

**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 15, 2022

Closing date and time: March 8, 2022 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) launched the Advanced Institute for Economic Development (Advanced Institute) and the Accredited California Economic Developer (ACE) program in 2019. This economic development training and certification program serves public and private sector economic development professionals throughout California and equips them to more effectively address the unique economic development challenges facing California's diverse communities. In addition to technical and leadership instruction, the Advanced Institute is a pre-requisite to become certified under the 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 expands on the Basic Economic Development Course ("Keys to Successful Economic Development" training) that the Academy and CALED have successfully operated for the past 11 years with 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).

The purpose of this Request for Qualifications (RFQ) is to secure volunteer instructors for the Advanced Training Institutes held in August 2022, 2023, and 2024. 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 Advanced Training Institute include:

1. Economic Development Strategic Planning

2. Business Retention and Expansion
3. Real Estate Development and Reuse
4. Economic Development Finance
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 syllabus for each course has been developed by Academy representatives. It is expected that selected instructor(s) for each course will provide any recommended updates to 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. slide deck, 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.

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.

B: ACE COURSES OVERVIEW

Core competencies of each of the five Advanced Institute courses are provided below. Once instructors are selected, it is expected that they will provide any recommended updates to the curriculum with final approval from The Academy.

- **Economic Development Strategic Planning**
 - Understand the importance of strategic planning for economic development
 - Review of the types of technical studies, data collection, and analysis that may be included in a comprehensive strategic planning processes (e.g. SWOT analysis, target industry/cluster analysis, real estate market projections, employment data, consumer expenditures, retail leakage, business climate and quality of life)

- Stakeholder engagement and consensus building and understanding the importance of maintaining a culture of inclusion
- Defining vision, goals, objectives and measurable action items
- Organizational structure (including external partnerships and alliances) to support effective implementation
- Monitoring implementation, celebrating success, and defining appropriate measurement metrics
- **Business Retention and Expansion**
 - Role of BRE as part of a comprehensive approach to economic development
 - Overview of BRE best practices and common roles of local government and other stakeholders and how these practices and roles have evolved in California recently
 - Effective types of models/tools for establishing and maintaining interface with key businesses/employers among rural, suburban, and urban communities
 - How economic developers can prioritize and respond to business needs in their communities
 - Positioning BRE program within a larger focus on business “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.
 - Pro forma analysis and understanding the use of project incentives
 - Redevelopment options/tools in the “Post Redevelopment” era, Enhanced Infrastructure Financing Districts, Opportunity Zones

- Public/private partnerships and developer RFQ/RFP processes
- Permitting
- **Economic Development Finance**
 - Federal funding sources relevant to economic development (e.g., Community Development Block Grants, Rural Business Enterprise Grants, Economic Development Administration programs, Environmental Protection Agency Brownfield Grants, and certain infrastructure grants that can support economic development)
 - Federal tax incentives relevant to economic development (Opportunity Zones, New Markets Tax Credits, Historic Preservation Tax Credits)
 - California-specific funding sources and financing tools available to local governments (Enhanced Infrastructure Financing Districts, Community Revitalization and Investment Advanced Institute for Economic Development Authorities, Community Facilities Districts, Property Based Improvement Districts, Transactions and Use Taxes, and other special taxes)
 - Grants and financing programs available from the State of California (Infrastructure Bank programs, Cal Competes, Cap and Trade programs, and other financing options)
 - Revolving loan funds and other tools for incentivizing business investment
 - Private development financing
 - How to structure a project or program's financing, how to establish and measure returns on investment, and ways to mitigate potential risk
- **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

- Overview of state and local governmental regulatory permit processes and effective strategies to interface these agencies
- Use of third-party facilitators to resolve permitting issues
- Best practices that streamline the permitting 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 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 discuss any suggest updates to 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 exam¹);
- If applicable, create “homework” to be assigned to participants prior to the class (optional, but 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 scheduled for August 15-19, 2022 in Central California (or in a virtual format pending

¹ 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.

health guidelines). The 2023 and 2024 Advanced Institutes will likely be held in the third week of August.

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 may be called for a phone interview, from which final selections for instructors will be made.

Please respond to this request via email to Helen Schaubmayer, Program Manager, CALED at: helen@caled.org identified in the subject line as “**Advanced Institute Instructor.**”

Please submit your response at the above address by 5:00 p.m. on **March 8, 2022**. Responses shall not be more than **5 pages in length**. Clarification requests and questions will be accepted by email at: helen@caled.org.