

**Appendix A**

**Application: Request for Proposals 218**

**Nonprofit Sustainability Initiative**

***Real Estate Acquisition and Capital Needs Assessment***

**City and County of San Francisco**

Office of Economic and Workforce Development



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| **APPLICATION DETAILS AND INSTRUCTIONS** |

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**Brevity and Style Guide**
There are character counts for narrative responses as a way to help you write informative, yet concise answers. To adhere to the character counts for each of the answers, consider using high-level, bullet-point style information about your organization and programs. You are welcome to use any commonly accepted abbreviations when responding to questions, unless instructed otherwise.

**Other Helpful Tips**

* Instructions and guidance on information to include in your responses are in italicized font throughout this proposal template. In preparing your proposal, please address all questions in response to the scope of work. Pay particular attention to and address in full; minimum qualifications, preferred qualifications, and any program area-specific questions.  Proposals are evaluated based on clarity, substance and measurable results.
* Be sure your email address is correct so that you will receive submission confirmations and RFP notices.
* You may type directly into this document or copy and paste answers from another document. Note that pasting from a word processing program into appropriate narrative fields will work, but formatting may need to be adjusted. If you subsequently convert or save this form prior to submission, formatting such as bullets, numbering, icons, images, etc. may be lost.

**Submitting**
Applications will be accepted until **5 P.M. PST on Wednesday, November 24, 2021.** When you are satisfied with your completed application packet, email it to: **oewd.procurement@sfgov.org**

Proposal Packages must include the application and all required, relevant, and requested addenda and forms. See “Proposal Package Checklist” at the end of this document for additional details on required items. You will receive an automated e-mail response to indicate that your submission was received. You will be responsible for ensuring that all required questions have been addressed and that all supplementary materials have been submitted on or before the deadline. **Note that electronic submission file sizes must be compatible with City email server limits (34MB)**, and it is your responsibility to ensure that the files submitted are all received by deadlines established to receive your submission. If you are submitting supplementary materials (such as work samples, photos, or other large files) in support of your proposal, you may send more than one email with attachments but you must indicate which proposal the files are pertaining to. Any subsequent email subject line(s) – particularly if files are coming from multiple agency representatives – should read **“Supplementary Attachments for (Agency)’s proposal to RFP #218”**

### QuestionsIf you have any questions when completing this application, please email oewd.procurement@sfgov.org. A list of substantive questions and answers will be posted to the OEWD website (link below) for review by all interested parties by Tuesday, November 16, 2021. See RFP and appendices for full terms, conditions, and instructions. All materials related to this RFP are available at <http://oewd.org/bid-opportunities/>RFP-218.

***All materials must be received on or before the deadline to be considered as part of the complete proposal package.******The electronic receive date and time will be established by the date/time assigned by the City email server upon receipt of the electronic message by the City email server.******Early submission is highly encouraged. Late submissions will not be considered.***

**Program Area Summary:**

OEWD is seeking proposals from nonprofit organizations to provide direct financial assistance to nonprofits for expenses related to space acquisition, and professional services related to acquisition planning and capital needs assessment. OEWD anticipates allocating funding of $2,316,000 in Fiscal Year 2022-23 and $2,200,000 in Fiscal Year 2023-24 for grants to be awarded under this program area. Budget targets for distinct pieces of work are described below.  Proposers should demonstrate compliance with these limits as part of their budget narrative.

The scope of work for the recipient(s) in this program area may include (but are not limited to) the following:

* Direct Financial Assistance  ($2,000,000 of total budget request each fiscal year)

The selected intermediary/ies will put out a call for proposals from nonprofits based in San Francisco, and applications will be reviewed by a racially and ethnically diverse panel consisting of City agency staff, and other experts from related fields. The selected intermediary or intermediaries will administer funds by providing technical assistance and direct financial assistance to tax-exempt 501c3 organizations with a demonstrated track record of providing substantial services and quality of life resources to low-income San Francisco residents. particularly those that have previously lacked large non-municipal contributions, but have secured some recent public or philanthropic investments; demonstrate success in pursuing community engagement strategies; show support for their efforts from multiple sectors; and are deeply rooted in communities of color, low-income and marginalized communities. Eligible expenses will be proposed by the intermediary/ies and may include but are not limited to costs for acquisition of deed-restricted nonprofit space.

