



Site Selection Assistance





Guidance on Statewide Site Selection Assistance for Economic Development Project Opportunities

The following provides an overview of the “Site Selection” service process that GO-Biz provides to clients/companies.

We’ve attempted to fully outline this process in detail however, each “Project” has unique needs and GO-Biz team members often tailor this service to fit the exact requirements of the client.



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Overview

- As a business unit within the Governor's Office of Business and Economic Development ("GO-Biz"), the California Business Investment Services ("CalBIS") team serves existing and prospective employers, corporate executives, business owners, and site location consultants who are considering California for business investment and expansion.
- CalBIS works cooperatively with federal, regional, local and other public and private institutions and trade organizations in attracting, retaining, and helping businesses grow and succeed in California.



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Overview (continued)

- In support of its duties, the CalBIS unit works with the assistance of local and regional governments as well as economic development and industry supporting organizations to identify and elicit real estate property as requested by those interested companies and/or their consultants.
- Provided at no cost to the client, CalBIS fulfills this service through the use of discreet, customized, site selection search activities based on specifications provided by the interested party.



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Overview (continued)

- CalBIS site selection search activities include the collection of confidential and sensitive corporate and proprietary information which may be used to prepare and distribute a *Request for Information* (“RFI”) to regional geographic areas throughout the state.
- CalBIS uses information collected through its network to assist the client in determining suitable locations for its proposed use.
- If/once a location is selected by the client, CalBIS serves as a facilitator to assist the client with assimilating into any community of its choice. Under the Public Records Act, the exemption for corporate proprietary information is contained in Government Code section 6254.15.



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Process

1. Initial inquiry, collection and qualification of information from client to CalBIS
2. CalBIS RFI issuance to statewide regional network based on the client's geographic preference
3. Response information collected by CalBIS from regional network
4. CalBIS preparation and response to client with findings
5. Client review, short listing (or selection) and subsequent follow up as needed



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Information Collected from the Client

- General information: a concise overview of the proposed business activity
- Occupancy information: estimated investments in land, building and equipment; occupancy, operation and expansion schedule; ranking for site selection factors
- Land and building requirements: minimum and maximum requirements for land acreage, building size and building components; acquisition preferences (purchase or lease) including lease requirements; other requirements including ceiling height, number and position of loading dock doors, parking, and storage
- Utility requirements: immediate and full operation estimates for electricity load demand, usage, voltage, amperage, and operating schedules; natural gas; water; waste water; communications and identification of any potential environmental issues
- Transportation requirements: truck, air, rail and shipping (including frequency)
- Employment information: number of employees at current facilities, at the new facility, transfers and new hires; job descriptions and proposed wages
- Ranking for geographic preference within the state
- Competitors: other states and foreign countries
- Special requirements: if any



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Geographic Selection

Clients rank geographic areas of interest using the following map.

Distribution

CalBIS will issue a RFI only to those regions ranked and selected by the client. Regional distribution includes all counties, all cities and towns, and to all regional economic development organizations (to the extent they exist or serve the area). RFIs are sent to the local Investor Owned Utility provider as a courtesy. All RFIs are sent by e-mail.





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RFI Content

RFIs generally contain the information and categories collected in the Site Selection Worksheet and also include:

- Project tracking number (e.g. "CBIS12345XX")
- A descriptor: Either a fictitious project name (e.g., Project Alpha or Project Zinc) or a few words to describe the proposed use or company activity (e.g., cosmetic product testing laboratory or component manufacturing)
- General information or additional considerations about the project (e.g. property must have adequate parking, property must be rail served)
- Instructions and deadlines for submission
- *Note: **All projects are confidential.**



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Responses: To the extent available, please include as much of the following.

- Pertaining to the region or locality:
 - Regional/local overview and general information
 - Quality of life measures (e.g., options for dining, shopping, entertainment, recreation, cultural arts, housing, commuting, and schooling)
 - Concentration and proximity of related industry clusters (if any)
 - Availability and proximity to commercial transportation infrastructure
 - Educational attainment level and proximity to available workforce
 - General cost of doing business in the area
 - Availability, or general willingness to consider making available, any applicable local incentives that best match or support the client's proposed activity or use (e.g., sales tax sharing, Capital Investment Incentive Program, fee reductions or waivers, free expedited processing, assignment of a dedicated case manager, etc.)



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Responses (continued)

- Profile or summary of real property that best matches the client's requirements:
 - Building or land size (acreage/square footage)
 - Site address or description
 - Zoning and status of entitlements
 - Available utility infrastructure
 - Photographs, site plans, plot plans or drawings
 - Pricing and terms
 - Scheduling considerations with respect to site availability
 - Potential for or known environmental or special issues
 - Contact information



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Deadlines

All response submissions should be sent to CalBIS by e-mail on or prior to the posted due date.

CalBIS endeavors to allow for as much time when possible but normally advises clients to allow for a minimum of two weeks for responses.

Sometimes however, a client or consultant may require a faster response.

Responses must include the Project Tracking Number in the subject line of the e-mail.

Failure to include the Project Tracking Number may cause the submittal to be missed or overlooked.



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Site Tours

- Should the location you present be selected by the client, CalBIS may return to you for additional information needed for client review as well as for scheduling a site visit.
- Most site tours primarily involve the client and site contacts.
- Site tours typically include the following:
 - Introductions between the client, or its representative, with the property owner, or its real estate broker or representative
 - Physical inspection of the site or building and surrounding neighborhood
 - Verification of utility services
 - Confirmation of pricing and scheduling



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General Recommendations and Online Resources

CalBIS typically provides its clients with information in the same format it is received from responding areas. In order to streamline and expedite the response process, responding areas may choose to consider developing a response template for use when responding to CalBIS RFIs.

IEDC – Economic Development Reference Guide

http://www.iedconline.org/clientuploads/Downloads/IEDC_ED_Reference_Guide.pdf

IEDC – Site Selection Data Standards <http://www.iedconline.org/web-pages/resources-publications/site-selection-data-standards/>

Development Alliance – Getting Started: Putting Together the Site Selection Data Standards http://www.developmentalliance.com/pdf/whitepaper_0206.pdf



Thank you

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