

**SUBMITTAL TO THE BOARD OF SUPERVISORS  
COUNTY OF RIVERSIDE, STATE OF CALIFORNIA**



ITEM: 3.26  
(ID # 25911)

**MEETING DATE:**

Tuesday, October 22, 2024

**FROM :** OFFICE OF ECONOMIC DEVELOPMENT

**SUBJECT:** OFFICE OF ECONOMIC DEVELOPMENT: Approve the Obligation of American Rescue Plan Act (ARPA) funds and Approval of the Professional Services Agreement for Economic Development Strategic Planning Services with Natelson Dale Group, Inc. through Fiscal Year 25/26. All Districts. [\$635,450 Total Cost - 100% ARPA funds] (4/5 Vote Required)

**RECOMMENDED MOTION:** That the Board of Supervisors:

1. Approve the Obligation of \$635,450 from the American Rescue Plan Act (ARPA) fund Economic Recovery category for Economic Development Strategic Planning Services;
2. Approve the Professional Services Agreement with The Natelson Dale Group, Inc. for Economic Development Strategic Planning Services for a total aggregate amount of \$552,565 through September 30, 2025, and authorize the Chairman of the Board to sign the Agreement on behalf of the County;
3. Authorize the Purchasing Agent, in accordance with Ordinance No. 459, based on the availability of fiscal funding and as approved by County Counsel to: (a) sign amendments that exercise the options of the agreement including modifications of the statement of work that stay within the intent of the Agreement; and (b) Authorize the Purchasing Agent to issue a Purchase Order to The Natelson Dale Group for Economic Development Strategic Planning Services that do not exceed the amount of \$552,565; and
4. Approve and direct the Auditor-Controller to Make Budget Adjustments as Shown on Schedule A.

**ACTION:4/5 Vote Required**

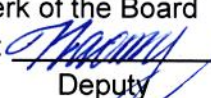
  
Suzanne Holland, Director of Office of Economic Development 10/10/2024

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**MINUTES OF THE BOARD OF SUPERVISORS**

On motion of Supervisor Gutierrez, seconded by Supervisor Spiegel and duly carried by unanimous vote, IT WAS ORDERED that the above matter is approved as recommended.

Ayes: Jeffries, Spiegel, Washington, Perez and Gutierrez  
Nays: None  
Absent: None  
Date: October 22, 2024  
xc: OED

Kimberly A. Rector  
Clerk of the Board  
By:   
Deputy

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<b>FINANCIAL DATA</b>	<b>Current Fiscal Year:</b>	<b>Next Fiscal Year:</b>	<b>Total Cost:</b>	<b>Ongoing Cost</b>
<b>COST</b>	\$ 635,450	\$ 0	\$ 635,450	\$0
<b>NET COUNTY COST</b>	\$0	\$0	\$0	\$0
<b>SOURCE OF FUNDS: 100% ARPA Funds</b>			<b>Budget Adjustment: Yes</b>	
			<b>For Fiscal Year: 24/25</b>	

**C.E.O. RECOMMENDATION:** Approve

**BACKGROUND:**

**Summary**

On March 11, 2021, President Biden signed the American Rescue Plan Act of 2021 (H.R. 1319) into law. The \$1.9 trillion package is intended to combat the COVID-19 pandemic, including the public health and economic impacts. On April 27, 2021, the Executive Office presented the Board of Supervisors with a preliminary ARPA funding allocation then on October 19, 2021, presented a revised funding allocation after the U.S. Treasury released the ARPA interim funding guidelines.

On May 5, 2021, the Board received and filed the Strategic Economic Recovery Framework presented by the Economic Recovery Task Force (ERTF). The framework contained short-term actions to assist business sectors finding it difficult to rebound from the pandemic and state closures, as well as mid to long range areas of focus for future growth and economic resiliency. Keys to the framework were short and long-term action items coordinated for an economic recovery and for the growth of the region whose trajectory includes the principles of equal access to opportunities and addressing barriers for economic equity and inclusion. The mid to long range vision of the framework includes action items of investing in small business innovation, entrepreneurship hubs, and small business development. This proposal aligns with the ERTF framework's action items.

On January 6, 2022, the U.S. Treasury issued the final funding guidelines. These guidelines further clarify the detailed eligibility criteria for use of these funds. As a result, under the Economic Recovery category allows for the development of programs to assist businesses and industries struggling to rebound from the pandemic as well as focus on strategic investment projects for future economic growth and resiliency. The final guidelines specifically identify business ecosystem support including providing and partnering with organizations that offer technical assistance to new and existing businesses as an eligible use of funds.

On February 8, 2022, the Board approved \$36 million for Economic Recovery in assisting businesses struggling to rebound from the COVID-19 pandemic and stimulate future economic growth and resiliency. The Office of Economic Development (OED) is recommending allocating \$635,450 of that funding for the creation of a countywide economic development strategic plan under a professional services agreement with Natelson Dale Group, Inc.

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OED and the Purchasing Department conducted a public procurement process in order to review proposals from qualified professional firms. Several proposals were received and after a thorough review process, Natelson Dale Group, Inc. was selected.

The Natelson Dale Group, Inc. (TNDG) is an economic development consulting firm established in California in 1974. The firm's practice focuses largely on the planning and implementation of business retention/expansion/attraction programs, coupled with strategic plans to leverage a community's real estate development assets. TNDG has worked with dozens of cities, tribes, counties, and regions throughout California, completing Comprehensive Economic Development Strategies, Economic Development Strategic Plans, real estate analysis and fiscal/economic impact analysis.

The goal of the Economic Development Strategic Plan is to identify economic development opportunities to promote sustainable economic growth while prioritizing the well-being of the county's diverse communities. The county is very diverse, evolving over time, and stakeholders from its various regions will be engaged to provide input on the plan based on the needs and differences of each region. The plan will aim to identify and develop key strategies to stimulate investments to elevate the county's economic profile. The focus will be to ensure that economic development initiatives create high quality job opportunities and resources accessible to all communities, especially those historically disadvantaged. It is desired that the Plan's strategies and principles will foster an environment that improves the overall well-being of Riverside County's communities while providing a clear path to programs and initiatives that support high quality job opportunities with career pathways, support an innovation and tech economy, and contribute to a thriving and equitable economy for generations to come.

The Plan will also consider and, where appropriate, incorporate and build upon objectives from the Riverside County Strategic Recovery Framework which was approved by the Board of Supervisors to respond quickly and provide support and resources to help the county's business community navigate health and safety requirements during the onset and closures of the COVID-19 pandemic. Additionally, the Plan will also take into consideration the planning efforts already completed by the Riverside County Workforce Development Board.

**Impact on Residents and Businesses**

The proposed funding is expected to have a positive impact on the entire County, including its businesses and residents. Local businesses penetrate every sector of the economy and contribute to sales tax revenues, jobs, and income. Strategic planning for Riverside County's economy will help guide future economic development efforts.

**Additional Fiscal Information**

The proposed services will be funded entirely by ARPA funding from the United States Department of Treasury funds and will not impact the County's General Fund. A budget adjustment in the amount of \$635,450 is recommended to increase revenues and appropriate

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ARPA funding for contract (\$552,565) and department administrative costs (\$82,885) through the end of fiscal year 24/25 and can be found in attached Schedule A.

**Contract History / Price Reasonableness:**

Purchasing on behalf of the Office of Economic Development issued RFP # EDARC-094 notifying 291 potential bidders, with 61 potential bidders accessing the bid. Five bid proposals were received and evaluated by the Office of Economic Development evaluation committee. The recommendation was made by that committee to award to The Natelson Dale Group.

**ATTACHMENTS:**

- Schedule A Budget Adjustment
- Professional Services Agreement - Natelson Dale Group, Inc.

**SCHEDULE A BUDGET ADJUSTMENT  
Fiscal Year 2024/2025**

**Increase estimated revenue:**

21735-1901000000-763520	Fed-American Rescue Plan Act	\$635,450
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**Increase in Expenditures:**

21735-1901000000-528500	Project Cost Expense	\$552,565
21735-1901000000-537180	Interfnd Exp – Salary Reimb	\$80,885
21735-1901000000-537020	Interfnd Exp -- Legal Services	\$2,000

  
Aaron Gettis, Chief of Deputy County Counsel      10/16/2024

**PROFESSIONAL SERVICE AGREEMENT**

for

**ECONOMIC DEVELOPMENT STRATEGIC PLANNING SERVICES**

between

**COUNTY OF RIVERSIDE**

and

**THE NATELSON DALE GROUP, INC.**



OCT 22 2024 3.26

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This Agreement, by and between The Natelson Dale Group, Inc., a California corporation, (herein referred to as "CONTRACTOR"), and the COUNTY OF RIVERSIDE, a political subdivision of the State of California, (herein referred to as "COUNTY"). The parties agree as follows:

**1. Description of Services**

**1.1** CONTRACTOR shall provide all services as outlined and specified in Exhibit A, Proposal for Professional Services, at the prices stated in Exhibit B, Bidder Cost Proposal Response.

**1.2** CONTRACTOR represents that it has the skills, experience, and knowledge necessary to perform under this Agreement and the COUNTY relies upon this representation. CONTRACTOR shall perform to the satisfaction of the COUNTY and in conformance to and consistent with the highest standards of firms/professionals in the same discipline in the State of California.

**1.3** CONTRACTOR affirms this it is fully apprised of all of the work to be performed under this Agreement; and the CONTRACTOR agrees it can properly perform this work at the prices stated in Exhibit B. CONTRACTOR is not to perform services or provide products outside of the Agreement.

**1.4** Acceptance by the COUNTY of the CONTRACTOR's performance under this Agreement does not operate as a release of CONTRACTOR's responsibility for full compliance with the terms of this Agreement.

**2. Period of Performance**

**2.1** This Agreement shall be effective upon signature of this Agreement by both parties and continues in effect through September 30<sup>th</sup>, 2025, unless terminated earlier. CONTRACTOR shall commence performance upon signature of this Agreement by both parties and shall diligently and continuously perform thereafter. The Riverside County Board of Supervisors is the only authority that may obligate the County for a non-cancelable multi-year agreement.

**3. Compensation**

**3.1** The COUNTY shall pay the CONTRACTOR for services performed, products provided and expenses incurred in accordance with the terms of Exhibit B, Payment Provisions. Maximum payments by COUNTY to CONTRACTOR shall not exceed Five-Hundred Fifty-Two Thousand Five-Hundred Sixty-Five Dollars (\$552,565.00) including all expenses. The COUNTY is not responsible for any fees or costs incurred above or beyond the contracted amount and shall have no obligation to purchase any specified amount of services or products. Unless otherwise specifically stated in Exhibit B, COUNTY shall not be responsible for payment of any of CONTRACTOR's expenses related to this Agreement.

3.2 No price increases will be permitted during the first year of this Agreement (If applicable). All price decreases (for example, if CONTRACTOR offers lower prices to another governmental entity) will automatically be extended to the COUNTY. The COUNTY requires written proof satisfactory to COUNTY of cost increases prior to any approved price adjustment. After the first year of the award, a minimum of thirty (30) days advance notice in writing is required to be considered and approved by COUNTY. No retroactive price adjustments will be considered. Any price increases must be stated in a written amendment to this Agreement. The net dollar amount of profit will remain firm during the period of the Agreement. Annual increases shall not exceed the Consumer Price Index- All Consumers, All Items - Greater Los Angeles, Riverside and Orange County areas and be subject to satisfactory performance review by the COUNTY and approved (if needed) for budget funding by the Board of Supervisors.

3.3 CONTRACTOR shall be paid only in accordance with an invoice submitted to COUNTY by CONTRACTOR within fifteen (15) days from the last day of each calendar month, and COUNTY shall pay the invoice within thirty (30) working days from the date of receipt of the invoice. Payment shall be made to CONTRACTOR only after services have been rendered or delivery of materials or products, and acceptance has been made by COUNTY. Prepare invoices in duplicate. For this Agreement, send the original and duplicate copies of invoices to:

County of Riverside Office of Economic Development  
3403 10<sup>th</sup> Street, Suite 400  
Riverside, CA 92501  
Attn: Fiscal Division

- a) Each invoice shall contain a minimum of the following information: invoice number and date; remittance address; bill-to and ship-to addresses of ordering department/division; Agreement number (EDARC-1065); quantities; item descriptions, unit prices, extensions, sales/use tax if applicable, and an invoice total.
- b) Invoices shall be rendered monthly in arrears, based on the percentage of each task completed during the preceding calendar month (with the completion percentages applied to the total cost for each task as specified in Exhibit B).

3.4 The COUNTY obligation for payment of this Agreement beyond the current fiscal year end is contingent upon and limited by the availability of COUNTY funding from which payment can be made, and invoices shall be rendered "monthly" in arrears. In the State of California, Government agencies are not allowed to pay excess interest and late charges, per Government Codes, Section 926.10. No legal liability on



the part of the COUNTY shall arise for payment beyond June 30 of each calendar year unless funds are made available for such payment. In the event that such funds are not forthcoming for any reason, COUNTY shall immediately notify CONTRACTOR in writing; and this Agreement shall be deemed terminated, have no further force, and effect.

**4. Alteration or Changes to the Agreement**

**4.1** The Board of Supervisors and the COUNTY Purchasing Agent and/or his designee is the only authorized COUNTY representatives who may at any time, by written order, alter this Agreement. If any such alteration causes an increase or decrease in the cost of, or the time required for the performance under this Agreement, an equitable adjustment shall be made in the Agreement price or delivery schedule, or both, and the Agreement shall be modified by written amendment accordingly.

**4.2** Any claim by the CONTRACTOR for additional payment related to this Agreement shall be made in writing by the CONTRACTOR within 30 days of when the CONTRACTOR has or should have notice of any actual or claimed change in the work, which results in additional and unanticipated cost to the CONTRACTOR. If the COUNTY Purchasing Agent decides that the facts provide sufficient justification, he may authorize additional payment to the CONTRACTOR pursuant to the claim. Nothing in this section shall excuse the CONTRACTOR from proceeding with performance of the Agreement even if there has been a change.

**5. Termination**

**5.1.** COUNTY may terminate this Agreement without cause upon thirty (30) days written notice served upon the CONTRACTOR stating the extent and effective date of termination.

**5.2** COUNTY may, upon five (5) days written notice terminate this Agreement for CONTRACTOR's default, if CONTRACTOR refuses or fails to comply with the terms of this Agreement or fails to make progress that may endanger performance and does not immediately cure such failure. In the event of such termination, the COUNTY may proceed with the work in any manner deemed proper by COUNTY.

**5.3** After receipt of the notice of termination, CONTRACTOR shall:

- (a) Stop all work under this Agreement on the date specified in the notice of termination; and
- (b) Transfer to COUNTY and deliver in the manner as directed by COUNTY any materials, reports, or other products, which, if the Agreement had been completed or continued, would have been required to be furnished to COUNTY.

5.4 After termination, COUNTY shall make payment only for CONTRACTOR's performance up to the date of termination in accordance with this Agreement.

5.5 CONTRACTOR's rights under this Agreement shall terminate (except for fees accrued prior to the date of termination) upon dishonesty or a willful or material breach of this Agreement by CONTRACTOR; or in the event of CONTRACTOR's unwillingness or inability for any reason whatsoever to perform the terms of this Agreement. In such event, CONTRACTOR shall not be entitled to any further compensation under this Agreement.

5.6 If the Agreement is federally or State funded, CONTRACTOR cannot be debarred from the System for Award Management (SAM). CONTRACTOR must notify the COUNTY immediately of a debarment. Reference: System for Award Management (SAM) at <https://www.sam.gov> for Central Contractor Registry (CCR), Federal Agency Registration (Fedreg), Online Representations and Certifications Application, and Excluded Parties List System (EPLS)). Excluded Parties Listing System (EPLS) (<http://www.epls.gov>) (Executive Order 12549, 7 CFR Part 3017, 45 CFR Part 76, and 44 CFR Part 17). The System for Award Management (SAM) is the Official U.S. Government system that consolidated the capabilities of CCR/FedReg, ORCA, and EPLS.

5.7 The rights and remedies of COUNTY provided in this section shall not be exclusive and are in addition to any other rights and remedies provided by law or this Agreement.

**6. Ownership/Use of Contract Materials and Products**

The CONTRACTOR agrees that all materials, reports or products in any form, including electronic, created by CONTRACTOR for which CONTRACTOR has been compensated by COUNTY pursuant to this Agreement shall be the sole property of the COUNTY. The material, reports or products may be used by the COUNTY for any purpose that the COUNTY deems to be appropriate, including, but not limit to, duplication and/or distribution within the COUNTY or to third parties. CONTRACTOR agrees not to release or circulate in whole or part such materials, reports, or products without prior written authorization of the COUNTY.

**7. Conduct of Contractor**

7.1 The CONTRACTOR covenants that it presently has no interest, including, but not limited to, other projects or contracts, and shall not acquire any such interest, direct or indirect, which would conflict in any manner or degree with CONTRACTOR's performance under this Agreement. The CONTRACTOR further covenants that no person or subcontractor having any such interest shall be employed or retained by CONTRACTOR under this Agreement. The CONTRACTOR agrees to inform the COUNTY of all the

CONTRACTOR's interests, if any, which are or may be perceived as incompatible with the COUNTY's interests.

7.2 The CONTRACTOR shall not, under circumstances which could be interpreted as an attempt to influence the recipient in the conduct of his/her duties, accept any gratuity or special favor from individuals or firms with whom the CONTRACTOR is doing business or proposing to do business, in accomplishing the work under this Agreement.

7.3 The CONTRACTOR or its employees shall not offer gifts, gratuity, favors, and entertainment directly or indirectly to COUNTY employees.

**8. Inspection of Service; Quality Control/Assurance**

8.1 All performance (which includes services, workmanship, materials, supplies and equipment furnished or utilized in the performance of this Agreement) shall be subject to inspection and test by the COUNTY or other regulatory agencies at all times. The CONTRACTOR shall provide adequate cooperation to any inspector or other COUNTY representative to permit him/her to determine the CONTRACTOR's conformity with the terms of this Agreement. If any services performed or products provided by CONTRACTOR are not in conformance with the terms of this Agreement, the COUNTY shall have the right to require the CONTRACTOR to perform the services or provide the products in conformance with the terms of the Agreement at no additional cost to the COUNTY. When the services to be performed or the products to be provided are of such nature that the difference cannot be corrected; the COUNTY shall have the right to: (1) require the CONTRACTOR immediately to take all necessary steps to ensure future performance in conformity with the terms of the Agreement; and/or (2) reduce the Agreement price to reflect the reduced value of the services performed or products provided. The COUNTY may also terminate this Agreement for default and charge to CONTRACTOR any costs incurred by the COUNTY because of the CONTRACTOR's failure to perform.

8.2 CONTRACTOR shall establish adequate procedures for self-monitoring and quality control and assurance to ensure proper performance under this Agreement; and shall permit a COUNTY representative or other regulatory official to monitor, assess, or evaluate CONTRACTOR's performance under this Agreement at any time, upon reasonable notice to the CONTRACTOR.

**9. Independent Contractor/Employment Eligibility**

9.1 The CONTRACTOR is, for purposes relating to this Agreement, an independent contractor and shall not be deemed an employee of the COUNTY. It is expressly understood and agreed that the CONTRACTOR (including its employees, agents, and subcontractors) shall in no event be entitled to any

benefits to which COUNTY employees are entitled, including but not limited to overtime, any retirement benefits, worker's compensation benefits, and injury leave or other leave benefits. There shall be no employer-employee relationship between the parties; and CONTRACTOR shall hold COUNTY harmless from any and all claims that may be made against COUNTY based upon any contention by a third party that an employer-employee relationship exists by reason of this Agreement. It is further understood and agreed by the parties that CONTRACTOR in the performance of this Agreement is subject to the control or direction of COUNTY merely as to the results to be accomplished and not as to the means and methods for accomplishing the results.

**9.2** CONTRACTOR warrants that it shall make its best effort to fully comply with all federal and state statutes and regulations regarding the employment of aliens and others and to ensure that employees performing work under this Agreement meet the citizenship or alien status requirement set forth in federal statutes and regulations. CONTRACTOR shall obtain, from all employees performing work hereunder, all verification and other documentation of employment eligibility status required by federal or state statutes and regulations including, but not limited to, the Immigration Reform and Control Act of 1986, 8 U.S.C. §1324 et seq., as they currently exist and as they may be hereafter amended. CONTRACTOR shall retain all such documentation for all covered employees, for the period prescribed by the law.

**9.3** Ineligible Person shall be any individual or entity who: Is currently excluded, suspended, debarred or otherwise ineligible to participate in the federal health care programs; or has been convicted of a criminal offense related to the provision of health care items or services and has not been reinstated in the federal health care programs after a period of exclusion, suspension, debarment, or ineligibility.

**9.4** CONTRACTOR shall screen prospective Covered Individuals prior to hire or engagement. CONTRACTOR shall not hire or engage any Ineligible Person to provide services directly relative to this Agreement. CONTRACTOR shall screen all current Covered Individuals within sixty (60) days of execution of this Agreement to ensure that they have not become Ineligible Persons unless CONTRACTOR has performed such screening on same Covered Individuals under a separate agreement with COUNTY within the past six (6) months. Covered Individuals shall be required to disclose to CONTRACTOR immediately any debarment, exclusion or other event that makes the Covered Individual an Ineligible Person. CONTRACTOR shall notify COUNTY within five (5) business days after it becomes aware if a Covered Individual providing services directly relative to this Agreement becomes debarred, excluded or otherwise becomes an Ineligible Person.

9.5 CONTRACTOR acknowledges that Ineligible Persons are precluded from providing federal and state funded health care services by contract with COUNTY in the event that they are currently sanctioned or excluded by a federal or state law enforcement regulatory or licensing agency. If CONTRACTOR becomes aware that a Covered Individual has become an Ineligible Person, CONTRACTOR shall remove such individual from responsibility for, or involvement with, COUNTY business operations related to this Agreement.

9.6 CONTRACTOR shall notify COUNTY within five (5) business days if a Covered Individual or entity is currently excluded, suspended or debarred, or is identified as such after being sanction screened. Such individual or entity shall be promptly removed from participating in any activity associated with this Agreement.

**10. Subcontract for Work or Services**

No contract shall be made by the CONTRACTOR with any other party for furnishing any of the work or services under this Agreement without the prior written approval of the COUNTY; but this provision shall not require the approval of contracts of employment between the CONTRACTOR and personnel assigned under this Agreement, or for parties named in the proposal and agreed to under this Agreement.

**11. Disputes**

11.1 The parties shall attempt to resolve any disputes amicably at the working level. If that is not successful, the dispute shall be referred to the senior management of the parties. Any dispute relating to this Agreement, which is not resolved by the parties, shall be decided by the COUNTY's Purchasing Department's Compliance Contract Officer who shall furnish the decision in writing. The decision of the COUNTY's Compliance Contract Officer shall be final and conclusive unless determined by a court of competent jurisdiction to have been fraudulent, capricious, arbitrary, or so grossly erroneous to imply bad faith. The CONTRACTOR shall proceed diligently with the performance of this Agreement pending the resolution of a dispute.

11.2 Prior to the filing of any legal action related to this Agreement, the parties shall be obligated to attend a mediation session in Riverside County before a neutral third-party mediator. A second mediation session shall be required if the first session is not successful. The parties shall share the cost of the mediations.

**12. Licensing and Permits**

CONTRACTOR shall comply with all State or other licensing requirements, including but not limited to the provisions of Chapter 9 of Division 3 of the Business and Professions Code. All licensing requirements shall be met at the time proposals are submitted to the COUNTY. CONTRACTOR warrants that it has all necessary permits, approvals, certificates, waivers and exemptions necessary for performance of this Agreement as required by the laws and regulations of the United States, the State of California, the County of Riverside and all other governmental agencies with jurisdiction, and shall maintain these throughout the term of this Agreement.