* Technical Assistance & Administration ($316,000 in FY22-23 and $200,000 in FY23-24 of total budget request)

Activities under this section may include:

* Work with OEWD to identify and prioritize properties to activate
* Assist nonprofit businesses in representing them, negotiating leases relevant toacquisition planning, assessing zoning and permitting, and drafting letters of intent.
* Assist nonprofit businesses in preparing budgets and proposals necessary to secure real estate resources
* Provide OEWD with real estate data such as development pipeline information, tenants in the market, and aggregate demand
* Provide in-depth consultations and other forms of individualized technical assistance related to acquisition planning; with the underlying goal of assisting nonprofits in communities of color, low-income and marginalized communities to plan for long-term facilities, thus helping maintain and expand vital services and resources.
* Provide asset reserve analyses and/or capital needs assessments to nonprofit organizations that own their facilities; these analyses and assessments will allow nonprofit organizations to plan for the long term maintenance and viability of their facilities, thus helping to insure the physical integrity of affordable community spaces where services can be provided to low-income households.

The intermediary/ies must provide annual reports describing assistance offered and status of nonprofits assisted, and an evaluation of impact of investment. The intermediary/ies must be able to sub-grant awarded funds to San Francisco nonprofits and successfully manage all accounting associated with grant awards, contracting and reimbursements. The intermediary/iesmay be required to provide monthly fiscal and programmatic updates to OEWD.

**Target Population**

* The agencies benefitting from these funds should substantially serve communities of color, low-income populations, and marginalized populations.

**Minimum Qualifications**

* Applicant must be a fully established nonprofit entity eligible to do business with the City and County of San Francisco.

**Preferred Qualifications**

* A minimum of three (3) years of experience providing real estate assistance to nonprofits, and a minimum of 20 clients served
* Experience managing the type of program/projects proposed in a city of similar or greater size than San Francisco
* Key personnel at the agency or within the project team with grantmaking and real estate development experience in the type of program/project proposed

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| **PART I. APPLICANT PROFILE** This section should include information for the entity that will hold the contractual obligation for the proposed project. Please note that OEWD is not accepting proposals from fiscal sponsors under this RFP. All fields marked by an asterisk (\*) are mandatory; enter N/A if not applicable. |
| **Applicant Name\*** *(75 characters)**e.g. Name as shown on your 501(c)(3) letter and to whom contributions are payable* |  **APPLICANT NAME** |
| **Doing Business As (DBA) or Also Known As (AKA), if applicable** *(50 characters)* |  DBA |
| **Address\****Please provide the address for your agency’s headquarters (“Street Address” should include Floor, Unit or Suite #, if needed)*  | [Street Address][City], [State] [Zip] |
| **Web Address\*** | [Website] |
| **Main Phone including area code\***   | [Main Phone] |
| **Executive Director/CEO Name\*** | [ED/CEO Name] |
| **Executive Director/CEO Title\*** | [ED/CEO Title] |
| **Executive Director/CEO Direct Phone\*** | [ED/CEO Phone] |
| **Executive Director/CEO Email\*** | [ED/CEO Email] |
| **City and County of San Francisco Supplier Status***Unless otherwise approved by OEWD, all applicants must be able to become a City Supplier within 10 days of notice of an award in order to begin contract negotiation. For more details, please visit* [*https://sfcitypartner.sfgov.org/*](https://sfcitypartner.sfgov.org/) | Current San Francisco Supplier or Bidder Number: [1234567890]  [ ]  Not a current San Francisco Bidder or Supplier |
| **Agency’s Federal Tax ID number** (also known as Employer Identification Number/EIN). If you do not have this information readily available, you can look it up on this site: <https://apps.irs.gov/app/eos/>  | [EIN] |

