

GRANT SOLICITATION

APRIL 21, 2025



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Section One. Overview

The California Workforce Development Board (CWDB) and the California Labor and Workforce Development Agency (LWDA) are pleased to announce the availability of up to \$18,577,290 in grant funding for the High Road Training Partnerships 2025 Grant Program (HRTP 2025), a California Jobs First initiative. A minimum of \$4,327,290 is allocated for partnerships in the Healthcare sector.

The High Road Training Partnerships (HRTP) grant aims to increase access to existing High Road jobs for underserved populations and create pathways for incumbent workers seeking job growth with High Road employers. CWDB's High Road policy centers on equity and job quality by promoting the goal of democratic access to high-quality employment and investment in emerging low-carbon industries. The HRTP model embodies the sector approach championed by the CWDB—industry partnerships that deliver job quality, economic equity for more workers, and climate resilience.

The HRTP 2025 grant will fund projects that align with one of the following criteria:

- Previous CWDB HRTP planning and development grantees who are prepared to implement participant training.
- Previous HRTP grantees that have implemented participant training and are seeking to expand programming.
- New High Road projects that include a Labor Management Partnership, a Community Benefits Agreement, Project Labor Agreement, and/or Labor Peace Agreement.

Section Two. Program Guidelines

Eligibility

Eligibility for HRTP 2025 funding is limited to applicants who meet one of the following criteria:

- Past or current CWDB-funded HRTP projects (existing projects)
- New projects that include at least one of the following:
 - o Labor Management Partnership
 - o Project Labor Agreement
 - o Labor Peace Agreement
 - o Community Benefits Agreements

To ensure HRTP investments align with demand for good jobs, eligibility for HRTP 2025 is limited to projects that will focus on one or more of the strategic sectors in their region(s) as identified in <u>California's Economic Blueprint</u> and the thirteen <u>California Jobs First Regional plans</u>.

Existing Projects

Existing projects include those awarded under previous High Road Training Partnership grant cycles. Existing projects also include HRTP grantees with active CWDB grants.

Applications for existing projects must expand, scale, or replicate a previously funded High Road Training Partnership.¹ This may entail implementing previously funded planning and development projects or expanding training implementation projects. Existing projects previously funded to implement training may only apply for the Expanding project type.

Existing projects with active CWDB grants must have expended at least 50% of their CWDB funding <u>and</u> achieved at least 50% of their project deliverables for their active grant at the time of Phase II application submission to be eligible for HRTP 2025 funding.

Existing projects and/or High Road Training Partnerships that will be applying with a new Lead Applicant must use the same project name as their previously awarded CWDB project.

New Projects

New projects are defined as existing partnerships that have not received previous HRTP grant funding from the CWDB. To be eligible for this funding, new projects must meet all eligibility requirements outlined in this RFA and submit documentation in the Phase II application substantiating that the proposed HRTP project will include a Labor-Management Partnership or the use of a Project Labor, Labor Peace, or Community Benefits Agreement. Definitions of these terms are provided below.

New projects are eligible to apply under the Training Implementation project type only. See the <u>Project Types</u> section for more information.

Required Agreements for New Projects

Applications for New Projects must include a Labor Management Partnership or the use of a Project Labor Agreement, Labor Peace Agreement, or Community Benefit Agreement. Required Agreements for New Projects may be formal or informal in nature, but must be substantiated in written form, accurately identified via the *Upload Documents* section of the Phase II application, and submitted to the CWDB prior to the Phase II deadline. Partnerships utilizing other formalized labor-management agreements may be considered on a case-by-case basis, provided they are substantiated in written form, accurately identified and submitted via the *Upload Documents* section of the Phase II application.

The CWDB will review all required agreements to ensure they align with the intent of this solicitation. Failure to accurately identify the type of agreement in the *Upload Documents* tab of the Phase II application may result in disqualification from funding consideration. See the <u>Upload Documents</u> section for more information about uploading documents in the Phase II application.

Labor-Management Partnerships

A Labor-Management Partnership (LMP) is a strategy used by labor and management to act together to jointly improve their workplace. Through an ongoing mutual commitment, LMPs serve as a collaborative effort to improve the labor-employer relationship, often by tackling complex issues not easily susceptible to solutions through traditional collective bargaining. These partnerships are designed to benefit the employer and its product or services while providing employees with an enhanced experience in the workplace.

In unionized workplaces, LMPs are formalized agreements or structures that bring union leaders and management together. They often involve joint committees or councils, collaborative problem-solving initiatives, negotiated partnership agreements, and training and development programs. In non-unionized workplaces, LMPs may take the form of joint committees, employee councils, training partnerships, or task forces. These structures give employees a voice in decision-making and help management understand employee concerns. They can function as informal or formal mechanisms to foster collaboration.²

LMPs enable employers of all sizes to address skills training, safety, health, changing technology, and other key issues. Goals that LMPs may strive to achieve include, but are not limited to, improving communications between labor and management, reviewing new or changing employer practices, and soliciting timely feedback.³

Examples of LMPs include, but are not limited to: joint apprenticeship committees, jointly trusted pensions,

² United States Department of Labor. <u>Labor-Management Partnership Program</u>, 2025.

³ Federal Mediation & Conciliation Service. Labor Management Partnerships, Forums, and Committees, 2022.

and jointly trusted health and welfare funds. LMP coordination with local workforce development boards (LWDB), community-based organizations (CBO), employment social enterprises (ESE), and worker centers is valuable in supporting new entrants to the sectors and employers represented by the LMP.

Community Benefits Agreements

A Community Benefits Agreement is a legally enforceable contract between community stakeholders and a business (or businesses) bidding for a public contract. Community Benefits Agreements provide a variety of local employment and community benefits in exchange for public support for the project. Many Community Benefits Agreements are negotiated with a developer by broad-based local coalitions that include community, environmental, and religious organizations as well as labor unions.⁴

Community benefits may include partnerships with High Road Construction Careers programs, as defined in Section 14005 of the Unemployment Insurance Code, local hire goals, coordination with programs that assist veterans in transitioning to civilian employment, job fairs for construction apprenticeship or pre-apprenticeship programs, or other methods agreed upon by the parties to promote employment and training opportunities for veterans and individuals who reside in economically disadvantaged areas. Community Benefits Agreements are often established between developers and coalitions of community organizations to ensure affected residents share in the benefits of development projects.

Project Labor Agreements

A Project Labor Agreement (PLA) is a pre-hire collective bargaining agreement with one or more labor unions setting the terms and protocols of project execution and worksite conditions and prohibiting work stoppages due to labor disputes. Each PLA is negotiated to meet the needs of a specific project owner/manager. By governing nearly all aspects of the project, PLAs maximize stability in terms of construction timelines and budget, guarantee positive outcomes, and resolve labor disputes without recourse to strikes or lockouts. By requiring the use of state-certified apprenticeship programs, PLAs benefit both contractors and communities by engaging a workforce that is undergoing or has undergone rigorous training, and that is paid family-sustaining wages.⁶

Labor Peace Agreements

A Labor Peace Agreement (LPA) is an arrangement between a union and an employer under which one or both sides agree to waive certain rights under federal law with regard to union organizing and related activity in exchange for labor peace. Under a LPA, an employer may agree to not impede workers' attempts to organize (e.g., card check neutrality, where an employer recognizes a union based on signed cards rather than by the results of a secret ballot election, refraining from expressing negative opinions about a union or intervening in an organizing campaign, and allowing workplace access to union organizers). In exchange, unions may promise not to strike, picket, or otherwise disrupt an employer's operations.⁷

California Jobs First Strategic Sector Alignment

The CWDB seeks to fund partnerships in high-demand strategic sectors across the state, as identified in <u>California's State Economic Blueprint</u> and the thirteen <u>California Jobs First Regional plans</u>.

The California Jobs First Regional plans reflect the research-backed, community-led efforts of over 10,000 local residents and experts who collectively identified twelve Strategic Sectors as key to driving local economies into the future. California's Economic Blueprint summarizes and analyzes these plans into one statewide report.

⁴ Carol Zabin et al, <u>Putting California on the High Road: A Jobs and Climate Action Plan for 2030</u>, UC Berkeley Labor Center; California Workforce Development Board, June 2020.

⁵ Public Contract Code, Ch. 61, §2(2500.5) (a)

⁶ Carol Zabin et al, <u>Putting California on the High Road: A Jobs and Climate Action Plan for 2030</u>, UC Berkeley Labor Center; California Workforce Development Board, June 2020.

⁷ U.S. Chamber of Commerce, <u>Labor Peace Agreements</u>, 2013.

The twelve Strategic Sectors identified by the California Economic Blueprint include:

- Aerospace & Defense
- Clean Economy
- Creative Economy
- Financial & Professional Services
- Healthcare
- High Technology
- Infrastructure/Construction⁸
- Life Sciences
- Manufacturing
- Tourism & Outdoor Recreation
- Transportation & Logistics
- Working Lands & Water

Potential applicants must illustrate how their project will focus on one or more of the Strategic Sectors in their region(s) as identified in <u>California's State Economic Blueprint</u> and the thirteen <u>California Jobs First Regional plans</u>. See Figure 1 to locate the Strategic Sector(s) that were identified for each region.

CALIFORNIA JOBS FIRST STRATEGIC SECTORS

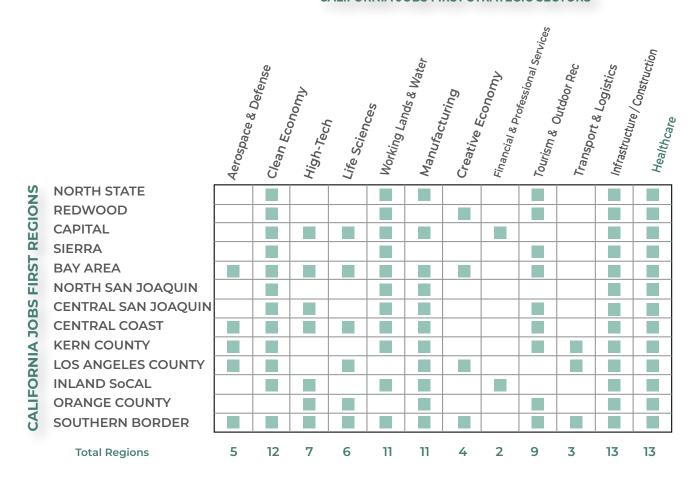


Figure 1: California Jobs First Strategic Sectors by Region

⁸ For more information about the Construction/Infrastructure Strategic Sector, please see pgs. 67-69 of the <u>California Economic Blueprint</u>.

The CWDB may consider applications from projects in which a regional priority is not indicated in the table above, provided:

- The project is focused on one of the twelve Strategic Sectors.
- The project's regional plan identifies demand for the project's target sector.
- Citations to the supporting regional plan content are included in the Project Summary section (1f) of the Phase I Pre-application and responses to relevant narrative prompts in the Phase II application.

Eligible Lead Applicants and HRTP Partners

One entity will apply on behalf of the proposed partnership and assume the Lead Applicant or Fiscal Agent role. Eligible Fiscal Agents or organizations serving as the Lead Applicant on behalf of an HRTP project include, but are not limited to:

- California Community College Districts
- California State Registered Apprenticeship Programs
- Community-Based Organizations and other non-profit organizations
- County social service agencies
- Industry-based intermediaries, including industry associations
- K-12 education entities and adult schools
- Labor organizations and labor-management partnerships
- Local Educational Agencies
- Local workforce development boards
- Native American tribes and tribe-serving non-profit organizations
- Training providers
- Worker Centers/Worker's Rights organizations
- Workforce intermediaries

To be eligible to serve as a Fiscal Agent for the HRTP 2025 grant program, non-profit organizations must:

- Be registered with the federal government pursuant to Internal Revenue Code Sections 501(c)3, (c)4, (c)6 or (c)10.
- Be registered in the State of California with the Department of Justice (DOJ) and appear in good standing on their Registry of Charities and Fundraisers.
- If a nonprofit entity is excluded from registering with the DOJ, justification must be provided with the application.

For-profit entities are not eligible to serve as Fiscal Agents.

Lead Applicants with delinquent nonprofit status with DOJ's Registry of Charitable Trusts (RCT) may be subject to disqualification.

The CWDB will review applications to ensure proposed new projects are non-duplicative of CWDB's existing <u>High Road investments</u>. Applications proposing projects that are not connected to but duplicative of the goals, strategies and/or occupational focus of an existing HRTP project in the proposed project's region may be disqualified from funding consideration.