**13. Use By Other Political Entities**

The CONTRACTOR agrees to extend the same pricing, terms, and conditions as stated in this Agreement to each and every political entity, special district, and related non-profit. It is understood that other entities shall make purchases in their own name, make direct payment, and be liable directly to the CONTRACTOR; and COUNTY shall in no way be responsible to CONTRACTOR for other entities' purchases.

**14. Non-Discrimination**

CONTRACTOR shall not be discriminate in the provision of services, allocation of benefits, accommodation in facilities, or employment of personnel on the basis of ethnic group identification, race, religious creed, color, national origin, ancestry, physical handicap, medical condition, marital status or sex in the performance of this Agreement; and, to the extent they shall be found to be applicable hereto, shall comply with the provisions of the California Fair Employment and Housing Act (Gov. Code 12900 et. seq), the Federal Civil Rights Act of 1964 (P.L. 88-352), the Americans with Disabilities Act of 1990 (42 U.S.C. S1210 et seq.) and all other applicable laws or regulations.

**15. Records and Documents**

CONTRACTOR shall make available, upon written request by any duly authorized Federal, State, or COUNTY agency, a copy of this Agreement and such books, documents and records as are necessary to certify the nature and extent of the CONTRACTOR's costs related to this Agreement. All such books, documents and records shall be maintained by CONTRACTOR for at least five years following termination of this Agreement and be available for audit by the COUNTY. CONTRACTOR shall provide to the COUNTY reports and information related to this Agreement as requested by COUNTY.

**16. Confidentiality**

**16.1** The CONTRACTOR shall not use for personal gain or make other improper use of privileged or confidential information which is acquired in connection with this Agreement. The term

“privileged or confidential information” includes but is not limited to: unpublished or sensitive technological or scientific information; medical, personnel, or security records; anticipated material requirements or pricing/purchasing actions; COUNTY information or data which is not subject to public disclosure; COUNTY operational procedures; and knowledge of selection of contractors, subcontractors or suppliers in advance of official announcement.

**16.2** The CONTRACTOR shall protect from unauthorized disclosure names and other identifying information concerning persons receiving services pursuant to this Agreement, except for general statistical information not identifying any person. The CONTRACTOR shall not use such information for any purpose other than carrying out the CONTRACTOR’s obligations under this Agreement. The CONTRACTOR shall promptly transmit to the COUNTY all third-party requests for disclosure of such information. The CONTRACTOR shall not disclose, except as otherwise specifically permitted by this Agreement or authorized in advance in writing by the COUNTY, any such information to anyone other than the COUNTY. For purposes of this paragraph, identity shall include, but not be limited to, name, identifying number, symbol, or other identifying particulars assigned to the individual, such as finger or voice print or a photograph.

**17. Administration/Contract Liaison**

The COUNTY Purchasing Agent, or designee, shall administer this Agreement on behalf of the COUNTY. The Purchasing Department is to serve as the liaison with CONTRACTOR in connection with this Agreement.

**18. Notices**

All correspondence and notices required or contemplated by this Agreement shall be delivered to the respective parties at the addresses set forth below and are deemed submitted two days after their deposit in the United States mail, postage prepaid:

**COUNTY OF RIVERSIDE**

County of Riverside Office of Economic Development  
3403 10<sup>th</sup> Street, Suite 400  
Riverside, CA 92501  
Attn: Purchasing & Finance

**CONTRACTOR**

The Natelson Dale Group, Inc.  
P.O. Box 489  
Yorba Linda, CA 92885

**19. Force Majeure**

If either party is unable to comply with any provision of this Agreement due to causes beyond its reasonable control, and which could not have been reasonably anticipated, such as acts of God, acts of war, civil disorders, or other similar acts, such party shall not be held liable for such failure to comply.

**20. EDD Reporting Requirements**

In order to comply with child support enforcement requirements of the State of California, the COUNTY may be required to submit a Report of Independent Contractor(s) form **DE 542** to the Employment Development Department. The CONTRACTOR agrees to furnish the required data and certifications to the COUNTY within 10 days of notification of award of Agreement when required by the EDD. This data will be transmitted to governmental agencies charged with the establishment and enforcement of child support orders. Failure of the CONTRACTOR to timely submit the data and/or certificates required may result in the contract being awarded to another contractor. In the event a contract has been issued, failure of the CONTRACTOR to comply with all federal and state reporting requirements for child support enforcement or to comply with all lawfully served Wage and Earnings Assignments Orders and Notices of Assignment shall constitute a material breach of Agreement. If CONTRACTOR has any questions concerning this reporting requirement, please call (916) 657-0529. CONTRACTOR should also contact its local Employment Tax Customer Service Office listed in the telephone directory in the State Government section under "Employment Development Department" or access their Internet site at [www.edd.ca.gov](http://www.edd.ca.gov).

**21. Hold Harmless/Indemnification**

**21.1** CONTRACTOR shall indemnify and hold harmless the County of Riverside, its Agencies, Districts, Special Districts and Departments, their respective directors, officers, Board of Supervisors, elected and appointed officials, employees, agents and representatives (individually and collectively hereinafter referred to as Indemnitees) from any liability, action, claim or damage whatsoever, based or asserted upon any services of CONTRACTOR, its officers, employees, subcontractors, agents or representatives arising out of or in any way relating to this Agreement, including but not limited to property damage, bodily injury, or death or any other element of any kind or nature. CONTRACTOR shall defend the Indemnitees at its sole expense including all costs and fees (including, but not limited, to attorney fees, cost of investigation, defense and settlements or awards) in any claim or action based upon such acts, omissions or services.

**21.2** With respect to any action or claim subject to indemnification herein by CONTRACTOR, CONTRACTOR shall, at their sole cost, have the right to use counsel of their own choice and shall have the



right to adjust, settle, or compromise any such action or claim without the prior consent of COUNTY; provided, however, that any such adjustment, settlement or compromise in no manner whatsoever limits or circumscribes CONTRACTOR indemnification to Indemnitees as set forth herein.

**21.3** CONTRACTOR'S obligation hereunder shall be satisfied when CONTRACTOR has provided to COUNTY the appropriate form of dismissal relieving COUNTY from any liability for the action or claim involved.

**21.4** The specified insurance limits required in this Agreement shall in no way limit or circumscribe CONTRACTOR'S obligations to indemnify and hold harmless the Indemnitees herein from third party claims.

**22. Insurance**

**22.1** Without limiting or diminishing the CONTRACTOR'S obligation to indemnify or hold the COUNTY harmless, CONTRACTOR shall procure and maintain or cause to be maintained, at its sole cost and expense, the following insurance coverage's during the term of this Agreement. As respects to the insurance section only, the COUNTY herein refers to the County of Riverside, its Agencies, Districts, Special Districts, and Departments, their respective directors, officers, Board of Supervisors, employees, elected or appointed officials, agents, or representatives as Additional Insureds. Policy shall name the COUNTY as Additional Insureds.

**A. Workers' Compensation:**

If the CONTRACTOR has employees as defined by the State of California, the CONTRACTOR shall maintain statutory Workers' Compensation Insurance (Coverage A) as prescribed by the laws of the State of California. Policy shall include Employers' Liability (Coverage B) including Occupational Disease with limits not less than \$1,000,000 per person per accident. The policy shall be endorsed to waive subrogation in favor of The County of Riverside. Policy shall name the COUNTY as Additional Insureds.

**B. Commercial General Liability:**

Commercial General Liability insurance coverage, including but not limited to, premises liability, unmodified contractual liability, products and completed operations liability, personal and advertising injury, and cross liability coverage, covering claims which may arise from or out of CONTRACTOR'S performance of its obligations hereunder. Policy shall name the COUNTY as Additional Insured. Policy's limit of liability shall not be less than \$2,000,000 per occurrence combined single limit. If such insurance contains a general aggregate limit, it shall apply separately to this agreement or be no less than two (2) times the occurrence limit. Policy shall name the COUNTY as Additional Insureds.

**C. Vehicle Liability:**

If vehicles or mobile equipment is used in the performance of the obligations under this Agreement, then CONTRACTOR shall maintain liability insurance for all owned, non-owned, or hired vehicles so used in an amount not less than \$1,000,000 per occurrence combined single limit. If such insurance contains a general aggregate limit, it shall apply separately to this agreement or be no less than two (2) times the occurrence limit. Policy shall name the COUNTY as Additional Insureds.

**D. Professional Liability**

Contractor shall maintain Professional Liability Insurance providing coverage for the Contractor's performance of work included within this Agreement, with a limit of liability of not less than \$1,000,000 per occurrence and \$2,000,000 annual aggregate. If Contractor's Professional Liability Insurance is written on a claims made basis rather than an occurrence basis, such insurance shall continue through the term of this Agreement and CONTRACTOR shall purchase at his sole expense either 1) an Extended Reporting Endorsement (also, known as Tail Coverage); or 2) Prior Dates Coverage from new insurer with a retroactive date back to the date of, or prior to, the inception of this Agreement; or 3) demonstrate through Certificates of Insurance that CONTRACTOR has Maintained continuous coverage with the same or original insurer. Coverage provided under items; 1), 2), or 3) will continue as long as the law allows. Policy shall name the COUNTY as Additional Insureds.

**E. General Insurance Provisions - All lines:**

1) Any insurance carrier providing insurance coverage hereunder shall be admitted to the State of California and have an A M BEST rating of not less than A: VIII (A:8) unless such requirements are waived, in writing, by the County Risk Manager. If the County's Risk Manager waives a requirement for a particular insurer such waiver is only valid for that specific insurer and only for one policy term.

2) The CONTRACTOR must declare its insurance self-insured retention for each coverage required herein. If any such self-insured retention exceeds \$500,000 per occurrence each such retention shall have the prior written consent of the County Risk Manager before the commencement of operations under this Agreement. Upon notification of self-insured retention unacceptable to the COUNTY, and at the election of the County's Risk Manager, CONTRACTOR'S carriers shall either; 1) reduce or eliminate such self-insured retention as respects this Agreement with the COUNTY, or 2) procure a bond which guarantees payment of losses and related investigations, claims administration, and defense costs and expenses.

3) CONTRACTOR shall cause CONTRACTOR'S insurance carrier(s) to furnish the County of Riverside with either 1) a properly executed original Certificate(s) of Insurance and certified original copies

of Endorsements effecting coverage as required herein, and 2) if requested to do so orally or in writing by the County Risk Manager, provide original Certified copies of policies including all Endorsements and all attachments thereto, showing such insurance is in full force and effect. Further, said Certificate(s) and policies of insurance shall contain the covenant of the insurance carrier(s) that thirty (30) days written notice shall be given to the County of Riverside prior to any material modification, cancellation, expiration or reduction in coverage of such insurance. If CONTRACTOR insurance carrier(s) policies does not meet the minimum notice requirement found herein, CONTRACTOR shall cause CONTRACTOR'S insurance carrier(s) to furnish a 30 day Notice of Cancellation Endorsement.

4) In the event of a material modification, cancellation, expiration, or reduction in coverage, this Agreement shall terminate forthwith, unless the County of Riverside receives, prior to such effective date, another properly executed original Certificate of Insurance and original copies of endorsements or certified original policies, including all endorsements and attachments thereto evidencing coverage's set forth herein and the insurance required herein is in full force and effect. CONTRACTOR shall not commence operations until the COUNTY has been furnished original Certificate (s) of Insurance and certified original copies of endorsements and if requested, certified original policies of insurance including all endorsements and any and all other attachments as required in this Section. An individual authorized by the insurance carrier shall sign the original endorsements for each policy and the Certificate of Insurance.

5) It is understood and agreed to by the parties hereto that the CONTRACTOR'S insurance shall be construed as primary insurance, and the COUNTY'S insurance and/or deductibles and/or self-insured retention's or self-insured programs shall not be construed as contributory.

6) If, during the term of this Agreement or any extension thereof, there is a material change in the scope of services; or, there is a material change in the equipment to be used in the performance of the scope of work; or, the term of this Agreement, including any extensions thereof, exceeds five (5) years; the COUNTY reserves the right to adjust the types of insurance and the monetary limits of liability required under this Agreement, if in the County Risk Manager's reasonable judgment, the amount or type of insurance carried by the CONTRACTOR has become inadequate.

7) CONTRACTOR shall pass down the insurance obligations contained herein to all tiers of subcontractors working under this Agreement.

8) The insurance requirements contained in this Agreement may be met with a program(s) of self-insurance acceptable to the COUNTY.

9) CONTRACTOR agrees to notify COUNTY of any claim by a third party or any incident or event that may give rise to a claim arising from the performance of this Agreement.

**23. General**

**23.1** CONTRACTOR shall not delegate or assign any interest in this Agreement, whether by operation of law or otherwise, without the prior written consent of COUNTY. Any attempt to delegate or assign any interest herein shall be deemed void and of no force or effect.

**23.2** Any waiver by COUNTY of any breach of any one or more of the terms of this Agreement shall not be construed to be a waiver of any subsequent or other breach of the same or of any other term of this Agreement. Failure on the part of COUNTY to require exact, full, and complete compliance with any terms of this Agreement shall not be construed as in any manner changing the terms or preventing COUNTY from enforcement of the terms of this Agreement.

**23.3** In the event the CONTRACTOR receives payment under this Agreement, which is later disallowed by COUNTY for nonconformance with the terms of the Agreement, the CONTRACTOR shall promptly refund the disallowed amount to the COUNTY on request; or at its option the COUNTY may offset the amount disallowed from any payment due to the CONTRACTOR.

**23.4** CONTRACTOR shall not provide partial delivery or shipment of services or products unless specifically stated in the Agreement.

**23.5** CONTRACTOR shall not provide any services or products subject to any chattel mortgage or under a conditional sales contract or other agreement by which an interest is retained by a third party. The CONTRACTOR warrants that it has good title to all materials or products used by CONTRACTOR or provided to COUNTY pursuant to this Agreement, free from all liens, claims, or encumbrances.

**23.6** Nothing in this Agreement shall prohibit the COUNTY from acquiring the same type or equivalent equipment, products, materials or services from other sources, when deemed by the COUNTY to be in its best interest. The COUNTY reserves the right to purchase more or less than the quantities specified in this Agreement.

**23.7** The COUNTY agrees to cooperate with the CONTRACTOR in the CONTRACTOR's performance under this Agreement, including, if stated in the Agreement, providing the CONTRACTOR with reasonable facilities and timely access to COUNTY data, information, and personnel.

**23.8** CONTRACTOR shall comply with all applicable Federal, State and local laws and regulations. CONTRACTOR will comply with all applicable COUNTY policies and procedures. In the

event that there is a conflict between the various laws or regulations that may apply, the CONTRACTOR shall comply with the more restrictive law or regulation.

**23.9** CONTRACTOR shall comply with all air pollution control, water pollution, safety and health ordinances, statutes, or regulations, which apply to performance under this Agreement.

**23.10** CONTRACTOR shall comply with all requirements of the Occupational Safety and Health Administration (OSHA) standards and codes as set forth by the U.S. Department of Labor and the State of California (Cal/OSHA).

**23.11** This Agreement shall be governed by the laws of the State of California. Any legal action related to the performance or interpretation of this Agreement shall be filed only in the Superior Court of the State of California located in Riverside, California, and the parties waive any provision of law providing for a change of venue to another location. In the event any provision in this Agreement is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remaining provisions will nevertheless continue in full force without being impaired or invalidated in any way.

**23.12** This Agreement, including any attachments or exhibits, constitutes the entire Agreement of the parties with respect to its subject matter and supersedes all prior and contemporaneous representations, proposals, discussions and communications, whether oral or in writing. This Agreement may be changed or modified only by a written amendment signed by authorized representatives of both parties.

**23.13** During the term of this Agreement and for one (1) years after the Agreement is terminated, CONTRACTOR will not indirectly or directly solicit to hire, any individual who is employed by COUNTY.

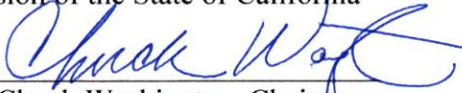
**23.14** Electronic Signatures. This Agreement may be executed in any number of counterparts, each of which will be an original, but all of which together will constitute one instrument. Each party to this Agreement agrees to the use of electronic signatures, such as digital signatures that meet the requirements of the California Uniform Electronic Transactions Act ("CUETA") Cal. Civ. Code §§ 1633.1 to 1633.17), for executing this Agreement. The parties further agree that the electronic signatures of the parties included in this Agreement are intended to authenticate this writing and to have the same force and effect as manual signatures. Electronic signature means an electronic sound, symbol, or process attached to or logically associated with an electronic record and executed or adopted by a person with the intent to sign the electronic record pursuant to the CUE TA as amended from time to time. The CUETA authorizes use of an electronic signature for transactions and contracts among parties in California, including a government agency. Digital signature means an electronic identifier, created by computer, intended by the party using it to have the same force and effect as the use of a manual signature, and shall be reasonably relied upon by

the parties. For purposes of this section, a digital signature is a type of "electronic signature" as defined in subdivision (i) of Section 1633.2 of the Civil Code.

**23.15** In the event of contradiction, between the County's and the CONTRACTOR's conditions, the County's conditions will prevail.

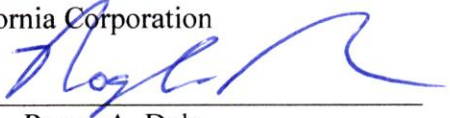
IN WITNESS WHEREOF, the Parties hereto have caused their duly authorized representatives to execute this Agreement.

**COUNTY OF RIVERSIDE**, a political subdivision of the State of California

By:   
Chuck Washington, Chairman  
Board of Supervisors


Dated: 10/22/2024

**THE NATELSON DALE GROUP, INC.**, a California Corporation


By:   
Roger A. Dale  
President

Dated: 9/25/24

ATTEST:  
Kimberly A. Rector  
Clerk of the Board

By:   
Deputy

APPROVED AS TO FORM:  
Minh C. Tran  
County Counsel

By:   
Stephanie Nelson  
Deputy County Counsel

OCT 22 2024 3.26

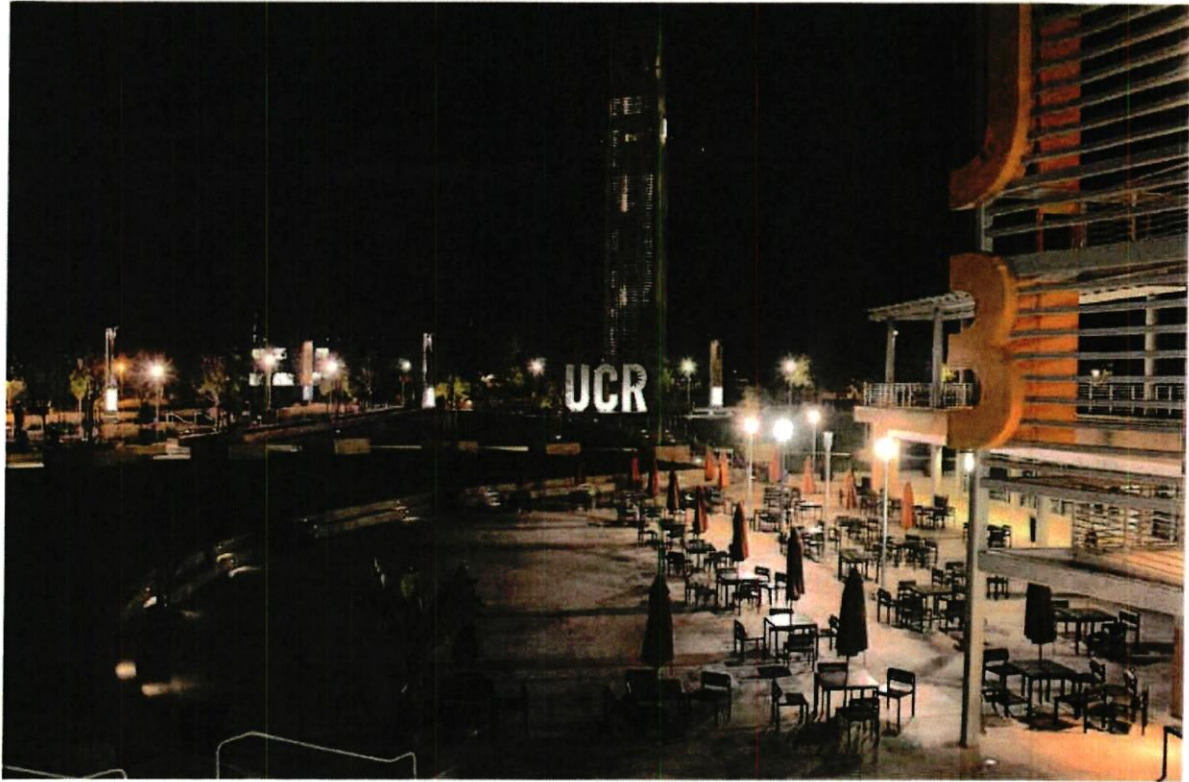
**Exhibit A – Proposal for Professional Services**



**Exhibit B – Bidder Cost Proposal**



**PROPOSAL FOR PROFESSIONAL SERVICES  
ECONOMIC DEVELOPMENT STRATEGIC PLAN**



Submitted to:  
**County of Riverside**

---

**SUBMITTED BY:**

**N** THE NATELSON DALE GROUP, INC.  
YORBA LINDA, CA • [www.natelsondale.com](http://www.natelsondale.com)  
O: 714.692.9596 • F: 714.692.9597

**April 16, 2024**

The Natelson Dale Group, Inc.  
P.O. Box 489  
Yorba Linda, CA 92885  
(714) 692-9596 phone / (714) 692-9597 fax  
[dale@natelsondale.com](mailto:dale@natelsondale.com)

April 16, 2024  
#7683

Matthew Gaeta, Procurement Contract Specialist  
Riverside County Purchasing and Fleet Services  
3450 14th Street, Suite 420  
Riverside, CA 92501

Dear Mr. Gaeta:

In response to your solicitation, **The Natelson Dale Group, Inc. (TNDG)** is extremely pleased to submit this proposal to prepare an Economic Development Strategic Plan and Comprehensive Economic Development Strategy (CEDS) for the County of Riverside. Based on our strong familiarity with the Inland Empire and our extensive experience leading economic development strategic planning processes for cities and counties throughout the United States, we believe our team is uniquely well-qualified for this assignment. We are excited that our team for this submission includes the following key partners:

- **Economic Growth Strategies, led by Paul Saldana** – an acclaimed California economic development practitioner
- **International Sustainable Resilience Center (ISRC)** – creators of the Economic Resilience Scorecard™
- **StateBook** – innovators of the Digital CEDS™ and other data-driven tools

We very much appreciate your consideration of our team and sincerely hope we have the opportunity to be of service to Riverside County on this exciting project.

Respectfully submitted,

THE NATELSON DALE GROUP, INC.



Roger Dale  
Managing Principal

**REQUEST FOR PROPOSAL # EDARC-094**  
**ECONOMIC DEVELOPMENT STRATEGIC PLANNING SERVICES**

**ATTACHMENT A: BIDDER PROPOSAL RESPONSE**



By:  
Matthew Gaeta, Procurement Contract Specialist  
Riverside County Purchasing & Fleet Services  
3450 14<sup>th</sup> Street, Suite 420  
Riverside, CA 92501  
(951) 955-4821  
Email: [mgaeta@rivco.org](mailto:mgaeta@rivco.org)  
NIGP Code(s): 91858, 91849, 95261, 96258  
UNSPSC: 80100000, 80110000, 72000000

**This RFP and any ensuing Addendums are available at the following links:**  
[www.purchasing.co.riverside.ca.us](http://www.purchasing.co.riverside.ca.us) and [www.publicpurchase.com](http://www.publicpurchase.com)

**NOTE: BIDDERS ARE RESPONSIBLE TO READ ALL INFORMATION THAT IS STATED IN THIS REQUEST FOR PROPOSAL AND PROVIDE A RESPONSE AS REQUIRED**

**BIDDERS MAY REQUEST THIS ATTACHMENT IN AN ELECTRONIC WORD FORMAT BY SENDING AN EMAIL REQUEST TO: Matthew Gaeta at: [Mgaeta@rivco.org](mailto:Mgaeta@rivco.org)**

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SECTION B PROPOSAL COVER PAGE ..... 3

SECTION C COMPANY PROFILE / EXPERIENCE ..... 5

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SECTION K SMALL BUSINESS AFFIDAVIT ..... 22

**TO ALLOW BIDDERS TO SUBMIT SECTION K & L AS INSTRUCTED,  
SECTIONS K & L HAVE BEEN ATTACHED AS SEPARATE DOCUMENTS  
ON THE PUBLIC PURCHASE WEBSITE**

**ATTACHMENT A** (Sections available separately on Public Purchase)

SECTION L BIDDER COST PROPOSAL RESPONSE .....

