partnership Agreement Letter* as described in RFP Item II.A and Technical Appendix A. Resumes for all members of the project team, as identified on Form C, Proposal Budget, must be included.

**FORM A**

**PROPOSAL COVER/SIGNATURE PAGE**

|  |  |
| --- | --- |
| **Proposer Agency Name:** | |
| **Project Title:** | |
| Address: | Telephone: |
| Fax: |
| Contact Name/Title: | E-mail: |
| Type of Organization:   For-profit organizations;   Non-profit organizations;   University   Economic Development   Public agencies; and/or   Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Proposed Budget: $ |
|  |

|  |  |
| --- | --- |
| **Collaborator Agency Name (Only applicable to Joint Proposals):** | |
| Address: | Telephone: |
| Fax: |
| Contact Name/Title: | E-mail: |
| Type of Organization:   For-profit organizations;   Non-profit organizations;   University   Economic Development   Public agencies; and/or   Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | Proposed Budget: $ |
|  |

|  |  |  |
| --- | --- | --- |
| A. | Proposer Signature (for “Lead Agency” if a Joint Proposal) | |
| To the best of my knowledge and belief, all data in this application are true and correct. The Governing body of the applicant has duly authorized the document and the applicant will comply with all contractual requirements as dictated by the Department of Labor, State of California and/or ICWDB if awarded. | | |
| Name of Authorized Representative: | | Title: |
| Signature of Authorized Representative: | | Date: |

|  |  |  |
| --- | --- | --- |
| **B.** | **Collaborator Information (Only applicable to Joint Proposals)**  Title: | |
| To the best of my knowledge and belief, all data in this application are true and correct. The Governing body of the applicant has duly authorized the document and the applicant will comply with all contractual requirements as dictated by the Department of Labor, State of California and/or ICWDB if awarded. | | |
| Typed Name of Authorized Representative: | | Title: |
| Signature of Authorized Representative | | Date: |

If the proposal includes more than one (1) collaborator (i.e., financial partner), attach additional pages to include “Collaborator Information” and “Collaborator Signature” for this agency(ies).

**FORM B**

**PROPOSAL NARRATIVE**

**Part 1 – Capabilities and Experience** (Earn up to 30 points)

1. Describe the organization or firm submitting the proposal, along with its capabilities. Describe your primary areas of expertise.

2. If the proposer (lead agency) is collaborating with one or more organizations and/or firms, describe the capabilities and experience of each partner.

3. Describe the specific experience of your organization or firm in providing services of the type requested by this RFP. Indicate what the similarities are and how your organization or firm executed a plan of action to achieve the desired results.

4. Briefly describe why your organization or firm is ideally suited for this type of project and what unique skills your team will bring to the project.

**Part 2 – Approach to Conducting the Needs Assessment, Developing the Report, and Providing Recommendations** (Earn up to 30 points)

5. Describe your overall approach to conducting the needs assessment project.

6. How will your organization or firm make use of myriad existing reports, information summaries, and data analyses?

7. To supplement existing information, what data gathering processes will be used?

8. To what extent will your firm engage with key workforce and economic development stakeholders in the county?

9. How will your approach to the project take into account the interest of communities and individuals throughout Imperial County?

10. How will your approach and processes lead to the development of a comprehensive workforce and economic development strategy for Imperial County?

**Part 3 – Final Product – Report on Lithium Valley Needs Assessment and Recommendations for Action** (Earn up to 30 points)

11. Describe how the final needs assessment report will reflect the objectives and deliverables established for the project.

12. What will make the final product (i.e., the needs assessment report and recommendations) usable by Imperial County, the ICWDB, and workforce and economic development stakeholders throughout the county?

13. How will your organization or firm promote the product to stakeholders upon its publication? How will you communicate its utility and optimal ways for transforming recommendations into actions?

**FORM C**

**PROPOSAL BUDGET**

Provide a comprehensive summary of proposed expenditures for project team staff costs, travel costs and other costs related to completing the work and services proposed. Please add additional rows as needed while keeping the same or a very similar format.

