

**The California Academy for Economic Development  
Accredited California Economic Developer (ACE)  
Professional Training Program**

**REQUEST FOR QUALIFICATIONS:  
INSTRUCTORS FOR ADVANCED TRAINING INSTITUTE**

**Issue date:** February 14, 2019

**Closing date and time:** March 8, 2019 by 5:00 pm

**Contact person:** Helen Schaubmayer, helen@caled.org

**A: OVERVIEW**

The California Academy for Economic Development (the Academy) and the California Association for Local Economic Development (CALED) are currently in the process of launching a new economic development training and certification program. The program will serve public and private sector economic development professionals from throughout California and will equip them to more effectively address the unique economic development challenges facing California's diverse communities. In addition to technical and leadership instruction, the program will offer the opportunity to become certified under the Accredited California Economic Developer (ACE) program. The accreditation process is intended to ensure a core level of competency among California's economic development professionals and to support individual economic developers in pursuing career advancement based on their specialized training.

The advanced training program will expand on the Basic Economic Development Course ("Keys to Successful Economic Development" training) that the Academy and CALED have successfully operated for the past 10 years at Fresno State University. Specifically, in order to be eligible for certification, Keys course graduates (or individuals who have met the basic training prerequisite by other means) will be required to complete additional course work consisting of five (5) one-day advanced courses (i.e., a total of five days of advanced instruction). For the inaugural year of the program, the five advanced courses will be clustered into a single five-day "Advanced Training Institute" tentatively scheduled for August 19-23, 2019 in Central California.

**The purpose of this Request for Qualifications (RFQ) is to recruit volunteer instructors for the 2019 Advanced Training Institute.** Ideal candidates are current or retired economic development practitioners and/or independent consultants or other professionals with specialized expertise relevant to economic development best practices.

**The five courses that will be offered at the 2019 Advanced Training Institute include:**

1. Economic Development Strategic Planning
2. Business Retention and Expansion
3. Real Estate Development and Reuse
4. Economic Development Finance Programs
5. Navigating the Regulatory Environment and Entitlement Process in California

Core competencies (i.e., a list of major topics that students would be expected to gain working knowledge of) and a preliminary syllabus for each course are currently being developed by Academy representatives. It is expected that selected instructor(s) for each course will finalize the syllabus, create a detailed agenda for the day of instruction, and develop training materials (e.g. reference documents, reading list) and teaching plan (e.g. PowerPoint, lecture content) with the Academy's input where appropriate. Additionally, the selected instructors will lead instruction individually or within a team for one or more courses at the Institute. The instructors will also be expected to administer a brief competency test at the conclusion of the class and to develop additional questions to be included in the ACE certification test (to be administered by the Academy separately from the Advanced Training Institute).

As the Academy is a not-for-profit association and desires to keep tuition costs as low as possible, the program is unable to provide any compensation for instructors; however, travel and other out-of-pocket expenses may be reimbursed as applicable. The success of this important program will depend on the willingness of practicing professionals and technical experts to contribute their time to advancing the cause of economic development in California.

General information regarding the Academy can be found at:  
[www.edacademy.org](http://www.edacademy.org).

**B: ACE COURSES OVERVIEW**

Preliminary core competencies of each of the five courses that will be offered at the 2019 Advanced Training Institute are provided below and are subject to change. Academy representatives are currently working on further developing these competencies and curriculum; however, once instructors are selected, it is expected that they will take the lead on finalizing the curriculum.