SECTION M FINANCIAL STATEMENTS .....

**ATTACHMENT A  
BIDDER PROPOSAL RESPONSE (SECTIONS A – I)**

**Section A Proposal Checklist**

**Instructions:**

- Bidder’s proposal shall follow the order provided below; however, the Bidder may insert the number of pages necessary to provide the required information. Bidders are not restricted to the number of pages that have been provided in this attachment.
- Bidder’s proposal must contain the following sections (**labeled Sections A – K and Sections L & M**) in the order listed below.
- The Proposal Checklist shall identify the page numbers where each of the identified sections can be located within the bidder’s response. To ensure that all items have been provided, bidders shall check off each box on the checklist to verify the requested information has been provided.
- Follow the instructions provided in each section of the RFP.
- Bidder may provide additional attachments in Section I of their proposals; however, each item shall be labeled to specifically identify what it is and what page number it can be located on in the response.
- Bidders that do not follow the instructions or do not provide the information requested in Terms and Conditions document “Section 5.0. Proposal Submittal Procedures”, may be found “non-responsive” and disqualified from the bid process.

**Name of Company:** The Natelson Dale Group, Inc.

**Service to provide:** Economic Development Strategic Planning Services

**Proposal Submittal Checklist**

*General Items:*

- Sections A – K** have been saved as one file (or separate files) in Microsoft Word or PDF format and uploaded to the Public Purchase website.
- Section L: Cost Proposal** has been saved as a separate file in Microsoft Word or PDF format and uploaded to the Public Purchase website. **Section L must be uploaded separately and may NOT be included as part of Sections A-K above or Section M below.**
- Section M: Financial Statements** which consists of **both** the balance sheet and income statement for the company have been saved as a separate file in Microsoft Word or PDF format and uploaded to the Public Purchase website. **Section M must be uploaded separately and may NOT be included as part of Sections A-K or Section L above.**

Bidders proposals shall consist of the following sections and indicate the page number where the section and attachments are located in the proposal.

	<b>Page Number</b>
<input type="checkbox"/> <b>Section A</b> – Proposal Submittal Checklist ( <i>this page</i> ) .....	<u>1</u>
<input checked="" type="checkbox"/> <b>Section B</b> – Proposal Cover Page ( <i>signed by Authorized Signatory</i> ).....	<u>3</u>
<input checked="" type="checkbox"/> <b>Section C</b> – Company Profile / Experience.....	<u>23</u>
<input checked="" type="checkbox"/> <b>Section D</b> – Acknowledgements .....	<u>7</u>
<input checked="" type="checkbox"/> <b>Section E</b> – Scope of Services.....	<u>10</u>

**Section F – References** .....27

**Section G – Bidder Attachments** .....23

Any response/information that Bidders are finding difficult to include in the “Bidders Response” boxes in any section of the RFP, can be included as an attachment in Section G. Attachments provided in Section G must be labelled as “Attachment 1”, “Attachment 2” and so forth. Enter the corresponding Attachment Number into the Bidder’s Response box with the words “See Section G.” List all attachments with an index Section.

List all attachments included in this Section. Please add rows and use additional pages to list attachments if necessary.

Attachment Number	Document Title	Page Number
Attachment 1	<a href="#">Firm Profile</a>	23
Attachment 2	<a href="#">Recent Projects</a>	27
Attachment 3	<a href="#">Subconsultant Projects</a>	30
Attachment 4	<a href="#">Key Personnel</a>	34
Attachment 5	<a href="#">Resumes</a>	37
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**Section H – Iran Contracting Act** .....18

**Section I – Compliance with Economic Sanctions in Response to Russia’s Actions in Ukraine** .....19

**Section J – Veteran, Active Duty and/or National Guard Business Affidavit** .....20

**Section K – Small Business Affidavit** .....22

**ATTACHMENT A: BIDDER’S COST PROPOSAL (SECTION L) AND FINANCIAL STATEMENTS (SECTION M) MUST BE UPLOADED TO THE PUBLIC PURCHASE WEBSITE AS TWO SEPARATE FILES AND NOT AS PART OF SECTIONS A – K ABOVE.**

**Section L – Bidder Cost Proposal Response\*** .....66

\* Please note: Section J is the only section the Cost Proposal Sheet, Budget Worksheets or any other cost-related information should appear in the bidder’s proposal. **Do not include** cost information in any other section.

**Section M – Financial Statements\*\*** .....70

\*\* Please note: Financial statements must include the organization’s balance sheet **and** income statement.

**Section B Proposal Cover Page**

The Proposal Cover Page must be signed by an authorized representative. Signature by an authorized representative of the firm on the Proposal cover page shall constitute a warranty, the falsity of which shall entitle the County of Riverside to pursue any remedy authorized by law, which shall include the right, at the option of the County of Riverside, of declaring any contract made as a result thereof, to be void. Digital signatures are acceptable (Reference: The Uniform Electronic Transaction Act (UETA) California Civil Code Section 1633.1 – 1633.

**BIDDER TO COMPLETE ALL APPLICABLE AREAS**

BIDDERS ARE REQUIRED TO REGISTER (IF NOT ALREADY REGISTERED) ON THE COUNTY OF RIVERSIDE'S WEBSITE:  
[WWW.PURCHASING.CO.RIVERSIDE.CA.US](http://WWW.PURCHASING.CO.RIVERSIDE.CA.US)

The County of Riverside Purchasing Department on behalf of the County of Riverside Office of Economic Development is soliciting Proposals from qualified providers for:

**RFP #EDARC-094: ECONOMIC DEVELOPMENT AND STRATEGIC PLANNING SERVICES**

All proposals shall be signed by an authorized agent and uploaded to the Public Purchase website at:  
[www.publicpurchase.com](http://www.publicpurchase.com) by the bid closing date on or before 1:30 p.m.

**NO FAXED OR EMAILED QUALIFICATION PACKAGES WILL BE ACCEPTED**

After close of this RFP, the award will be announced within 60- 120 days. If an addendum is issued for this procurement, it will be the Bidder's responsibility to retrieve all applicable addenda from the Public Purchase / Purchasing website.

*"Execution hereof is certification that the undersigned has read and understands the terms and conditions hereof, and that the undersigned's principal is fully bound and committed."*

Company Name: The Natelson Dale Group, Inc.

Mailing Address: P.O. Box 489

City: Yorba Linda

State: CA

Zip: 92885

Remit to Address: P.O. Box 489

City: Yorba Linda

State: CA

Zip: 92885


Phone # (714) 692-9596

FAX # (714) 692-9597

Contractor Website: [natelsondale.com](http://natelsondale.com)

Name: Roger Dale

Title: Managing Principal

Signature: 

Date: 4/8/24

Email: [dale@natelsondale.com](mailto:dale@natelsondale.com)



TO APPLY AND QUALIFY FOR PREFERENCE PROGRAM BIDDER MUST CHECK THE PREFERENCE BEING APPLIED FOR BELOW.  
**BIDDER MUST ALSO COMPLETE AND SUBMIT THE APPLICABLE PREFERENCE PROGRAMS AFFIDAVIT AND INCLUDE IT IN THIS SECTION OF THE PROPOSAL FOR REVIEW AND CONSIDERATION.**

(ONLY ONE MAY BE SELECTED)

**Small Business Preference**  
*(Must submit Small Business Affidavit)*

OR

**Veteran, Active Duty and/or National Guard Business Preference**  
*(Must submit Veteran, Active Duty and/or National Guard Business Affidavit)*

## PRE-BID MEETING INFORMATION

**The non-mandatory Pre-bid Meeting for this RFP will be offered virtually via Microsoft Teams.**

Instructions on how to access the meeting have been provided below.

**DATE: March 27, 2024**

**TIME: 10:00 a.m. Pacific Standard Time**

**LOCATION: Microsoft Teams**

**Microsoft Teams meeting**  
**Join on your computer, mobile app or room device**

[Click Here To Join Meeting](#)

Meeting ID: 220 988 090 206

Passcode: nyAguL

[Download App](#) | [Join on the web](#)

**Or call in (audio only)**

+1 951-465-8390 343274312#

Phone conference ID: 343 274 312#

*RFP documents are available for review and may be downloaded at: [www.publicpurchase.com](http://www.publicpurchase.com)*

*Please be advised these documents will be discussed during the Pre-bid Meeting.*

*If attendees do not have access to the documents, they will also be available for review during the meeting.*

### Section C Company Profile / Experience

This section of the proposal is designed to establish the bidder as an entity with the ability and experience to provide services as specified in the RFP. The Company Profile should be concise and clear, and include descriptive information regarding service delivery. The following information must be provided as follows:

1. Firm Profile: Provide a description of the firm, including number of professional personnel, years in business, office location(s), organizational structure (e.g., corporation, partnership, sole proprietor, etc.), areas of particular expertise, etc.

**BIDDER'S RESPONSE:**

Attachment 1 – Firm Profile page 23

2. A list of the three most recent similar projects by the proposed project team. Include at least one project on which all of the principal team members, including key sub-consultants, worked together. Do not list any projects that were performed by key team members when they were employed by other firms. Each description shall include:
  - The name of the client and a contact name, address, and telephone number.
  - The scope of the consultant's involvement in the project.
  - The month of the consultant's involvement in the project.
  - The month and year the projects started and the month and year they were completed.
  - The total value of the services provided.
  - The key personnel involved and the sub-consultants employed.

**BIDDER'S RESPONSE:**

Attachment 2 – Recent Projects page 27

3. Sub-consultants should identify at least three (2) recent projects of a similar nature as references. Give the following information on each project:
  - The name and location of the project.
  - The estimated total value.
  - The year the project was started and completed.
  - The firm's project responsibilities. Indicate which responsibilities were those of personnel who would be assigned to this project.
  - The name, title, and telephone number of a contact person with the client who is familiar with the project.

**BIDDER'S RESPONSE:**

Attachment 3 – Subconsultant Projects page 30

4. A list of any consultant's contracts terminated (partially or completely) by clients for convenience or default within the past seven years. Include contract value, description of work, client, contract number, and the name and telephone of the contracting entity.

**BIDDER'S RESPONSE:**

None

5. Location of principal office that will be responsible for the implementation of this contract.

**BIDDER'S RESPONSE:**

The principal office of The Natelson Dale Group, Inc. is Yorba Linda, CA  
 The principal office of Economic Growth Strategies, LLC is Bakersfield, CA.

6. An explanation of any past or active litigation involving the Bidder or any principal officers thereof in connection with any contract. **Enter "N/A" if this does not apply to the Bidder**

**BIDDER'S RESPONSE:** None

7. Bidders must not be debarred, suspended or otherwise excluded from or ineligible to participate in Federal Assistance Programs under Executive Order 12549, "Debarment and Suspension," 7 CFR Part 3017, 45 CFR Part 76, and 44 CFR Part 17.. Bidders attests that it, its employees, directors/officers, contractors, subcontractors or agents (collectively "Contractor") are not suspended, debarred, excluded, or ineligible for participation in Medicare, Medi-Cal or any other Federal or state funded health care program, or from receiving Federal funds as listed in the List of Parties Excluded from Federal Procurement or Non-procurement Programs issued by the Federal General Services Administration. Contractor must notify the County in writing within thirty (30) calendar days if, at any time during the term of any resulting Agreement, Contractor or CONTRACTOR'S officers, board members, employees, associates, and agents becomes suspended, debarred, excluded or ineligible for participation in Medicare, Medi-Cal or any other Federal or State funded health care program, as defined by 42. U.S.C. 1320a-7b(f), or from receiving Federal funds as listed in the List of Parties Excluded from Federal Procurement or Non-procurement Programs issued by the Federal General Services Administration. Contract will indemnify, defend and hold the County harmless for any loss or damage resulting from the conviction, debarment, exclusion or ineligibility of the Contractor.

Bidders must provide a statement in the section below that attest to and certify that they are not debarred, suspended, or otherwise excluded from or ineligible to participate in Federal Assistance or State Programs. Vendors' eligibility will be verified by the County prior to award of agreement.

**BIDDER'S RESPONSE:**

TNDG can attest and certify that they are not debarred, suspended, or otherwise excluded from or ineligible to participate in Federal Assistance of State Programs.

8. Bidders must go to the System for Award Management (SAM) at: [www.sam.gov](http://www.sam.gov), search for their organizations name and submit a printout with their proposal that verifies the contractor is not listed on the SAM website for:
- ✓ Central Contractor Registry (CCR)
  - ✓ Federal Agency Registration (Fedreg)
  - ✓ Inline Representations and Certifications Application
  - ✓ Excluded Parties List System (EPLS)

The System for Award Management (SAM) is the Official U.S. Government system that consolidated the capabilities of CCR/FedReg, ORCA, and EPLS. If awarded a contract, awarded vendor must notify the County immediately if debarred at any time during the contract period.

**BIDDER'S RESPONSE:**

Vendor will notify the County immediately if debarred at any time during the contact period.

This section shall designate key personnel who will be involved in this project, their roles and responsibilities and their experience in similar past projects.

- 1. Bidder shall specifically designate the Project Manager for this project, the Lead Consultant (if separate from Project Manager), and any additional key personnel who will be involved on this project. Describe their roles and responsibilities, and their experience in similar past projects. A Project Manager must be named.

**BIDDER RESPONSE:**  
 Attachment 4 – Key Personnel page 34

*Bidder can add as many sections to this bid response box as they need to state all employees providing services.*

- 2. **In addition, copies of the following items shall also be provided:**
  - a. Resumes;
  - b. Any additional information, which will assist in evaluating the individual’s qualifications

**BIDDER RESPONSE:**  
 Attachment 5 – Resumes of Key Personnel page 37

- 3. **If staff have not yet been identified and/or hired,** please include a job description which describes the minimum qualifications of each position in which the information requested in the two items above have not been provided.

**BIDDER RESPONSE:**  
 N/A

**Section D Acknowledgements**

- D-1: **Scope of Service Acknowledgement:** Bidder shall provide a statement below that they have read the Terms & Conditions Document and they acknowledge that they will comply with the RFP requirements if awarded a contract.

*Provide a statement to indicate that you have read the Terms & Conditions Document and will comply in full with the RFP requirements if awarded a contract for this program.*

**BIDDER’S RESPONSE:**  
 We have read the Terms and Conditions Document and will comply in full of the RFP requirements if awarded a contract for this program.

- D-2: **Clarifications, Exceptions or Deviations**  
 All Bidder(s) shall describe any exception or deviation from the requirements of the RFP. Each clarification, exception or deviation must be clearly identified in the space provided below. **If your firm has no clarifications,**

**exceptions or deviations, a statement to that effect shall be included in this section.** The sample agreement has been attached to the RFP as **Exhibit A** and incorporated herein by this reference.

The following contractual terms are **non-negotiable**:

- |   |                           |
|---|---------------------------|
| 1. Indemnification  | 5. Disputes               |
| 2. All Insurance Provisions   | 6. Governing Law          |
| 3. Termination provisions   | 7. Confidentiality        |
| 4. Ownership/Use of Contract Materials and Products (if applicable) | 8. Subcontractors; and    |
|   | 9. Reporting Requirements |

*If your organization has any clarifications or if you have **exceptions or deviations to any of the other areas not listed above**, please provide an explanation below. **If your organization has no clarifications, exceptions or deviations, a statement to that effect shall be provided below.***

**BIDDER'S RESPONSE:**

There are no clarifications, exceptions, or deviations from the requirements of the RFP, Addendum No. 1 or the Sample Agreement.

**D-3 Evidence of Insurance/ Insurability**

All Bidder(s) shall submit evidence of all required insurance (an Accord cover page will suffice) **or** a statement indicating that the Bidder understands there will be insurance requirements, and that they will comply in full if awarded a contract. Upon notification of contract award, the Bidder has ten (10) calendar days to produce the required insurances including a certified endorsement naming the County as additionally insured and waiver of subrogation endorsement. Do not purchase additional insurance until this bid has been awarded.

*Provide proof of insurance - **or** - a statement that your organization understands the insurance requirements and will comply in full if awarded a contract.*

**BIDDER'S RESPONSE:**

Attachment 6 - Certificate of Insurance page 46

**D-4: Business Licenses/Permits**

Provide a copy of current business license or other applicable licenses. The Bidder shall certify to the possession of any and all current required licenses and permits.

*Provide a copy of your current business license, or other applicable licenses – **and** – provide a statement certifying to the possession of any and all current required licenses and permits. If a business license is not required in your jurisdiction, please provide supporting documentation to that effect.*

**BIDDER'S RESPONSE:**

Attachment 7 – Business License page 48

CERTIFICATION OF ACKNOWLEDGMENTS

I, Roger Dale, a duly authorized agent of The Natelson Dale Group, Inc.,  
Printed Name of Agent/Officer Name of Organization

hereby certify that The Natelson Dale Group, Inc. by submission of this proposal in response to  
Name of Organization

the **Economic Development and Strategic Planning Services Request for Proposal**, do hereby acknowledge I

have read items G-1 thru G-4 above and by signing below attest to our organization's acceptance of these requirements if  
awarded the contract for this project.



Signature \_\_\_\_\_ Date 4/15/24

Title of Agent/Officer Managing Principal

## Section E Scope of Services

This RFP has a space provided under each question the County has of the Bidder. This RFP is available for electronic download at [www.publicpurchase.com](http://www.publicpurchase.com).

**Bidders must address all points in this section.** All questions are in italicized font in the box.

### 1. Program Goals

The goal of the Economic Development Strategic Plan is to create a plan to support businesses in the county that were affected by the pandemic and promote sustainable economic growth while prioritizing the well-being of the county's diverse communities. The Plan will aim to identify and develop key strategies to stimulate investments to elevate the county's economic profile. The focus will be to ensure that economic development initiatives create high quality job opportunities and resources accessible to all communities, especially those historically disadvantaged. It is desired that the Plan's strategies and principles will foster an environment that improves the overall well-being of Riverside County's residents while providing a clear path to programs and initiatives that support high quality job opportunities with career pathways, support an innovation and tech economy, and contribute to a thriving and equitable economy for generations to come.

The Plan will also consider and, where appropriate, incorporate and build upon objectives from the Riverside County Strategic Recovery Framework (Appendix A, Subsection 1.3) which was created by the Riverside County Board of Supervisors to respond quickly and provide support and resources to help the county's business community navigate health and safety requirements during the onset and closures of the COVID-19 pandemic. Additionally, the Plan should also take into consideration the planning efforts already completed by the Riverside County Workforce Development Board (Appendix A, Subsection 1.4) and incorporate or reference appropriate components.

As part of this strategic planning process, the County desires to partner with Visit Greater Palm Springs, the official tourism marketing agency for the Coachella Valley, to create a plan specific to the Coachella Valley region which consists of nine cities and several unincorporated communities. That regional plan will be incorporated into the greater Riverside County plan as an addendum that can be used separately by regional organizations in the Coachella Valley.

*Acknowledge the Program Goals set forth in the Scope of Services.*

***BIDDER'S RESPONSE:***

We acknowledge the Program Goals set forth in the Scope of Services and provide a detailed response under the project narrative section.

### 2. County of Riverside Sub Regions

The County seeks the support of a team capable of developing a Plan, through research, analysis, trend forecasting, and defined community outreach described below. The Bidder's overall responsibility and scope of work is to prepare an Economic Development Strategic Plan containing goals, objectives, and implementation measures for the county and its five sub-regions:

#### 2.1 Northwest

The largest region in terms of population contains the county's three largest cities: Riverside, Corona and Moreno Valley. It also includes the cities of Eastvale, Jurupa Valley, Norco, and Perris, along with the unincorporated communities of Home Gardens, Temescal Valley, Highgrove, and Mead Valley.

#### 2.2 Southwest

Covering the cities of Canyon Lake, Temecula, Murrieta, Lake Elsinore, Wildomar, and Menifee, the region also covers unincorporated communities such as Aguanga, Anza, French Valley, Lakeland Village, and Wine Country.

#### 2.3 Pass Area

Covering the cities of Calimesa, Banning, and Beaumont, along with the unincorporated communities of Cabazon, Cherry Valley, and Whitewater.

#### 2.4 Hemet/San Jacinto

The region covers Hemet and San Jacinto Valley including unincorporated communities of Nuevo, Homeland, Valle Vista, and Winchester.

#### 2.5 Coachella Valley & Blythe Area

The Coachella Valley includes the cities of Cathedral City, Coachella, Desert Hot Springs, Indian Wells, Indio, La Quinta, Palm Desert, Palm Springs and Rancho Mirage. The Coachella Valley also covers the unincorporated communities of Bermuda Dunes, Desert Edge, Indio Hills, Mecca, Idyllwild/Pine Cove, North Shore, Oasis, Sky Valley, Desert Palms, Thermal, Thousand Palms, Vista Santa Rosa, Ripley, Garnet, Desert Center, Desert Palms, Mesa Verde, Mountain Center, and White Water.

*Acknowledge the County of Riverside Sub Regions defined in the Scope of Services.*

**BIDDER'S RESPONSE:**

We acknowledge the County of Riverside Sub Regions defined in the Scope of Services and provide a detailed response under the project narrative section.

### 3. Support Services

The result will be a concise work plan for implementing recommended strategies and established metrics to measure the outcomes. The Bidder shall provide professional services to support the following tasks:

- 3.1 Review and analysis of existing demographic and socioeconomic data, labor force characteristics, sales tax revenue and other key economic data.
- 3.2 Preparation of key demographic trends and forecasts, social factors, economic factors, and financial indicators for inclusion into the strategic plan. This task should include preparation of a market segmentation of the county's retail/commercial and industrial market segments.
  - 3.2.1 Conduct an analysis of demographic and economic data to identify disparities and gaps in economic opportunities across various communities within Riverside County.
- 3.3 Provide understanding and consensus of the county's primary strengths, weaknesses, opportunities, and threats (SWOT analysis) that directly impact the economic competitiveness of the county.
- 3.4 Preparation of a customized, locally based economic development strategy setting forth goals and objectives for taking advantage of the opportunities and solving the economic development challenges of the area, including suggested activities, projects, and programs to implement objectives and goals set forth in the strategy.
- 3.5 Create an implementation plan that identifies issues/items which require action in the short or long-term. Specific issues to be studied include but are not limited to:
  - 3.5.1 Preparation of business attraction and retention strategies incorporating results from county's SWOT



analysis.

3.5.2Preparation of performance measures with timelines that will be used to evaluate whether and to what extent plan goals and objectives have been or are being met.

3.6 With department, monitor and assess the impact of current business outreach and support initiatives on economic growth, job creation, and the overall business climate within Riverside County.

*Acknowledge the Support Services set forth in the Scope of Services.*

**BIDDER'S RESPONSE:**

We acknowledge the Support Services set forth in the Scope of Services and provide a detailed response under the project narrative section.

**4. Coachella Valley Regional Plan**

In collaboration with Visit Greater Palm Springs staff, the vendor will develop and implement a plan of action that will facilitate, but is not limited to, the following:

4.1 Conduct and Economic SWOT analysis.

4.2 Conduct an economic brand analysis to assess current image and reputation.

4.3 Identify what differentiates Greater Palm Springs from its peers and competition and articulate a compelling brand identity that inspires the support of its broad range constituents.

4.4 Meet with City leaders and staff to learn about their economic development efforts.

4.4.1 Evaluate and consider existing concept marketing material created from past branding efforts.

4.5 Develop and manage methodology for measuring and evaluating impact and success of website outreach and communication programs.

