

**AMENDMENT #2 TO PROFESSIONAL SERVICES AGREEMENT  
COUNTY OF MONTEREY & MONTEREY COUNTY BUSINESS COUNCIL (MCBC)**

**THIS AMENDMENT** is made to the AGREEMENT for Development Set-Aside services by and between **MONTEREY COUNTY BUSINESS COUNCIL (MCBC)**, hereinafter “CONTRACTOR”, and the County of Monterey, a political subdivision of the State of California, hereinafter referred to as “County”.

**WHEREAS**, the County and CONTRACTOR wish to amend the AGREEMENT to add additional services and to increase the total amount of the AGREEMENT due to the addition of services.

**NOW THEREFORE**, the County and CONTRACTOR hereby agree to amend the AGREEMENT in the following manner:

1. Section 2., “PAYMENTS BY THE COUNTY” shall be amended by removing, “*The total amount payable by County to CONTRACTOR under this Agreement shall not exceed the sum of \$200,000.00*” and replacing it with “*The total amount payable by County to CONTRACTOR under this AGREEMENT shall not exceed \$375,000.00.*”
2. EXHIBIT A – Paragraph 2 shall be amended by removing, “*MCBC FY2022-23 Exhibit B1*” and replacing it with “*MCBC FY2023-24 Exhibit B2*”.
3. EXHIBIT B – Shall be amended by adding Exhibit B2 to the agreement as, “*MCBC FY2023-24 Exhibit B2*”, attached hereto.
4. Except as provided herein, all remaining terms, conditions and provisions of the AGREEMENT are unchanged and unaffected by this AMENDMENT and shall continue in full force and effect as set forth in the AGREEMENT.
5. A copy of the AMENDMENT shall be attached to the original AGREEMENT executed by the County on July 1, 2021.

*This space left blank intentionally*

Agreement No. A-15602 for Development Set-Aside

IN WITNESS WHEREOF, the parties have executed this AMENDMENT on the day and year written below.

MONTEREY COUNTY

CONTRACTOR

\_\_\_\_\_  
Contracts/Purchasing Officer

DocuSigned by:  
By: Chris Steinbruner  
4F07948C4345496  
\_\_\_\_\_  
Signature of Chair, President, or  
Vice-President

\_\_\_\_\_  
Dated:

\_\_\_\_\_  
Chris Steinbruner, Chair  
Printed Name and Title

*Approved as to Fiscal Provisions:*

\_\_\_\_\_  
Dated: 7/26/2023 | 8:35 AM PDT

\_\_\_\_\_  
Deputy Auditor/Controller

DocuSigned by:  
By: Joe Foster  
9988BDE1E66C439  
\_\_\_\_\_  
(Signature of Secretary, Asst. Secretary, CFO,  
Treasurer or Asst. Treasurer)\*

\_\_\_\_\_  
Dated:

\_\_\_\_\_  
Joe Foster, Secretary  
Printed Name and Title

*Approved as to Liability Provisions:*

\_\_\_\_\_  
Risk Management

\_\_\_\_\_  
Dated: 7/26/2023 | 9:35 AM PDT

\_\_\_\_\_  
Dated:

*Approved as to Form:*

\_\_\_\_\_  
Deputy County Counsel

\_\_\_\_\_  
Dated:

\*INSTRUCTIONS: If CONTRACTOR is a corporation, including limited liability and non-profit corporations, the full legal name of the corporation shall be set forth above together with the signatures of two specified officers. If CONTRACTOR is a partnership, the name of the partnership shall be set forth above together with the signature of a partner who has authority to execute this Agreement on behalf of the partnership. If CONTRACTOR is contracting in an individual capacity, the individual shall set forth the name of the business, if any, and shall personally sign the Agreement.



# **WORKPLAN 2023 -2024**

## **MCBC MISSION**

**Forging cross-sector alliances to build a vibrant and prosperous Monterey County Business Community.**

## **BACKGROUND AND OVERVIEW**

The Monterey County Business Council (MCBC) is a 501(c)(6) nonprofit corporation comprised of professionals from business, government and education working together on countywide issues. All 12 cities in Monterey County are members. Since its founding in 1995, the membership only organization has promoted the concept of private-public partnerships by bringing business experience and techniques to the public arena in order to bolster workforce and economic development. As we venture into our third decade of work, the MCBC is at the forefront of fostering and developing regional assets and collaboration in areas such as economic growth, workforce, broadband deployment, leadership development, and an inventory of assets to better help create and retain jobs and businesses in Monterey County. The MCBC serves both business and government by providing collaborative leadership, promoting sustainability and global competitiveness of existing and emerging businesses, while reflecting our strong commitment to economic vitality, the environment and quality of life.