- **Economic Development Strategic Planning**
  - Review of the types of technical studies that may be included strategic planning processes (e.g., SWOT analysis, target industry/cluster analysis, real estate market projections)

- Stakeholder engagement and consensus building
- Defining vision, goals, objectives and action items
- Organizational structure (including external partnerships and alliances) to support effective implementation
- Monitoring implementation and measuring progress
- **Business Retention and Expansion**
  - Role of BRE as part of comprehensive approach to economic development
  - Overview of BRE best practices
  - Effective models/tools for establishing and maintaining interface with key businesses/employers
  - Proactively detecting and responding to business risks/opportunities
  - Resiliency
  - Positioning BRE program within a larger focus on business/development “friendliness”
- **Real Estate Development and Reuse**
  - Current trends in housing, retail, office, industrial, hotel, and mixed-use development
  - Specialized areas of focus: affordable housing, infill development, TOD, etc.
  - Permitting
  - Pro forma analysis and understanding the role of incentives
  - Redevelopment options/tools in the “Post Redevelopment” era
  - Public/private partnerships and developer RFQ/RFP processes
- **Economic Development Finance**
  - Overview of Federal funding sources relevant to economic development (e.g., Community Development Block Grants,

Rural Business Enterprise Grants, Economic Development Administration funding, etc.)

- Grant applications
- Overview of Federal tax incentives relevant to economic development (New Markets Tax Credits, Historic Preservation Tax Credits, Opportunity Zones)
- California-specific funding sources and financing tools
- Revolving loan funds and other tools for incentivizing business investment
- **Navigating the Regulatory Environment and Entitlement Process in California**
  - Overview of regulatory issues most relevant to economic development practitioners
  - CEQA from an economic developer's perspective
  - Interface with State agencies
  - NIMBY-ism and the economic development process

## **C: SCOPE OF WORK**

The Academy is seeking statements of qualifications from candidates who are both interested in and highly qualified to collaborate with representatives of the Academy to refine and finalize the required course curriculum and serve as course instructors.

Respondents shall indicate in their submittal to this RFQ in which courses they are interested.

The scope of work for selected instructors includes the following for their assigned course(s)—input from the Academy will be provided as appropriate:

- Work in collaboration with representatives of the Academy to finalize course core competencies and syllabus;
- Create training materials (e.g. course reference materials, reading list)—the Academy will be responsible for printing materials or other format to provide to students;
- Develop teaching plan (e.g., agenda for instruction day, presentation materials and lecture content);

- Develop test questions (for course and certification exams<sup>1</sup>);
- If applicable, create “homework” to be assigned to participants prior to the class (optional, but highly recommended in order to maximize the value of face-to-face instruction time);
- Include methods for team building / group interaction during the class, as applicable;
- Selected instructors shall be available (either one individual or a team) for one day of instruction during the Advanced Training Institute tentatively scheduled for August 19-23, 2019 in Central California.

#### **D: INFORMATION ON SUBMITTING A REPLY**

Respondents to this RFQ should demonstrate their qualifications, capability, capacity, and experience to provide the services under the scope of work and should have experience in the topics covered in the certification coursework.

Respondents may elect to respond individually or in teams (allowing for the scope of work to be carried out by multiple individuals). If multiple individuals are included as part of a team response, response should include qualifications and experience of each individual.

Please address the following in your response:

- Course(s) you are interested in teaching at the Advanced Institute
- Qualifications in relation to the scope of work and course core competencies listed above, in particular related California-specific topics.
- Experience in public speaking in a teaching (or comparable) environment

The best-qualified candidates will be called for a phone interview, from which final selections for instructors will be made. The selected instructor(s) and the Academy will enter into a speaker engagement MOU.

Please respond to this request via email to Helen Schaubmayer, Program Manager, CALED at: [helen@caled.org](mailto:helen@caled.org) identified in the subject line as “**ACE Program Instructor.**”

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<sup>1</sup> Individuals attending the five-day Advanced Training Institute will receive a “Certificate of Completion” indicating successful completion of the training phase of the program. Each class will include a basic competency test at the end of the training day (to be administered by the instructor) to ensure “successful completion” of the training. Full ACE certification will involve (among other requirements) a more extensive test to be administered by the Academy at a later date; instructors will be expected to develop questions to be included in the certification test.

Please submit your response at the above address by 5:00 p.m. on **March 8, 2019**. Responses shall not be more than **5 pages in length**. Clarification requests and questions will be accepted by email at: [helen@caled.org](mailto:helen@caled.org).