4.5.1 Define key performance indicators (KPI's) to measure the success of the strategy.

4.6 Identify key target industry sectors for economic development.

4.6.1 Conduct market research to identify current and potential target segments based on local strengths opportunities and economic trends.

4.6.2 Analyze the potential of these segments in our area.

4.6.3 Prioritize sectors with the most growth potential.

4.7 Develop short term and long-term goals.

4.7.1 Outline actionable steps and tactics to achieve the identified goals.

4.7.2 Provide recommendations for infrastructure development and investment attraction.

4.7.3 Identify potential funding sources and grand opportunities to support strategy implementation.

*Acknowledge the Coachella Valley Regional Plan requested in the Scope of Services.*

**BIDDER'S RESPONSE:**

We acknowledge the Coachella Valley Regional Plan requested in the Scope of Services and provide a detailed response under the project narrative section.

**5. Stakeholder Engagement**

5.1 With department, host at least four (4) community engagement sessions with regionally based stakeholders, including higher education institutions, business and local community leaders to understand the specific needs of various communities and industries in Riverside County. Sessions should be held at various locations including the Coachella Valley, northwest, southwest, and mid-county regions.

5.2 The Bidder will be expected to regularly interface with designated County staff (in-person meetings and virtual) concerning approach and tasks throughout the project. The Bidder should have frequent interaction with staff to ensure that the County's desired objectives are met, and that County's unique concerns are addressed.

5.3 Attendance of at least two (2) meetings and/or study sessions with County Board of Supervisors to discuss findings and present the draft and/or final Plan. The County will be responsible to schedule these meetings and Bidder is responsible to provide representation.

*Acknowledge the Stakeholder Engagement requirements set forth in the Scope of Services.*

**BIDDER'S RESPONSE:**

We acknowledge the Stakeholder Engagement requirements set forth in the Scope of Services and provide a detailed response under the project narrative section.

6. Economic Sector Analysis

6.1 Bidder shall provide a comprehensive analysis of the Riverside County economy, including key economic indicators, including the county's industrial sector, foreign direct investment, education levels, commuting patterns, office space availability, and population trends. This analysis should include current and forecasted growth, the impact of e-commerce, the major countries and industries receiving foreign direct investment connections to logistics and innovation, technological growth, average lease rates and vacancy rates, and a projection of future population changes. The analysis will also include an examination of population growth by census tract and in and out migration by education levels and age group.

6.2 Bidder shall provide a review and analysis of cleantech and its growth in Riverside County, including an overview of cleantech, examples of cleantech companies in the county and their past and current projects, an estimate of cleantech jobs and potential economic impact if data allows, and an overview of notable clean tech investments such as the OASIS campus, the CARB facility, CE-CERT, and county/County electric vehicle stations. This discussion should include an analysis of the economic impact of the OASIS campus if data permits. Identify opportunities for growth and innovation in the region, with a focus on the role of higher education and other workforce development leaders.

6.3 Bidder shall provide a conclusion to the report that summarizes Riverside County's role in the Southern California economy, compiles all recommendations made throughout the study, and restates identified employment, business development, and FDI opportunities.

*Acknowledge the Economic Sector Analysis requirements set forth in the Scope of Services.*

**BIDDER'S RESPONSE:**

We acknowledge the Economic Sector Analysis requirements set forth in the Scope of Services and provide a detailed response under the project narrative section.

- 7. U.S. Economic Development Administration, Comprehensive Economic Development Strategy Compatibility  
Bidder will review the County’s current CEDS, the USEDA CEDS guidelines and the Riverside County Strategic Recovery Framework to understand what is expected to be included in the Economic Development Strategic Plan. Plan to be submitted and approved by the by the U.S. Department of Commerce, Economic Development Administration (USEDA). The County will solicit information for projects from all cities, local partners and other stakeholders across the county that might qualify for USEDA funding opportunities for inclusion in the project section of the CEDS. CEDS guidelines will need to be adhered to and can be viewed here: <https://www.eda.gov/sites/default/files/2023-03/2023-CEDS-Content-Guidelines-Full-Report.pdf>

*Acknowledge the U.S. Economic Development Administration, Comprehensive Economic Development Strategy Compatibility requirements set forth in the Scope of Services.*

***BIDDER’S RESPONSE:***

We acknowledge the U.S. Economic Development Administration, Comprehensive Economic Development Strategy Compatibility requirements set forth in the Scope of Services and will comply with such requirements. We provide a detailed response under the project narrative section.

This section shall provide a written general understanding of the requirements in the Scope of Services as detailed in the RFP. Space has been provided under each question for the Bidder to provide a response to the question being asked/information being requested. The description of services shall include, in the following order, each of the sections identified below. Bidders are required to provide a response to each level of service which they are interested in providing. The information required for each item has been italicized and listed directly above the “Bidder’s Response” within each box.

- 1. **Project Narrative:** This section should provide a detailed description that outlines your plan for delivery of services as described in Attachment A Section E Scope of Services Subsections 1 through 7. Provide a description of the tasks, sub-tasks, and deliverables that will be provided. The Scope of Work Program should be presented in a logical format that can be easily attached to the Professional Service Agreement. Include any additional items not mentioned in Sections C through G.

***BIDDER’S RESPONSE:***

Attachment 8 – Project Narrative page 49

- 2. **Project Schedule:** Provide a comprehensive Critical Path Method (CPM) schedule describing the nature and estimated timeline of proposed work objectives and milestones.

***BIDDER’S RESPONSE:***

Attachment 9 – Project Schedule page 64

- 3. **Collaboration:** Provide a description of the Bidder’s approach to communicating effectively with County staff and officials, other jurisdictional stakeholders, and the public, to facilitate successful delivery of assigned tasks.

**BIDDER'S RESPONSE:**

Attachment 10 – Collaboration page 65

**Section F References**

This section of the proposal shall include the following:

Provide at least three (3) references from previous cities, counties or other agencies for community engagement and/or Economic Development Strategic Plan work completed within the last ten (1) years, and also provide web links to appropriate examples of recent economic development plan work products.

<b>Reference 1</b>	
Company name:	County of Kern
Address:	1115 Truxtun Avenue Bakersfield, CA 93301
Contact person:	Jim Damian, Chief Economic Development Officer
Email address:	JimD@kerncounty.com
Telephone address:	(661) 868-3183
Project name:	Kern County Comprehensive Economic Development Strategy (CEDS)
Dates worked performed:	November 2020 – October 2021
Summary of scope of services:	Preparation of Countywide Comprehensive Economic Development Strategy (CEDS) and action plan; facilitation of stakeholder outreach; coordination with jurisdictions to identify CEDS project list.
Project cost:	\$48,840
Web link	<a href="https://www.kerncounty.com/home/showpublisheddocument/7279/637913287179270000">https://www.kerncounty.com/home/showpublisheddocument/7279/637913287179270000</a>
<b>Reference 2</b>	
Company name:	City of Bakersfield
Address:	1600 Truxtun Avenue Bakersfield, CA 93301
Contact person:	Christian Clegg, City Manager

Email address:	cclegg@bakersfieldcity.us
Telephone address:	(661) 326-3751
Project name:	Bakersfield Economic Development Strategic Plan
Dates worked performed:	June 2020 – September 2021
Summary of scope of services:	Prepared Citywide economic development strategic plan in tandem with County-level CEDS; coordinated with regional initiative led by Brookings Institution; completed real estate market forecasts and target industry analyses to support EDSP.
Project cost:	\$185,000
Web link	<a href="https://content.civicplus.com/api/assets/319bac29-84be-4383-8d85-dc79f5122da9">https://content.civicplus.com/api/assets/319bac29-84be-4383-8d85-dc79f5122da9</a>
<b>Reference 3</b>	
Company name:	City of Menifee
Address:	29844 Haun Road Menifee, CA 92586
Contact person:	Gina Gonzalez (Note: Ms. Gonzalez was the City of Menifee's Economic Development Director during the time of our work for the City. She has recently accepted a new position as Economic Development Director for the City of Lake Elsinore. The contact information provided is for her new position.)
Email address:	ggonzalez@lake-elsinore.org
Telephone address:	(951) 674-3124 Ext. 919
Project name:	City of Menifee Comprehensive Economic Development Strategy (CEDS)
Dates worked performed:	October 2018 – September 2021
Summary of scope of services:	Preparation of City of Menifee's first Comprehensive Economic Development Strategy (CEDS) in 2019; facilitation of stakeholder outreach (including CEDS Committee); target industry analysis; competitive assessment; preparation of CEDS Annual Performance Reports in 2022, 2021, 2022 and 2023.
Project cost:	\$115,000 (including original CEDS plus four Annual Performance Reports)
Web link	<a href="https://www.menifeebusiness.com/wp-content/uploads/2020/03/Comprehensive-Economic-Development-Strategy-City-of-Menifee-CA-9-11-19.pdf">https://www.menifeebusiness.com/wp-content/uploads/2020/03/Comprehensive-Economic-Development-Strategy-City-of-Menifee-CA-9-11-19.pdf</a>

## Section G Acknowledgements

Any response that Bidders are finding difficulty pasting into the "Bidders Response" boxes in any section of the RFP, bidders shall include in Section G. When including attachments to Section G, label the attachments "Attachment 1", "Attachment 2" and so forth. Enter the corresponding "Attachment Number" into the Bidder's Response box as the example shows below:

**EXAMPLE:**

**SECTION D ACKNOWLEDGEMENTS**

**G-3: Evidence of Insurance/ Insurability**

*All Bidder(s) shall submit evidence of all required insurance (an Accord cover page will suffice) or a statement indicating that the Bidder understands there will be insurance requirements, and that they will comply in full if awarded a contract. Upon notification of contract award, the Bidder has ten (10) calendar days to produce the required insurances including a certified endorsement naming the County as additionally insured and waiver of subrogation endorsement. Do not purchase additional insurance until this bid has been awarded.*

*Provide proof of insurance - or - a statement that your organization understands the insurance requirements and will comply in full if awarded a contract.*

**BIDDER'S RESPONSE:**

*"Attachment 1 - Certificate of Insurance page 39"*

**G-4: Business Licenses/Permits**

*Provide a copy of current business license or other applicable licenses. The Bidder shall certify to the possession of any and all current required licenses and permits.*

*Provide a copy of your current business license, or other applicable licenses -- and -- provide a statement certifying to the possession of any and all current required licenses and permits.*

**BIDDER'S RESPONSE:**

*"Attachment 2 - Business License page 40"*

**Section H Iran Contracting Act**


IRAN CONTRACTING ACT  
(Public Contract Code sections 2202-2208)

Prior to bidding on, submitting a proposal or executing a contract or renewal for a State of California contract for goods or services of \$1,000,000 or more, a vendor must either: a) certify it is not on the current list of persons engaged in investment activities in Iran created by the California Department of General Services ("DGS") pursuant to Public Contract Code section 2203(b) and is not a financial institution extending twenty million dollars (\$20,000,000) or more in credit to another person, for 45 days or more, if that other person will use the credit to provide goods or services in the energy sector in Iran and is identified on the current list of persons engaged in investment activities in Iran created by DGS; or b) demonstrate it has been exempted from the certification requirement for that solicitation or contract pursuant to Public Contract Code section 2203(c) or (d).

To comply with this requirement, please insert your vendor or financial institution name and Federal ID Number (if available) and complete one of the options below. Please note: California law establishes penalties for providing false certifications, including civil penalties equal to the greater of \$250,000 or twice the amount of the contract for which the false certification was made; contract termination; and three-year ineligibility to bid on contracts. (Public Contract Code section 2205.)

**OPTION #1 - CERTIFICATION**

I, the official named below, certify I am duly authorized to execute this certification on behalf of the vendor/financial institution identified below, and the vendor/financial institution identified below is not on the current list of persons engaged in investment activities in Iran created by DGS and is not a financial institution extending twenty million dollars (\$20,000,000) or more in credit to another person/vendor, for 45 days or more, if that other person/vendor will use the credit to provide goods or services in the energy sector in Iran and is identified on the current list of persons engaged in investment activities in Iran created by DGS.

<i>Vendor Name/Financial Institution (Printed)</i>		<i>Federal ID Number (or n/a)</i>	
<b>The Natelson Dale Group, Inc.</b>		<b>95-4647275</b>	
<i>By (Authorized Signature)</i>			
			
<i>Printed Name and Title of Person Signing</i>			
<b>Roger A. Dale, Managing Principal</b>			
<i>Date Executed</i>		<i>Executed in</i>	
<b>4/14/24</b>		<b>Yorba Linda, CA</b>	

**OPTION #2 - EXEMPTION**

Pursuant to Public Contract Code sections 2203(c) and (d), a public entity may permit a vendor/financial institution engaged in investment activities in Iran, on a case-by-case basis, to be eligible for, or to bid on, submit a proposal for, or enters into or renews, a contract for goods and services.

**N/A**

**Section I Compliance with Economic Sanctions in Response to Russia's Actions in Ukraine**


**(Respondents)**

Prior to bidding on, submitting a proposal, or executing a contract, a contractor must certify: 1) it is not a target of economic sanctions and 2) in compliance with economic sanctions imposed by the U.S. government in response to Russia's actions in Ukraine, as well as any requirements related to the Russian sanctions imposed by the California Governor's Executive Order N-6-22 issued on March 4, 2022 and under state law, if any.

To comply with this requirement, please insert the contractor name and Federal ID Number (if available), complete the information described below and execute by an authorized representative of the contractor.

**CERTIFICATION**

I, the authorized representative for contractor named below, certify I am duly authorized to execute this certification on behalf of the contractor below, and the contractor identified below has conducted a good faith review of existing contracts. I attest that the contractor is not a target of economic sanctions, and that contractor is in compliance with the economic sanctions imposed by the U.S. government in response to Russia's actions in Ukraine, as well as any requirements related to the Russian sanctions imposed by the California Governor's Executive Order N-6-22 issued on March 4, 2022 and under state law, if any.

<i>Contractor Name (Printed)</i> <b>The Natelson Dale Group, Inc.</b>		<i>Federal ID Number (or n/a)</i> <b>95-4647275</b>
<i>By (Authorized Signature)</i> 		
<i>Printed Name and Title of Person Signing</i> <b>Roger Dale, Managing Principal</b>		
<i>Date</i> <b>4/15/24</b>		



## Section J Veteran, Active Duty and/or National Guard Business Affidavit

The County of Riverside Veteran, National Guard, and/or Active Duty Business Preferences may be applied to this Request for Proposal/Quotation/Qualification. If you qualify for any of these preferences, please submit this form along with your response to this RFP/Q/Qu.

### Definitions of Veteran, National Guard, and/or Active Duty Businesses

**PLEASE CHECK THE CATEGORY YOU ARE APPLYING FOR:**

**A Service-Disabled Veteran-Owned Business (SDVOB) shall mean a business concern, consultant or contractor that is at least 51 percent directly and unconditionally owned and controlled by a combination of one or more service-disabled veteran(s).** A service-disabled veteran is a person who served on active duty with the Army, Air Force, Navy, Marine Corps, or Coast Guard, Federal Reservists, or National Guard and who possesses either a disability rating letter issued by VA establishing a service-connected rating between 0 and 100 percent, or a disability determination from the Department of Defense.

**A Veteran-Owned Business (VOB) shall mean a business concern, consultant or contractor that is at least 51 percent directly and unconditionally owned and controlled by a combination of one or more veteran(s).** A veteran is a person who served on active duty with the Army, Air Force, Navy, Marine Corps, or Coast Guard for any length of time and who was discharged or released under conditions other than dishonorable. Federal Reservists or members of the National Guard called to federal active duty, as well as Federal Reservists or National Guard members who have completed twenty (20) years of service and are eligible to receive Reserve component retirement, also qualify as veterans.

**A National Guard and Federal Reserve Veteran-Owned Business shall mean a business concern, consultant or contractor is at least 51 percent directly and unconditionally owned and controlled by a combination of one or more National Guard or Federal Reservist veteran(s).** Federal Reservists or National Guard veteran is a member who served honorably in the Reserves or National Guard but has no active duty time other than for training purposes only.

**An Active members of the U.S. Armed Forces, National Guard or Federal Reservist-Owned Business shall mean a business concern, consultant or contractor that is at least 51 percent directly and unconditionally owned and controlled by a combination of one or more active members of the U.S. Armed Forces, National Guard or Federal Reservist(s).** An active member is a person who is a current member of the U.S. Armed Forces serving on active duty or who is a current member of the National Guard or Federal Reserve forces serving on Title 10 or Title 32 active duty or current members of the National Guard and Reserve forces.

**A Veteran-Qualified Business (VQB) shall mean a business concern, consultant or contractor that maintains a workforce in which no less than 10% of its total are veteran employees.** A veteran is a person who served on active duty with the Army, Air Force, Navy, Marine Corps, or Coast Guard for any length of time and who was discharged or released under conditions other than dishonorable. Federal Reservists or members of the National Guard called to federal active duty or disabled from a disease or injury incurred or aggravated in the line of duty or while in training status, as well as Federal Reservists or National Guard members who have completed twenty (20) years of service and are eligible to receive Reserve component retirement, also qualify as veterans.

The supporting documentation to be provided along with this form and your response to this RFP/Q includes:

#### **SDVOB, VOB, VQB Business**

A valid DD Form 214 (long form) or NGB Form 22 along with a VA disability rating letter for each veteran owner(s) to establish confirmation of military service and discharge status. National Guard members and Federal Reservists with twenty (20) years or more service shall provide a copy of retirement orders or Military identification card showing retired status from the reserves

#### **National Guard and Federal Reserve Veteran-Owned Business**

A valid NGB Form 22 for each Nation Guard veteran owner(s) to establish confirmation of service. A valid DD Form 214 (long form) and an honorable discharge certificate for each Federal Reservist veteran owner(s) to establish confirmation of service.

#### **Active members of the U.S. Armed Forces, National Guard or Federal Reservist-Owned Business**

Proof of service orders or military ID card showing active Reserve, National Guard or Active Duty status in the U.S. Armed Forces.

The County of Riverside Veteran Business and Veteran Qualified Business Preference may be applied to this Request for Proposal/Quotation. If you qualify for this preference, please submit this form along with your response to this RFP/RFQU/Q.

**Definition of Veteran Business and Veteran Qualified Business**

A **Veteran Business** shall mean a business that is at least fifty-one percent (51%) owned by one or more veterans.

A **Veteran Qualified Business** shall mean a business which can provide proof of their workforce containing no less than ten percent (10%) veterans.

Veterans as used in this policy means a person who has served or is currently serving in the U. S. armed services, reserves or active, and is serving honorably or has been honorably discharged.

Additional supporting documentation that may be requested by the County to verify qualification includes:

*Please check the category you are applying for:*

**Veteran Business:**

**Company must be registered with Vet Biz at [www.vetbiz.gov/cve completed s.jpg](http://www.vetbiz.gov/cve_completed_s.jpg):** This site provides verification information about Service-Disabled Veteran-Owned Small Businesses (SDVOSBs) and Veteran-Owned Small Businesses (VOSBs). Companies who want to participate in the County's Veterans Preference Program must be listed in this database in order to be eligible for veteran preferences.  
Company must submit DUNS # for website verification.

**Veteran Qualified Business:**

**Company must submit payroll records** that demonstrate that 10% of your workforce is comprised of veterans. DD214 Forms must be submitted for all employees claiming veteran status.

Business Name: \_\_\_\_\_

Physical Address: \_\_\_\_\_

Phone: \_\_\_\_\_ FAX: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Total Number of Company Employees (where applicable): \_\_\_\_\_ Total Number of Veteran Employees: \_\_\_\_\_  
DUNS # (where applicable): \_\_\_\_\_

Hours of Operation: \_\_\_\_\_

\_\_\_\_\_  
Signature of Company Official

\_\_\_\_\_  
Date

**Submittal of false data will result in disqualification of Veteran Preference and/or doing business with Riverside County.**

**Section K Small Business Affidavit**

The County of Riverside Small Business Preference may be applied to this Request for Proposal/Quotation. If you qualify for this preference, please submit this form along with your response to this RFP/Q.

**Definition of Small Business**

A small business shall mean a business concern, consultant or contractor that meets the following requirements:

- 1. Be independently owned and operated.
- 2. Not be nationally dominant in its field of operation.
- 3. Operate primarily within the U.S. and make contributions to the U.S. economy through payment of applicable local, state, and federal taxes.
- 4. Meet size standards established by the U.S. Small Business Administration which specifies firm size by North American Industrial Classification System (NAICS) codes.

The supporting documentation to be provided along with this form and your response to this RFP/Q includes:

- 1. **Proof of payment of applicable local, state, and federal taxes.**
- 2. **A current business license** if required for the political jurisdiction the business is located.
- 3. **Proof of annual business revenue and number of company employees.**

Business Name: \_\_\_\_\_

Physical Address: \_\_\_\_\_

Phone: \_\_\_\_\_ FAX: \_\_\_\_\_ E-Mail: \_\_\_\_\_

Number of Company Employees: \_\_\_\_\_ Annual Revenue: \_\_\_\_\_

NAICS Code(s): \_\_\_\_\_

Business License # (where applicable): \_\_\_\_\_ Jurisdiction \_\_\_\_\_

Established Hours of Operation: \_\_\_\_\_

\_\_\_\_\_  
Signature of Company Official Date

**Submittal of false data will result in disqualification of Veteran Preference and/or doing business with Riverside County. Additional information about the application of these preferences can be found in Board Policy B-34 (<https://www.rivcocob.org/wp-content/uploads/2019/06/POLICY-B34.Revised.05-21-19.pdf>).**

**Attachment 1 – Firm Profile**

The Natelson Dale Group, Inc. (TNDG) has assembled a team with extensive experience preparing economic development strategic plans and economic resilience plans that meet the requirements of the US Economic Development Administration for Comprehensive Economic Development Strategies.

**Lead Consultant**

The Natelson Dale Group, Inc. (TNDG) is an economic development consulting firm established in California in 1974. The firm's practice focuses largely on the planning and implementation of business retention/expansion/attraction programs, coupled with strategic plans to leverage a community's real estate development assets. TNDG is a "boutique" firm not only in terms of size but also in terms of philosophy and approach. In this regard, the firm's principal personally manages every contract and maintains primary contact with the client. As our references will attest, exceptional responsiveness to the unique needs of each client is a hallmark of TNDG's approach. TNDG will deploy four professional staff members to this project as identified in the proposal.

TNDG has worked with dozens of cities, tribes, counties, and regions throughout California, completing Comprehensive Economic Development Strategies, Economic Development Strategic Plans, real estate analysis and fiscal/economic impact analysis.

Riverside County (All Projects) Recent Projects		County Level Economic Development Strategies	City Level Economic Development Strategies	
Agua Caliente Tribe	Jurupa Valley	Guilford County (NC)	Anaheim	Menifee
Banning	Lake Elsinore	Kern County	Antioch	Monterey Park
Beaumont	La Quinta	Imperial County	Arvin	Modesto
Cahuilla Tribe	Menifee	Larimer County (CO)	Bakersfield	Ontario
Calimesa	Moreno Valley	Los Angeles (San Gabriel Valley subregion)	Beaumont	Palm Desert
Canyon Lake	Palm Desert	Osceola County (FL)	Burbank	Phoenix (AZ)
Cathedral City	Palm Springs	San Bernardino (multiple sub- regions)	Camarillo	Pinole
Coachella	Perris	San Diego (South County Subregion)	Canyon Lake	San Francisco
Corona	Murrieta	San Joaquin County	Carson	San Pablo
Desert Hot Springs	Riverside	Sonoma County	Coachella	San Ramon
Eastvale	San Jacinto	Ventura County	Compton	Santa Fe
Hemet	Temecula	Yuma County (AZ)	Coronado	Springs
Indio	Wildomar		El Cajon	Simi Valley
			Escondido	Stockton
			Fresno	Tracy
			Garland (TX)	Ventura
			Kyle (TX)	Vista
			Los Angeles	

The following represents a sample of recent projects similar in scope and nature to the requirements of the RFP.