Note: The billing rate may include salaries, fringe benefits, support staff, organizational overhead, and all other costs associated with each individual listed below.

|  |  |  |
| --- | --- | --- |
| **Budget Item/Category** | | **WIOA Budgeted Amount** |
| A. | **Staff Name**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Number of Hours: \_\_\_\_\_\_\_\_\_  Billing Rate: \_\_\_\_\_\_\_\_\_\_ | ­­­$\_\_\_\_\_\_\_\_\_ |
| B. | **Staff Name**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Number of Hours: \_\_\_\_\_\_\_\_\_  Billing Rate: \_\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| C. | **Staff Name**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Number of Hours: \_\_\_\_\_\_\_\_\_  Billing Rate: \_\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| D. | **Staff Name**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Number of Hours: \_\_\_\_\_\_\_\_\_  Billing Rate: \_\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| E. | **Travel:** | $\_\_\_\_\_\_\_\_\_ |
| F. | **Other Costs**:  Description: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| G. | **Other Costs:**  Description: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | $\_\_\_\_\_\_\_\_\_ |
| H. | **Total Project Funding** | **$** |

**FORM D**

**PROPOSAL BUDGET NARRATIVE**

Provide a brief overview of the budget, highlighting key aspects such as distribution of costs and how each budget category contributes to the overall success of the project. Additional rows may be added as necessary.

|  |  |
| --- | --- |
| **Category/Explanation** | **Amount** |
| 1. Staff Costs: Generally highlight what costs are included within billing rates for each staff member on the project team. | |
|  | $ |
| Total Staff Costs | $ |
| 1. Travel Costs: Provide the number of trips planned, who will be traveling, the   duration of each trip (number of days on-site), and any other relevant  details regarding travel costs. | |
|  | $ |
| Total Travel Costs | $ |
| 1. Other Costs (Description: \_\_\_\_\_\_\_\_\_\_\_\_\_) | |
|  | $ |
| Total Other (Specify) | $ |
| **TOTAL PROJECT FUNDING** | $ |

**FORM E**

**PROPOSER’S WORK PLAN**

Using the spaces provided below, provide concise descriptions of activities and deliverables that will be completed throughout the 14-month period of the contract. The list below should complement and correspond to information provided in the proposal narrative (Form B). Add as many rows as needed. Delete unused rows.

**Quarter 1 Activities and Deliverables** (May and June 2024)

***Activities***

|  |  |
| --- | --- |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

***Deliverables***

|  |  |
| --- | --- |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

**Quarter 2 Activities and Deliverables** (July through September 2024)

***Activities***

|  |  |
| --- | --- |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

***Deliverables***

|  |  |
| --- | --- |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

**Quarter 3 Activities and Deliverables** (October through December 2024)

***Activities***

|  |  |
| --- | --- |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

***Deliverables***

|  |  |
| --- | --- |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

**Quarter 4 Activities and Deliverables** (January through March 2025)

***Activities***

|  |  |
| --- | --- |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

***Deliverables***

|  |  |
| --- | --- |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

**Quarter 5 Activities and Deliverables** (April through June 2025)

***Activities***

|  |  |
| --- | --- |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

***Deliverables***

|  |  |
| --- | --- |
| 1. |  |
| 2. |  |
| 3. |  |
| 4. |  |

**FORM F**

**PROPOSER’S REFERENCES**

A minimum of 3 References from past customers should be provided in the following format.

|  |  |  |
| --- | --- | --- |
| 1. | **Customer Name** |  |
| Address | |  |
| Telephone Number | |  |
| Contact Name | |  |
| Title | |  |
| Email | |  |

|  |  |  |
| --- | --- | --- |
| 2. | **Customer Name** |  |
| Address | |  |
| Telephone Number | |  |
| Contact Name | |  |
| Title | |  |
| Email and Phone | |  |

|  |  |  |
| --- | --- | --- |
| 3. | **Customer Name** |  |
| Address | |  |
| Telephone Number | |  |
| Contact Name | |  |
| Title | |  |
| Email and Phone | |  |

**FORM G**

**PROPOSER’S WORK SAMPLES**

Proposers must provide hyperlinks to work samples (e.g., needs assessments, analyses, reports, recommendations) for 2 to 4 past projects that are reasonably similar to the objectives, outcomes, and deliverables associated with services sought through this RFP. Provide the information requested in the tables below.

**Work Sample 1**

|  |  |
| --- | --- |
| Name of project |  |
| Project funder |  |
| Project completion date |  |
| Name of project report or document |  |
| Hyperlink to document. |  |

**Work Sample 2**

|  |  |
| --- | --- |
| Name of project |  |
| Project funder |  |
| Project completion date |  |
| Name of project report or document |  |
| Hyperlink to document. |  |

**Work Sample 3**

|  |  |
| --- | --- |
| Name of project |  |
| Project funder |  |
| Project completion date |  |
| Name of project report or document |  |
| Hyperlink to document. |  |

**Work Sample 4**

|  |  |
| --- | --- |
| Name of project |  |
| Project funder |  |
| Project completion date |  |
| Name of project report or document |  |
| Hyperlink to document. |  |