### **MONTEREY BAY PTAC - APEX ACCELERATORS**

The MCBC's economic development efforts were greatly enhanced in 2012 when it created and became the host organization for the Monterey Bay Procurement Technical Assistance Center (PTAC), now called APEX Accelerators. The Monterey Bay APEX Accelerators mission is to improve the economic condition of our region by assisting small and medium size businesses in applying for and obtaining local, state and federal government contracts. The Monterey Bay APEX provides procurement technical assistance to help companies sell their products or services to the appropriate government agency by offering confidential counseling at no cost to the client. The core of the procurement assistance program is counseling and education. The Monterey Bay APEX is staffed with four local counselors experienced in government contracting and provides a wide range of services, including classes, individual counseling and easy access to bid opportunities, contract specifications, procurement histories, and other information necessary to successfully compete for government contracts. Our APEX counselors have backgrounds in government acquisition, and all receive ongoing training to keep pace with continually evolving acquisition procedures and policies.

The Monterey Bay APEX will continue to develop partnerships with government agencies, universities, community colleges, local economic development entities, small business development centers and other business programs or local institutions providing additional contracting opportunities. It will also continue to educate area businesses on opportunities for obtaining and performing under federal, state and local contracts by providing workshops and training in collaboration with groups such as the California State University, Monterey Bay (CSUMB) Small Business Development Center (SBDC) and regional chambers of commerce.

## **SUPERVISOR SPEAKER SERIES/MEMBERSHIP LUNCHESES**

We continue our Supervisor Speaker Series to bring the public sector, private industry, and non-profit organizations a better understanding of what is happening countywide--- straight from each of the Supervisors. We hold the series in each supervisorial district and give the Supervisors the forum to discuss hot topics and issues both within their district, and countywide initiatives. Additionally, we address big issues like cannabis taxing and Laguna Seca funding and hear from speakers like John Narigi and the CEO's of local cannabis companies. We also give the microphone to new leaders who are handling issues within their respective industries, like Dr. Chad Harris, CEO of Natividad Hospital, Dr. Vania Quinonez, President of CSUMB and Mr. Michael Gutierrez, President of Hartnell College. Speakers this year include Sonia de la Rosa, new CAO of the County of Monterey, and new Sheriff Tina Nieto.

## **LEADERSHIP MONTEREY COUNTY**

In 2018, MCBC launched Leadership Monterey County. Previously, there were two leadership training organizations in the county, Leadership Salinas Valley and Leadership Monterey Peninsula. MCBC offered to take the lead to merge the two into a county-wide program and formulated a new 501(c)(3) organization with a board of directors comprised of board members of the Salinas Valley Chamber of Commerce and former board members of Leadership Monterey Peninsula.

Graduates of the program are encouraged to lead in the business, government, education, and not-for-profit arenas and enhance the economic vitality of the region. This program is designed to educate future leaders of the Monterey County Economic Opportunity Pillars: Agriculture, Tourism, Education, and Research. Mitchell Friedman, a professor at the Naval Postgraduate School, is the facilitator. As of this year, the program has graduated 150 participants.

## **MONTEREY BAY DEFENSE ALLIANCE**

The MCBC's crucial component of our support in furtherance of efforts to prepare our region for the next possible round of Base Realignment and Closure (BRAC). As part of such efforts, MCBC will continue to work with a regional approach by convening and providing administrative and logistical support to its meetings, which include members of the Monterey Bay Defense Alliance and faculty and staff from CSUMB, MIIS, NPS, Defense Manpower Data Center (DMDC), and the U.S. Army Training and Doctrine Command (TRADOC) Analysis Center (TRAC). Participants give updates on their research projects and collaborations, like research into topics such as using social science theory to understand social media data and current and planned research using social media data, such as dealing with foreign and domestic terrorism. Native language capabilities are crucial to such national security efforts. Further, a recent memorandum issued by the Assistant Secretary of Navy (Manpower and Reserve Affairs) Deputy Under Secretary of the Navy (Management) emphasized the Department of Navy's need to create a "data savvy workforce" to ensure the military "stays at the forefront of this rapidly evolving data- centric environment" in which

“information sharing, data analytics, and knowledge management touch all aspects of the workforce.” The participants in the meetings are at the forefront of such efforts and the MCBC will continue to work with our region’s military personnel and facilities to help ensure they remain at the forefront of such work and thereby better prepare to demonstrate that our regional military installations are vital to not only our local economy, but to national defense and security.