**Carson, California: Economic Development Strategic Plan (2023).** TNDG prepared an economic development strategic plan for the City of Carson in the South Bay area of Los Angeles County. This process included a comprehensive demographic/SWOT analysis;

target industry/cluster analysis; market demand studies for retail, office, industrial, entertainment, and hotel development; extensive stakeholder outreach; and preparation of a detailed 5-year Action Plan.

**Antioch, California: Economic Baseline and Strategic Plans (2022).** TNDG completed an economic development baseline analysis and strategic planning process for the City of Antioch. This assignment included a target industry/cluster analysis, an extensive stakeholder outreach process, and preparation of an innovate strategic plan and implementation "tool kit." The strategic plan is organized around eight major initiatives: Business Development Pipeline; Real Estate Development Capacity; Workforce Opportunity Initiative; Entrepreneurial Startup Assistance; Direct Project Investment (Public-Private Partnerships); Leveraging Housing Demand to Promote Economic Development; Regional Advocacy; and Resource ("War Chest") Development.

**Sonoma County, California: Comprehensive Economic Development Program Review (2022).** For the Sonoma County Economic Development Board (EDB), TNDG conducted a program-by-program review of EDB core services, including evaluation of the following: scope of services offered; program design and allocation of resources; service delivery and execution; program efficacy; and metrics tracked. The project included interviews with a cross section of County staff, community leaders, business owners and other constituents (identified by the EDB). As part of this process, TNDG profiled comparable economic development organizations throughout the Western U.S. to identify best practice models relevant to Sonoma County.

**El Cajon, California: Economic Development Strategic Plan (2022).** TNDG prepared an economic development strategy plan for the City of El Cajon in east San Diego County. This work included a target industry analysis, commercial/industrial real estate demand projections, a focused stakeholder outreach process, and preparation of an action plan that leverages the City's economic development programming through partnerships with an array of regional organizations. El Cajon's EDSP focuses on the following strategic priorities: revitalization of retail commercial centers; maximizing land capacity for industrial development; expanding the downtown business mix; and promoting entrepreneurial development opportunities.

**Kern County, California: Comprehensive Economic Development Strategy (2021).** In tandem with a separate planning process led by the Brookings Institution, TNDG prepared a new countywide CEDS for Kern County in 2021. In addition to an extensive SWOT analysis, preparation of the CEDS involved direct interface with County staff and each of Kern County's eleven incorporated cities (to identify and prioritize candidate projects for future USEDA grant applications). The process also included a large CEDS Committee comprising executives from each of Kern County's major industry clusters.

**Bakersfield, California: Economic Development Strategic Plan (2021).** TNDG led an 18-month strategic planning process for the City of Bakersfield, with a focus on identifying major “game-changing” investments the City could pursue with available state and federal recovery funding. TNDG’s work was completed in close coordination with the regional “Better Bakersfield, Boundless Kern” (B3K) initiative facilitated by The Brookings Institution. TNDG’s work included an industry cluster analysis, commercial/industrial real estate market studies, and a comprehensive stakeholder outreach process (including specific engagement with the development community, industry stakeholders, and downtown business/civic leaders).

The following represents a sampling of TNDG’s previous projects within Riverside County.

**Menifee, California: Comprehensive Economic Development Strategy (2019) and Annual Performance Reports (2020-2023).** TNDG completed a new Comprehensive Economic Development Strategy (CEDS) for the City of Menifee. The six-month planning process included a detailed analysis of the community’s economic development assets and opportunities, as well as its current deficiencies and challenges. The background analyses included a target industry study focused on defining potential growth opportunities within the larger Riverside County/San Diego County economy. TNDG has subsequently completed three Annual Performance Reports for the City.

**Beaumont, California: Economic Development Strategic Plan (2019).** TNDG completed a detailed Economic Development Strategic Plan, including a target industry analysis and commercial/ industrial real estate market forecast, for the City of Beaumont. The Plan focuses on leveraging the City’s strategic location in the eastern Inland Empire, available land resources, skilled resident workforce, and quality-of-life amenities.

**Palm Desert, California: Economic Development Strategic Plan (2018).** TNDG completed a detailed Economic Development Strategic Plan, including a target industry analysis and commercial/industrial real estate market forecast, for the City of Palm Desert. The Plan focuses on leveraging the City’s strategic location within the Coachella Valley and its well-established reputation as a center for tourism, retail trade, and higher education. The implementation plan includes a business incubator/accelerator focused on the Valley’s emerging technology cluster.

### **Subconsultants**

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**Economic Growth Strategies, LLC** was established in 2020 as a result of the global pandemic to help communities and organizations move from response to recovery. Founded by Paul Saldana, CEcD, who garnered recognition from the International Economic Development Council for navigating his organization and community quickly to economic recovery, Paul partnered to develop economic recovery and resilience planning for communities across the U.S. EGS has worked on regional Comprehensive Economic

Development Strategies, local Economic Development Strategic Plans, Tourism Marketing Analysis, and Target Industry Analysis, individually and in conjunction with strategic partners, such as those included in this proposal. EGS will deploy four staff to this project as identified in the proposal.

**Statebook**, established in 2014, is the first company to provide a digital, data-driven platform solution for corporate location decision-making and economic development efforts. Trusted by the U.S. Department of Commerce and companies like Amazon, IBM and DuPont, real estate brokerage firms like Colliers and Cushman Wakefield, as well as by hundreds of economic development organizations across the U.S., StateBook's patented, proprietary platform gives communities a competitive edge and enables companies to research the best, most sustainable location decisions by accessing reliable, sourced information. StateBook developed the Digital CEDS™, a new technology solution to transform traditional CEDS reports into easy-to-update, interactive online resources featuring StateBook's always-updated data. StateBook's Digital CEDS™ platform is now enjoying adoption by regional government agencies across eight states and Puerto Rico.

The **International Sustainable Resilience Center** is a 501(c)(3) non-profit founded in 2017 and is an International Specialist Center of Excellence. The ISRC is dedicated to integrating resilience into both the built environment and natural environment. By ensuring that individuals, neighborhoods, and communities minimize the risk of damage from disasters of all types, ISRC provides for a more sustainable environment. Resilience is the capacity to better withstand and recover quickly from hazards of all types. Sustainability means using less Sustainable resilience combines the two. Sustainable Resilience ensures natural or built environments are resistant to damage and destruction. ISRC created the Economic Resilience Scorecard™ to provides businesses, investment, and site location executives, as well as other job-creating investors, an objective assessment of a community's disaster risk and resilience. The Scorecard also enables communities to demonstrate the measures they have put in place to better prepare for, withstand and recover from adverse incidents. resources to make something resilient.

### Attachment 2 – Recent Projects

#### The Natelson Dale Group (TNDG)

<b>Project: Kern County Economic Development Strategy (CEDS)</b>	
The name of the client and a contact name, address, and telephone number.	<b>Client:</b> County of Kern (in partnership with Kern Economic Development Corporation) <b>Contact Name:</b> Jim Damian, Chief Economic Development Officer <b>Address:</b> 1115 Truxtun Avenue Bakersfield, CA 93301 <b>Phone:</b> 661.868.3183
The scope of the consultant's involvement in the project.	Preparation of Countywide Comprehensive Economic Development Strategy (CEDS) and action plan; facilitation of stakeholder outreach; coordination with jurisdictions to identify CEDS project list.
The months of the consultant's involvement in the project.	12
The month and year the projects started and the month and year they were completed.	November 2020 – October 2021
The total value of the services provided.	\$48,840
The key personnel involved and the sub-consultants employed.	Roger Dale, Joe McClure, Alan Levenson, Joe Collins

<b>Project: City of Bakersfield Economic Development Strategic Plan</b>	
The name of the client and a contact name, address, and telephone number.	<b>Client:</b> City of Bakersfield <b>Contact Name:</b> Christian Clegg, City Manager <b>Address:</b> 1600 Truxtun Avenue Bakersfield, CA 93301 <b>Phone:</b> 661.326.3751
The scope of the consultant's involvement in the project.	Prepared Citywide economic development strategic plan in tandem with County-level CEDS; coordinated with regional initiative led by Brookings Institution; completed real estate market forecasts and target industry analyses to support EDSP.
The months of the consultant's involvement in the project.	16
The month and year the projects started and the month and year they were completed.	June 2020 – September 2021
The total value of the services provided.	\$185,000



The key personnel involved and the sub-consultants employed.	Roger Dale, Joe McClure, Alan Levenson, Joe Collins, Paul Saldana (City staff at that time)
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<b>Project: Countywide Economic Development Program Assessment (Sonoma County)</b>	
The name of the client and a contact name, address, and telephone number.	<b>Client:</b> Sonoma County Economic Development Board <b>Contact Name:</b> Ethan Brown, Executive Director <b>Address:</b> 141 Stony Circle Santa Rosa, CA <b>Phone:</b> 707.565.7589
The scope of the consultant's involvement in the project.	To support restructuring of the County's economic development department, TNDG provided a comprehensive review of all existing economic and workforce development programs. This process included extensive stakeholder interviews, case study profiles of "best practice" models from other counties, and recommended priorities for new Sonoma County programs.
The months of the consultant's involvement in the project.	9
The month and year the projects started and the month and year they were completed.	June 2021 – February 2022
The total value of the services provided.	\$50,000
The key personnel involved and the sub-consultants employed.	Roger Dale, Joe McClure, Alan Levenson, Joe Collins

<b>Project: Comprehensive Economic Development Strategy (CEDS) for City of Menifee</b>	
The name of the client and a contact name, address, and telephone number.	<b>Client:</b> City of Menifee <b>Contact Name:</b> Gina M. Gonzalez, MA-URP, ACE, Director of Economic Development <b>Address:</b> N/A – contact is now in new position at City of Lake Elsinore (phone number below) <b>Phone:</b> 951.674.3124 ext. 919
The scope of the consultant's involvement in the project.	Preparation of City of Menifee's Comprehensive Economic Development Strategy (CEDS); facilitation of stakeholder outreach (including CEDS Committee); preparation of CEDS Annual Performance Reports.

The months of the consultant's involvement in the project.	11
The month and year the projects started and the month and year they were completed.	October 2018 – September 2019  (Annual Performance Reports completed in 2020, 2021, 2022 and 2023)
The total value of the services provided.	\$115,000 (including original CEDS and four Annual Performance Reports)
The key personnel involved and the sub-consultants employed.	Roger Dale, Joe McClure, Alan Levenson, Joe Collins

**Attachment 3 – Sub-consultant Recent Projects**

**Economic Growth Strategies**

The name and location of the project.	<b>Karuk Tribe Comprehensive Economic Development Strategy (CEDS) Happy Camp CA</b>
The estimated total value.	\$47,685
The year the project was started and completed.	2021-22
The firm's project responsibilities. Indicate which responsibilities were those of personnel who would be assigned to this project.	Developed CEDS in conformance with EDA requirements and approved by EDA. Paul Saldana led the project and was assisted in economic resilience by subconsultant International Sustainable Resilience Center.
The name, title, and telephone number of a contact person with the client who is familiar with the project.	Erin Hillman Director of Operations (530) 493-1600

The name and location of the project.	<b>Target Industry Analysis &amp; Strategy Frederick, CO</b>
The estimated total value.	\$50,000
The year the project was started and completed.	2023
The firm's project responsibilities. Indicate which responsibilities were those of personnel who would be assigned to this project.	EGS served as the project manager for the assignment and Jay Moon (EGS consultant) and David Dodd (with subconsultant ISRC) served on the team.
The name, title, and telephone number of a contact person with the client who is familiar with the project.	Max Daffron Economic Development Manager (720) 382-5537

The name and location of the project.	<b>Wood County Economic Development Strategy Wood County, TX</b>
The estimated total value.	\$80,000
The year the project was started and completed.	2023-24
The firm's project responsibilities. Indicate which responsibilities were those of personnel who would be assigned to this project.	EGS conducted analysis of existing land use plans and provided recommendations on the highest and best use for economic diversification for the region. EGS consultant Jay Moon served on project team and David

	Dodd (with subconsultant ISRC) served as lead consultant.
The name, title, and telephone number of a contact person with the client who is familiar with the project.	Christine Thomas Executive Director (903) 768-2402

**International Sustainable Research Council**

The name and location of the project.	<b>United Nations Economic Commission for Europe Public Private Partnership International Centre of Excellence</b>  <b>Geneva, Switzerland</b>
The estimated total value.	Confidential
The year the project was started and completed.	2023-24
The firm's project responsibilities. Indicate which responsibilities were those of personnel who would be assigned to this project.	Leading the creation of standards to integrate resilience/climate adaptation into all public private partnerships. Includes addressing existing infrastructure as well as PPPs for new development. Project Lead David Dodd
The name, title, and telephone number of a contact person with the client who is familiar with the project.	Tony Bonnici Chief, Cooperation and Partnerships Section +41-79-794-3653

The name and location of the project.	<b>Yuba-Sutter Economic Development Corporation</b> <b>Yuba City, California</b>
The estimated total value.	\$140,000
The year the project was started and completed.	2021-22
The firm's project responsibilities. Indicate which responsibilities were those of personnel who would be assigned to this project.	Creating the resilience portion of the organization's EDA-mandated CEDS, including: Stakeholder Engagement, Discovery, Investigation, and Evaluation; Supply Chain and Workforce Resilience Analyses; Guided Economic Resilience Self-assessment; Strategic Action Agenda With Evaluation Metrics  Project Lead: David Dodd
The name, title, and telephone number of a contact person with the client who is familiar with the project.	Brynda Stranix President & CEO (530) 751-8555

The name and location of the project.	<b>City of Lake Charles, Louisiana</b>
The estimated total value.	\$50,000 (subcontracted amount)
The year the project was started and completed.	2020
The firm's project responsibilities. Indicate which responsibilities were those of personnel who would be assigned to this project.	Analysis of economic and resilience benefits of new thoroughfare connecting critical evacuation routes for a hurricane-prone city. Included projected economic benefits, and use of the "ant hill algorithm" to predict changes in evacuation traffic patterns due to the new parkway.  Project Lead: David Dodd
The name, title, and telephone number of a contact person with the client who is familiar with the project.	Nic Hunter Mayor (337) 491-1201

**Statebook International**

The name and location of the project.	<b>Central New York Regional Planning &amp; Development Board, Syracuse NY</b>
The estimated total value.	Proprietary
The year the project was started and completed.	2023
The firm's project responsibilities. Indicate which responsibilities were those of personnel who would be assigned to this project.	Creation of Digital CEDS. Calandra Cruickshank (Lead), Eric Savage, Jeff Beliveau, Dana Valdez. <a href="https://cnyrpdb.digitalceds.com/">https://cnyrpdb.digitalceds.com/</a>
The name, title, and telephone number of a contact person with the client who is familiar with the project.	David Bottar Executive Director (315) 422-8276

The name and location of the project.	Digital CEDS for Piedmont Triad Regional Development Corp. Greensboro, NC
The estimated total value.	Proprietary
The year the project was started and completed.	2022

The firm's project responsibilities. Indicate which responsibilities were those of personnel who would be assigned to this project.	Creation of Digital CEDS. Calandra Cruickshank (Lead), Eric Savage, Jeff Beliveau, Dana Valdez.  <a href="https://ptrc.digitalceds.com/">https://ptrc.digitalceds.com/</a>
The name, title, and telephone number of a contact person with the client who is familiar with the project.	Michelle Slaton Economic Development and Business Services Manager (336) 904-0300

The name and location of the project.	<b>Digital CEDS for Southeastern Connecticut Enterprise Region (SECTER)</b>
The estimated total value.	Proprietary
The year the project was started and completed.	2022
The firm's project responsibilities. Indicate which responsibilities were those of personnel who would be assigned to this project.	Creation of Digital CEDS. Calandra Cruickshank (Lead), Eric Savage, Jeff Beliveau, Dana Valdez  <a href="https://secter.digitalceds.com/">https://secter.digitalceds.com/</a>
The name, title, and telephone number of a contact person with the client who is familiar with the project.	R.T. Brown Director of Economic Development Strategies and Business Services (860) 437-4659

**Attachment 4 – Key Personnel**

This section designates key personnel who will be involved in the project, their roles and responsibilities and their experiences in similar past projects. Additional information on the principals of each principal and senior staff is included in Attachment 5.

**Lead Consultant: The Natelson Dale Group, Inc.**

**Roger A. Dale, Managing Principal of TNDG**, will serve as Lead Consultant and will administer the contract with the County of Riverside, supervise TNDG staff and subconsultants. In this capacity, he will be responsible for primary client interface, overall completion of work products, and coordination of the project team (including all subcontractors). Mr. Dale has been a project manager with TNDG for 36 years and managed TNDG's work on all the previous projects listed in this proposal.

**Joseph E. McClure, Senior Associate of TNDG**, will be a principal participant throughout the process, and will have substantial roles in the stakeholder outreach and CEDS preparation tasks. Joe has more than 35 years' experience in economic consulting, including a substantial focus on economic development strategic planning and community revitalization. Through TNDG, he provides services in geography-based economics.

**Alan Levenson, Senior Associate of TNDG**, will lead the local economic assessment and industry cluster analysis. Mr. Levenson has served in a similar capacity for a number of previous economic development strategies completed by TNDG, including previous CEDS assignments for Escondido, Menifee, the Inland Valley Development Agency, Kern County and San Joaquin County.

**Joseph Collins, Research Associate of TNDG**, will support the project team with data analysis and GIS mapping. Mr. Collins has worked on a variety of economic development projects throughout California and Arizona. His diverse academic and professional career has provided him with the opportunity to work on several projects for various non-profit, private, and public entities that have facilitated community planning, local development, and regional economic development. His varied experience includes: fiscal and land economic feasibility analysis, geospatial and descriptive data analytics, graphic presentation, market analysis, and the practice of urban planning and development

**Project Manager: Economic Growth Strategies, LLC.**

**Paul Saldana, Managing Director of Economic Growth Strategies, LLC** will serve as the primary day-to-day project manager, aligning the project tasks, budget, and assignments of team members. With more than 30 years' experience as an economic development professional at the city, county and regional level, Paul will also ensure that the action strategies and recommendations are practical and achievable for the County and its stakeholders. EGS will deploy Senior Consultants and Project Assistant to provide stakeholder engagement, SWOT analysis, site selection opportunity analysis, and identify business development opportunities for the County.

**Arturo Gallardo, Senior Consultant to EGS**, will serve as Assistant Project Manager for the Coachella Valley Regional Plan and assist with stakeholder engagement and strategy development. Mr. Gallardo has more than 25 years' experience in economic development and project management. He has worked the past 7 years on economic recovery efforts resulting from natural disasters and COVID-19 including helping to develop the first Economic Development District and associated CEDS in Puerto Rico.

**Jay C. Moon, Senior Consultant to EGS**, is the former President and CEO of the Mississippi Manufacturers Association and managed the Mississippi's Manufacturing Extension Partnership (MEP) program. Jay has over 35 years of professional economic development experience in site development, business retention, strategic plan development, financial incentive creation, and marketing. He is experienced at foreign direct investment strategy and implementation and led the site location of a new \$1.5 billion, 6,000+ employee Nissan Automotive Assembly facility. Mr. Moon will provide input on site selection analysis, manufacturing potential and foreign direct investment opportunities. Jay is a past Chairman of the International Economic Development Council Board of Directors.

**Stradd Herrera, Research Analyst of EGS**, has worked in the economic development field for the past eight years for a multijurisdictional Economic Development Corporation as well as the Research Analyst for EGS. Mr. Herrera has been involved in a number of programs and projects that have supported business attraction, retention and expansion efforts, including managing online real estate database; developing and marketing of a \$500,000 micro business loan program; managing promotional website; assist in the preparation of proposals in support of business recruitment strategies.

**Digital CEDS/Data Provider: StateBook International**

**Calandra Cruickshank** is the founder and CEO of StateBook International®, a patented, digital location intelligence platform that provides strategic economic insights powered by data science to inform the optimal locations for real estate investment. In this dynamic role, she supports Fortune 500 corporations, real estate investors, developers, and lenders with data-driven risk analysis, labor assessments, and real-time mobility insights.



**Eric Savage** is chief technology officer of StateBook International®, responsible for the technical direction and development of the StateBook platform. Eric has spent over 20 years creating database search engines and business analytics platforms, helping many Fortune 1000 companies create high-performing and intuitive solutions. Eric has focused extensively on deploying "very large databases" requiring both flexible search and instantaneous access and has been a pioneer developing alternative database technologies.

**Jeff Beliveau** is vice-president and chief economist of StateBook International® with primary responsibility for assuring StateBook's data conceptualization, design, modeling, implementation, and quality assurance. An economist and expert in primary research, Jeff provides strategic vision and leadership around StateBook's data to deliver actionable economic insights derived from analysis of the US economy and local geographic trends. Jeff has a knack for turning difficult concepts into easy-to-understand language.

**Dana Valdez** is vice-president, director of operations of StateBook International®. Dana is responsible for overseeing daily business activities, managing resources, and accounting, and ensuring effectiveness across operating platforms Dana also provides exceptional customer experience to StateBook customers, ensuring their outcomes are substantive and actionable. She helps coordinate across multiple partners and business types to provide seamless coordination and integrations.

#### **Economic Resilience: International Sustainable Resilience Center (ISRC)**

**David Dodd, CEcD, Founding President/CEO of ISRC**, is one of the world's foremost experts in economic resilience, post-disaster economic recovery, climate adaptation finance, and using natural solutions for climate resilience. A Certified Economic Developer, he has worked on CEDS and other economic development strategies throughout the US for the past 25 years. The National Recovery Coordination group considers a guide that he co-authored as best practice for economic recovery and resilience. David also serves as treasurer and co-chairman of the sustainability and resilience chapter for the World Association of Public Private Partnership Units & Professionals' (WAPPP). David is the creator of the Economic Resilience Scorecard and will led the deployment and analysis of the scorecard for Riverside County and develop the economic resilience section of the Economic Development Plan.

**Anne Usher, Climate Resilience Consultant of ISRC**, is a policy expert on climate change and sustainability. Her experience understanding the connection between economic development and climate resilience will help the team align the economic resilience strategies with the overall economic growth opportunities, particularly in clean and renewable energy.

## Attachment 5 – Resumes &amp; Additional Info



Roger Dale  
Managing Principal  
The Natelson Dale Group, Inc.

#### Education

- ❖ Bachelor of Arts in Economics (cum laude), Claremont McKenna College
- ❖ Master's in Resource & Environmental Economics, University of California Riverside
- ❖ Real Estate Climate Action, Risk Assessment, Resilience, Net Zero Success, Harvard Graduate School of Design

#### Affiliations

- ❖ California Association for Local Economic Development (CALED)
- ❖ International Economic Development Council (IEDC)

#### Subject Matter Expertise

Strategic Plan Development  
Foreign Direct Investment  
International Trade & Export  
Site Selection Analysis  
Program Design & Implementation  
Workforce Development Strategies

#### Experience


Roger Dale has been affiliated with The Natelson Dale Group, Inc. (TNDG) since 1988 and is the firm's managing principal. His background encompasses real estate development, economic development, regional economic analysis, environmental and land use policy, and renewable energy. His project experience includes real estate market forecasting, fiscal impact analysis, business retention/attraction, and preparation of regional-scale economic development strategic plans. He has prepared real estate forecasts for municipal planning efforts throughout California and Arizona. Mr. Dale has also prepared market and financial feasibility analyses for private developers. Key projects include a 4,200-acre subdivision in Moorpark, California; an 885-acre mixed-use development on the Big Island of Hawaii; a tourist-oriented retail/restaurant complex in Honolulu; several regional shopping centers in southern California; a 3,200-unit residential development in the Santa Clarita Valley; and a master-planned community in Yokohama, Japan.


Over the past 25 years, a significant focus of Mr. Dale's work has been on the development of cluster-based economic and workforce development strategies. In this regard, he has managed industry cluster analyses and developed related retention/ expansion/attraction plans for dozens of communities across the United States.