Project Types

The HRTP 2025 grant program will fund projects in two stages of project readiness:

- Training Implementation
- Expanding

Descriptions, funding award ranges, and duration of project type are listed below.

Training Implementation

Award Range: up to \$3,000,000

Grant Term: 24 months

Training Implementation projects deliver training programs to achieve employment and/or career advancement outcomes for participants. These projects also model strategies for developing industry-based, worker-focused training partnerships, including labor-management partnerships.

Partnerships applying for Training Implementation grants must substantiate existing partnership commitments through formal Memoranda of Understanding (MOUs), clearly define the role of all project partners, identify gaps and opportunities in the target geography and occupation(s) the project will address, and articulate a clear training strategy and planned training outcomes.

Training Implementation applicants are not required to have been funded for planning and development by CWDB provided they meet the eligibility criteria outlined in this RFA. However, applicants will be prompted to detail past planning and development activities in their Phase II application.

Past Planning and Development HRTP grantees and new projects are eligible to apply for the Training Implementation project type.

Training Implementation projects are required to leverage and/or match funding from a non-HRTP source at a 1:1 ratio. For more information about HRTP 2025's match requirement, see the *Cost Sharing* section of this RFA.

Expanding

Award Range: up to \$5,000,000

Grant Term: 24 months

An Expanding project is an existing HRTP that can demonstrate its alignment with HRTP's Essential Elements and is expanding the partnership and/or program scope. Expanding projects must be able to demonstrate past success in achieving training outcomes and detail how the project will focus on increasing scale and/or replication.

Expanding projects should seek to increase the number of new job placements and expand the partnership's presence within the industry. Expanding projects may also extend their capacity to adjacent industry sectors and occupations, replicate the project in other regions, and/or expand access to programming to new target populations. Expanding projects will also grow existing partnerships through strategies such as adding additional program partners, enhancing conflict resolution, and developing sustainable funding mechanisms.

Partnerships applying as Expanding projects must substantiate existing partnership commitments through formal MOUs with one or more employers (partnerships with multiple employers are encouraged for larger grants), at least one worker organization, and at least one training provider. Applicants must also clearly define the role of each project partner, identify gaps and opportunities in the target geography and occupation(s) the project will address, and articulate a clear training strategy and training outcomes.

Only past CWDB-funded Training Implementation HRTP grantees are eligible to apply as an Expanding project.

Expanding projects are required to leverage and/or match funding from a non-HRTP source at a 1:1 ratio. For more information about HRTP 2025's match requirement, review the *Cost Sharing* section of this RFA.

Required Partners

Collaborative, multi-stakeholder partnerships working to align interests and identify common goals are the hallmark of the High Road model. On the demand side, industry leaders identify shared needs, challenges, and objectives, which intermediaries address by identifying the appropriate workforce development strategies to employ on the supply side. All HRTPs must consist of at least one of each: an employer, a worker representative, and a training provider. All proposed partnerships must be substantiated in the application narrative questions, *Partner Roles and Responsibilities* exhibit, and through Evidence of Formal Partnerships as described in the section referenced below.

Employers

Proposed employer partners should understand the workforce needs unique to their industry and be able to serve as economic anchors for target(ed) communities. They should offer industry analyses about the jobs and skills they need and provide specific information about technology, equipment, and operational conditions critical for effective job training. Partnerships with employers should seek to identify opportunities for hiring, upskilling, promotion, retraining, and problem-solving for future demand.

Employers who pay higher wages and incorporate frontline worker input into processes (e.g., how to standardize delivery ordering) see cost reduction via reduced turnover (with worker replacement costs, even for low-wage work, representing up to 20% of an employee's salary); labor productivity gains (from bettermotivated workers and increased efficiencies facilitated through better communication, etc.) and other forms of competitive advantage.¹⁰

Applicants are encouraged to demonstrate throughout the application that their proposed employer partners align with the High Road Essential Elements.

High Road Employer Characteristics

- Offer comparatively good wages and benefits relative to the industry, occupation, and labor market in which participating workers are employed.
- Pay workers at or above regional living wages and pay at or above regional prevailing wage standards where such standards exist for the occupations in question.
- Have a history of investment in employee training, growth, and development.
- Provide opportunities for career advancement and wage growth.
- Provide safe and healthy working conditions, paid time off, and other employer-paid benefits such as health insurance and retirement contributions.
- Consistently comply with workplace laws and regulations, including proactive efforts to remedy past problems and maintaining insurance for any workers to be employed by the project.
- Establish fair and predictable scheduling practices.
- Adopt mechanisms to include and amplify worker voice and agency in the workplace.
- Demonstrate sincere willingness not to impede workers' efforts to form a union or otherwise improve their workplace(s), access to career pathways, and job quality.

Proposed partnerships that include one or more employers that are found to have a history of Occupational Safety and Health Administration (OSHA) violations, wage theft, and/or unfair labor practice complaints on file with the National Labor Relations Board (NLRB) may be disqualified from funding consideration.

Worker Representatives

Workers are invaluable members of HRTPs, and their industry expertise and input are equally important as the expertise of employers. Workers help shape training programs and curricula, train and mentor others, and function at the center of developing industry solutions.

^{9 &}lt;u>Unemp. Ins. Code</u> §14005-2 (s)

¹⁰ Ton, Zeynep. The Case for Good Jobs. Harvard Business Review, Nov 2017.

Worker representatives must:

- Be independent of the partnership's employers.
- Demonstrate a record of meaningful, consistent, and ongoing advocacy of workers' interests.
- Provide representation throughout the project.

A Worker Representative partner must be an organization rather than an individual worker.

Industries and employers with Collective Bargaining Agreements must demonstrate participation and support from the union(s) representing their workers through Memoranda of Understanding (MOUs) or other partnership agreements. Eligible Worker Representative partners may include, but are not limited to, the organization types listed below.

Worker Centers

Worker Centers are community-based and community-led organizations that combine service, advocacy, and organizing to provide support to low-wage workers. Their principal mission is to organize workers to transform industry practices to improve pay, employment stability, economic insecurity, safety, and treatment on the job. California is home to a robust worker center field that includes more than 30 organizations.¹¹

Worker Cooperatives

Worker Cooperatives allow workers to become owners of the programs they participate in and create wealth-building for participants. They can also support small businesses by allowing them to expand without hiring full-time staff until they have grown sufficiently to cover costs, while simultaneously training job seekers for opportunities with large employers.¹²

Employment Social Enterprises

Employment Social Enterprises (ESE) are mission-driven, revenue-generating businesses that invest the money they make into jobs and training for people with diverse talents and experiences who are striving to overcome employment barriers. Independent research has verified that the experience these businesses provide more than doubles job retention increases wages and incomes, and decreases recidivism.¹³

Training Providers

Training providers can include but are not limited to, any of the entities listed below, provided they have demonstrated the capacity to provide the training described by the applicant in the Phase II application.

Community-Based Organizations and Non-Profits

Community-based organizations (CBOs) are local, non-profit, mission-driven groups with the experience and capacity to train, provide support, and advocate for workers from disadvantaged or underrepresented populations or communities. They provide insight and expertise in working with specific population groups and are embedded in the communities they represent and serve. CBOs often effectively provide recruitment, retention, outreach, and engagement activities, as well as targeted support services and training.

Local Workforce Development Boards

Local Workforce Development Boards (LWDBs) ensure the provision and coordination of WIOA Title I services and provide day-to-day administrative and policy oversight of the delivery of services to job seekers and businesses. LWDBs' service strategies are designed to reflect regional labor market needs, local economic and social conditions, and demographics.

^{11 (}Kevin L. Lee, 2022)

^{12 (}Employment Development Department, 2021)

^{13 (}Employment Development Department, 2021)

They must be consistent with the policy direction of California's Unified Strategic Workforce Development Plan (State Plan). Accordingly, LWDBs are essential partners in carrying out the State Plan and will help successful HRTPs understand regional demand and priorities, leverage existing programs and funding, provide case management, and provide job placement assistance.

Community Colleges and Adult Education Schools

Community colleges and adult education schools have been crucial partners in workforce development since their inception. These institutions provide access to workforce education in a wide variety of subjects and career pathways. Many have also evolved to serve the needs of the local community and industry partners. Community college partners and adult education schools have the resources to create programs that serve vulnerable populations by providing a more accessible, affordable, and flexible learning environment and offer a bridge to more advanced degrees.

Environmental and Environmental Justice Organizations

Climate change does not impact all communities equally. Low-income communities and communities of color bear a disproportionate burden of the effects of high-pollution industries and are more vulnerable to the effects of climate change and associated environmental, economic, and public health impacts. Engagement with CBOs and ecological justice organizations can help projects understand communities' needs and identify opportunities for greater economic and environmental resiliency through the advancement of job quality, equity, and local pathways to safer, healthier, and more highly skilled jobs. While not all HRTPs will have a clear environmental focus, the CWDB encourages representatives from these organizations to be included in HRTPs to the extent feasible.

Evidence of Formal Partnerships

All applicants are required to submit evidence of partnership for each of the Required Partners. As detailed below, all projects must submit signed Memoranda of Understanding (MOUs) for each Required Partner.

Lead Applicants serving as one of the Required Partners are encouraged, but not required, to submit a formal MOU or Letter of Support on behalf of their own organization. For Lead Applicants only, the application will function as the organization's formal commitment to complete the proposed program activities. However, Lead Applicants serving as a convener on behalf of the three required partners but are not themselves performing the role of training provider, worker representative, or employer must submit one document evidencing formal partnership from each of the three Required Partners.

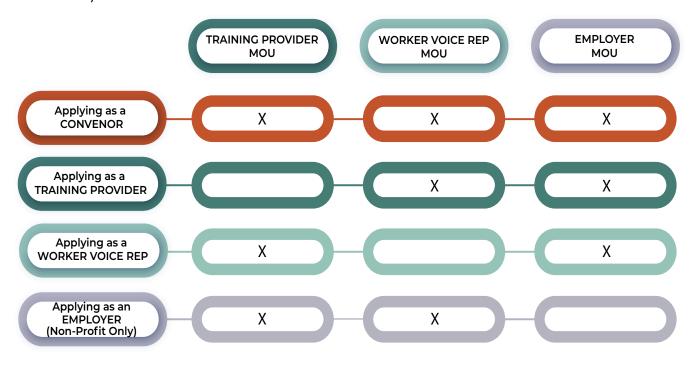
Phase II applications that do not include all required partnership evidence as described in this section will be disqualified during Technical Review and will not advance to the application scoring phase.

MOU Requirements

All applicants must provide evidence of an existing partnership from at least one organization representing each of the Required Partners as described above. Evidence of partnership must be provided in the form of signed Memoranda of Understanding (MOUs) submitted via the *Upload Documents* section of the application for each Required Partner.

Minimum requirements for Required Partner MOUs include:

- Name of the proposed project and/or partnership.
- A signature from an authorized representative of the organization on the official letterhead of the signatory's organization.
- Description of the roles and responsibilities the Required Partner agrees to perform as part of the funded HRTP project. (**Note**: The roles and responsibilities described in each MOU should be consistent with those detailed for that partner in the *Partner Roles and Responsibilities* of the Phase II application exhibit.)



X = MOU is Required

Figure 2: Required MOUs

Additional Program Partners

Applicants are encouraged to include additional program partners whenever possible. Additional Partners may be referenced throughout the application narrative questions and exhibits, and any supplemental evidence of partnerships may be submitted via the *Upload Documents* section of the application. Whereas signed MOUs are required for the Required Partners noted above, signed MOUs are not required for additional partners.

Additional Partners may include, but are not limited to:

- Adult Education Schools
- California Community College Districts
- Community-based organizations and other non-profit organizations
- Employment Social Enterprises
- Environmental and Environmental Justice Organizations

- Industry-based intermediaries (including industry associations)
- Industry-based training providers
- Labor organizations and labor-management partnerships
- Local workforce development boards
- Subject matter experts
- Worker Centers
- Worker Cooperatives

Role of the Lead Applicant

Creating resilient regional economies requires partnership, power-sharing, and a shared burden of responsibility. Effective HRTPs take strides to ensure disinvested communities participate in regional planning and economic development efforts. Lead Applicants will need to invite a diverse group of stakeholders from each of the Required Partners to form the initial HRTP and develop tailored partnership MOU(s) together.

Lead Applicant as Core Convener

The Lead Applicant will be the primary point of contact for the CWDB and will lead inclusive training implementation/expansion efforts. As the Core Convener of the partnership, Lead Applicants will assume the primary role of coordinating project activities among program partners and advancing the goals of the project.

Lead Applicant as Fiscal Agent

The Lead Applicant will represent the HRTP project and make disbursements on behalf of the awarded partnership. As such, they must possess legal authority to administer state funds as they will be responsible for organizing, coordinating, and reporting on project activities, deliverables, and program metrics on behalf of their High Road Training Partnership. They are the lead reporting entity for their project and are expected to administer fiscal responsibilities for this grant program. In their role as Fiscal Agents, Lead Applicants may also provide services to participants.

The CWDB recommends that Lead Applicants possess experience managing state and/or federally-funded grants and organizational capacity to organize and coordinate project teams comprised of representatives from the partner organizations listed in the Required Partners section of this solicitation.

Target Populations

Training Implementation and Expanding project applicants must identify one or more target population(s) that will benefit from the project. Awarded grantees will be responsible for determining whether an individual meets their selected target population definition.

English Language Learners: An English Language Learner (ELL) is defined as a person who has limited ability in speaking, reading, writing, or understanding the English language and (a) their native language is a language other than English or (b) he or she lives in a family or community environment where a language other than English is the dominant language.

Homeless and Housing Insecure:¹⁵ A homeless and/or housing insecure individual lacks a fixed, regular, and adequate nighttime residence; has a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings; is living in a supervised publicly or privately operated shelter designated to provide temporary living arrangements; is an unaccompanied or migratory youth; and/or is fleeing domestic violence or life-threatening conditions in the individual's current housing situation.

¹⁴ WIOA Public Law 113-128, Section 203(7)(a) and (b)

^{15 42} U.S.C. Section 11302 103(a) and (b)

Justice-involved Individuals:¹⁶ A justice-involved individual is defined as an adult or juvenile (a) who is or has been subject to any stage of the criminal justice process; and for whom services may be beneficial; or (b) who requires assistance in overcoming artificial barriers to employment resulting from a record of arrest or conviction.

People with Disabilities:¹⁷ People with Disabilities (PWD) is an individual who identifies as a person with a physical or mental impairment that substantially limits one or more major life activities of such individual, has a record of such impairment, or is regarded as having such an impairment.

Veterans: A veteran is a person who served in the active military, naval, or air service and who was discharged or released under conditions other than dishonorable.

Youth: For the purposes of this RFA, a youth is an individual who meets the criteria for WIOA-eligible out-of-school youth ages 18-24.

Immigrants/Refugees:²⁰ An immigrant is defined as a citizen and national of the United States (U.S.); a lawfully admitted permanent resident; a refugee; an asylee; a parolee; an eligible migrant or seasonal farmworker; or another immigrant authorized by the attorney general to work in the U.S.

Low-income Workers: Including but not limited to individuals who reside in low-income communities²¹ and low-income households.²²

Other Under-resourced Communities: Including but not limited to residents of disadvantaged communities, ²³ underserved populations as defined under Executive Order 13985, ²⁴ Native American communities, Communities of Color, and unemployed individuals.

Applicants seeking to serve participants who do not align with this list must provide a clear definition of any target populations not defined in this RFA.

Section Three. HRTP Background

California Unemployment Insurance Code (Unemp. Ins. Code) <u>Section 14005(r)</u> defines "High Road" as a set of economic and workforce development strategies to achieve economic growth, economic equity, shared prosperity, and a clean environment.

The strategies include but are not limited to, interventions that:25

• Improve job quality and job access, including for women and people from underserved and underrepresented populations.

¹⁶ WIOA Public Law 113-128, Section 3(38)(a) and (b)

^{17 42} U.S.C. Section 12102 1(a)(b)(c)

^{18 38} U.S.C. Section 101

¹⁹ WIOA Public Law 113-128, Section 129(a)(1)(B)

²⁰ WIOA Public Law 113-128, Sections 167(1) and 188(a)5

²¹ Low-income communities (LICs) are census tracts with median household incomes at or below 80 percent of the statewide median income or with median household incomes at or below the threshold designated as low-income by the Department of Housing and Community Development's (HCD) State Income Limits adopted pursuant to <u>California Health and Safety Code, Section 50093</u>.

²² Low-income households (LIHs) are those with household incomes at or below 80 percent of the statewide median income or with household incomes at or below the threshold designated as low-income by the Department of Housing and Community Development's (HCD) State Income Limits adopted pursuant to Section 50093.

²³ Disadvantaged communities are identified by the California Environmental Protection Agency (CalEPA) as the top 25% most impacted census tracts in <u>CalEnviroScreen 3.0</u> – a screening tool used to help identify communities. The map of SB 535 disadvantaged communities can be found on the <u>CalEPA's Office of Environmental Health Hazard Assessment (OEHHA)</u> website.

²⁴ Executive Order On Advancing Racial Equity and Support for Underserved Communities Through the Federal Government

^{25 &}lt;u>Unemp. Ins. Code</u>, §14005 (r)R (1-3)

- Meet the skill and profitability needs of employers.
- Meet the economic, social, and environmental needs of the community.

"High Road Training Partnership" refers to an initiative or project that models strategies for developing industry-based, worker-focused training partnerships, including labor-management partnerships. ²⁶ HRTP projects operate via regional, industry, or sector-based training partnerships that include employers, workers, and their representatives including organized labor, CBOs, education, training, and social services providers, and labor market intermediaries.

High Road Training Partnerships demonstrate job quality standards and employment practices that include, but are not limited to, the following:²⁷

- Provision of comparatively good wages and benefits relative to the industry, occupation, and labor market in which participating workers are employed.
- Payment of workers at or above local or regional living wage standards as well as payment at or above regional prevailing wage standards where such standards exist for the target occupations in question.
- A history of investment in employee training, growth, and development.
- Provision of opportunities for career advancement and wage growth.
- Safe and healthy working conditions.
- Consistent compliance with workplace laws and regulations, including proactive efforts to remedy past problems.
- Adoption of mechanisms to include worker voice and agency in the workplace.

Essential Elements of High Road Training Partnerships

The CWDB's High Road Training Partnerships grant program demonstrates a sector-based approach to workforce development that is characterized by four elements:

- Design Quality Jobs
- Ensure Equity for Workers
- Amplify Worker Voice
- Invest in Environmental Sustainability

Applications for all project types should highlight how HRTP's four Essential Elements will be incorporated into their project's framework. Successful applicants will demonstrate how the Essential Elements undergird their project's design and implementation.

Design Quality Jobs

Quality jobs provide family-sustaining wages, health benefits, a pension, worker advancement opportunities, and collective worker input. Quality jobs are stable, predictable, safe, and free of discrimination. They have the potential to transform workers' lives and create resilient, thriving communities and a more just and equitable economy.

HRTPs raise industry standards by building partnerships that connect workers and communities to safer, healthier, and more highly skilled jobs and a supportive workforce development infrastructure to reach socioeconomic success.

To learn more about Job Quality Indicators, see the Program Priorities section of this RFA.

For more information on Job Quality, please review CWDB's Job Quality document.

^{26 &}lt;u>Unemp. Ins. Code</u>, §14005 (s)

²⁷ Unemp. Ins. Code, §14005(s) (1-7)

Ensure Equity for Workers

Although California's economy generates enormous wealth and prosperity, over a third of all workers earn low wages, and the majority are people of color. Systemic barriers, such as geographic segregation, discrimination, hiring bias, and unemployment, prevent many Californians from realizing their full economic potential. Historical patterns of discrimination and institutional racism have led to concentrations of people of color and women in low-wage and often unhealthy or dangerous jobs.²⁸

Equity ensures that gender, race, ethnicity, or other demographic characteristics do not affect access to and advancement in quality jobs.

HRTPs offer a more inclusive definition of industry leadership.²⁹ In a space usually reserved for employers, workers within HRTPs share their expertise and articulate their goals for themselves and their industries, setting new parameters for industry management. Through this collaborative framework with diverse partners, HRTPs strive to secure mutually beneficial results for workers, their labor representative(s), and High Road employers.

For more information on Ensuring Equity, please review CWDB's <u>A Road Map To Equity</u> and <u>High Road</u> Overview.

Amplify Worker Voice

Worker voice refers to creating opportunities for workers to participate in decisions that affect their livelihoods. These opportunities can take shape through many types of structures, including, but not limited to, labor unions, worker centers, LMPs, or other entities with a demonstrated history of providing consistent and independent worker voice that informs employer decision-making.

Including knowledge gleaned from workers' experiences helps ensure that solutions developed through the partnership are relevant and effective. HRTPs reallocate power so that all parties—employers, workers, labor representatives, and community members—benefit.

HRTPs do not view soliciting input from workers in the industry as a one-time activity nor as an add-on to other partnership work. Rather, successful HRTPs find ways to amplify and embrace worker voice throughout all aspects of the partnership by developing explicit means to include ongoing worker input in problem-solving for the industry and by providing equal participation in governance and strategy setting.³⁰

Applicants are encouraged to include opportunities for worker voice in program design, implementation, and evaluation whenever possible.

For more information on Amplifying Worker Voice, please review CWDB's <u>HRTP Essential Elements: Worker</u> Voice document.

Invest in Environmental Sustainability

The unequal impact of climate change has profound consequences on health and economic outcomes for the most vulnerable and disadvantaged populations. Environmental sustainability refers to supporting efforts toward a carbon-neutral economy. The state's climate agenda aligns with a vision of shared prosperity, recognizing both carbon reduction and economic growth as achievable goals.³¹

²⁸ Annette Bernhardt, Low-Wage Work in California: 2014 Chartbook, (UC Berkeley Center for Labor Research and Education), April 2015

²⁹ Gonzalez-Vasquez, Ana Luz, and Magaly Lopez. <u>The High Road to Economic Prosperity: An Assessment of the California Workforce Development Board's High Road Training Partnerships Initiative</u>, (UCLA Labor Center), May 2021, 25.
30 Ibid, 15.

³¹ The California High Road: A Road Map to Climate Resilience. UCLA Labor Center.

As the state begins to mobilize towards a carbon-neutral economy, prioritizing job quality and promoting equity in access, training, and retention are imperative to ensuring workers have the critical skills industries need to address climate change and environmental sustainability.

California uses a variety of methods to identify disadvantaged and underserved communities, including the California Department of Public Health's <u>Climate Change and Health Vulnerability Indicators</u> visualization map and the California Office of Environmental Health Hazard Assessment's <u>CalEnviroScreen tool</u>. Both resources can serve to inform workforce planning efforts and aid in the understanding of the people and regions in California that are most susceptible to adverse health impacts associated with climate change.

The Essential Elements in Practice

High Road policy builds on areas where the interests of employers, workers, job seekers, and environmental advocates overlap to create pathways to high-quality jobs while raising the profile of existing ones. To this end, the CWDB has reflected on lessons learned from previous implementation cycles of High Road principles in workforce development policy, arriving at four distinct yet complementary approaches to implementing and expanding the Essential Elements of High Road.

Professionalize Precarious Work

Many Californians served by the public workforce system will enter jobs in the service economy, including healthcare, food service, retail, and hospitality, due to their ease of access. These growing industries,³² often contain numerous jobs that offer limited pathways to economic mobility. Elevating the economic and environmental profile of existing work in the service economy is one key task for High Road investment. Through partnership with employers, worker representatives, and training providers, this approach seeks to increase the recognition of skill standards in traditionally low-wage jobs where none currently exist.³³

Examples of strategies to professionalize precarious work include but are not limited to:

- Working with employers who have good labor practices (competitive pay, adequate staffing practices, fair scheduling practices,³⁴ a healthy and safe workplace, transparent break and leave policies, and offer avenues for workers to voice concerns or input).
- Working with employers committed to a high-retention, worker-investment model of employment (retain & upskill).
- The introduction of certification standards in traditionally informal fields to upskill workers in these occupations while working with interested employers or employer representatives.
- Ensuring that certification is industry-relevant and representative of a set of skills translatable to pay premia or other measurable gains.³⁵

Democratize Access to High-Quality Middle Skill Jobs

Through the HRTP 2025 grant, the CWDB seeks to increase the accessibility of in-demand, middle-skill jobs to underrepresented groups. Democratizing access refers to project activities that promote equitable access to quality jobs and reverse patterns of occupational segregation by both race and gender.

³² Retail, food service, and healthcare are all among top projected employment industries over the next ten years. For full details, visit <u>Employment Projections (ca.gov)</u>, select Long-Term Projections, and sort by Projected Year Employment Estimate, 2030.

³³ The concepts on this page are further outlined in pp. 21-22 of the Strategic Elements section of <u>CWDB's State Plan</u> and reflect the work of CWDB Research & Data Specialist Phyllis Jeffrey & the Research Team.

³⁴ Wolfe, Julia, Janelle Jones, and David Cooper. <u>Fair Workweek' Laws Help More Than 1.8 Million Workers</u>. Economic Policy Institute (epi.org), 2018, 2-3.

³⁵ Gonzalez-Vasquez, Ana Luz, and Magaly Lopez. <u>The High Road to Economic Prosperity: An Assessment of the California Workforce Development Board's High Road Training Partnerships Initiative</u>, (UCLA Labor Center), May 2021, 17-18.

Lift All Workers to the High Road

Supporting the employability of vulnerable populations is an important aspect of CWDB's programs. This approach prioritizes support and direct services for individuals who experience multiple barriers to training and employment. This ensures access to high-quality jobs for all workers, including those facing structural barriers (homelessness, incarceration, etc.).

Examples of lifting all workers to the High Road include but are not limited to:

- Efforts to provide access to affordable and stable housing
- Childcare services
- Transportation assistance
- Legal assistance for participants

Participatory Planning

Fostering partnerships between workers and employers helps ensure that jobs within an industry remain accessible and high-quality and that jobs in emerging industries are designed with the participation of employers, workers, and communities. This approach emphasizes the co-design of jobs and training to meet the demand(s) of the future.

Examples of participatory planning include but are not limited to:

- Including workers in the design of career ladders that provide career advancement opportunities and access to upward mobility.
- Written agreements between workers and employers that define, ensure the quality of, and forge paths of accessibility to jobs in settings that may not yet exist.
- Project labor agreements, community workforce and benefits agreements, or other contractual agreement(s) between workers and employers that aim to ensure jobs offered provide benefits to local communities.

Projects should aim to facilitate participatory planning for the training needs, quality, and accessibility of jobs. Proposed partnerships should promote industry planning for workforce needs in a manner that considers workers' well-being and environmental health.

Section Four. Program Priorities

Funding for Communities that Need it Most

Grant applications will be assessed on their ability to effectively demonstrate the need for services in their identified region and occupation(s). Applicants should identify distinct regional factors that may disadvantage workers and prevent them from achieving their full economic potential. Additionally, applicants must identify and quantify gaps and opportunities in the *Application Narrative* section of the application.

While the application includes prompts for several types of gaps and opportunities (noted below), applicants may also propose strategies for addressing additional gaps and opportunities:

- Demand for new workers in the target occupation(s) within the project's planned service area.
- Opportunities to improve job quality and career advancement for workers in the project's target occupations.
- Opportunities for workers, employers, and training providers to work together to inform the design and implementation of the project.
- Barriers to participation in training and employment among the project's target population.
- Opportunities for the project to provide benefits to the broader community.

Applicants should align their *Application Narrative* responses in Phase II with their responses in the *Strategies, Outcomes, and Indicators* exhibit. The latter includes text fields for applicants to articulate strategies, outcomes, and indicators in which applicants should describe how the project will use HRTP 2025 funding to address and measure the success of strategies that connect to the gaps and opportunities identified in the *Application Narrative*.

Applicants should use both quantitative and qualitative supporting data from reliable, high-quality sources that demonstrate the socioeconomic, climate, and community-wide factors that inform the application. The data should reflect the applicant's comprehensive understanding of the issues and capacities specific to their region and suggest the potential for success. A list of data sources and resources that may be useful to applicants can be found in Appendix B. This list is not comprehensive, and applicants are encouraged to reference additional data sources that have informed the analysis of gaps and opportunities the project seeks to address.

Strategies that Lead to Impactful, Measurable Outcomes

As noted above, successful applicants for this grant will define and quantify service gaps among their target populations in the communities they plan to serve and connect the identified gaps to strategies, outcomes, and indicators. The subsections below are intended to provide applicants with guidance for identifying and defining these elements in their application.

Strategies

As noted in Section Three, High Road strategies include but are not limited to, interventions that:³⁶

- Improve job quality and job access, including for women and people from underserved and underrepresented populations.
- Meet the skill and profitability needs of employers.
- Meet the economic, social, and environmental needs of the community.

Applicants should customize proposed strategies in a way that responds to the unique needs of the region's workers and employers. Successful applicants will propose concrete and specific strategies that operationalize the High Road elements through modalities such as Lifting All Workers, Professionalizing Precarious Work, Democratizing Access to Quality Jobs, and Participatory Planning.

Outcomes

Applicants should propose strategies that are connected to clearly defined results. Strategies should connect to clearly defined qualitative and/or quantitative outcomes that are measurable and tied to one or more Indicators (described below). Examples of outcomes include, but are not limited to:

Job Quality

- Comparatively good wages relative to the industry, occupation, and labor market in which participating
 workers are employed; including a living wage.³⁷
- Opportunities for training and advancement.
- Worker benefits such as health insurance, retirement, paid sick days, and paid family leave.
- Stable, predictable work schedules.
- Adequate staffing practices, including reasonable staff-to-patient ratios.
- Worker voice and agency.
- Healthy work environment.
- Wage increases as skills are acquired.
- Compliance with all workplace laws (e.g., wage and hour, employee classification, health and safety,

³⁶ Unemp. Ins. Code §14005-2 R(1)

³⁷ A living wage is what one full-time worker must earn on an hourly basis to help cover the cost of their family's minimum basic needs where they live while still being self-sufficient. Visit the MIT Living Wage Calculator for more information

- anti-discrimination, workers' compensation, and right to organize laws).
- Respect for and inclusion of worker voice.

<u>Equity</u>

- Access to quality jobs through the development of inclusive recruitment pipelines, training opportunities, and retention strategies.
- High-quality training infrastructure that includes access to online platforms, culturally and linguistically
 inclusive education and mentoring opportunities, and wraparound support for those with the highest
 barriers to employment.
- Identifying workplace solutions that help address systemic barriers.
- Incorporating community expertise to create equitable systems and practices.
- Creation of formal agreements to align climate issues with equity and environmental sustainability goals.³⁸

Worker Voice³⁹

- Industry demand to understand the needs of the workforce.
- Commitment to the partnership itself.
- Infrastructure for balanced governance and decision-making.
- Planning to effectively design, deliver, and evaluate programs.
- Ongoing training to support workers' success while on the job.
- Whole person support to turn what would otherwise be barriers into strengths.

Environmental Sustainability⁴⁰

- Quality jobs that offer climate awareness training to make workplaces safer and meet environmental sustainability standards.
- Regional strategies that institutionalize sustainable practices that reduce the energy consumption, operational costs, and environmental footprint of their industry.
- Mitigation strategies that anticipate and prevent the negative consequences of climate change for workers and local communities.
- Incorporation of a climate perspective into workplace safety processes.
- Prioritization of greenhouse gas reduction co-benefits.⁴¹

Indicators

Applicants must identify indicators that will be used to measure the outcomes of a project's proposed strategies. Proposed indicators should answer the question, "How will my project demonstrate whether its strategies are successful?"

Indicators should seek to capture how strategies and outcomes will benefit workers, employers, and the community where the project is taking place. As such, indicators may focus on measuring outcomes related to employment, career advancement, community benefits, job quality, equity, worker voice, and/or environmental sustainability. Applicants can also identify unique, project-specific indicators that align with their proposed strategies and outcomes.

³⁸ Gonzalez-Vasquez, Ana Luz, and Magaly Lopez. <u>The High Road to Economic Prosperity: An Assessment of the California Workforce Development Board's High Road Training Partnerships Initiative</u>, (UCLA Labor Center), May 2021, 34.

³⁹ HRTP Essential Elements: Worker Voice. UC Berkeley Labor Center. June 2020.

⁴⁰ The California High Road: A Road Map to Climate Resilience. UCLA Labor Center.

^{41 (}California Air Resources Board, n.d.)

Applicants may also reference the Measuring Partnerships subsection of this RFA for potential indicators.

California Jobs First Alignment

As outlined in Section Two, eligible HRTP 2025 projects must focus on one or more California Jobs First Strategic Sector. The CWDB seeks to further emphasize alignment with California Jobs First by prioritizing funding for projects that 1) demonstrate a history of engagement with the California Jobs First regional collaborative process and 2) align their proposed HRTP project with the strategies and goals of their respective California Jobs First regional plan(s).

Engagement with California Jobs First Collaborative Process

In 2022, California <u>invested \$5 million</u> into thirteen Jobs First regional entities to establish collaboratives made up of a variety of stakeholders including local governments, business and labor leaders, environmental justice advocates, workforce professionals, and more. These collaboratives then developed region-specific, datadriven, community-led economic development strategies focused on creating good-paying, accessible jobs and sustainable growth.

The CWDB will prioritize funding for projects in which the Lead Applicant and/or one or more project partners have actively participated in the California Jobs First collaborative process. Applicants that can demonstrate a history of engagement in their regional collaborative process will be eligible to receive bonus points in the Phase II application provided they 1) detail the relevant organization's role in the Jobs First collaborative process in the HRTP 2025 application narrative prompts and 2) substantiate their involvement in the collaborative process via a signed Letter of Support from their regional California Jobs First Council.

Letters of Support must be submitted via the Upload Documents exhibit in the Phase II application and: 1) include the name of the proposed HRTP 2025 project 2) be signed by a member of the Jobs First collaborative's leadership on behalf of the Jobs First collaborative.

Alignment with California Jobs First Regional Plans

Applications that demonstrate intentional alignment between proposed HRTP 2025 project activities and the strategies and goals identified in their region's <u>California Jobs First regional plan</u> will receive priority consideration for HRTP 2025 grant funding.

Applicants with no previous history of engagement with the California Jobs First collaborative process are encouraged to review the Jobs First regional plan(s) for the region(s) their project intends to serve and detail how their proposed HRTP project will support and align with the strategies and goals articulated in its applicable Jobs First regional plan(s). Lead applicants must detail alignment between their proposed HRTP project and the strategies and goals of their region's Job First plan(s) in the Phase I project summary and in responses to the relevant narrative prompts in the Phase II application.

Project Sustainability

A core aspect of the High Road approach is a long-term commitment to collaboration. Project sustainability involves establishing and expanding partnerships that continue to operate and serve participants beyond the term of a CWDB-funded grant award. As such, the CWDB seeks to fund projects that embed long-term sustainability into their program's design. Promising practices of long-standing HRTPs that have achieved sustainability include but are not limited to:⁴²

- Maximize and diversify funding efforts to be results-oriented and demand-driven to align with industry needs. Position proposed programming with comparable workforce funding streams by leveraging federal, state, philanthropic, and/or private-sector investments that can maximize the project's impact.
- Identify relevant ongoing workforce planning processes or projects in their respective region(s) that align with HRTP's Essential Elements or that strive to operationalize High Road strategies for the target

⁴² HRTP Promising Practices. UC Berkeley Labor Center. July 2020.

population(s) as described in the Program Guidelines section. Examples of such statewide efforts include the <u>Greenhouse Gas Reduction Fund</u> (GGRF), <u>California Job's First</u> (<u>formerly Community Economic Resilience Fund</u>), <u>California's Master Plan for Career Education</u>, and <u>California's Master Plan for Aging</u>.

- Develop effective intermediaries to advise, design, and implement the partnership's training goals and hire dedicated staff to help institutionalize the partnership.
- Develop and empower labor management partnerships to foster the expectation that leaders will
 treat the partnership as a core business practice. The partnership should be seen as an integral part of
 regular work and problem-solving, rather than an unrelated or additional task.
- Support labor and management partners in expanding and sustaining the partnership approach within the industry.
- Establish strategic partnerships with local workforce development boards to leverage and integrate funding resources collaboratively.
- Develop multi-employer benefit trust funds (e.g., Taft-Hartley Trust) to institute governance between private sector employers and unions.

The CWDB will consider each applicant's strategy for sustaining their proposed project beyond the term described by the applicant in their Application Narrative responses.

Focus on New Workers

Applicants may propose training for incumbent workers; however, projects that propose to increase the number of <u>new</u> workers placed into quality jobs in their target industry will receive preference. The CWDB may also consider a proposed project's projected cost per participant placed into new jobs when determining grant awards.

Supporting LA Wildfire Recovery

HRTP 2025 applicants demonstrating a meaningful connection to the LA County wildfire recovery efforts are eligible for priority consideration. This includes, but is not limited to, creating a lasting impact by targeting industry sectors and/or occupations to upskill workers in career pathways that enhance recovery efforts. Applicants looking to show how their project will support LA wildfire recovery efforts must outline their project's proposed strategy in the application's narrative section during Phase II of the application process to receive consideration.

Section Five. How to Apply

Applying for HRTP 2025 is a two-phase process:

- 1. Phase I entails submitting a Pre-Application via email to the CWDB by the application due date.
- 2. Phase II requires submitting the HRTP 2025 application, including Narrative Responses, Required Partner MOUs, and Agreements for New Projects in the Cal-E-Grants portal.

Questions pertaining to Phases I and II may be sent to the CWDB's Solicitations Team at <u>Solicitations@cwdb.ca.gov</u>, with "HRTP 2025 Inquiry" in the subject line. Any questions received that are unrelated to the HRTP 2025 solicitation may not be addressed.

Phase I Pre-Application Instructions

The Pre-Application is a standardized form intended to collect details of the proposed project and its planned use of funds. The Pre-Application will serve as a screening tool to evaluate and determine whether applicants meet the minimum eligibility criteria outlined in this solicitation.

To be considered for funding, applicants must submit a completed Pre-Application on behalf of their proposed

HRTP to <u>Solicitations@cwdb.ca.gov</u> with "HRTP 2025 Pre-Application Submission" in the subject line by **Wednesday, May 21, 2025, at 5:00 pm PT.** Prospective applicants are strongly encouraged to review this RFA in its entirety before applying for funds. Late submissions will not be accepted. There are no exceptions to the deadline.

Following the submission of a Pre-Application, selected applicants will be invited to apply via Cal-E-Grants as described below for Phase II. Unsuccessful applicants will receive notification from the CWDB that their proposed project was not accepted and that they are ineligible to advance to Phase II of the application process.

Completing the HRTP 2025 Phase I Pre-Application

Organizations applying for HRTP 2025 must respond to each applicable prompt in the Pre-Application. Responses containing text boxes must be single-spaced and in 12-point Arial font (the Pre-Application will automatically default to this formatting response with these settings). Responses should directly address the prompts. Failure to respond to all applicable prompts in the Pre-Application may result in disqualification.

The HRTP 2025 Pre-Application is available here.

Phase II Application Instructions

Phase II of the HRTP 2025 application process is by invitation only. Applicants who submit a Pre-Application during Phase I and meet the minimum eligibility requirements will be invited to complete a Phase II application. Selected applicants will receive an email invitation from the CWDB to apply for HRTP 2025 funding.

Phase II applications must be submitted electronically through the <u>Cal-E-Grants</u> website by **Wednesday**, **July 9, 2025**, at **5:00 pm PT**. Only applications submitted through the Cal E-Grants application portal will be considered. Paper applications will not be accepted and will be automatically disqualified.

Selected applicants invited to Phase II will find the HRTP 2025 application on <u>Cal-E-Grants</u> under the Funding Opportunities link (located in the upper left corner of the website) or under the CWDB link (located in the middle of the website). To begin the application, locate and select the High Road Training Partnership 2025 link and select Start Application.

Applicants who have not advanced to Phase II will not have access to view the HRTP 2025 application in Cal-E-Grants.

Phase II applicants must document any changes from the approved information submitted during Phase I in the Phase II Application Elements as described below. This includes, but is not limited to, funding amount, project type, target occupation(s), region(s), etc. Failure to provide sufficient justification for deviations to the project as described in the Pre-Application may result in disqualification.

Cal-E-Grants

In partnership with the Employment Training Panel (ETP), the CWDB posts available grant opportunities on the Cal-E-Grants website

Cal-E-Grants supports the state's administration of grant programs, including application submission, application ranking and assessment, and contract generation. New Users must create an account to complete and submit an application package.

To receive funding consideration, all required Narrative questions, exhibits, and documentation must be completed and submitted in Cal-E-Grants by the application deadline.

Creating a Cal-E-Grants Account

Applicants must create a Cal-E-Grants account to access the HRTP 2025 application.

To sign up for an account:

- 1. Click on the Log In button on Cal-E-Grants.
- 2. Select Sign Up.
- 3. Enter the required information in the New User Registration Form.
- 4. Follow the steps to complete registration.
- 5. For more information on new registration, refer to the New User Registration.

If a Cal-E-Grants account already exists for your organization, request your organization's primary account holder to add the applying user via the system's Manage Users function. For information on adding new users, visit Manage Users.

Logging in to Cal-E-Grants

Applicants must log in to the webpage using the administrator credentials created by their organization. It is recommended that the individual with the organization's administrator credential be the only person to add new and manage existing users. The administrator can add multiple users, inactivate users, and delete the contents of input fields in the application. When added, new users will be able to complete and submit the HRTP application and, if awarded, have access to complete and submit Quarterly Progress Reports, Invoices, Modification Requests, etc.

Phase II Application Elements

To be considered for funding, applicants invited to complete a Phase II application must complete each of the following application elements. Applications submitted with missing or incomplete information may be disqualified.

Cover Page

Input general information about the partnership and proposed project.

Project Narrative

Respond to the narrative questions about the proposed project. Narrative questions will vary based on the applicant's project type. There is a 3,000-character limit per text box.

Strategies, Outcomes, and Indicators

Five application narrative questions are marked with an asterisk symbol (*). The gaps and/or opportunities described in those narrative responses must be addressed with corresponding strategies, outcomes, and indicators listed in the Strategies, Outcomes, and Indicators application exhibit.

For more information about these concepts, refer to the Strategies, Outcomes, and Indicators subsections in Section II of this RFA. The application narrative responses that require corresponding responses in the Strategies, Outcomes, and Indicators section are Questions 3, 7, 8, 10, and 11.

Applicants must begin by restating or summarizing the gaps/opportunities identified in each narrative response in the first (left-most) column of the Strategies, Outcomes, and Indicators exhibit. There is a dedicated text field for each required input. There is a 500-character limit per text field. Applicants are encouraged to identify additional strategies, outcomes, and indicators beyond the required five to better define their approach and detail their plans. To add and identify additional strategies, outcomes, and indicators, applicants should select the "+Add" button in the bottom right-hand corner of the exhibit.

Work Plan

Provide details about proposed activities and estimated milestone completion dates quarterly throughout the grant term. This information must align with the scope of work, goals, and deliverables outlined in the project narrative.

Participant Plan

Projects must identify their target population(s) and the number of participants the project plans to enroll, train, and place in post-secondary education, state-approved apprenticeship, and/or employment. Applicants must also provide detailed information about their project's participant placement and/or career objectives, participant lifecycle, and types of supportive services offered. For more information, refer to the Target Populations section of this document.

Partner Roles and Responsibilities

List all partnering organizations and their roles and responsibilities as part of the HRTP 2025 project and any leveraged/match funds provided by partner organizations.

Employers(s), Worker Representative(s), and Training Provider(s) are required partners and must be included.

Note: While there is no dedicated field for "Training Providers," applicants must specify at least one organization that will provide participant training.

Expenditure Plan

Enter quarterly expenditure projections for the proposed grant funding.

Note: The Expenditure Plan will automatically display 13 quarters for all project types. However, Training Implementation and Expanding projects should only complete 8 quarters (24 months).

Budget Narrative

Provide details related to proposed line-item allocations, including but not limited to cost-breakdown calculations, subrecipient information, and purchase justification.

Supplemental Budget

Complete if grant funds are used for Equipment Purchases, Leased Equipment, Contractual Services, and/or Subrecipient.

Budget Summary

List all line-item allocations of the proposed budget. Costs are divided into two categories: Grant Funds and Leveraged Funds (match). All Training Implementation and Expanding projects are required to leverage and/or match funding from a non-HRTP source at a 1:1 rate for their proposed projects and must identify the source of leverage and/or match funds. Failure to identify the source will result in a scoring reduction.

Upload Documents

Applicants must submit at least one signed Memoranda of Understanding (MOUs) from an organization representing each of the Required Partners.

To successfully submit MOUs, applicants must upload MOUs from the Required Partners using the designated MOU 1 and MOU 2 fields under the Name column and complete the *Description* column to identify each document. The description text for MOUs, Letters of Support, and Additional Documents should be labeled and described with the appropriate information. For example, an applicant uploading a training provider MOU should use the MOU 1 field and state "Training Provider" in the description column. There is a 500-character limit per text field.

Additionally, applicants must upload and submit a completed <u>Payee Data Record</u> (STD 204) and, if applicable, a <u>Payee Data Record Supplement</u> (STD 205). These uploads do not require a description as they are standard forms.

New Projects should upload and identify the required agreement type by specifying whether it is a Labor-Management Partnership, Project Labor, Labor Peace, or Community Benefits Agreement.

Applicants seeking to substantiate support from their California Jobs First collaborative as outlined in the Engagement with California Jobs First Collaborative Process subsection must upload a Letter of Support via the Upload Documents exhibit in the row labeled "Jobs First Letter of Support" in order to receive full credit for the Phase II narrative prompt in which applicants will detail their engagement with their Jobs First collaborative process. Letters of Support must include the name of the proposed HRTP 2025 project and signature(s) from the member(s) of the Jobs First collaborative's leadership.

Lead applicants serving as a convener-only (see page 11 for more information) must submit one MOU for each of the three Required Partners (a total of three MOUs). Convener-only applicants must use the "Additional Documents" option to upload the third required MOU.

See the **Evidence of Formal Partnerships** section for more information on substantiating partnerships.

Section Six. Program Timeline

Application and Award Timeline

Phase I: Pre-Application Timeline

Event	Details
RFA Release	Monday, April 21, 2025
Pre-Application Release	Monday, April 21, 2025
Pre-Application Due (Deadline)	Wednesday, May 21, 2025, at 5:00 PM
Notification of Phase II Status	May 23 – June 6, 2025

Phase II: Application Timeline (Invitation Only)

Event	Details
Phase II Application Opens	Monday, June 9, 2025
Applications Due (Deadline)	Wednesday, July 9, 2025, at 5:00 PM
Award Announcement	Fall 2025
Grant Agreement Processing	2-6 months
Estimated Program Start Date	January 1, 2026
Grant Term	24 months

The CWDB reserves the right to modify any dates in this RFA without an addendum. All dates provided in the table above are estimates and are subject to change. Significant dates, including cutoff dates and review periods can be found on the <a href="https://hrtp

Applying for HRTP 2025 is a two-phase process:

Phase I involves completing and submitting a Pre-Application. The deadline for submitting the Pre-Application is **Wednesday, May 21, 2025, at 5 PM**. Applicants must email their completed Pre-Application to Solicitations@cwdb.ca.gov.

Late submissions will not be accepted.

In Phase II, selected applicants will be invited to complete an Application through <u>Cal-E-Grants</u>. Access to the HRTP 2025 application will be granted only to organizations that have received an invitation from the CWDB. The application deadline is **Wednesday**, **July 9**, **2025**, **at 5 PM**. Applicants are encouraged to submit their application 48 hours in advance to ensure there are no errors in submission. Late applications will not be accepted under any circumstances.

The online application portal will close once the deadline has passed—no exceptions will be made to the deadline. Technical issues that prevent submission by the deadline will not be grounds for an extension.

To ensure timely assistance with application issues, applicants are encouraged to submit requests for assistance to Solicitations@cwdb.ca.gov at least two (2) business days before the Phase II application deadline. The CWDB cannot guarantee individualized assistance with Phase II application issues if notified less than two days prior to the Phase II application deadline.

Weekly Q&A

The CWDB will post a weekly Question and Answer (Q&A) document to the HRTP 2025 webpage during Phase I and II of the open application periods to address any questions submitted by interested applicants. The Q&A document serves as a supplement to this RFA and is intended to clarify policy about the grant and application process. Individual CWDB staff cannot respond directly to inquiries or engage with potential applicants during the open application period. Questions regarding this RFA can be sent via email to Solicitations@cwdb.ca.gov. Please use "HRTP 2025 Question" in the subject line.

Phase I Weekly Q&A

Cumulative Q&As will be posted on the <u>HRTP 2025</u> webpage on a weekly basis **beginning Friday, May 2, 2025**. Questions must be received each Tuesday by 2:00 PM (PT) to be included in that Friday's weekly posting. The last Q&A posting will be Friday, May 16. The deadline to submit questions is **Wednesday, May 14, at 2:00 PM**. Questions submitted after the deadline will not be included or answered in the Q&A.

Phase II Weekly Q&A

Cumulative Q&As will be posted on the <u>HRTP 2025</u> webpage on a weekly basis beginning **Friday, June 20, 2025.** Questions must be received each Tuesday by 2:00 PM (PT) to be included in that Friday's weekly posting. The last Q&A posting will be Wednesday, July 2, 2025. The deadline to submit questions is **Monday, June 30, at 2:00 PM.** Questions submitted after the deadline will not be included or answered in the Q&A.

Section Seven. Selections and Award Process

Required Exhibits

Applicants must complete and submit all required application elements. Training Implementation and Expanding projects are required to complete the Participant Plan.

The Cal-E-Grants system will not allow an application to be submitted if any required fields are incomplete.

Application Scoring Rubrics

The table below provides an overview of the scoring categories and total points available by section that will be used during the CWDB's application scoring process.

Phase II Application Scoring Rubric

Scoring Element	Percentage of Total Score	Application Section
Equity	10	
Job Quality	10	
Worker Voice	10	
Environmental Sustainability (Optional)	5	Responses to questions in <i>Application</i> Narrative
Project Sustainability	10	
Alignment with State and Regional Priorities (BONUS)	10	
Partnerships	20	Responses to questions in Application Narrative and Partner Roles & Responsibilities
Participant Plan	15	Responses to questions in <i>Participant Plan</i>
Strategies, Outcomes, & Indicators	15	Responses to Strategies, Outcomes, & Indicators
Budget	5	Responses to the following exhibits: • Budget Narrative • Supplemental Budget • Budget Summary • Expenditure Plan
Total Points Available	100*	

^{*}Including bonus points, the maximum Phase II application score is 110.

Technical Review

All submitted applications will be subject to an initial round of review for adherence to and alignment with HRTP program requirements. Prior to the CWDB's application scoring process, all applications will be reviewed for:

- Applicant eligibility⁴³
- MOUs⁴⁴
- Registration with the Attorney General's Registry of Charities and Fundraisers

Applications that do not meet the above criteria will not be scored.

⁴³ Based on the guidelines in Section Two: Program Guidelines - Eligibility

⁴⁴ See Evidence of Formal Partnerships for guidelines and requirements.

Budget Review

The CWDB will review application budgets for the following:

- Grant allocations are completed accurately and are consistent between the Budget Summary, Budget Narrative, Funding Plan, and Supplemental Budget, if applicable.
- Sufficient details, context, and justification are provided for the proposed expenditures in the Budget Narrative and Supplemental Budget, if applicable.
- Costs are allowable (see Allowable Uses of Funds).

Application Scoring Process

All applications will be evaluated and ranked in accordance with the scoring criteria outlined in the Application Scoring Rubrics section of this RFA. The CWDB will not adjust project types for awarded applicants.

Communication of Award Decisions

All applicants will receive an emailed communication of their award decision to the primary point of contact identified in their application following the conclusion of the application scoring process. Awarded grantees must respond via email to Solicitations@cwdb.ca.gov within three (3) business days to confirm acceptance of a grant award. Awarded applicants who do not confirm their award within this timeline may be subject to forfeiture of the award. The CWDB will also post a list of awarded projects to its website following the conclusion of the award process.

Acceptance of Award

Upon confirmation of acceptance of their award as outlined in the *Communication of Award Decisions* above, awarded applicants agree to complete all exhibit modifications identified by the CWDB within no more than 30 calendar days, unless otherwise specified by CWDB. Failure to complete requested exhibit modifications in accordance with the timeline and specifications conveyed to the awarded applicant by CWDB may result in revocation of a grant award.

Awarded applicants also agree to comply with all guidelines and stipulations outlined in this RFA, all terms in the grant agreement, and all administrative and reporting requirements communicated by the CWDB at any point in the designated grant term.

The CWDB reserves the right to revise the terms and conditions of HRTP 2025 awards throughout the grant agreement execution process and grant term.

Application Exhibit Modifications

Following the award notice and prior to the grant agreement execution, the CWDB's Program Implementation and Regional Support (PIRS) Branch will work directly with the point of contact listed in the application to initiate the modification process. During this stage, awarded applicants will be required to update their application exhibits. This process is time-sensitive and requires responses to all emails and the return of all paperwork promptly to authorize funding and begin project activities by the program start date.

The application exhibit update modification process will include the following steps:

- 1. An analyst from the PIRS Branch will contact the application point of contact with the needed revisions or additional information requests.
 - a) If assistance is needed during this process, contact the PIRS Branch through their inbox, HRTP@cwdb.ca.gov.
- 2. The analyst will reopen the application for edits in the Cal-E-Grants system. Complete and submit a Modification Request in the Cal-E-Grants system.
 - a) Prior Approval authorization (via Use of Funding or Purchase Justification forms) may be

needed depending on the nature of the request. If required, the CWDB will notify and provide the appropriate forms for completion. These will be added to the application via the *Upload Documents* section.

- i) Additional information from the Reference Allowable Costs and Prior Written Approval guidance.
- b) If assistance is needed prior to starting the request, contact the PIRS Branch through their inbox.
- 3. Once received, the CWDB will review the Modification Request and respond with the next steps, including guidance on specific exhibit revisions being requested.
- 4. Revisions will be completed in the Cal-E-Grants system. Applicable exhibits (tabs) will be opened for edits, reflecting the changes outlined in the Modification Request.
- 5. After revisions are submitted, the CWDB will review them and determine whether additional information or justification is needed. Once approved, the CWDB will provide formal written approval and any pertinent information or next steps. Depending on the nature of the request, prior written authorization may be needed. If required, the CWDB will notify and request approval for additional information from the Reference Allowable Costs and Prior Written Approval guidance.
- 6. After Award Announcements are made, the CWDB will release a Grant Administration Guide to all HRTP 2025 grantees, providing further guidance on using the Cal-E-Grants system for monitoring and reporting purposes.

Grant Agreement Process and Timeline

CWDB partners with EDD to process and execute grant agreements following the award process. The grant agreement process begins with CWDB program staff contacting awarded organizations to make necessary edits to application exhibits. Award applicants are expected to respond and make requested edits promptly. Once requested edits are made, the CWDB will submit relevant documentation to EDD for grant agreement processing.

This process includes several steps in which EDD collects, reviews, and approves submitted grant agreement documentation. At the conclusion of this process, the completed grant agreement package will be sent to the awarded organization for signature. Upon receipt of the required signature(s), the grant agreement will be executed. Program activities cannot begin until a grant agreement is fully executed, regardless of the assigned grant term start date. If a grant agreement is executed before the assigned grant term date, program activities cannot begin until the start date of the grant term, January 1, 2026. Awarded grantees should expect the grant agreement process to take two to six months.

Any changes to an organization's contact information as identified in their application at any point during the grant cycle, including primary and fiscal point(s) of contact, must be communicated to the CWDB immediately. If a contact changes during the application modifications or after grant agreement execution, the change should be communicated to <a href="http://example.com/http://exampl

Rejection of Funding Request

All award decisions are considered final; however, applicants not selected for the award may request a summary of feedback from the CWDB scoring panel. Requests for feedback must be sent to Solicitations@cwdb.ca.gov within 30 calendar days of CWDB's award decision message. Applicants submitting such a request will receive an emailed summary of scorer comments within 10 business days of their request.

The CWDB reserves the right to waive any immaterial deviation in an application. However, the waiver of an immaterial deviation in an application shall in no way modify the document or excuse the successful applicant from full compliance with the application requirements after the contract is awarded.

An application may be rejected for any of the following:

- The application is incomplete or fails to meet the solicitation specifications and/or basic application requirements.
- The application contains false or misleading statements or references that do not support an attribute or condition claimed by the applicant. The application shall be rejected if, in the CWDB's opinion, such information was intended to erroneously mislead the state in its evaluation of the application.
- The applicant has received a substantive negative contract evaluation from the State of California.
- The applicant has had a contract with the State of California canceled due to failure to comply with the Drug-Free Workplace Act of 1990.
- It is determined that the applicant is not responsible. Examples of why an applicant may not be found responsible include, but are not limited to:
 - o No business license.
 - Submitted an application when the license is subject to suspension on the date of the application opening and/or award of the contract, or during the proposed term of the Agreement.
 - o An application is submitted without an authorized signature.
 - o The applicant falsified any information in the application package or has had poor performance on a previous contract with the CWDB.
 - o Upon license verification with the Contractor's State Licensing Board, it is found that an applicant's license is subject to suspension on the date of the application opening and/or award of the contract or during the proposed term of the Agreement.

Fund Source Information

Funding for this program was designated to the CWDB in the 2024-2025 State Budget, which allocated up to \$18,577,290 for the High Road Training Partnerships. Of the total funding available, a minimum of \$4,327,290 is allocated for projects in the healthcare sector. All awards are subject to the availability of appropriated funds and to any modifications or additional requirements that may be imposed by law. The CWDB reserves the right to adjust the total number, duration, and amount of each grant award, including allocating additional funds above the requested amounts.

Funding amount requests should be clearly justified and outlined within the application as outlined in the How to Apply section of this RFA. The CWDB reserves the right to request additional information as needed.

Administrative Performance

For applications submitted by organizations that have received past CWDB grant funding, the CWDB may review its administrative records to evaluate whether a prospective HRTP 2025 grantee was able to achieve an adequate level of administrative performance under their previous CWDB grant(s). Factors that will be considered when evaluating past administrative performance include but are not limited to success in achieving proposed project goals, fiscal agent performance, data collection and reporting, and the occurrence of any cash holds or de-obligations. Findings that indicate an organization was unable to adequately administer past CWDB grant funding may disqualify such an organization from consideration for HRTP 2025 funding.

The CWDB will collect and maintain administrative performance data for awarded HRTP 2025 grantees, which may be considered in future CWDB funding decisions.

Section Eight. Administrative Requirements

This section outlines administrative requirements for applicants and awarded grantees.

Cost Sharing

Applicants applying for Training Implementation and Expanding projects must leverage proposed HRTP funding with external non-CWDB resources at a 1:1 ratio with the total requested amount. A 1:1 leverage and/or match means the applicant must contribute an amount equal to the requested grant award.

Example: If an applicant requests \$2,000,000 in grant funds, they must also document \$2,000,000 in leverage and/or match funds, resulting in a total project amount of \$4,000,000.

Leveraged Resources

Leveraged resources (match requirement) may include both non-cash (in-kind) and cash contributions, as long as they are made outside the domain of the donor and provide benefits and/or scale the proposed project as well as the donor's impact aims.

Leveraged resources are to be used by the grantee(s) and/or subrecipient contractor(s) to support the proposed project's activities (such as training or supportive services) and may include a cash dollar amount up to the equivalent value of the total requested funding, in-kind services with an equivalent dollar value, or a combination of the two. It is the applicant's responsibility to ensure that the use of match funding is allowable by its source.

The CWDB has the sole authority to determine whether proposed leveraged resources are acceptable. Leveraged resources may be from a variety of sources, including, but not limited to businesses, industry associations, labor organizations, CBOs, education and training providers, and/or federal, state, and local government programs.

Projects are encouraged to propose leveraged resources from similar workforce initiatives, including, but not limited to California Jobs First, Economic Development Administration's Good Jobs Challenge, etc., in a manner that strategically aligns with the intent of the HRTP 2025 grant program.

Workforce Innovation and Opportunity Act (WIOA) funds may be used as leverage, but **not** as a cash source or to make a Cash Match.⁴⁵ All leveraged funds will be subject to the reporting requirements contained in <u>Workforce Services Directive 19-05</u> and Title 2 Code of Federal Regulations (CFR) Part 200: "Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards,"

Grant Term

The anticipated grant term for projects funded through this RFA will be 24 months with an anticipated start date of **January 1, 2026.** No obligation of funds will be allowed before or beyond the grant term. Any grant funds not expended during the grant agreement period shall be returned to the state. The CWDB and EDD reserve the option to extend grant periods within the term limits placed on the funding appropriation and with proven justification.

Allowable Uses of Funds

The use of funds awarded through this RFA is governed by state and federal directives and the federal Office of Management and Budget (OMB) Guidance for Grants and Agreements (<u>Uniform Guidance for Federal Awards 2 CFR Part 200</u>). General funding requirements are described in Appendix A.

⁴⁵ Cash Match is a contribution of funds made available specifically for project activities and is consistent with the allowable activities of the funding source.

Funds awarded through this RFA cannot be used to purchase real property or construct buildings.

Although some grantees may be permitted to submit Work Plan modifications to the CWDB on a case-by-case basis after the grant award, this section outlines both allowable and disallowable activities that may be undertaken with HRTP funding.

Administrative and Indirect Cost Limits

Administrative Costs should be detailed in the Budget Narrative section of the application, under the Other line item. Details should include which line items within your budget have Administrative Costs associated with them. Administrative Costs, in this way, are considered direct costs as defined.

Indirect Costs should be detailed in the Budget Narrative section of the application, under the Indirect Costs line item. Details should include cost-breakdown calculations and sufficient justification. For more information on Indirect Costs, see CWDB State-Funded Program: Indirect Costs Directive CWDB25-01.

Negotiated Indirect Cost Rate Agreement (NICRA)

Negotiated Indirect Cost Rate Agreements are established by the U.S. government. If claiming an indirect cost rate above 20%, the applicant is required to submit a NICRA from a cognizant agency outlining all the above information to the CWDB for review and approval. Each agreement must include:

- The approved rate(s) and information directly related to the use of the rates, e.g., type of rate, effective period, and distribution base.
- The treatment of fringe benefits as either direct and/or indirect costs.
- General terms and conditions.
- Special remarks, e.g., the composition of the indirect cost pool.

NICRAs with redacted information will not be accepted. Organizations with a NICRA accepted by CWDB will have administrative costs capped at 10% of the grant award.

De Minimis Rate

Organizations without a NICRA or unable to provide one can use a de minimis indirect cost rate of 20% of the modified total direct costs (MTDC). The rate caps administrative costs at 10% and combined administrative and indirect costs cannot exceed 20% of the total grant award amount.

When Should Costs that are Normally Indirect Be Counted as Direct Costs?

Costs for program implementation are direct costs, however, direct costs should include costs normally classified as indirect when they are directly allocated to the project, including costs from the following activities:

- Managing, coordinating, directing, and/or evaluating the overall program/project.
- Preparing program plans, budget schedules, and related amendments.
- Monitoring programs, projects, sub-recipients, and related systems and processes.
- Developing systems and procedures, including management information systems, for assuring compliance with program requirements.
- Preparing reports and other documents related to program requirements.
- Evaluating program results against stated objectives.
- Performing administration services such as program-specific payroll, accounting, auditing, or legal activities.

What Types of Non-Labor Costs Should be Treated as Indirect Costs?

Examples of non-labor costs that should be treated as indirect costs when directly allocated to the project

funded by this grant include:

- Costs for goods and services required for administration of the program, including goods and services such as the rental or purchase of equipment, utilities, office supplies, postage, and rental and maintenance of office space
- Travel costs incurred for official business in carrying out program management and administrative activities.

Travel Reimbursements

The travel and per diem rates shall be set in accordance with the California Department of Human Resources for comparable classes. Travel outside the State of California will *not* be reimbursed unless prior written authorization is obtained from the CWDB.

Contractor Procurement

The Fiscal Agent must determine the relationship with partners within the scope of the grant on a case-by-case basis prior to entering into a contractual agreement. When determining whether a Contractor or Subrecipient relationship exists, the substance of the relationship is more important than the form of the agreement (i.e., grant, contract, subgrant, or subcontract). All characteristics related to the type of provider and agreement should be analyzed and no single factor should be taken in isolation. Not all characteristics will be present in every relationship. Contractors are subject to procurement regulations as defined in CWDB State-Funded Program: Subrecipient and Contractor Management Directive CWDB24-01. All state grant procurements must be "necessary and reasonable" in operating the state program and directly contribute to its success and outcomes.

Type of Purchase	Amount	Quotes Needed
Micro Purchases	Less than \$10,000	One quote at a reasonable cost
Small Purchases	Between \$10,000 and \$250,000	Two written quotes from a catalog
Sealed Bids	Any	Three formal written bids in response to an Invitation for Bid (IFB)
Competitive Proposals	Any	Three written competitive proposals in response to a Request for Proposal (RFP)
Noncompetitive Proposals	Any	All bids and quotes obtained

Noncompetitive Procurement (Sole source)

If a purchase is a sole-source purchase (only one vendor is capable of providing an item or service, so a competitive bid cannot be obtained), justification must be provided to the CWDB detailing why the purchase cannot be competitively procured and why the provider was selected.

All sole-source purchases (regardless of price) require a Proprietary Letter. A Proprietary Letter explains an entity's rights to its specialized goods or services. Fiscal Agents do not need to submit this letter to the CWDB but are required to obtain and keep the Proprietary Letter on file in the event they are monitored.

Equipment Procurement

Grantees (Fiscal Agents) must obtain three competitive quotes for purchases and purchase orders over \$2,500. Quotes must justify that the cost of the equipment is reasonable. Fiscal Agents do not need to submit quotes to the CWDB but are required to obtain and keep them on file in the event they are monitored. For example, buying ten laptops at \$500 each would result in a purchase order of \$5,000 and would require obtaining and retaining records for three competitive quotes.

Community of Practice

Awarded grantees will be required to participate in Community of Practice events. The Community of Practice is a forum for grantees, staff, partners, and other key system stakeholders to share information, and provides the opportunity to solve problems and prioritize challenges addressed through dialogue and proactive thinking. Grantees and their program partners are expected to access peer and expert technical assistance, share successful program models, and coordinate performance criteria and evaluation activities through the learning community. New grantees will have access to HRTP experts - grantees from past HRTP cycle(s) who have acquired a wealth of knowledge pertaining to the development and implementation of successful partnership(s) strategies in their respective regions.

In addition to the statewide Community of Practice described above, awarded grantees must cultivate a Community of Practice within their proposed partnership by hosting in-person and/or virtual gatherings amongst their proposed partners. Best practices and lessons learned from these network-level Communities of Practice must be documented and shared with the CWDB.

Progress Reporting and Close-out

The Fiscal Agent must complete and submit semi-annual progress reports (due on the 20th of the following month after the reporting period) and a close-out report (due 30 days after the end of the grant term). The CWDB reviews the progress reports to ensure projects' progress throughout the grant term.

Fiscal Agents must complete and submit semi-annual progress reports and close-out reports through Cal-E-Grants. An email notification will be sent to the Fiscal Agent when the report is active and available to complete.

The Fiscal Agent is responsible for providing complete and comprehensive responses demonstrating activities, progress, success, and challenges in project implementation. Failure to provide correct or responsive answers may impact the performance and evaluation of the Fiscal Agent and the project.

Grantee Onboarding and Administration Guide

Following the execution of the grant agreement, the CWDB PIRS team will host individual onboarding sessions and provide grantees with a grant administration guide.

Periodic Review and Information Requests

The CWDB may conduct periodic reviews or request information from Fiscal Agents as needed throughout the grant term. Periodic review and information requests may include, but are not limited to, surveys, interviews, and site visits.

If a Fiscal Agent is not performing in accordance with program requirements, the Fiscal Agent will be subject to remedies for non-performance, including cash hold and de-obligation.

Record Retention

Fiscal Agents are required to maintain the project and fiscal records in a manner that will allow state and local reviewers to evaluate the project's effectiveness and proper use of funds. The record retention system must include both original and summary (e.g., computer-generated) data sources. Fiscal Agents will retain all records pertinent to this contract for three (3) calendar years from the date of final payment of this contract. Specific documentation and records used for this purpose are within the Fiscal Agent's discretion to determine and produce if requested. The CWDB will rely on federal standards regarding Record Retention and Access.

CWDB Support

CWDB staff is available to respond to questions about the HRTP 2025 grant. Questions about this solicitation and/or Cal-E-Grants issues can be sent to Solicitations@cwdb.ca.gov. Awarded grantees may submit

questions regarding the grant agreement process to <u>Contracts@cwdb.ca.gov</u>. Questions regarding application modifications and/or grant administration can be sent to the grantee's designated contact on the CWDB's PIRS Team.

CWDB PIRS staff will provide day-to-day grant oversight, administrative assistance, and project management, including grant agreement, fiscal, reporting, and grant technical assistance.

Awarded grantees will also work with a Field Specialist from the CWDB's Equity, Climate, and Jobs Branch. The Field Specialist will provide strategic support, capture lessons from the field, and help grantees navigate challenges.

Advance Payment

This grant operates on a reimbursement structure, although awarded applicants may submit an invoice to receive up to 25% of their approved budget upon Standard Agreement (grant agreement) execution with the CWDB to support the implementation of grant activities. An applicant's need for advanced payment funds must be illustrated and accounted for within the itemized budget and expenditure timelines in accordance with the agreed-upon Work Plan. Details should be provided in Exhibit B2 – Budget Narrative for the categories utilizing advanced funds.

Applicants must agree to meet the conditions of <u>California Government Code 11019.1</u>. These conditions include, but are not limited to, demonstrating good standing with the IRS depositing any advance funds received into a federally insured, interest-bearing account, and submitting an itemized expenditure plan for advanced funds. Applicant agrees to ensure it has established procedures to minimize the time between the transfer of advance funds and spend down, and to provide a progress report to CWDB that includes proof of expenditure and work completed. Any accumulated interest shall be deemed to be grant moneys, subject to federal laws and regulations, and the recipient shall report interest earned on the advanced payment to the administering state agency.

Awarded applicants will submit their advance fund request via their first monthly invoice submission to the CWDB through Cal-E-Grants. Payments shall be issued within 45 calendar days from the date the invoice is processed by EDD Fiscal Division, in accordance with the California Prompt Payment Act. The CWDB PIRS team will provide a tracking workbook to account for the spend down of all advanced funds that will be submitted to the CWDB monthly until all advanced funds have been spent down in their entirety. When ten percent (10%) or less in advanced funds remains, the awarded applicant can begin billing for the remaining awarded grant funds through the standard, monthly reimbursement process, as described in the Invoicing section of this RFA. The awarded applicant is still required to account for the remaining advanced funds when requesting reimbursement in this way. The CWDB will inform awarded applicants when their advanced funds have been entirely spent.

Under no circumstances will the CWDB pay for services provided before the start date or the state's final Standard Agreement approval, whichever is **later**. Final approval occurs when all parties have signed the Standard Agreement, with the latest signature date being the date of final approval.

Invoicing

Grantees will submit monthly invoices in accordance with funding requirements for approval by CWDB in the Cal-E-Grants system. Invoices are due by the 20th of the month following the invoice period. Invoices must be submitted even when there is a \$0 balance for the month. Payments shall be issued within 45 calendar days from the date the invoice is approved and processed by the EDD Fiscal Program Division in accordance with the California Prompt Payment Act.

If a new user needs to complete and submit an invoice on Cal-E-Grants, the primary user for the organization should add a new user rather than create a new Cal-E-Grants account. Refer to Manage Users for instructions on how to add a new user to the primary user's Cal-E-Grants account. Training will be provided to all selected grantees.

Under no circumstances will the CWDB pay for services provided after the grant agreement end date. Final invoices for all reimbursable grant activities must be submitted no later than the 20th day of the following month after the end date of the grant term.

Monitoring and Audits

After grant approval, Fiscal Agents may be monitored and/or audited by the state in accordance with existing policies, procedures, and requirements governing the funding source and grant program. The purpose is to identify areas of strength and non-compliance. If selected, the Fiscal Agent/Awardee is expected to:

- Be responsive to all compliance monitors' Fiscal and Program Management requests.
- Provide reasonable and timely access to records and staff.
- Facilitate access to subcontractors and communicate with compliance monitors promptly and accurately.
- Conduct regular oversight and monitoring of all Fiscal Agents and their contractors.⁴⁶
- Ensure that all awarded funds are compliant with State regulations.

If performance is insufficient or the project is not performing and making progress toward deliverables, the state will consider placing the agency on cash hold and possibly de-obligating funds.

Close-out Period

The grant close-out period refers to the 60-day period before the end date of the grant agreement or its funding being fully utilized. The close-out period is a critical piece in the cycle of a grant agreement. It is used by the grantee to liquidate remaining obligations and to prepare and transmit final fiscal and program documents. Additionally, the grantee should review and enter or close out participant data, ensuring all participant data are entered and captured accurately. The final invoice is due on the 20th of the following month after the end of the grant term, and the close-out report is due 30 days after the end of the grant term. Grant funds cannot be spent after the grant term ends, nor can pre-payment be made for activities occurring outside of the grant term. Any unspent grant funds will revert to the State of California.