MCBC formed the Monterey Bay Defense Alliance with Representative Jimmy Panetta as an advocate for the group on national affairs. The Congressman laid out a series of strategies to help Monterey County retain its military installations. The group meets monthly, and Monterey Bay Defense Alliance also expanded the board to include representatives from Hospitality and Education—identifying the need to expand the efforts into other significant areas of the economy on the Monterey Peninsula. MCBC supported two large regional events with MBDA in 2022. One summit in October with Dr. Jefferey Lewis from Middlebury Institute of International Studies speaking about National Security interests in the Monterey Bay area. The second was the California Defense Communities Alliance (CDCA), “Next Generation of Public Partnerships Forum” held in Los Angeles and Sacramento. CDCA is a newly formed statewide alliance in support of the US military in California. It is supported by the Governor's Military Council, and strong encouragement of local advocacy. Recently, MBDA reported out with Congressman Panetta’s introduction of the Annual Regional Economic Impact Report. MBDA meetings have also featured VADM Ann Rondeau of the Naval Postgraduate School and former Commandant COL Phillip Deppert of the Defense Language Institute.

## **CENTRAL COAST BROADBAND CONSORTIUM**

Through part of this past year, MCBC provided support for broadband. Broadband is a critical infrastructure demand for developing business so many representatives from various industries and municipalities voiced their concerns in a productive and constructive manner. Past speakers and panelists have included Sunne McPeak, President and CEO of the California Emerging Technology Fund; Lisa Ludovici, Leslie Humphries and Nancy Castellanos of Charter Communications; Rene Mendez, City Manager, City of Gonzales; Ray Espinoza, CAO, San Benito County; Steve Blum, Central Coast Broadband Consortium; Tony Cricelli, CEO, Redshift; and Todd Porteous, Broker, Manager, Coldwell Banker.

## **LOCAL BUSINESS ADVOCACY**

MCBC will continue to advocate for business legislation at both the local and state level. However, **MCBC does not endorse political candidates.** This past fiscal year MCBC testified at city council meetings, authored letters of support for state legislation on broadband infrastructure. Additionally, MCBC was present for business-related issues being presented at City of Marina, City of Salinas, City of Pacific Grove and County Board of Supervisors meetings, as well as city planning

commission meetings and strategic planning sessions for multiple jurisdictions. MCBC is continuing to lead efforts on a

countywide “Local First” initiative, which encourages local cities to adopt a local preference policy for purchases by staff at the city. MCBC has met with multiple cities in Monterey County in expanding those guidelines. Monterey County Board of Supervisors and City of Salinas City Council have taken the lead and already have these policies in place, so the efforts will be directed at the remaining 11 cities that do not have it.

## **ECONOMIC VITALITY AWARDS – “COVID BUSINESS SURVIVAL AWARDS” GALA**

Taking a cue from the overwhelming dark cloud of COVID-19, MCBC opted to pivot the Gala this year to honor the local businesses who managed to take strong leadership roles in how COVID was addressed in Monterey County.

There were eight awards presented at the Gala. They are listed below for your reference.

1. Small Business Innovation- Stonies Taphouse and Bistro
2. Agriculture- Braga Fresh
3. Higher Education & Research- CSUMB
4. Hospitality & Tourism- Portola Hotel & Spa at Monterey Bay
5. Health & Wellness- Clinica De Salud Del Valle De Salinas
6. Non-Profit- Community Foundation for Monterey County
7. Creative & Technology- Virus Geeks
8. Lifetime Achievement Award- Mary Ann Leffel

The MCBC Board of Directors felt each of these organizations were champions of their respective industries and led their industry-standards to address the pandemic.

Lastly, and certainly not to be underestimated, the pandemic hit and MCBC took a strong lead in providing free webinars to over 2,400 small and large businesses through Zoom webinars for Monterey County business owners through 2020-2022. We are continuing the partnership with the County of Monterey in 2023-2024 with the one-time ARPA “Building Business Back” plan that will focus specifically on countywide business retention, and flood damage programs.

MCBC’s success with educational lunches and forums, Monterey Bay APEX, Leadership Monterey County, Central Coast Broadband Consortium and the Monterey Bay Defense Alliance has resulted in greater awareness of our County’s incredible resources and has broadened our base of assets, collaborations and successful entrepreneurial endeavors.

## **KEY PROGRAMS/PROJECTS - REQUEST FOR INVESTMENT**

### **I. Monterey Bay Procurement Technical Assistance Center (PTAC) – Now Called “APEX ACCELERATOR”**

Monterey Bay APEX Funding Request: \$125,000.00 (\$75,000 increase)

The Monterey Bay Apex Accelerator is providing free consulting to small and medium businesses in Monterey County, enabling them to apply and win government contracts in all sectors – local, state, and federal agencies. Our APEX is funded, in part, by a contract with the Defense Logistics Agency (DLA) and a match from the MCBC and its partners. Our local Monterey Bay APEX Accelerator has had enormous success nationwide, resulting in the acquisition of 15 other counties in California for counseling assistance. Additionally, the overwhelming success of contracts awarded in Monterey County alone has encouraged our APEX in confidently increasing our Workplan from the goal in 2018-2019 (\$500,000) and 2019-2020 goal (1000% increase to \$5,000,000) to doubling our efforts in 2021-2022 and again for 2022-2023 had a \$10,000,000 goal in local contracts awarded for Monterey County businesses. We want to grow the program in 2023-2024 by hiring two Monterey County bilingual business counselors, and grow to \$20,000,000 in local contracts, 250 jobs created or retained, and 75 contracts awarded to Monterey County businesses.