Mr. Dale has an active interest in environmental mitigation and habitat conservation planning. For many years, he has served on the board of an environmental non-profit accredited by the Land Trust Alliance.


#### Selected Project Experience


- Beaumont (CA), Economic Development Strategic Plan
- Menifee (CA), Comprehensive Economic Development Strategy (CEDS)
- Palm Desert (CA), Economic Development Strategic Plan
- Kern County (CA), Comprehensive Economic Development Strategy (CEDS)
- Kern County, (CA), Economic Analysis of Carbon Management Industry
- Sonoma County (CA), Comprehensive Economic Development Program Review
- Bakersfield (CA), Economic Development Strategic Plan
- San Bernardino County (CA), CEDS for IVDA/SBVIAA


	<p>Joseph McClure Senior Associate The Natelson Dale Group, Inc.</p>
<p><b>Education</b></p> <ul style="list-style-type: none"> <li>❖ Bachelor of Science, Architecture, University of Cincinnati</li> <li>❖ Master of Science, Urban Planning, University of Arizona</li> </ul> <p><b>Certifications &amp; Credentials</b></p> <p>Registered Architect, Arizona</p> <p><b>Subject Matter Expertise</b></p> <p>Market Analysis Target Industry Identification Fiscal &amp; Economic Impact Analysis Economic Base Analysis Tribal Economic Development GIS</p>	<p><b>Experience</b></p> <p>Joe McClure has served as principal or manager of land economics research and advisory-services organizations for more than 35 years. Through TNDG, Joe provides services in geography-based economics, with a strategic focus of consolidating views on a region's economic development targets, issues, and approaches, and relating a region's existing economic base to its competitive environment. McClure has been retained by both private developers and public agencies at all levels of government. To facilitate project implementation, he has conducted workshops, written grant applications, and assisted with negotiations.</p> <p>Mr. McClure's multidisciplinary background incorporates many phases of the community and real estate development process: economic analysis and strategy development, market and financial feasibility assessment, and planning and design. He has presented papers on business and economic development issues at regional and international economic development conferences, has served as Adjunct Lecturer at the University of Arizona in the Geography and Regional Development program, and on Arizona and national ULI Advisory Services panels. McClure served as a Civil Engineering Officer in the U.S. Air Force.</p> <p>His published materials include contributions to the Local Economic Development Handbook: A Guide for Practitioners &amp; Communities, published by ACCRA and the American Chamber of Commerce Executives, and Economic Development Review.</p> <p><b>Selected Project Experience</b></p> <ul style="list-style-type: none"> <li>• Beaumont (CA), Economic Development Strategic Plan</li> <li>• Menifee (CA), Comprehensive Economic Development Strategy (CEDS)</li> <li>• Palm Desert (CA), Economic Development Strategic Plan</li> <li>• Kern County (CA), Comprehensive Economic Development Strategy (CEDS)</li> <li>• Sonoma County (CA), Comprehensive Economic Development Program Review</li> <li>• Bakersfield (CA), Economic Development Strategic Plan</li> <li>• San Bernardino County (CA), CEDS for IVDA/SBVIAA</li> </ul>

	<p>Alan Levenson Senior Associate The Natelson Dale Group, Inc.</p>
<p><b>Education</b></p> <ul style="list-style-type: none"> <li>❖ Bachelor of Arts (Honors), Economics &amp; Political Science, University of California, Riverside</li> <li>❖ Master's in Business Administration, University of California, Los Angeles</li> </ul> <p><b>Affiliations</b></p> <ul style="list-style-type: none"> <li>❖ California Association for Local Economic Development (CALED)</li> <li>❖ International Economic Development Council (IEDC)</li> </ul> <p><b>Subject Matter Expertise</b></p> <p>Fiscal impact analyses Retail market analyses Real estate development feasibility</p>	<p><b>Experience</b></p> <p>Mr. Levenson offers an academic background in economic theory with particular emphasis on economic development. Prior to joining the firm, Mr. Levenson spent two years as a research consultant for NEMESIS (Núcleo de Estudos Modelos Espaciais Sistêmicos), which is a research network dedicated to the study of systemic spatial models of the Brazilian economy.</p> <p>A significant focus of Mr. Levenson's work at TNDG has been on preparing regional economic impact analyses for a wide range of projects. Among others, these projects have included a major regional health care facility in Riverside, CA, a technology and education park in Tustin, CA, a business park in Victorville, CA, and a highway construction interchange project in Pima County, AZ. Mr. Levenson has experience with the major economic impact modeling software packages, including the Bureau of Economic Analysis's Regional Input-Output Modeling System (RIMS) and the Minnesota Implan Group's IMPLAN program.</p> <p>Mr. Levenson has managed the preparation of a number of regional economic development plans, with a particular focus on industry "cluster" strategies. He played a key role in developing and preparing TNDG's "National and Regional Directory of Targeted Growth Industries", a publication that provided detailed summaries of cluster initiatives at the statewide and metropolitan statistical area (MSA) level.</p> <p><b>Selected Project Experience</b></p> <ul style="list-style-type: none"> <li>• Beaumont (CA), Economic Development Strategic Plan</li> <li>• Menifee (CA), Comprehensive Economic Development Strategy (CEDS)</li> <li>• Palm Desert (CA), Economic Development Strategic Plan</li> <li>• Kern County (CA), Comprehensive Economic Development Strategy (CEDS)</li> <li>• Kern County, (CA), Economic Analysis of Carbon Management Industry</li> <li>• Sonoma County (CA), Comprehensive Economic Development Program Review</li> <li>• Bakersfield (CA), Economic Development Strategic Plan</li> <li>• San Bernardino County (CA), CEDS for IVDA/SBVIAA</li> </ul>


	<p><b>Paul Saldana</b>                  Managing Director/Principal Consultant                  Economic Growth Strategies, LLC</p>
<p><b>Education</b></p> <ul style="list-style-type: none"> <li>❖ Doctorate (ABD), Organizational Leadership &amp; Change, California Baptist University</li> <li>❖ Masters Business Administration, Crown College</li> <li>❖ Bachelor of Arts Business Administration, Crown College</li> </ul> <p><b>Certifications &amp; Credentials</b></p> <ul style="list-style-type: none"> <li>❖ Certified Economic Developer (CEcD),</li> <li>❖ Career Technical Education Credential,</li> <li>❖ Certificate in Public Engagement, Pepperdine University</li> </ul> <p><b>Subject Matter Expertise</b></p> <p>Community Engagement                  Organizational Development                  Site Selection Analysis                  Land Use &amp; Environmental Analysis                  Target Industry Recruitment                  Program Design &amp; Implementation                  Workforce Development Strategies</p>	<p><b>Experience</b></p> <p>In 2022, Paul became the only economic development professional in California to maintain status as a Certified Economic Developer for over 30 years. He holds another national distinction, leading two organizations to achieve status as an Accredited Economic Development Organization). Paul's leadership was recognized by IEDC as the only organization in California to receive the coveted Economic Development Organization of the Year by IEDC.</p> <p>Paul has worked in diverse communities, geographic environs, and at various levels of local economic development. He's assisted hundreds of businesses with their expansion and location needs, creating thousands of jobs and millions of dollars in recurring revenue for local governments, schools, and special districts.</p> <p>Paul's experience working in city and county government offers him the understanding to communicate the intricacies of the planning and permitting process to prospective businesses. He has led community vision projects, general and specific plans, annexations, supervised planning, building inspection, code enforcement, and capital improvement programs. His grant writing skills have produced over \$30 million in project revenue. Paul's extensive experience in community-level economic development ranges from Main Street programs to complete redevelopment. He has managed business recruitment, global trade, and business assistance at the regional level and entrepreneurial development.</p> <p><b>Selected Project Experience</b></p> <p>Bakersfield (CA), Economic Incentives &amp; Assistance                  Frederick (CO), Target Industry Analysis                  Karuk Tribe (CA), Economic Development Strategy                  Natchitoches (LA), Tourism Marketing Analysis                  Santa Maria (CA), Airport Target Industry Analysis                  Tulare County (CA), Economic Development Strategy                  Wood County (TX), Economic Development Strategy                  Yuba-Sutter (CA), Economic Recovery &amp; Resilience Plan</p>


	<p>Arturo Gallardo Senior Consultant Economic Growth Strategies, LLC</p>
<p><b>Education</b></p> <ul style="list-style-type: none"> <li>❖ Bachelor of Arts, International Studies, New York University</li> <li>❖ Project Management Theory, School of Professional Studies, NY University</li> </ul> <p><b>Subject Matter Expertise</b></p> <p>Strategic Development Foreign Direct Investment International Trade &amp; Export Site Selection Analysis Program Design &amp; Implementation Workforce Development Strategies</p>	<p><b>Experience</b></p> <p>Mr. Arturo Gallardo has been involved in the field of economic development, international trade and export promotions in the Continental U.S., Europe, and Puerto Rico for over 25 years. He has also been specifically engaged in efforts to promote economic development initiatives to support the recovery and redevelopment of jurisdictions impacted by natural disasters.</p> <p>Most recently working under the umbrella of the U.S. Dept of Commerce disaster recovery team at FEMA's missions he supported efforts to have the U.S. Dept of Transportation extend the DOT Expanded Air Cargo Transfer Rights to Puerto Rico's three international airports and worked to promote the activation of the U.S. Maritime Administration's (MARAD) M-2 Maritime Highway System around the Island to bring additional resiliency to the Port of Ponce and other port facilities. Working at the recent Kentucky tornadoes and flood recovery, he supported efforts to identify opportunities for the expansion of broadband services to rural regions of Kentucky, workforce development, and efforts to organize workshops and webinars to assist local governments and area development districts identify federal and non-federal resources to bring local recovery and redevelopment.</p> <p>Arturo's previous experience includes working for the Puerto Rico Industrial Development Company's Aguadilla Air Cargo Hub and the Port of the Americas Transshipment Port (Guayanilla) projects; Acting Director of the PR Commercial Office in Spain; Co-Manager of the Virginia Economic Development's VALET export promotion program, and supported efforts by the U.S. District Export Council's to restart the redevelopment of the Aguadilla Airport as a regional air cargo hub.</p> <p><b>Selected Project Experience</b></p> <p>Fresno (CA), Workforce Development Study, Transformative Climate Communities Project Puerto Rico (US), Economic Development Strategic Planning and Economic Recovery program Virginia (VA) Leaders in Export Trade Program</p>

	<p>Jay Moon, CEcD Senior Consultant Economic Growth Strategies, LLC</p>
<p><b>Education</b></p> <ul style="list-style-type: none"> <li>❖ Bachelor of Arts, International Relations, University of Georgia</li> <li>❖ Master of Public Administration, University of Georgia</li> <li>❖ Economic Development Institute, University of Oklahoma</li> </ul> <p><b>Certifications &amp; Credentials</b> Certified Economic Developer (CEcD)</p> <p><b>Professional Achievements</b></p> <ul style="list-style-type: none"> <li>❖ Past Chair, International Economic Development Council (IEDC)</li> <li>❖ Fellow Member &amp; Honorary Life Member, IEDC</li> <li>❖ Past Dean, University of Oklahoma's Economic Development Institute</li> <li>❖ Lifetime Achievement Award for Excellence in Economic Development from the IEDC</li> </ul> <p><b>Subject Matter Expertise</b></p> <p>Advance Manufacturing Recruitment Foreign Direct Investment International Trade &amp; Export Program Design &amp; Implementation Site Selection Analysis Strategic Development Workforce Development Strategies</p>	<p><b>Experience</b></p> <p>Jay C. Moon specializes in working with local communities and economic development organizations. Jay is the former President and CEO of the Mississippi Manufacturers Association, the largest and most influential voice for Mississippi manufacturers. Jay was also the manager for the Mississippi's Manufacturing Extension Partnership (MEP) program.</p> <p>Jay has more than 35 years of professional economic development experience in site development, business retention, strategic plan development, financial incentive creation and marketing. Prior to joining the MMA, Jay ran the economic, community, building and planning departments for Gulport, MS. He also served as the Deputy Director &amp; Chief Operating Officer and Director for International and National Development with the Mississippi Development Authority. During that period, Jay led Mississippi's successful effort to locate the new \$1.5 billion, 6,000+ employee Nissan Automotive Assembly facility. This project was named by Site Selection Magazine, Corporate Location Magazine, Area Development Magazine and Southern Business &amp; Development Magazine as the top development project of that year.</p> <p>As former chairman of Mississippi's State Workforce Development Board (SWIB) and the State Longitudinal Data System, Jay is a frequent speaker on the subject of workforce development. Jay served on the board of directors of the National Association of Manufacturers, the largest manufacturing association in the United States representing over 11,000 manufacturing companies.</p> <p><b>Selected Project Experience</b></p> <p>Frederick (CO), Target Industry Analysis Grenada County (MS), Strategic Plan Development Montana Coal Country Transition Study Natchitoches (LA), Tourism Marketing Analysis Parker (CO), Economic Development Strategy Van Alstyne (TX), Economic Development Plan Wood County (TX), Economic Development Strategy</p>

	<p>David Dodd                  Founding President/CEO                  International Sustainable Resilience Center</p>
<p><b>Education</b></p>	<p><b>Experience</b></p>
<ul style="list-style-type: none"> <li>❖ Louisiana Tech University</li> <li>❖ Graduate School of Banking, Louisiana State University</li> </ul>	<p>David Dodd, is one of the world's foremost experts in economic resilience, post-disaster economic recovery, climate adaptation. His international work includes developing the framework for Japan's economic recovery after the Fukushima nuclear disaster. In the United States, David has been a part of 10 disaster recovery efforts, including the aftermaths of Hurricanes Sandy and Katrina. The National Recovery Coordination group considers a guide that he co-authored as best practice for economic recovery and resilience. David also serves as treasurer and co-chairman of the sustainability and resilience chapter for the World Association of Public Private Partnership Units &amp; Professionals' (WAPPP). He helps to lead the American Society of Adaptation Professionals' Funding and Finance and Policy and Practice groups.</p>
<p><b>Certifications &amp; Credentials</b>                  Certified Economic Developer (CEcD)</p>	<p>David has been a speaker and panelist at many global economic development and climate events such as the UN Council for Trade and Development's World Investment Forum. David was recently appointed to lead the preliminary development of Standards for integration of resilience into all public private partnerships by the UN Economic Commission for Europe's Executive Bureau. He will be inaugurated formally as Chair of this effort in April 2024.</p>
<p><b>Professional Achievements</b></p> <ul style="list-style-type: none"> <li>❖ Fellow Member &amp; Honorary Life Member, IEDC</li> <li>❖ Past Dean, University of Oklahoma's Economic Development Institute</li> </ul>	<p>David partnered with performance achievement firm NOVACES, LLC to support disaster recovery from Superstorm Sandy, tornadoes in Oklahoma and Arkansas, floods in Oklahoma and Louisiana, and Hurricanes in Puerto Rico, Louisiana, and Texas. David created the Economic Resilience Scorecard and has authored economic resilience and recovery plans for local communities and regions.</p>
<p><b>Subject Matter Expertise</b></p>	<p><b>Selected Project Experience</b></p>
<p>Economic Resilience                  Disaster Mitigation                  Climate Adaptation                  Public Private Partnerships                  Strategic Development                  Infrastructure Resilience</p>	<p>Frederick (CO), Target Industry Analysis                  Natchitoches (LA), Economic Development Strategy                  Puerto Rico Economic Development Strategy                  Van Alstyne (TX), Economic Development Plan                  Wood County (TX), Economic Development Strategy                  Yuba-Sutter (CA), Economic Recovery &amp; Resilience Plan</p>



	<p>Anne Usher                  Hazard &amp; Climate Resilience Consultant                  International Sustainable Resilience Center</p>
<p><b>Education</b></p> <ul style="list-style-type: none"> <li>❖ Master of Arts, Journalism &amp; Public Affairs, American University, Washington DC</li> <li>❖ Master of Natural Resources in Global Sustainability</li> <li>❖ Bachelor of Arts, Diplomacy &amp; Foreign Affairs, Miami University, Oxford OH</li> </ul> <p><b>Certifications &amp; Credentials</b></p> <ul style="list-style-type: none"> <li>❖ Virginia Tech, Graduate Certificate, Natural Resources Management</li> <li>❖ Advance CEQA, University of San Diego</li> </ul> <p><b>Professional Memberships</b></p> <ul style="list-style-type: none"> <li>❖ American Society of Adaptation Professionals</li> <li>❖ Association of Environmental Planners</li> <li>❖ American Planning Association</li> </ul> <p><b>Subject Matter Expertise</b>                  Hazard Mitigation Analysis                  Adaptation &amp; Sustainability                  Land Use Analysis                  Urban Water Management                  Climate Resilience</p>	<p><b>Experience</b></p> <p>Anne Usher is a global environmental professional and policy expert with roles as a climate resilience consultant, climate writer for USAID, and editorial officer for national and global environmental programs at The Pew Charitable Trusts. Her technical aptitude and ability to prioritize and manage several projects simultaneously provides the ISRC team with a unique set of skills to deploy the economic resilience scorecard. She has experience and training to advise communities on ways to reduce GHG emissions and become more resilient to climate change.</p> <p>Usher is adept at developing relationships with a variety of stakeholders and communicating complex issues, including environmental laws and policies. A San Diego resident, Usher has a unique experience in assisting coastal related industries, including startup companies seeking opportunities in the Blue economy. Her industry experience extends to the clean energy and connection with new business ventures.</p> <p><b>Selected Project Experience</b></p> <p>Climatebase Fellowship                  WayZero Project                  Rhodomaxx startup consultant                  California State Parks &amp; Recreation                  Ocean Vision West Coastal Solutions project</p>

	<p><b>Calandra Cruickshank</b>                  Founder &amp; CEO                  StateBook International®</p>	
<p><b>Education</b></p> <ul style="list-style-type: none"> <li>❖ Bachelor of Science, Journalism, University of Colorado at Boulder</li> </ul> <p><b>Professional Memberships</b></p> <ul style="list-style-type: none"> <li>❖ Chair of the CoreNet NYC PropTech Committee</li> <li>❖ Board of Directors for the International Economic Development Council (IEDC)</li> <li>❖ Chaired Women in PropTech's New York City Chapter</li> </ul> <p><b>Subject Matter Expertise</b></p> <p>Digital CEDS                  Data Analytics                  Technology in Economic Development</p>	<p><b>Experience</b></p> <p>Calandra Cruickshank is the founder and CEO of StateBook International®, a patented, digital location intelligence platform that provides strategic economic insights powered by data science to inform the optimal locations for real estate investment. In this dynamic role, she supports Fortune 500 corporations, real estate investors, developers, and lenders with data-driven risk analysis, labor assessments, and real-time mobility insights.</p> <p>Passionate about data, Calandra delivers digital solutions to proptech, fintech and govtech firms and advises on how normalized public and private data can be leveraged to drive deeper and more meaningful data insights. She also works closely with economic development organizations (EDOs) across the U.S., providing data and technology-driven, digital strategic planning and marketing tools to help communities build capacity, catalyze organic growth and ensure long-term business sustainability. Calandra developed the Digital CEDS™ platform and digitized the International Sustainable Resilience Center's (ISRC) Economic Resilience Scorecard™. She is currently building an Infrastructure Resilience Scorecard, also in partnership with ISRC and the World Association for Public Private Partnerships.</p> <p>Calandra is dedicated to promoting thought leadership around innovative and disruptive technologies, tackling diversity, and empowering women in the industry. She is a frequent speaker at industry events. Calandra serves as the and is actively involved in several other industry groups.</p>	

Attachment 6 – Certificate of Insurance



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
11/17/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER (OC) Heffernan Insurance Brokers 18004 Sky Park Circle, Suite 210 Irvine CA 92614	CONTACT NAME: Lauren Sebastiani PHONE: 949-771-3400 FAX: 949-771-3401 ADDRESS: laurense@HeffINS.com
INSURED The Natelson Dale Group, Inc. P.O. Box 489 Yorba Linda CA 92885	INSURER(S) AFFORDING COVERAGE INSURER A: Travelers Casualty Insurance Company of America NAIC # 19046 INSURER B: Travelers Property Casualty Company of America 25674 INSURER C: Continental Casualty Company 20443 INSURER D: INSURER E: INSURER F:

COVERAGES CERTIFICATE NUMBER: 1064047760 REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

ORDER LINE	TYPE OF INSURANCE	ADDITIONAL	SUBROGATION	POLICY NUMBER	POLICY EFF DATE	POLICY EXP DATE	LIMITS
A	COMMERCIAL GENERAL LIABILITY <input checked="" type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:			6803R0268982347	9/1/2023	9/1/2024	EACH OCCURRENCE \$2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$1,000,000 MED EXP (Any one person) \$5,000 PERSONAL & ADV INJURY \$2,000,000 GENERAL AGGREGATE \$4,000,000 PRODUCTS - COM/PROP AGG \$4,000,000
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY			6803R0268982347	9/1/2023	9/1/2024	COMBINED SINGLE LIMIT (Ea accident) \$ Included in GL BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROP/STOR/PARTNER/EXECUTIVE/OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	UB8R7414412347G	9/1/2023	9/1/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
C	Professional Liability			MCH254071817	9/1/2023	9/1/2024	Limit per Claim: \$2,000,000 Aggregate Limit: \$2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 Sample of Coverages at time of binding. Does not provide any proof of coverage unless holder name and address is completed.

<b>CERTIFICATE HOLDER</b>  Name Address City ST Zip Code	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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ACORD 25 (2018/03)

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**CERTIFICATE OF LIABILITY INSURANCE**

DATE (MM/DD/YYYY)  
04/07/2024

[THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.]

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Next First Insurance Agency, Inc. PO Box 60787 Palo Alto, CA 94305	<b>CONTACT NAME:</b> PHONE (A/C No. Ext): (855) 222-5999      FAX (A/C No): E-MAIL ADDRESS: support@nextinsurance.com	
	<b>INSURER(S) AFFORDING COVERAGE</b> NAIC #	
<b>INSURED</b> Economic Growth Strategies LLC 101 N Anderson Rd Exeter, CA 93221	<b>INSURER A:</b> State National Insurance Company, Inc.      12831	
	<b>INSURER B:</b>	
	<b>INSURER C:</b>	
	<b>INSURER D:</b>	
	<b>INSURER E:</b>	

**COVERAGES**      **CERTIFICATE NUMBER:** 457964637      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDITIONAL INSURED (Y/N)	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:	X	NXTRRL4TQJ-00-GL	10/01/2023	10/01/2024	EACH OCCURRENCE \$1,000,000.00 DAMAGE TO RENTED PREMISES (Ea occurrence) \$100,000.00 MED EXP (Any one person) \$10,000.00 PERSONAL & ADV INJURY \$1,000,000.00 GENERAL AGGREGATE \$1,000,000.00 PRODUCTS - COMP/OP AGG \$1,000,000.00 \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED <input type="checkbox"/> AUTOS ONLY HIRED <input type="checkbox"/> AUTOS ONLY SCHEDULED <input type="checkbox"/> AUTOS NON-OWNED <input type="checkbox"/> AUTOS ONLY					COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED    RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in KH) If yes, describe under DESCRIPTION OF OPERATIONS below:	Y/N	N/A			<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability	X	NXTRRL4TQJ-00-GL	10/01/2023	10/01/2024	Each Occurrence: \$1,000,000.00 Aggregate: \$1,000,000.00

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks: Schedule, may be attached if more space is required)**  
 The Certificate Holder is The Natelson Dale Group. This Certificate Holder is an Additional Insured on the General Liability policy per the Additional Insured Automatic Status Endorsement. All Certificate Holder privileges apply only if required by written agreement between the Certificate Holder and the Insured, and are subject to policy terms and conditions.