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| **POINT OF CONTACT FOR THIS APPLICATION**If another individual will serve as the primary point of contact for this application, please list their contact information here. This person should be authorized to clarify programmatic and budgetary questions on behalf of the Lead Applicant. |
| **Primary Point of Contact Name\***[Contact Name] | **Primary Point of Contact Title\***[Contact Title] |
| **Primary Point of Contact Direct Phone\***[Contact Phone] | **Primary Point of Contact Email\***[Contact Email] |
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| **PARTER AGENCIES**If this application includes funding for other agencies that will serve as sub-grantees, please list them below and briefly describe their role in the project, e.g. “(Agency) will provide outreach services.” You may list nonprofit organizations, for profit organizations, public entities or individuals (sole proprietors) that make up your project team in this section. |
| [Agency Name] | Role in Project |
| [Agency Name] | Role in Project |
| [Agency Name] | Role in Project |
| [Agency Name] | Role in Project |
| [Agency Name] | Role in Project |
| [Agency Name] | Role in Project |
| **APPLICANT’S ORGANIZATIONAL BUDGET INFORMATION** |
| **Applicant Total Organizational Budget\* $[Applicant Budget]** | *Please list the total organizational budget for the Applicant for the last completed fiscal year****.*** *Please submit the Applicant’s organizational budget with your proposal packet as a supporting document.* |
| **REQUESTED BUDGET AMOUNT** |
| **Total Proposed Project Budget\* $[Proposed Project Budget]** | *This field is the amount requested for funding through this proposal, and should match the number in Column E (“Requested Budget Amount”) of Appendix B - Budget Template. This response should not include leveraged resources. Please make sure that leveraged resources are listed in Column F of your Proposal Budget Template (Appendix B) and described in the Financial Management and Budget section of your proposal narrative (see below).* |

**PART II. PROJECT DESCRIPTION**

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| **Introduction** | **Character Limit** | **Point value** |
| **Project Title** |  100 characters | N/A |

**PROJECT TITLE**

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| **Section 1** | **Point Value** |
| **Applicant Qualifications and Staff Assignments** | **30 points** |

*This section should briefly address the principal objectives of the proposed project, and establish the applicant’s professional qualifications and the experience of proposed partners, sub-contractors and staff. The applicant should detail past experience and track record implementing projects similar to the proposed activities. The applicant should provide an overview of staff assignments.  Details may include how staff will be accessible and available to individuals and/or organizations receiving services, the relevant experience of staff members, and the distribution of workload within the project team.*

Specific questions in this area:

1. **Briefly describe your organization’s mission, values, and history providing services to residents, nonprofits and businesses in San Francisco.** (Limit: 1,000 characters)

Mission & Values

1. **Describe your staffing plan for the proposed project** (Limit: 3,000 characters). Please answer all of the following in this section:
	1. List the names, titles and qualifications of staff, and partners that will make up the project team. If you do not have a person identified yet (e.g. if you have a vacant position), please provide information on the status of the hiring process.
	2. List any subcontractors such as project managers, engineers, architects or firms that may provide services.
	3. How will work be distributed within the project team?

Staffing Plan

1. **Describe the project team’s past experience successfully implementing regranting projects and technical assistance for real estate activities, including grants or contracts with the City of San Francisco or other funders.** You may include details on active/ongoing projects as well as prior/completed projects. Please be sure to highlight successful outcomes for the target populations or neighborhoods in the program area. (Limit: 2,000 characters)

Past Experience

1. **Language Capacity and Cultural Competencies.** (Limit: 2000 characters)Indicate the languages spoken by the project team, and the team members’ proficiency:

a. Level 1 – Elementary proficiency
b. Level 2 – Limited working proficiency
c. Level 3 – Professional working proficiency
d. Level 4 – Full professional proficiency
e. Level 5 – Native or bilingual proficiency

Are there any specific cultural, professional, educational or other skills that will help the project team deliver the proposed project?

Language Capacity and Cultural Competencies

1. **Hourly Rate.** The Business Development Division has a standard hourly rate cap of $175 for nonprofit consulting, though organizations with extensive and/or specialized experience may be paid more. Partners who elect to use consulting rates should include all direct and indirect costs in the rate (often referred to as a “blended rate”) and may bill for consultants and deliverables.

Are you willing to be compensated at or under the Business Development Division’s hourly rate cap of $175 per hour?

[ ]  Yes

[ ] No (If you answer no, please answer question below)
**What is your organization’s blended hourly rate?** Please detail the costs that are included in your blended hourly rate (Limit: 1000 characters)

Blended Rate

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| **Section 2** | **Point Value** |
| **Approach, Activities and Outcomes** | **40 points** |

*This section should outline a plan of action that describes in sufficient detail the specific scope of services applicant(s) proposal and how the proposed work will be accomplished. The plan should address all functions and activities for which applicants seek funds. Cite factors that might accelerate or decelerate work, explain rationales for strategies selected, and describe any unique or unusual features of the proposed project, such as design or technological innovations, cost or time saving strategies, or methods to increase engagement of targeted stakeholders in services. Include and make clear the organizations, cooperating entities, consultants or key individuals who will work on the proposed activities, with a brief description of their contributions and qualifications.*

* 1. **Clearly state your approach to the project.** (Limit: 4,000 characters). Provide detailed goals and objectives, and describe any evidence-based practices that inform your project design.

Approach

* 1. **Describe the services to be provided.** (Limit: 4,000 characters) For each service component, provide detail on the following, as appropriate: types of activities; number of clients served; number of hours; frequency of services; location(s) of services; and methods that will be used to deliver services.

Services

**3. Provide a project timeline.** (Limit: 3,000 characters) Please include all major milestones and target dates, as appropriate, including key dates for regranting milestones. Describe any factors that might speed or hinder implementation of the project, and explain how you will manage unanticipated project hurdles, should they arise.

Timeline

**4. Describe your success, experience and expertise working with municipal entities to advance racial equity and anti-poverty strategies.** Please reference experience navigating legislative constraints and procurement policies. (Limit: 2,000 characters) Describe specific engagement strategies that you will use to reach target populations identified in the RFP.

Equity and Anti-Poverty Strategies

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| **Table of Client Activities and Outcomes** If applying to provide Nonprofit Sustainability Initiative services; provide a completed table detailing the client activities and outcomes. The activities and outcomes prepopulated in the charts below are suggestions and recommendations. Complete those that apply to your proposed program design; enter 0 or N/A if you do not anticipate providing the suggested activity. You may also propose and provide details on additional activities you anticipate providing in the empty rows below. |

**Table of Possible Activities and Outcomes for Nonprofit Sustainability Initiative**

**Table of Possible Client Activities for this Proposal**

|  |  |  |
| --- | --- | --- |
| **Activity** | **Goal #** | **Outcome** |
| **Nonprofits participate in financial assistance informational events** | **#**Goal **Nonprofits attended**  | **Nonprofits complete an application for acquisition funding**  |
| **Nonprofits awarded funds for space acquisition** | **#**Goal **Nonprofits awarded** | **Low-income residents can access services from trusted providers in high-quality facilities** |
| **Nonprofits complete capital needs assessments** | **#**Goal **Nonprofits completing assessment** | **Low-income residents continue to access services from trusted providers in high-quality facilities** |
| **Nonprofits receive acquisition planning consultations** | **#**Goal **Nonprofits completing scoped consultation** | **Trusted providers of services led by and centering Black, Indigenous, Latinx, API, low-income and marginalized communities advance self-determined goals to attain permanent facilities.**  |
| **Nonprofits receive financing resource referrals** | **#**Goal **of resource referrals** | **Nonprofits attain grants, loans and financial resources for acquisition projects** |
| **Nonprofits receive pro bono service referrals** | **#**Goal **of pro bono referrals** | **Nonprofits secure valuable human resources** |
| [Additional Proposed Activity Metric] | **#**Goal | Outcome |
| [Additional Proposed Activity Metric] | **#**Goal | Outcome |
| [Additional Proposed Activity Metric] | **#**Goal | Outcome |
| [Additional Proposed Activity Metric] | **#**Goal | Outcome |
| [Additional Proposed Activity Metric] | **#**Goal | Outcome |
| [Additional Proposed Activity Metric] | **#**Goal | Outcome |
| [Additional Proposed Activity Metric] | **#**Goal | Outcome |
| [Additional Proposed Activity Metric] | **#**Goal | Outcome |

**Table of Possible Non-Client Activities for this Proposal**

*Note: When adding dates to this table, please format as MM/DD/YYYY*

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Unit of Measure** | **Description** | **Goal #**  | **Start Date** | **End Date** |
| **RFP issued for nonprofit space acquisition** | Description | **#**Goal | Start Date | End Date |
| **Panelists review nonprofit proposals** | Description | **#**Goal | Start Date | End Date |
| **Nonprofits notified of panel decision** | Description | **#**Goal | Start Date | End Date |
| **Square feet attained by nonprofits**  | Description | **#**Goal | Start Date | End Date |
| **Jobs retained** | Description | **#**Goal | Start Date | End Date |
| **Engagement events or presentations** | Description | **#**Goal | Start Date | End Date |
| [Additional Proposed Activity Metric] | Description | **#**Goal | Start Date | End Date |
| [Additional Proposed Activity Metric] | Description | **#**Goal | Start Date | End Date |
| [Additional Proposed Activity Metric] | Description | **#**Goal | Start Date | End Date |
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| [Additional Proposed Activity Metric] | Description | **#**Goal | Start Date | End Date |

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| **Section 3** | **Character Limit** | **Point Value** |
| **Performance Measurement and Reporting** | **4,000 characters** | **15 points** |

For this section, provide a narrative – limited to 4,000 characters – describing the following:

* How data on project activities and outcomes will be collected and reported.
* Measures that will be developed and/or used to determine the extent to which the project has achieved its stated objectives
* How data will be used to determine whether the needs identified are being met and whether project results are being achieved
* Any processes and procedures that are or will be in place to determine whether the project is being conducted in a manner consistent with the work plan and how effectiveness and efficiency will be improved
* How the outcomes proposed and measured will demonstrate positive impact based on the Scope of Work outlined within the program area.

Performance Measurement

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| --- | --- | --- |
| **Section 4** | **Character Limit** | **Point Value** |
| **Financial Management and Budget** | **4,000 characters** | **15 points** |

Please provide a brief narrative – limited to 4,000 characters – detailing the financial management of the organization. In this section, you should respond to the following, as applicable:

* Describe the key features of your organization’s financial tracking system and confirm it is capable of generating all financial information needed for required reports, including data needed to monitor, evaluate and if necessary, modify program performance.
* Describe in detail any cost allocation plan utilized when costs are chargeable to more than one cost category, or to more than one program and/or funding source.
* If proposing a management fee/fiscal fee, identify how the requested percentage was identified.
* Provide a narrative justification for items in the budget
* Provide details on any matching or leveraged funds including anticipated source, amount, and restrictions.  *Note: in addition to your written narrative (limited to 4,000 characters), submit a proposed budget for the project using the budget template available on the RFP 218 website (“Appendix B”).* In addition to your response to this section, Panelists will also score this section based on review of Appendix B (Budget) as well as your overall organizational budget.

Budget Narrative

**Submission Authorization**

* I agree that I am an owner or officer of the proposing organization who is duly authorized to bind the Applicant.
* I agree to accept all conditions, provisions, requirements, and specifications contained in the City and County of San Francisco Request for Proposals. (It is the responsibility of the Applicant to ensure that all named partners are in agreement with the proposal prior to submission.)
* I agree that the Proposal shall be binding for no less than one hundred twenty (120) days.
* I understand that, if selected, my organization must comply with City and County ordinances and contracting requirements including general liability and auto insurances, compliance with equal benefits ordinance, and current SF business tax certificate, if applicable.
* By submitting this proposal, I attest that my organization is not currently debarred or suspended from participation in local, State or Federal programs.

I certify that the information provided in this application is true:

**Printed Name of Executive Director, Chief Executive Officer, Board Chair or other duly authorized representative:** NAME

**Date:**

**Proposal Package Checklist**

The following items must be completed and included in the application package.

 **Templates provided as Appendices to RFP 218:**

[ ]  **Appendix A, Application** template – This template includes the question set that all applicants must respond to.

[ ]  **Appendix B, Proposed Budget** template– Please list your proposed project budget on this template and submit it with your application.

[ ]  **Appendix C, Board and Staff Composition Chart** template – Please list all current Board information for your organization and submit it with your application.

**Additional required attachments:**

[ ]  **Organizational Budget** (no template) – Organizational Budget for the current or last completed Fiscal Year for the Primary Applicant, the entity that will hold the contractual obligation if awarded (no template provided)**.**

[ ]  **Organizational Chart** (no template) – Organizational Chart for the Primary Applicant, the entity that will hold the contractual obligation if awarded (no template provided)**.**

Only Proposal Packages submitted using the approved templates with all required attachments will be considered for funding.

Alternative formats of templates may also be provided to individuals with disabilities by contacting oewd.procurement@sfgov.org before the submission deadline.

**Proposal Package Submission**

When all items are complete, submit the entire Proposal Package by **5:00 p.m. on Wednesday, November 24, 2021**. Complete proposal packages must be emailed to oewd.procurement@sfgov.org and received by the City server by 5:00 p.m.

Upon successful submission, you will receive an email response to confirm your submission was received by the deadline. Save this information for future reference.