

Facilitation Coordination Services for
Central San Joaquin Valley CERF (Valley CERF)
February 27, 2023

BACKGROUND AND PURPOSE:

Since 1966, the Central Valley Community Foundation (CVCF) has been a trusted partner in philanthropy. Our mission is to “*connect capital and communities for a ‘just and thriving’ Central Valley.*” To advance this mission, CVCF works closely with community, civic, and philanthropic partners to support “collective impact” strategies that advance inclusive and sustainable economic development, including Valley CERF.

Valley CERF (Community Economic Resilience Fund) is a two-year, inclusive economic development planning process involving stakeholders from Fresno, Madera, Tulare and Kings Counties. With financial support from the State of California and in partnership with local conveners and a research team, CVCF will help over 140 organizations representing (1) labor and worker voice, (2) employers, business associations and economic development, (3) education and workforce training, (4) local government, (5) tribal communities, (6) environment and environmental justice, and (7) community voice to develop a long-range, inclusive, and sustainable economic development plan. These stakeholder groups – called Local High Road Transition Collaboratives or “HRTCs” – will be organized geographically with a Local HRTC in Tulare/Kings, Fresno County (rural), Fresno DRIVE (metro), and Madera County. The work product of the Valley CERF planning process will be a long-range, inclusive economic development plan for the entire four-county region.

FISCAL SPONSOR AND REGIONAL CONVENER:

The State of California has contracted with CVCF to serve as the Fiscal Sponsor and Regional Convener of Valley CERF. In this capacity, CVCF will support the Local Conveners, execute grant agreements and contracts on behalf of the local and regional stakeholder tables, procure and oversee research and consulting support, develop and support communications for the region, provide support and coordination as requested by the Local Conveners, and ensure the local and regional stakeholder tables meet the state’s guidelines and requirements for the CERF program.

LOCAL CONVENERS AND RESEARCH TEAM:

The following partners have been secured to serve as Local Conveners and members of the Research Team:

- **United Way of Fresno and Madera Counties** – Local Convener for Madera County HRTC
- **Tulare County Workforce Investment Board** – Local Convener for Tulare/Kings Counties HRTC
- **Office of Community and Economic Development at Fresno State** – Local Convener for Fresno County HRTC
- **Research Team** – The Urban Institute, California Forward, Sierra Resource Conservation District, and Yosemite / Sequoia Resource Conservation & Development Council, Fresno State (public health research)

In addition, CVCF coordinates the Fresno DRIVE (Developing the Region's Inclusive and Vibrant Economy) Coalition, which will serve as the Local HRTC for the metropolitan area.

The Local Conveners are responsible for:

- Providing staff and meeting support to the Local HRTCs
- Ensuring an inclusive community process
- Ensuring the community engagement plan is implemented according to the direction of the Local HRTC stakeholders
- Administering grant support and payments to local CBO partners
- Working with the Local HRTC, Regional Convener and Research Team to ensure coordination throughout the region, including providing support for drafting the local and regional inclusive economic development plans.

REGIONAL HRTC

After the Local Conveners have worked with their local partners to develop their local priorities and strategies over the course of 18 months, representatives from each Local HRTC will come together to form the Valley CERF Regional HRTC. The Regional HRTC will review findings from our research partners and the Local HRTC plans and work collaboratively to develop a regional economic transition roadmap with strategies, policy solutions, and priority projects.

EXPECTED OUTCOMES AND CONSULTING DESCRIPTION:

CVCF is seeking facilitation coordination services to support the Local HRTCs and Regional HRTC.

Duties and outcomes for the selected service provider include but are not limited to:

- Working closely with CVCF and the Local Conveners, develop the overall facilitation plan for the Local HRTC and Regional HRTC planning processes.
- Utilizing the contractor's experience and network, help identify, recruit and recommend facilitators to manage and facilitate the meetings in Tulare/Kings, Madera, Fresno County and Fresno Metro, including drafting the RFP and reviewing submittals. CVCF will be the contracting entity for the selected facilitators.
- Onboarding the selected facilitators to ensure they are aware of the unique situations "on the ground" in each county, are familiar with the members of each of the roundtables (including local conveners), understand the timeline and responsibilities of the facilitator role.
- Share the facilitation plan and basic ground rules with facilitators such that facilitators can work with local stakeholders to customize meeting ground rules for their specific stakeholders.
- Assist local conveners with the design and approach for each of the meetings, including location, agenda, goals, format, facilitation, translation, etc.

- Assist with design and production of meeting materials, as needed, for the meetings, in cooperation with the local conveners.
- Provide overall support and direction to the selected facilitators to ensure milestones are met by each local table.
- Work with Research Team to incorporate their learnings into Local HRTC meetings to foster understanding of research findings and inform economic strategies and priority projects.
- Attend, by August 2023, at least one meeting (preferably two) in each county to conduct evaluation and assessment of the facilitator, how the local group is functioning, and provide suggestions on improvements that could be made.
- Meet regularly with the Local and Regional Conveners and the CVCF team and provide progress reports as requested.
- Prepare agendas and lead monthly check in calls (Zoom) with all local facilitators to discuss meetings, challenges with stakeholders, best practices and troubleshoot challenges.
- Plan and facilitate the process for the Regional HRTC, comprised of representatives from the Local HRTCs, to develop the final Regional Economic Recovery and Transition Plan for the Central San Joaquin Valley. This includes the design and approach for each of the meetings, including location, agenda, goals, format, facilitation, translation, etc.
- Participate in CERF evaluation efforts, such as responding to surveys or interview requests.

LOCATION:

Contractor may work via zoom and agrees to attend various in-person meetings as outlined in the RFP.

BUDGET:

Seeking one contractor with a flat fee budget to perform identified services between March 31, 2023 through December 31, 2024.

DESIRED QUALIFICATION FOR PROPOSERS:

- At least 15 years' experience with meeting design and facilitation, small and large group facilitation, public participation, community outreach and engagement.
- Ability to provide coaching and mentoring to new facilitators who may have less experience working in groups that experience conflict.
- Proven experience working with diverse community and integrating diversity, equity and inclusion into community outreach and engagement efforts.
- Proven experience working in rural communities, especially communities that are economically dependent on agriculture.
- Proven experience working with communities that are experiencing intergenerational trauma and significant socioeconomic challenges.
- Understanding of the physical, biological and psychological challenges that can be experienced by groups of people coming together to work on aspirational goals and community transformation.

- Deep understanding of, and experience with, IAP2 Core Values, the IAP2 Spectrum of Public Participation and IAP2 Ethics surrounding public participation.
- Master's degree is desired.

PROJECT DURATION: March 31, 2023 - December 31, 2024

PROPOSAL SUBMISSION:

Proposals must be under 15 pages in length, include a full statement of qualifications, two references, and a scope of work that ensures delivery of the outcomes listed above. Proposals must be submitted by March 17, 2023, at 5:00 p.m. to kerry@centralvalleycf.org. CVCF believes this RFP is complete in its scope and explanation of work. However, if questions arise, please e-mail kerry@centralvalleycf.org.