<b>CERTIFICATE HOLDER</b> The Natelson Dale Group PO Box 489 Yorba Linda, CA 92885	<b>LIVE CERTIFICATE</b>  Click or scan to view	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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ACORD 25 (2016/03)

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**Attachment 7 – Business License**

<b>BUSINESS CERTIFICATE</b>		<b>CITY OF YORBA LINDA</b>	
<small>The person, firm or corporation named below is granted this business certificate pursuant to the provisions of Yorba Linda Municipal Code Chapter 5, to engage in, carry on, or conduct the business, trade, calling, profession, exhibition, or occupation described below. Issuance of certificate is not an endorsement, nor certification of compliance with other ordinances or laws. Starting January 1, 2021, Assembly Bill 1607 requires the prevention of gender-based discrimination of business establishments. A full notice is available in English or other languages by going to: <a href="https://www.dca.ca.gov/publications/">https://www.dca.ca.gov/publications/</a></small>			
<b>BUSINESS NAME:</b>	The Natelson Dale Group Inc	<b>BUSINESS TYPE:</b>	65066 - ECONOMIC DEVELOPME
<b>BUSINESS LOCATION:</b>	4150 VIEW PARK DR YORBA LINDA, CA 92886-7801	<b>DESCRIPTION:</b>	ECONOMIC DEVELOPMENT CONSULTANTS
<b>BUSINESS OWNER(S):</b>	Roger A. Dale		
THE NATELSON DALE GROUP INC PO BOX 489 YORBA LINDA, CA 92885-0481		<b>Business License Number:</b> 26725 <b>Effective Date:</b> July 01, 2023 <b>Expiration Date:</b> June 30, 2024	
<b>TO BE POSTED IN A CONSPICUOUS PLACE</b>		<b>NOT TRANSFERABLE</b>	

**Attachment 8 – Project Narrative**

**Project Alignment with RFP Scope of Services**

The RFP identifies a Scope of Services designed to achieve the creation of an Economic Development Strategic Plan (EDSP) for the County of Riverside. The project narrative aligns the County's Scope of Services with a set of tasks that will accomplish the work in accordance with the RFP. The following table shows the alignment of tasks with the RFP.

		RFP Scope of Services Subsections 1 through 7						
		1	2	3	4	5	6	7
		Program Goals	Sub Regions	Support Services	Coachella Valley Regional Plan	Stakeholder Engagement	Economic Sector Analysis	CEDS Compatibility
Project Narrative Tasks	<b>Task 1 Administration &amp; Management</b>							
	1.1	✓						
	1.2	✓				✓		✓
	1.3	✓						✓
	1.4	✓						
	1.5	✓						
	<b>Task 2 Regional Outreach &amp; Stakeholder Engagement</b>							
	2.1	✓	✓	✓				✓
	2.2	✓	✓	✓	✓	✓		✓
	2.3	✓	✓	✓	✓	✓		✓
	2.4	✓	✓	✓	✓	✓		✓
	2.5	✓	✓	✓		✓		✓
	2.6	✓	✓	✓		✓		✓
	<b>Task 3 Economic Base Analysis</b>							
	3.1	✓	✓	✓	✓		✓	✓
	3.2	✓	✓	✓	✓		✓	✓
	3.3	✓	✓	✓	✓		✓	✓
	3.4	✓	✓	✓			✓	✓
	<b>Task 4 Competitive Analysis</b>							
	4.1	✓	✓	✓			✓	✓
	4.2	✓	✓	✓			✓	✓
	4.3	✓	✓	✓			✓	✓
	<b>Task 5 Business Retention, Recruitment, Expansion Analysis</b>							
	5.1	✓	✓	✓			✓	✓
	5.2	✓	✓	✓			✓	✓
	5.3	✓	✓	✓			✓	✓
	<b>Task 6 Economic Resilience Plan</b>							
	6.1	✓	✓	✓			✓	✓
	6.2	✓	✓	✓			✓	✓
	<b>Task 7 Coachella Valley Regional Plan</b>							
	7.1	✓		✓	✓			
	7.2	✓		✓	✓			
	7.3	✓		✓	✓			
	7.4	✓		✓	✓	✓		
	7.5	✓		✓	✓			
	7.6	✓		✓	✓			
	7.7	✓		✓	✓			
	<b>Task 8 Draft Plan</b>							
	8.1	✓	✓	✓			✓	✓
	8.2	✓	✓	✓			✓	✓
	8.3	✓	✓	✓			✓	✓
	<b>Task 9 Final Plan</b>							
	9.1	✓	✓	✓			✓	✓
	9.2	✓	✓	✓			✓	✓

**Task 1 – Project Initiation & Administration**

**Task 1.1 Project Initiation Meeting**

TNDG will facilitate a project initiation meeting with County staff. The purpose will be to confirm the work plan, the anticipated stakeholder outreach process, and review the overall project schedule. The team will also review the data and reports it has gathered and identify missing existing background data. The meeting may also be used to identify members of (or candidate participants) for the CEDS Strategy Committee (13 CFR §303.6(b)(1)). The requirement of a CEDS Strategy Committee may vary from region to region, however, the team wants to ensure that if required, the identification of the group is done at the earliest possible stage in the plan development process.

**Task 1.2 Finalize Stakeholder Engagement Plan**

The team will work with the County to develop a final stakeholder engagement plan that is consistent with the work plan and meets the timeframe for the County. This may include modification of the proposed schedule and content of the stakeholder meetings and additional options for stakeholder engagement.

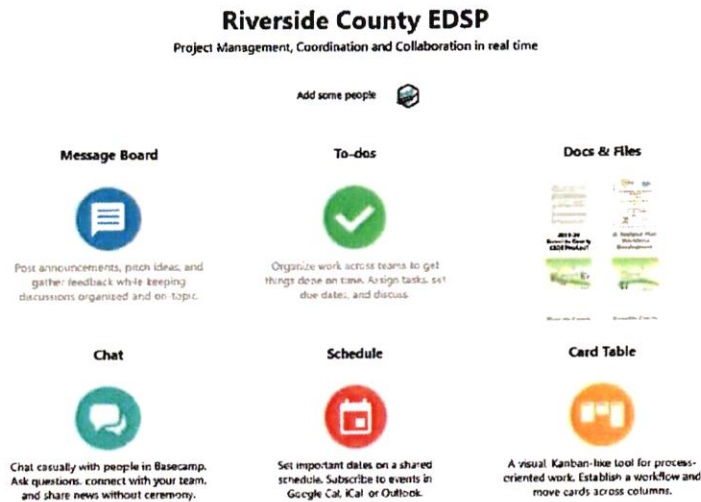
**Task 1.3 Analysis of Existing Regional and County Plans and Reports**

The team will analyze current regional and statewide economic development strategies, initiatives, and programs including, but not limited to, the Riverside County Strategic Recovery Framework, 2019-24 Riverside County CED, Riverside County General Plan, Inland Empire 2021-24 Regional Workforce Development Plan, Visit Greater Palm Springs plan, reports from the Inland Economic Growth and Opportunity (IEGO), city and subregional economic development plans. The team uses a cloud-based file sharing system that will allow the project manager(s) from the County to view and add to the library of documents collected for the analysis.



### Task 1.4 Project Administration

The team uses a cloud-based platform Basecamp for project management, coordination, and collaboration. The screenshot below illustrates the initial microsite set up for the preparation of this proposal. The site is used by the consulting team to communicate in real time on the progress of the tasks, upload and download information and schedule activities and meetings. The County's designated project manager(s) will be provided access to the site to access information including memos, draft reports, and other resources. Primary communication will be facilitated through the check-in meetings (see Task 1.5), however the project manager will see message board posts throughout the project. Additional microsities may be established for each of the subregions to augment project administration and coordination as needed.



### Task 1.5 Project Coordination Meetings

Following the initial kick-off meeting, the Project Manager will meet virtually with the County's designated project manager every three (3) weeks (or as agreed in final agreement) for a progress update and to secure any assistance that might be necessary for current tasks. Draft reports, analysis, questions will be addressed during the coordination meetings. Additional meetings for the Coachella Valley Regional Plan are established separately, although the updates will be included on the overall project agenda.

### Task 2 Regional Outreach & Stakeholder Engagement

The outreach and engagement process will have the following purposes:

- ❖ Assessing perceptions of current economic conditions, including short-term issues as well as the region's position relative to long-term challenges and opportunities.
- ❖ Identifying emerging opportunities for new or expanded existing economic activity, and challenges related to losses of major employers or other region-wide setbacks.
- ❖ Reviewing and confirming existing goals for economic development.
- ❖ Identifying areas of progress in the strategies contained in the former CEDS and areas that have been particularly challenging.



- ❖ Reviewing current target industry clusters and identifying new clusters of interest.

**Translation:** Many members of the team are bi-lingual and capable of communicating with stakeholders and the general public in English and Spanish. The cost proposal includes a budget for simultaneous translation at meetings as needed and preparation of an EDSP/CEDS Information page and Executive Summary in Spanish as well. Other language translations may also be considered in the final agreement.

## **2.1 Development of Subregional Stakeholder List**

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Stakeholders should include, but not be limited to non-profits, government agencies, business leaders, major retail brokers, developers, educational institutions, and utility providers. Stakeholders should represent a broad range of voices within the County. The consultant will work with County staff to determine the final list of stakeholders by Subregion.

## **2.2 Stakeholder Meetings**

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The team will facilitate three (3) meetings with stakeholders in each of the four (4) sub regions (Coachella Valley is listed separately) for a total of 12 meetings. The initial meeting will gather initial information from the stakeholders to inform the SWOT analysis and initial areas of focus. The second meeting will be conducted to receive initial feedback on the summary reports and the initial strategic direction. The final meeting will review the draft report. Ideally, the meetings will be conducted in person and at the first meeting all stakeholders will be asked to commit to attending all three meetings. To facilitate efficiency in scheduling, the meetings will be held over a two-day period, with two subregional meetings on one day and two on the following day.

## **2.3 One-on-one Meetings**

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Often times the larger group meetings yield information or questions that require additional follow-up so that the team can garner additional insight. Likewise, information from analysis can generate opportunities to dig deeper into the data. The budget accounts for up to thirty (30) individual meetings (primarily virtual) and can accommodate additional meetings and in person meetings during the various site visits.

## **2.4 Community Workshops**

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The team will facilitate six (6) community workshops (open to the general public and business community) to solicit input. The team will work with County staff to determine the optional locations for these workshops to ensure participation from across the County. The workshops could be held virtual as an option or a hybrid setting. Translation can be provided with a local subcontractor or scheduling one of the bilingual team members to be present at the community workshops. A final schedule will be developed as part of the stakeholder engagement planning process.

## **2.5 Strategy Committee Meetings/Updates**

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The team will facilitate three (3) meetings with the Strategy Committee (or equivalent), one meeting early in the process to identify broad issues and opportunities, one meeting mid-way through the process to formulate preliminary strategies, and one meeting near the end of the process to review the draft strategy. A schedule of meetings will be set with the stakeholder engagement plan.

## **2.6 Board of Supervisors Meetings**

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The lead consultant and project manager will participate in two (2) Board of Supervisors meetings at the discretion of County staff. Team recommends one meeting to present an overview of the EDSP/CEDS process and provide a debriefing of the work accomplished to date and another to obtain Board approval of the final plan (required before submitting the CEDS for EDA approval).

## **Task 3 Economic Base Analysis**

### **3.1 Demographic and Economic Indicator Analysis**

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The team will perform qualitative and quantitative research on the County demographics and key economic indicators. The team will compile a range of economic and demographic data to prepare an up-to-date economic profile of Riverside County, constituent cities/communities by subregion, and the relevant surrounding region. These will include standard government data for metrics such as employment by industry; unemployment, underemployment, and labor force participation rates; median household and average per capita income levels; wealth and credit levels; population growth; educational attainment; building permit activity; taxable retail sales, home ownership rates and home values; and citywide assessed valuation. Where applicable, data for Riverside County (and each constituent city/community by subregion) will be compared to the following larger Inland Empire region. The compiled data will cover a 10-year historic period and (for selected variables) 10-year future projections.

### **3.2 Market Segmentation Analysis**

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The market segmentation analysis will consist of the following components:

- ❖ First Tier: An overview of the County's economy and the drivers responsible for the majority of the economic activity in Riverside County. At a minimum, the analysis will include the following information: the private employers with the largest number of employees in the County; largest government employers in the County; industries that are employing the most people within the County; employers that employ the most County residents; businesses that produce the most tax revenue for the County (and subregions).
- ❖ Second Tier: An Overview of the micro-enterprise, small business and gig economy components of the economic activity within the County.

- ❖ An analysis of current economic trends to determine their impact on the County's future economic composition.
- ❖ Identification of Riverside County's position within the following larger reference areas: Inland Empire Region, Southern California and California; this part of the analysis will consider how the shared economies interact and how each business sector contributes to the local economy.

The resulting analysis will inform opportunities for the County's regional/commercial, office and industrial segments.

### **3.3 Benchmark Analysis**

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The team will work with the County project team to identify benchmark counties or regions from which to assess how Riverside County performs in relation to the benchmark areas. The team will develop key benchmarks such as job growth, new business growth, industry diversification, and other economic metrics. The benchmarking analysis will also utilize standards and leading practices that other communities who may not be directly competitive with Riverside County to attract similar industries. The insights from the benchmarking analysis will work to refine the work plan for the EDSP and be the catalyst for future economic priorities.

### **3.4 Economic Base Analysis Report**

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A final economic base analysis report will provide a high-level summary and key insights from the resulting analysis of Tasks 3.1, 3.2 and 3.3. The insights serve the goal of satisfying the EDA requirement for "summary of economic conditions" (13 CFR 303.7(b)) for the CEDS and serve to inform the remainder of the planning process. The Base Analysis Report will also serve as an opportunity to share insights with stakeholders and support the continued solicitation of feedback into the planning process.

## **Task 4 Competitive Analysis**

### **4.1 SWOT Analysis**

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The team will perform countywide and subregional SWOT (Strengths, Weaknesses, Opportunities, Threats), based on the data, document reviews and stakeholder input from the preceding tasks. The main intent of this task will be to draw key "themes" from the background research and analyses that can be linked to the various action strategies defined in the EDSP/CEDS. The process is designed to produce a SWOT report that is a succinct summary of the key areas and will serve as the basis for the strategy formulation discussion at the second stakeholder meetings. The SWOT analysis also will address the following topics:

Federal laws, policies, and regulations.

- ❖ Land and Labor availability.
- ❖ Limited public facilities and services.
- ❖ Identify outside competition.

- ❖ Other internal issues that hinder regional and local economic development.

Identify economic opportunities.

- ❖ Expansion opportunities for existing businesses/industries
- ❖ Tourism development, visitor support, and air/water transportation
- ❖ E-commerce
- ❖ Small business development
- ❖ Opportunities related to other natural resources.
- ❖ New/emerging opportunities that could result in competitive advantages.

Alignment and demonstrate compatibility with previous plans/efforts including:

- ❖ Existing initiatives related to the region's key industry clusters.
- ❖ Existing master plans and workforce investment strategies that can be leveraged by the plan.
- ❖ Analysis/integration of past, present and anticipated economic development plans (particularly regional plans that are under development).

#### **4.2 Stakeholder analysis**

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A stakeholder analysis using findings from community engagement activities will be conducted. Analysis will outline stakeholder concerns, opportunities for future participation in economic development activities, and future needs of stakeholders based on distinct regional and industry profiles.

#### **4.3 Target Industry Analysis**

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Conduct an industry analysis to serve as a basis for defining an updated list of targeted industries for the County and subregions. The focus on identifying strong growth industries is consistent with USEDA's preference for cluster-based economic development strategies and will also provide a practical basis for defining development strategies that incorporate the concept of economic resilience. The team will utilize the following data sources to complete the industry cluster analysis:

- ❖ Previous target industry report(s) for economic development organizations in Riverside County (and adjacent regions, if relevant);
- ❖ Employment by industry (at 6-digit NAICS level) for Riverside County and its subregions.
- ❖ Industry trend analysis using proprietary sources, site locator data and industry forecasts (Sample of industry profile is illustrated).

The target industry analysis will include the following:

- ❖ A current industry snapshot for the County and the subregions.
- ❖ Identify key industries and their market locations that should be targeted.

- ❖ Identify development opportunities and strategies to establish the County as a leading destination for cleantech, including an analysis of existing infrastructure services to support cleantech growth (OASIS, CARB, CE-CERT, etc.)
- ❖ Identifies opportunities for foreign direct investment and business development opportunities.



### Control, Electromedical, Measuring & Navigational Instruments

Companies in this industry segment manufacture navigational, measuring, electromedical, and control instruments, including aeronautical instruments, appliance regulators and controls, analytical lab instruments, navigation and guidance systems, and various types of testing equipment.

Key Considerations	<b>Growth Projection</b> Revenue for US control, electromedical, and navigational instruments production is forecast to grow at an annual compounded rate of 1% between 2023 and 2027.	<b>Market Opportunities</b> Companies like █████ a major industry leader, can be a catalyst for additional entries from this industry.	
	<b>Industry Drivers</b> Technology Innovation: Advances in science and technology, including information technology Government Regulations: Changes in federal, state, or local government regulations or business-related policies.	<b>Business Challenges</b> Market penetration: New technologies, such as electric traction, have to compete with traditional equipment which typically has long operational horizons. Labor force: The industry faces challenge to provide workforce that understands the elements of farming along with the application of technology, a blend of disciplines not readily found. Cost: The cost for R&D is high and therefore not led by farming, interests but technology innovation and thus the recovery costs drive the application price for the technology.	<b>Critical Issues</b> Adverse Impact of Pandemic - There is a decline in overall revenue largely due to reduced economic activity. Manufacturers recognise the adverse effects of the pandemic on the demand for their products and their operations, supply chains and distribution systems, research and product development efforts, ability to generate cash flow, and access to capital. Dependence on Government Contracts - Government purchases may account for a large percentage of industry revenues since companies may serve the US government almost exclusively. The government can terminate a contract for its convenience or for the company's failure to comply with the terms of the contract or the applicable legislatures and regulations.

#### 4.4 Workforce Development Integration

The creation of new jobs, particularly good-paying jobs, requires a workforce development system that provides upskill and reskill opportunities for the existing workforce as well as strong career pathways. The team will use information discovered from the industry analysis and insights from industry leaders to analyze the existing workforce development, career pathway and higher education programs to identify gaps and opportunities to better integrate the workforce development system industry needs. The team's experience in advancing workforce development strategies around advance manufacturing, clean energy and supplier networks will provide opportunity to identify new prospects for internal and external collaboration. A primary focus of the integration analysis will be to ensure that there is a strong talent development pipeline strategy for future economic success.

#### Task 5 Business Retention, Recruitment and Expansion Strategic Analysis

##### 5.1 Business Retention, Recruitment and Expansion Strategic Analysis

Riverside County enjoys a strong reputation among site locators and various trade industry groups. The consulting team brings decades of experience years of successful experience recruiting and facilitating the expansion of dozens of businesses, bringing thousands of

jobs to the communities they represent. This combination (and a rolodex of contacts) will allow the team to collaborate with County staff to conduct a Business Retention, Recruitment and Expansion Strategic Analysis to inform the final plan strategies. The analysis will include identifying business segments, their primary interests, the best outreach tools, and key messages for the County to consider in recruitment and retention programs. Recommendations will be made on the County's marketing practices and tools, brand development, and programs that support these efforts.

### 5.2 Business Incentives & Assistance Analysis

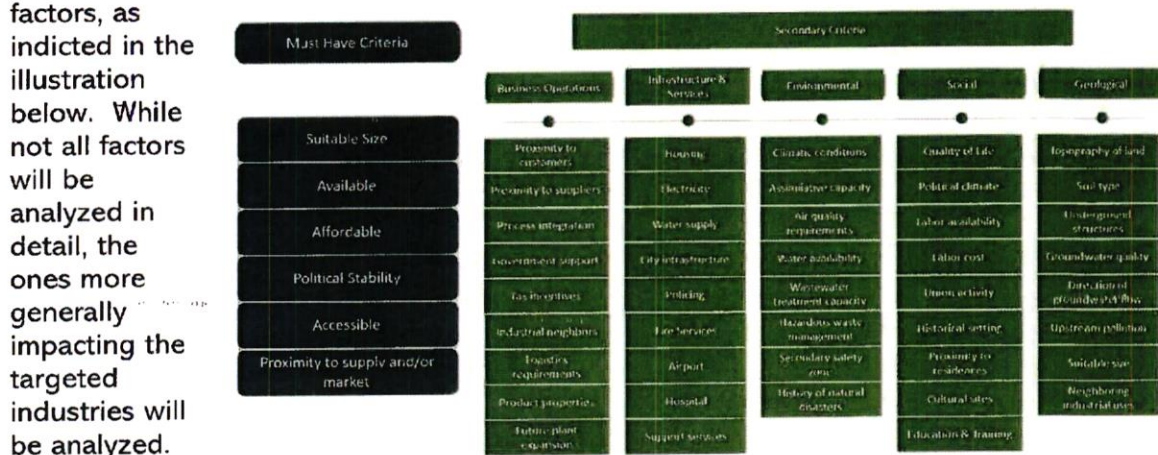
Based on a systematic review of the County's existing incentives and related policies, the TNDG team will develop recommendations for aligning incentive policies with the EDSP/CEDS objectives. The recommendations will specially focus on ways that the County can leverage incentives to improve its overall competitive position.

Project Manager Paul Saldana will lead the development of a Business Incentive Plan, drawing on his 30+ years of experience as a leading economic development practitioner in California (he has created incentive/assistance policies for communities ranging in size/population from 15,000 to 400,000). The EDSP will define appropriate parameters for the use of incentives, within a framework that is flexible enough to respond to business needs while also serving the best interests of the County and the public (potentially including processes for cost/benefit analysis and assessing the County's return on investment for financial incentives). In this regard, the EDSP will recognize that the most impactful incentive policies allow for the customization of project-specific incentive "packages" to meet the requirements of individual deals.

As part of the incentives analysis, the TNDG team will prepare a competitive assessment that compares Riverside County's policies to a set of "best practices" derived from case study profiles of 6-8 competitor regions (counties). The competitor regions to be profiled will be mutually determined by TNDG and the client.

### 5.3 Site Selection Factors Review

A compilation of the results of the SWOT analysis and industry trends linked to the major site location factors, as indicated in the illustration below. While not all factors will be analyzed in detail, the ones more generally impacting the targeted industries will be analyzed.








## Task 6 – Economic Resilience Analysis

A major requirement of an EDA approved CEDS is an Economic Resilience Plan. Likewise the Federal Emergency Management Agency (FEMA) in conjunction with EDA, established guidelines for the alignment of the CEDS with the County's Hazard Mitigation Plan (HMP). The team, led by the International Sustainable Resilience Center will provide the required analysis and strategy as well as a value-added tool to measure the ongoing status of the County's economic resilience.

### 6.1 Economic Resilience Scorecard

The Economic Resilience Scorecard includes comprehensive self-assessment, and delivers a powerful, step-by-step resilience framework that provides the ability to benchmark, track and measure meaningful progress and tangibly increase economic resilience. The team will deploy the Scorecard to provide a baseline assessment to recommend actions to improve resilience of the County, including the following:

❖ Foundational Resilience		<b>Foundational</b>	<ul style="list-style-type: none"> <li>Measures the capacity and infrastructure for building and enhancing economic resilience</li> </ul>
❖ Natural Disaster Resilience		<b>Natural Disaster</b>	<ul style="list-style-type: none"> <li>Measures the resources and deployment ability to respond to natural disasters</li> </ul>
❖ Pandemic Resilience		<b>Pandemic</b>	<ul style="list-style-type: none"> <li>Measures the ability of region to proactively respond to pandemic or related health events</li> </ul>
❖ Resilience Against Acts of Terror		<b>Cyber</b>	<ul style="list-style-type: none"> <li>Measures the strategies and programs to manage and respond to cyber attacks on public and private enterprises</li> </ul>
❖ Cyber Resilience		<b>Societal</b>	<ul style="list-style-type: none"> <li>Measures the responsive programs of the public sector to residents and businesses, including level of communication</li> </ul>
❖ Societal Resilience			
❖ Small Business Resilience			

The recommended actions will include resources and best practices to achieve a stronger benchmark. The tool will allow for regular assessments by the County and ongoing inquiries to the ISRC team.