Section Nine. Data Collection and Reporting

This section provides applicants with an overview of the data collection, reporting, and evaluation expectations and requirements that may apply to awarded grantees.

Collaboration with the HRTP Program Evaluation Team

Awarded grantees must comply with all administrative and reporting requirements. They must submit demographic information on the participants they serve, the services they provide to participants, and the outcomes participants achieve ("Data Metrics") to the CWDB using the Cal E-grants ("CEG") participant data system. Grantees are required to collect information for all fields listed in CWDB's Participant Data Fields Guide as a condition of funding.

A complete list of data variables awarded grantees are required to collect is included in Appendix B, along with the source of data. Full definitions of variables and response options are provided in the <u>Participant Data Guidance</u> webpage. Response options described in CEG allow participants to opt out of providing information

⁴⁶ This requirement ensures that all expenditures meet the cost category and limitation requirements of CWDB, that all Fiscal Agents are compliant with applicable laws and regulations, and provide technical assistance as needed.

for most variables, but grantees must still attempt collection via participant self-attestation or documentation supplied by the participant. Any information that establishes eligibility in a program is required and must be provided.

<u>Measuring Impact: How to Approach Participant Data Collection</u> provides additional guidance on CWDB's data security and confidentiality practices, along with the purpose of collecting participant data and some suggested best practices for collecting individual information.

HRTP grantees may define additional metrics and must document and report on progress throughout the grant term.

Grantees that do not comply with data collection and reporting requirements may be subject to de-obligation of any outstanding grant funds. All reporting requirements outlined in this RFA are subject to change to comply with all state and federal laws.

Grantees may be required to participate in a third-party evaluation of work achieved at the end of the grant term.

Measuring Partnerships

The CWDB seeks to comprehensively assess the impact of its HRTP grants. Doing so requires considering benefits to (1) trainees; (2) employers; (3) consumers and (4) the environment.

HRTP Common Metrics: Measuring Benefits to Trainees

The CWDB has established metrics for the HRTP 2025 program, which all Training Implementation and Expanding Project grantees must address in their report:

- % of the target number of project participants who completed training and/or obtained an industry-recognized credential.
- % of training project graduates with measurable skill gains (training/sector specific).
- % of training project graduates employed in training-related industry.
- Median training project graduate wages over time and compared to regional living wage targets, and
 regional occupational medians (pre-training and post-training). Participant post-exit wage data will
 be compared with the occupational median from the <u>Occupational Employment and Wage Statistics</u>
 (OEWS) survey.
- % of training project graduates with employer-provided benefits (healthcare, paid leave, meaningful path to retirement).
- % of training project participants who receive supportive services and type of supportive services received.
- % of training project participants receiving public safety net benefits during and following program completion.

All HRTP Common Metrics must be measured and reported in a way that examines results through an equity lens. This requires disaggregating results by gender, race, ethnicity, and other relevant demographic information.

HRTP grantees may define additional metrics and must document and report on progress throughout the grant term.

As noted in multiple studies of "job quality," workers seek better pay but also other indicators of quality work, including security, autonomy over task performance, health and safety, and a sense of support from

supervisors and coworkers.47

Measuring Benefits to Employers

There are several specific areas in which research suggests that employers see gains from a high-worker-investment, high-retention, high-quality employment model such as that described by the High Road approach.

Several distinct areas of potential gain are summarized in a <u>recent brief</u> from the workforce nonprofit, Jobs for the Future:⁴⁸

- Increased Worker Productivity and Engagement
- Lowered Business Costs
- Increased Business Profitability
- Higher Customer Ratings
- Enhanced Business Reputation

CWDB will assess employer impact through various approaches, including but not limited to semi-annual narrative report questions and a post-grant survey to employer partners. The survey will be administered directly to employer partners, and will include, but will not be limited to, questions on the following topics:

- Whether a training program was designed by the employer, or design of the specifics of the training program.
- Plans to continue training beyond the grant period.
- Results of training.

Measuring Benefits to Consumers

- A high worker-investment model follows a competitive strategy based on quality. This focus should directly translate to gains for consumers, particularly in certain areas.
- In healthcare, research substantiates gains both from a better-paid and better-trained workforce and from the ethnic or racial concordance of carers with patients.⁴⁹ Areas of the state that are most greatly underserved are those that are socioeconomically depressed and disproportionately people of color.
- CWDB will use participant data to evaluate the success of meeting equity goals for both trainees and communities served.

Measuring Climate Benefits

CWDB will collect information about the environmental impacts of the project via semi-annual progress reports (see example questions below):

- Please report any environmental benefits directly traceable to the employment of workers trained by your program if tracked.
- Please report any skills gained by workers, especially related to climate change.
- Do you receive additional funding from any climate-related agencies or organizations?
- Do any partner organizations in your project hold climate-related industry certifications?
- Describe the mechanisms in place to ensure worker input into project goals.
- Have specific climate-related goals been established in a plan agreed to by the project? Please provide details.

⁴⁷ Maestas, Nicole, Kathleen J. Mullen, David Powell, Till von Wachter and Jeffrey B. Wenger.2023."The Value of Working Conditions in the United States and the Implications for the Structure of Wages." *American Economic Review, 113 (7): 2007–47.*48 Jobs for the Future, "The Business Case for Investing in Talent": 2024

⁴⁹ See: <u>Proposed health care minimum wage increase: What it would mean for workers, patients, and industry - UC Berkeley Labor Center;</u> A wide body of research has found that racial/ethnic concordance among providers and patients is crucial to quality care (<u>PPIC 2014</u>, p. 7); however, Latinos, African Americans, and Native Americans are severely underrepresented in the physician workforce, and other health occupations e.g. behavioral health (California Future Health Workforce Commission 2019, pp. 5, 12).

Appendices

The appendices in this section contain examples, explanations, and concepts of standard contracting language and templates that will be included in the contract of awarded grantees.

Appendix A. Allowable Expenditure Guidance

Allowable Activities

Allowable costs must meet four primary criteria:

- 1. Substantiation that the cost was necessary and reasonable for proper and effective administration of all allocations.
- 2. The cost must be justifiable.
- 3. The cost must be allocable to the funding sources' activities.
- 4. The cost must not be a general expense required to carry out the Grantee's overall responsibilities (not supplanting).

However, even if the costs meet the prior four criteria, they must be approved within the Grantee's application work plan and budget; otherwise, they are not allowable. The state has the discretion to impose special conditions above and beyond the funding source, which would also determine the allowability of the costs.

While the proposed cost is allowable under the funding source, is it also reasonable?

"Reasonable" is defined as agreeable to sound judgment, not exceeding the limit prescribed by reason (not excessive), moderate in price, and a rational decision. Systems that guide this definition include those that are:

- necessary for the performance of the grant
- following sound business practices (procurement processes)
- following state and local laws
- following the terms of the grant; using fair market prices; acting with prudence under the circumstances; and having no significant deviation from established prices.

What are the guidelines for allocable?

"Allocable" is defined as capable of being allocated or assigned. A cost is considered allocable to a particular funding source/program to the extent it actually benefits the objectives of that program. Grantees may only charge in proportion to the value received by the funding source/program.

Example: The Project Director works 80% on the funded program (only 80% of the salary and benefits can be charged in the grant application). Above and beyond this definition, allocable also means that the cost must be related to the activities identified in the approved work plan.

When do I need to submit a Purchase Justification Form?

It is not necessary to include a Purchase Justification Form with the grant application. During the review process, if CWDB staff finds that there is a purchase of a single item or a group of items to serve the same purpose that exceeds \$2,500, the Contractor will be asked to submit a Purchase Justification Form for review and approval. This applies to any future contract amendments where purchases fall under this description.

Supplanting

Grant funds provided under HRTP 2025 shall not be used to supplant, replace, or duplicate funding from other sources or initiatives. Grant funds must be used exclusively for the purposes outlined in the grant application and for activities directly related to HRTP 2025 programming. Transferring or using grant funds from one initiative to support the activities of another initiative, or for purposes outside of the approved scope of the Grantee's HRTP 2025-funded project, is not allowed unless explicitly authorized in writing by CWDB.

Grantees must ensure that HRTP 2025 funds are used to enhance, rather than replace, existing funding or resources for target programming.

Allowability of General Costs

Grantees must follow the intent of the RFA to ensure the cost is necessary, reasonable, allocable, justifiable, and not supplanting. Any additional cost restrictions identified in the RFA would supersede allowable costs within this document.

Appendix B. Required Cal E-Grants Participant Data Fields

The information below describes the complete set of variables that projects will be required to collect and report to the CWDB. Parenthetical notes clarify the source of information for each variable.

The superscripts after the field names indicate the source of information for the field.

- (*) Indicates fields for which information is received directly from participants.
- (*) Indicates fields generated automatically by the Cal E-Grants System.
- (A) Indicates fields where the information is sourced from the administrative data maintained by the grantee.

Grantee Information

- Grant Title⁺
- Grant Name⁺
- Lead Agency Applicant Name⁺

Participant Information

- Participant ID⁺
- First Name*
- Last Name*
- Date of Birth*
- Does Participant have a Social Security Number?*
- Social Security Number*
- Gender*
- Transgender/Gender Nonconforming*
- Sexual Orientation*
- Address Line 1*
- Address Line 2*
- City, State, Zip Code*
- Race/Ethnicity*
- Individual with a Disability*
- Veteran Status*
- Employment Status*
- Individual Income*
- Household Income*
- Household Size*
- Unemployment Insurance (UI) Eligible*
- Long-Term Unemployed*
- Dislocated Worker*
- School Status*
- Highest Education Level Completed*
- Immigrant*
- Public Benefits Status*
- Foster Care Individual*
- Homeless Individual/Runaway Youth*
- Formerly Incarcerated/Justice-Involved*
- English Language Learner*
- Basic Skills Deficient/Low Literacy*
- Single Parent*
- Displaced Homemaker*

- Migrant/Seasonal Farmworker Status*
- Desired Occupation*
- Enrollment Date^A
- Has Participant exited the program?^A
- Exit Date^A
- Which services were provided?^A

Supportive Services

- Service Provider Name^A
- Supportive Service Name^A
- Service Start Date^A
- Supportive Service Status^A
- Supportive Service Type^A

Career Services

- Service Provider Name^A
- Career Service Name^A
- Service Start Date^A
- Career Service Type/Type of Internship/Work Experience^A
- Career Service Status^A
- Service Completion or Withdraw Date^A
- Reason for Withdrawing from Service^A

Training Services

- Training Provider Name^A
- Training Course Name^A
- Training Start Date^A
- Training Type^A
- Occupation of Training Description^A
- Occupation of Training (O*Net Code)^A
- Training Course Status^A
- Training Completion/Withdraw Date^A
- Reason for Withdrawing from Training^A

Milestones

- Skill Gain: Training Milestone^A
- Skill Gain: Skills Progression^A, Stabilized Housing*, Improved Health*, Improved Personal Finances*

Credentials

- Has Participant received a Credential?^A
- Credential Name^A
- Credential Type^A
- Date Attained Recognized Credential^A

Post-Exit Outcomes

- Post-Exit Employed*
- Post-Exit Holding Multiple Jobs*
- Post-Exit Employment Related to Training*
- Career Advancement for Incumbent Worker*
- Post-Exit Wages or Salary (quarterly)*
- Occupation Description*
- Occupation (O*Net Code)*
- Employer-Provided Benefits*
- Post-Exit DAS Registered Apprenticeship*
- Post-Exit Postsecondary Education*

Appendix C. Additional Resources

The CWDB encourages applicants to reference high-quality resources while completing their HRTP 2025 application and narrative responses. The following list contains federal, state, and external resources that may be used in addition to any preferred sources of information.

CWDB Resources

High Road Across California: HRTP Interactive Map, 2024

High Road Construction Careers Regional Map, 2024

High Road Training Partnership: High Road Overview, June 2018

HRTP Essential Elements: Worker Voice, June 2020

The California High Road: A Road Map to Equity, 2020

The California High Road: A Road Map to Job Quality, 2020

State Resources

California Air Resources Board, Health-Air Pollution Health Effects, 2024

California Department of Public Health, *Climate Change and Health Vulnerability Indicators*, December 21, 2023

Department of Health Care Access and Information, <u>Health Workforce Research Data Center Annual Report to the Legislature</u>, January 2024

Department of Health Care Access and Information, <u>Health Workforce Research Data Center Health Workforce</u> <u>Update</u>, September 2024

Office of Environmental Health Hazard Assessment, CalEnviroScreen 4.0, May 2023