According to the Association of Procurement Technical Centers, nationwide in 2017, APEXs served over 48,000 clients and helped them win over \$20 billion in government contracts and subcontracts. That’s a return on investment (ROI) of \$571 for every \$1 in spending!<sup>1</sup>

The continued growth of this program is assured with the increased awareness of local businesses for contracting opportunities with state, local and federal governmental agencies.

#### Monterey Bay APEX Accelerator Performance Measures:

250 new jobs created and/or retained. \$20,000,000.00 in new contracts awarded for Monterey County small and medium-sized businesses. We have outperformed year after year and are requesting to grow the program.

---

<sup>1</sup> <http://www.aptac-us.org/contracting-assistance/successes/>



## II. Increase Small and Medium Size Business Outreach Efforts

Funding Request: **\$50,000** (same funding as previous 10 years)

MCBC key objectives for 2023-2024 include the following:

- To create greater alignment among the activities of business, government, education, media, health and foundation/community-based efforts.
- To build coalitions around key community issues and foster increased public- private partnerships.
- To develop strategies and programs that support the development of jobs and business opportunities.
- To work to improve the business climate to retain and expand existing businesses and the recruitment of new businesses; to keep economic development in the forefront of municipal priorities.

In order to fulfill those objectives, MCBC will continue to provide facilitation and implementation of programming supporting the main economic drivers of Monterey County. The flexibility of industries remains a major topic, but it can be presumed the major industries continue to fall under the Monterey County Economic Opportunity Pillars: Agriculture, Tourism, Education, and Research. These efforts aid in accelerating regional development of small and medium-size businesses and the creation and retention of jobs.

Overall, MCBC will continue to execute the facilitation of the Leadership Monterey County program. MCBC will also continue to educate and engage the public, among other things, highlighting the success of our initiatives and partners through events such as our Supervisor Speaker Series, Hot Topics forums and Annual Economic Vitality Awards.

MCBC will also continue to advocate for the region's military missions through the Monterey Bay Defense Alliance which seeks to prepare the County for the next anticipated BRAC round. In addition, the MCBC continues to work with Congressman Panetta's staff and regional partners on The Monterey Bay Defense Alliance. Monterey County encompasses a wide variety of Department of Defense and National Security organizations (DoD/NS), and in order to gain maximum funding for these organizations and to prepare for the next round of BRAC, Team Monterey has fostered a collaborative team environment between these organizations to identify common areas of interest and capability for partnering. These organizations include: Fleet Numerical Meteorology & Oceanography Center; the Naval Research Laboratory; the Naval Postgraduate School; the

Defense Manpower Data Center; the Defense Language Institute; U. S. Coast Guard Monterey; Fort Hunter Liggett; Camp Roberts; and the Defense Personnel Security Research Center.

Partners in all the aforementioned activities include, but are not limited to, the following: local Chambers of Commerce; Small Business Development Center, the Association of Monterey Bay Area Governments; Monterey County special districts; the Monterey County Office of Education; CSUMB; MPC, Hartnell College; MIIS; NPS; the Workforce Development Board; Small Business Administration; trade organizations, and all cities of Monterey County. Monterey County is internationally recognized for its artistic and cultural output, festivals and institutions, which also encompasses our growing wine and culinary reputation, making the County a desired tourist destination for reasons other than our stunning natural beauty.

The MCBC continues to leverage its website and growth of social media platforms and gain more followers through Facebook, Instagram, Twitter and LinkedIn, publicizing its ongoing efforts, increasing community awareness and fostering collaboration with new and existing partners throughout the County. The County of Monterey is recognized as a sponsor on all promotional and program materials. The County is also recognized in weekly emails to over 1500 businesses and our Friday Facts, a weekly newsletter featuring articles about new and important business-related events in Monterey County.

Performance Measures:

MCBC will provide facilitation and implementation of programs that support County of Monterey Economic Opportunity Pillars: Agriculture, Tourism, Education, and Research, designed for growth in awareness and retention and creation of jobs – **6 programs**.

MCBC will host Economic Activities promoting business advocacy, leadership, and public engagement, designed for growth in public engagement and outreach for economic development – **16 programs**

\*\*\*

**TOTAL FUNDING REQUEST FOR 2023-2024: \$200,000**