### 6.2 Economic Resilience Plan

The team will provide narrative and data for the economic resilience portion of the EDSP/CEDS, including analysis and recommended "Steady State" economic resilience initiatives that meet the EDA guidelines. "Steady State" initiatives tend to be long-term efforts that seek to bolster the community or region's ability to withstand or avoid shock. Initiatives can include establishing capabilities for the economic development organization to be responsive to the County's recovery needs following any disruptive incident/hazard. The plan will include a comparative table showing the connections between the EDSP/CEDS and the County's Hazard Mitigation Plan, as outlined by the Federal Emergency Management Agency and Economic Development Administration.

## Task 7 Coachella Valley Regional Plan

The development of the Coachella Valley Plan will run concurrently with the development of the overall plan. The team is designating a Project Manger specifically for the development of the Coachella Valley Regional Plan. This will allow for a single point of contact for the regional stakeholders and allow for the seamless integration of the overall work the team is conducting with the development of the Regional Plan. Likewise, team

members specializing in marketing, branding and industry targeting will be resourced to the Regional Plan development.

### **7.1 SWOT**

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The SWOT analysis described in 4.1 will have an expanded set of factors to include the Coachella Valley specific factors. The team will work with the stakeholder group from the region to further flush out the unique elements of the SWOT for the region and will expand the information gathering accordingly. The SWOT analysis will take particular focus on infrastructure and programs that would be needed by industry. The regional SWOT analysis will be used to help inform the draft plan.

### **7.2 Economic Brand Analysis**

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The brand analysis will focus on industry sectors, both existing and opportunistic, to assess the current image and reputation among internal and external audiences. The team will utilize its relationships with national site locators and industry leaders, particularly manufacturing, to gain insight and emerging themes to consider in the region's brand. The team will evaluate current economic development activity and branding efforts and compare and contrast those with the marketplace impressions. These will include factors such as experience of place, emotional experience and the values the region offers.

### **7.3 Brand Differentiation Analysis**

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Tasks 7.1 and 7.2 will produce themes for the team to utilize to formulate the brand platform for the Coachella Valley region. These themes will be utilized by the team along with criteria for positioning that the team has used in other projects, specifically differentiation from the "crowd", a message that is compelling and persuasive, and most importantly, one that is authentic to the target markets. As with the overall countywide business recruitment analysis and recommendations, the Coachella Valley region will have a set of target segments, their primary interests, recommended outreach tools/methods, and suggested key messages for these segments. For example, the team developed "Pedal into History" theme for a southern US city of historic presence to attract both biking related businesses and market the unique biking opportunities within the region as well. A similar series of key messages will be developed for the analysis.

### **7.4 Stakeholder Engagement**

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The stakeholder engagement will follow a similar schedule and activity as the overall project with some exceptions. An additional stakeholder engagement session is added for the team to present the final plan to the leadership group. Likewise, additional one-on-one meetings are programmed to ensure that cities and other individual stakeholders are able to share their efforts and experiences in economic development with the team.

### **7.5 Industry Sector Identification**

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The industry sector analysis conducted in task 4.1 will be expanded to include more in-depth analysis of the Coachella Valley region. Additional industry interviews are likewise



included to understand the supply chain correlation within this subregion. A particular focus will be those industries with the most growth potential for the area, particularly related to Lithium and other raw material development within the region.

### **7.6 Draft Regional Plan**

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A draft plan with the elements identified in the countywide plan (task 8.2) will be included in the Regional Plan. In addition, the unique analysis in 7.2 and 7.3 will be included in the Regional Plan. Like the countywide plan, the Regional Plan will set out goals, objectives, strategies, potential funding sources and partners for collaboration (both internal and external to the region). The draft plan will also outline the Coachella Valley's unique regional relationship and how collaboration and competition within the larger border region would be managed.

### **7.7 Final Regional Plan**

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Following the distribution of the draft plan to stakeholders, the team will receive feedback and make modifications to the final plan as needed. The final plan will be presented at a stakeholder meeting or event and the team will be available to the region to discuss the findings and recommendations.

## **Task 8 Draft Plan Process**

### **8.1 EDA Eligible Project List Review**

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The RFP the County will solicit information for projects from cities, partners and stakeholders for inclusion in the project section of the plan to comply with the CEDS requirements. The team will review the projects based on the EDA's priority investment criteria consisting of:

- ❖ **Equity:** Economic development planning or implementation projects that advance equity across America through investments that directly benefit 1) one or more traditionally underserved populations, including but not limited to women, Black, Latino, and Indigenous and Native American persons, Asian Americans, and Pacific Islanders or 2) underserved communities within geographies that have been systemically and/or systematically denied a full opportunity to participate in aspects of economic prosperity such as Tribal Lands, Persistent Poverty Counties and rural areas with demonstrated, historical underservice.
- ❖ **Recovery & Resilience:** Economic development planning or implementation projects that build economic resilience to and long-term recovery from economic shocks, like those experienced by coal and power plant communities, or other communities impacted by the decline of an important industry or a natural disaster, that may benefit from economic diversification-focused resilience.
- ❖ **Workforce Development:** Economic development planning or implementation projects that support workforce education and skills training activities directly connected to the hiring and skills needs of the business community and that result in well-paying, quality jobs.

- ❖ **Manufacturing:** Economic development planning or implementation projects that encourage job creation, business expansion, technology and capital upgrades, and productivity growth in manufacturing, including efforts that contribute to the competitiveness and growth of domestic suppliers or to the domestic production of innovative, high-value products and production technologies.
- ❖ **Technology-Based Economic Development:** Economic development planning or implementation projects that foster regional knowledge ecosystems that support entrepreneurs and startups, including the commercialization of new technologies, that are creating technology-driven businesses and high-skilled, well-paying jobs of the future.
- ❖ **Environmentally-Sustainable Development:** Economic development planning or implementation projects that help address the climate crisis including through the development and implementation of green products, green processes, including green infrastructure, green buildings, and green places, including an emphasis on density in the vicinity of the development.
- ❖ **Exports & FDI:** Economic development planning or implementation projects that enhance or build community assets to support growth in US exports or increased foreign direct investment.

The team will utilize its experience developing EDA funded projects to provide additional narrative in project descriptions to ensure that it is clear the projects meet one or more of the EDA investment priorities.

## 8.2 Draft Plan

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The team will prepare a draft plan which will incorporate the results of previous tasks into a document framework that will guide the County's economic development efforts through the next 5 years. At minimum, the draft plan will contain the following elements:

- ❖ Provide primary goals and objectives for economic development for the next 5 years.
- ❖ Identify the County's place in the market.
- ❖ Identify primary opportunities and challenges.
- ❖ Identify targeted industries and strategies for expanding these industries.
- ❖ Identify major industries for business attraction and retention efforts.
- ❖ Identify specific policies, programs, and initiatives for obtaining economic development objectives.
- ❖ Identify specific action items to be implemented for achieving the corresponding strategic goals and objectives over the next 5 years.
- ❖ Identify an implementation timeline, prioritize actions where appropriate, and articulating the level of effort and length of time anticipated for actions.

- ❖ Identify who in the County government and/or community stakeholders will be responsible for each item as well as any supporting agencies and partners.
- ❖ Identify metrics for the County to measure success to ensure outcomes are achieved.
- ❖ Include budget estimates for each item, as applicable.
- ❖ Include best practices or examples of success, as applicable.

The draft plan will be distributed as agreed to by the County for a period of thirty (30) days to receive input from the public and stakeholders to meet EDA guidelines for the CEDS document.

### **8.3 Digital CEDS Deployment**

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As part of the TNDG team, StateBook will be retained to do the following for Riverside County:

- ❖ Provide a one-year subscription to the StateBook platform (included in your Digital CEDS™ subscription) to support the research phase of the planning process.
- ❖ Design, develop and deliver a Digital CEDS™ platform for your region that includes: a custom website designed to meet the needs of Riverside County's specific CEDS report and always-updated, interactive, visualized data APIs. The system includes a user-friendly content management system that enables easy updates to CEDS report narrative and pictures, as needed, for annual updates.

The deployment of the Digital CEDS will coincide with the draft EDSP/CEDS and changes to the final document will be published on the Digital CEDS.

## **Task 9 Final Plan**

### **9.1 Final Economic Development Strategic Plan**

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Following the 30-day public review period, the team will prepare the final EDSP/CEDS. A PowerPoint presentation of the proposed EDSP and Implementation Plan for the Board of Supervisors' consideration and approval at a County public meeting will also be prepared for review by County staff. The team will collaborate on the creation of a agenda staff report as needed.

Following adoption of the plan, the team will prepare a one-page summary of the plan (in English and Spanish) that can be used to communicate the plan to the general public. The final plan will also be revised on the Digital CEDS site.

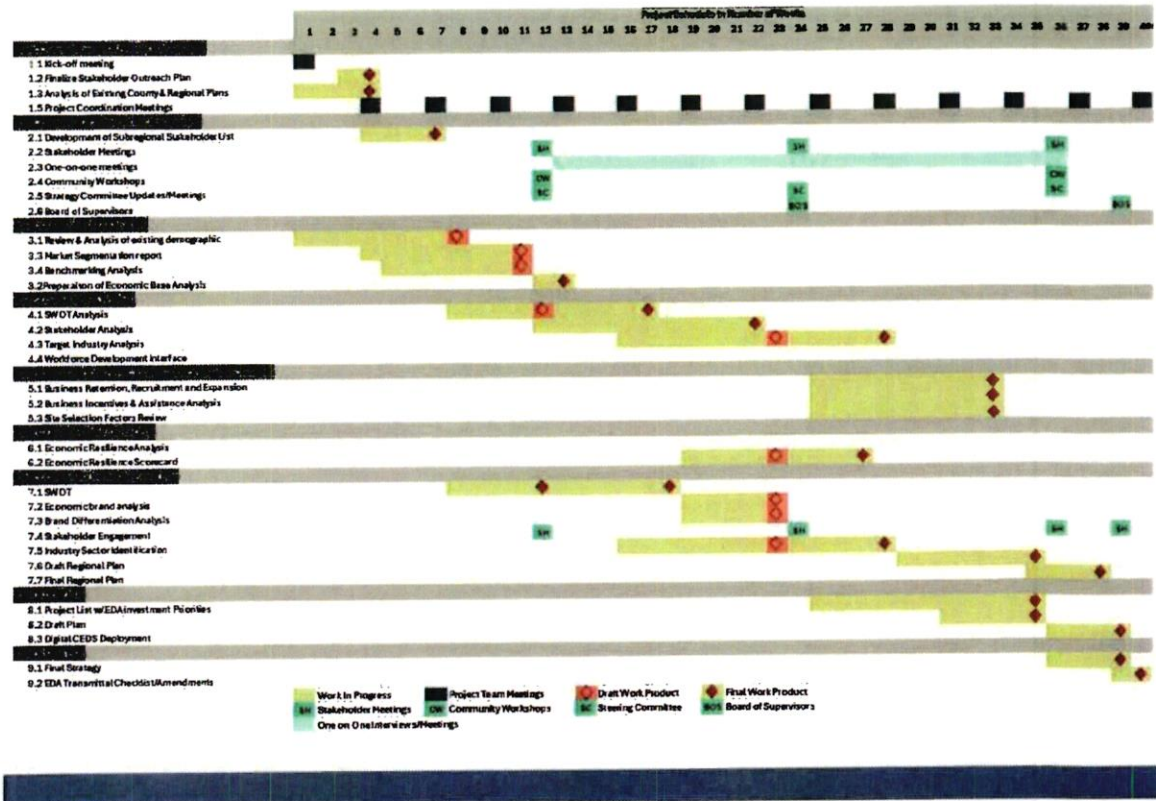
## 9.2 Transmittal & Approval by EDA

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The team will prepare the final EDSP/CEDS for submission to the EDA Regional Representative for review and approval using the EDA transmittal checklist. The Plan will demonstrate how it meets each element of the requirements of EDA. The team will make any amendments to the final plan until it is approved by EDA.

### Attachment 9 – Project Schedule

The project schedule is based on completion within 40 weeks from initiation. The final schedule will be developed collaboratively with County staff and can be shortened or extended to meet County's needs and expectations. The schedule shows the critical path for each of the task elements, identifies approximate stakeholder and community engagement activities and aligns with the EDA requirement for a 30 day public review period prior to adoption.



## Attachment 10 – Collaboration

Tasks 1 & 2 detail the proposed collaboration and engagement process for the project. The team uses several engagement types to ascertain information and involvement in the planning process. A detailed communication and engagement plan will be finalized with the scope of work, but at minimum will include the following methods related to specific tasks. Participation activities can be scheduled in person or virtual depending on protocols in place at the time of contract initiation. The team is technologically adept and holding one-one-one and town hall style meetings virtually as well as in person.



**Project Management Meetings:** Team members will meet with County project team on a minimum of every three weeks for update calls. Most will be virtual, with in-person meetings scheduled during site visits.



**Town Hall Opportunities:** The team will schedule town hall style meetings to engage the general community in the process at opportune times to solicit initial input as well as progress feedback during the process. Additional opportunities for engagement will be planned with the project team as determined.



**Stakeholder Identification:** The project team and County team will work collectively to identify and coordinate with applicable stakeholders.



**Structured one-on-one interviews:** The team will utilize one-one-one interviews with key stakeholders within the region to assess and clarify economic conditions.



**Focus Groups:** The team will use focus group meetings as needed with target industry sectors and other vital community sector groups.



**Online Surveys:** The team will develop and deploy online surveys for the wider stakeholder community and the public to evaluate the findings and provide feedback and insights.



**Targeted, structured phone survey:** Any missing groups or organizations that did not participate in stakeholder meetings, focus groups, etc. will be identified and invited to respond by phone.



**Updates/Draft/Final Plan Presentation:** Members of the team will provide updates and presentation of final plan to Strategy Committee, stakeholder groups and the Board of Supervisors. A separate presentation to a designated Coachella Valley group is also proposed.

**The Natelson Dale Group, Inc.**  
**P.O. Box 489**  
**Yorba Linda, CA 92885**  
**(714) 692-9596 phone / (714) 692-9597 fax**  
**[dale@natelsondale.com](mailto:dale@natelsondale.com)**

May 27, 2024

Matthew Gaeta, Procurement Contract Specialist  
Riverside County Purchasing and Fleet Services  
3450 14th Street, Suite 420  
Riverside, CA 92501

RE: BEST AND FINAL OFFER – Economic Development Strategic Plan and Comprehensive Economic Development Strategy (CEDS) for the County of Riverside

Dear Mr. Gaeta:

In response to your May 22 email, **The Natelson Dale Group, Inc. (TNDG)** is pleased to submit the attached Best and Final Offer (BAFO) to prepare an Economic Development Strategic Plan and Comprehensive Economic Development Strategy (CEDS) for the County of Riverside. The intent of this submission is to provide our BAFO (which indicates the same total price as our original proposal). It does not in any other way supplement or change our proposal.

Our designated contact person for questions or contract issues is:

Roger Dale, Managing Principal  
The Natelson Dale Group, Inc.  
P.O. Box 489  
Yorba Linda, CA 92885  
(714) 692-9596 office  
(714) 609-5845 cell  
(714) 692-9597 fax  
[dale@natelsondale.com](mailto:dale@natelsondale.com)

We very much appreciate your continued consideration of our team and sincerely hope we have the opportunity to be of service to Riverside County on this important project.

Respectfully submitted,

THE NATELSON DALE GROUP, INC.



Roger Dale  
Managing Principal

**COUNTY OF RIVERSIDE**  
**Economic Development Strategic Planning Services**  
**REQUEST FOR PROPOSAL # EDARC-094**



**BEST AND FINAL OFFER**  
**May 22, 2024**

**CERTIFICATION OF RECEIPT OF BEST AND FINAL OFFER**  
**(BAFO-COVER PAGE)**

I certify that I have received this (BAFO) on behalf of the company listed below.

Signed: \_\_\_\_\_ Dated: May 27, 2024

Name and title: Roger Dale, Managing Principal

Company: The Natelson Dale Group, Inc.



**BEST AND FINAL OFFER**  
**TO REQUEST FOR PROPOSAL # EDARC-094**

**1.0** This Best and Final Offer (BAFO) is considered to be part of the Request for Proposal (RFP). All other terms of the RFP remain unchanged and in effect. This BAFO is intended to solicit bidder's best and final pricing without compromising services or deliverable in regard to the original proposal submitted by the Vendor of the above referenced RFP. Any information contained herein will be considered part of the Vendor's proposal and as such will be used in the evaluation of the bid responses.

The request in this BAFO is primarily the result of your companies RFP response to EDARC-094, Economic Development Strategic Planning Services.

**Receipt of BAFO Request Cover Page**

To verify that you have received a copy of this BAFO, please sign the cover page of this BAFO and return it no later than 05/29/24 by email (as a PDF with signature) to:

Matthew Gaeta, Procurement Contract Specialist – [mgaeta@rivco.org](mailto:mgaeta@rivco.org)

**2.0 GENERAL REQUIREMENTS & RESPONSE SUBMITTAL**

**2.1 Procedures for Submitting Vendor's Response:**

All responses must be submitted in accordance with the standards and specifications contained within this Best and Final Offers (BAFO) and must contain a cover letter with a certification of receipt cover page to meet the requirements specified.

The cover letter and cover page of a response must be signed appropriately and completed with the date, company name, and name and title of a company officer/owner authorized to sign on behalf of the company.

**2.2 Cover Letter/Signature on Response**

- a. The cover letter shall act as an introduction to your response and outline the intent.
- b. A cover letter, which shall be considered an integral part of the response, shall be signed by individuals who are authorized to bind VENDOR contractually. Each authorized individual must include printed name, signature and indicate the classification or position that the individual holds in the firm.
- c. The cover letter shall designate a person or persons who may be contacted during the period of evaluation with questions or contract issues. Include name(s), title, address, telephone number, fax number, and email address.
- d. The County shall not pay any costs incurred or associated in the preparation of this or any proposal or for any vendor participation in the procurement process.
- e. The BAFO response may be electronically delivered through email. Each page of the response must state "Best and Final Offer" in the footer or a similar location on each page. Responses must be clean and suitable for copying. Responses must be specific unto themselves. For example, "See Enclosed Manual" will not be considered an acceptable response.
- f. The Vendor must provide only the information requested in this BAFO, and must not provide any information different from what is specifically requested or which in any other way supplements or changes the Vendor's proposal.

- g. **Late responses will not be accepted.** Postmarks **will not** be accepted in lieu of this requirement. Responses submitted to any other County office will be rejected. The responses shall be concise and to the point. Costly bindings, color plates, glossy brochures, etc. are neither necessary nor recommended. Examples of previous work may be submitted but will not necessarily influence the evaluation process. A letter format in sufficient detail to allow thorough evaluation and analysis is required.

**3.0 BAFO Price Structure:**

- 1. Cost Proposal for all services and deliverables being requested in the Scope of Services found in Attachment A.

***BIDDER'S RESPONSE:***  
***Total Price in numbers:*** \$552,565  
***Total Price in words:*** Five hundred fifty-two thousand five hundred sixty-five dollars.

- 2. Budget Narrative that describes and details total costs for all services and deliverables being requested in the Scope of Services found in Attachment A, including if applicable, other service-related expenses and administrative costs.

***BIDDER'S RESPONSE:***

Task	Total Cost
<b>Task 1 Project Initiation &amp; Administration</b>	
1.1 Project Initiation Meeting	\$2,220
1.2 Finalize Stakeholder Outreach Plan	\$3,280
1.3 Analysis of Existing County & Regional Plans	\$10,750
1.4 Project Administration	\$5,300
1.5 Bi-weekly Project Check-in meetings	\$14,025
<b>Task 2 Regional Outreach &amp; Stakeholder Engagement</b>	
2.1 Development of Subregional Stakeholder List	\$1,060
2.2 Stakeholder Meetings	\$28,750
2.3 One-on-one meetings	\$14,400
2.4 Community Workshops	\$8,025
2.5 Strategy Committee Updates/Meetings	\$7,600

2.6 Board of Supervisors (2 sessions)	\$3,900
<b>Task 3 Economic Base Analysis</b>	
3.1 Demographic & Economic Indicator Analysis	\$28,610
3.2 Market Segmentation Analysis	\$28,500
3.3 Benchmarking Analysis	\$12,700
3.4 Economic Base Analysis Report	\$31,940
<b>Task 4 Competitive Analysis</b>	
4.1 SWOT Analysis	\$19,080
4.2 Stakeholder Analysis	\$4,750
4.3 Target Industry Analysis	\$20,800
4.4 Workforce Development Integration	\$19,000
<b>Task 5 Business Retention, Recruitment, Expansion Analysis</b>	
5.1 Business Retention, Recruitment and Expansion	\$10,750
5.2 Business Incentives & Assistance Analysis	\$6,700
5.3 Site Selection Factors Review	\$7,750
<b>Task 6 Economic Resilience Plan</b>	
6.1 Economic Resilience Scorecard	\$15,000
6.2 Economic Resilience Analysis	\$35,000
<b>Task 7 Coachella Valley Regional Plan</b>	
7.1 SWOT	\$10,125
7.2 Economic Brand Analysis	\$9,500
7.3 Brand Differentiation Analysis	\$17,400
7.4 Stakeholder Engagement	\$6,850
7.5 Industry Sector Identification	\$9,225
7.6 Draft Regional Plan	\$11,100
7.7 Final Regional Plan	\$3,700
<b>Task 8 Draft Plan</b>	
8.1 EDA Eligible Project List Review	\$7,800
8.2 Draft Plan	\$33,600
8.3 Digital CEDS Deployment	\$35,000
<b>Task 9 Final Plan</b>	
9.1 Final Strategy	\$17,075
9.2 EDA Transmittal Checklist/Amendments	\$5,300
<b>Non-Task Related Costs</b>	
Data Acquisition	\$20,000
Translation Services	\$7,500
Travel	\$8,500

Contingency for additional task orders	\$10,000
<b>Total Project Costs</b>	<b>\$552,565</b>

SCHEDULE A  
Office of Economic Development  
Budget Adjustment  
Fiscal Year 2024/2025

Increase estimated revenue:

21735-1901000000-763520	Fed-American Rescue Plan Act	\$635,450
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Increase in Expenditures:

21735-1901000000-528500	Project Cost Expense	\$552,565
21735-1901000000-537180	Interfnd Exp – Salary Reimb	80,885
21735-1901000000-537020	Interfnd Exp -- Legal Services	2,000

**Lopez, Daniel**

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**From:** Brad Anderson <ba4612442@gmail.com>  
**Sent:** Monday, October 21, 2024 10:42 AM  
**To:** Clerk of the Board  
**Subject:** Public Comment Agenda Item: 3.26 for the BOS October 22, 2024 meeting

**CAUTION:** This email originated externally from the Riverside County email system. **DO NOT** click links or open attachments unless you recognize the sender and know the content is safe.

October 21, 2024

Riverside County Board of Supervisors (BOS)  
Riverside, CA.  
Attention: Clerk of the Board of Supervisors

Re: Written letter to be entered in the Public record and made available for public inspection for the October 22, 2024 Board of Supervisors meeting - Agenda Item: 3.26 (Inappropriate use of ARPA resources)

Dear current BOS,

This letter is in opposition of this board's consideration to use American Rescue plan (ARPA) funds for named economic development strategic planning from a private sector business.

It's reasonable to consider that Riverside County officials are willing to expell ARPA resources to private sector businesses (Natelson Dale Group, Inc) for aspects that appear to favor the appropriate avenues for ARPA funds to be redirected. But, such actions appears to discolor the true intentions that ARPA funds were intended to be used for. Worth noting is the eighth two thousand eight hundred eighth five (\$82,885.00) dollars that Riverside County Administrator's will "take" of ARPA funds to administer that contract.

Consider ethical standards and the long term benefits of following those standards.

Sincerely,

Brad Anderson | 37043 Ferber Dr. Rancho Mirage, CA. 92270

Cc: