**Appendix A: Application Questions - Request for Proposals 122**

### This Appendix includes the questions that will be asked in the application to OEWD Request for Proposals (RFP) #122. You may use this document to draft your responses, but please be sure to enter your responses into the online application by the deadline -- Wednesday, March 31, 2021 at 5:00 P.M.

**To access the online application, visit the following website:**

[**OEWD RFP 122 Website**](https://oewd.org/bid-opportunities/rfp-122)

### There is no need to upload this Appendix with your application. Please make sure you upload all required attachments listed on the Proposal Package Checklist found at the end of this document.

### If you have any questions about the content of this appendix, OEWD is here to help! Please submit questions to [oewd.procurement@sfgov.org](mailto:oewd.procurement@sfgov.org)

**PART I. APPLICANT PROFILE**

In this section, provide all organizational contact information. Note that if you are a **fiscal agent**, you will need to complete an applicant profile for both your organization and your subgrantee.

* The **Primary (Lead) Applicant** is the organization or firm that will hold the contractual obligation with the City.
* If you are applying as the fiscal agent for another entity, your application must also identify a **Program** **Lead**, which is the entity delivering services.

Information requested in the **Applicant Profile** section includes:

* Organization name
* Address, website and main phone number
* Executive Director name, contact information
* Proposal point of contact name, contact information
* Type of entity (nonprofit, for-profit, etc.)
* Supplier (City vendor) Status
* Local Business Enterprise (LBE) status
* Information about your Board of Directors (see details below)
* Information on additional organizations involved in delivering the program
* Overall organizational budget (upload)
* Program area in RFP 122 you are applying to. **Note – you may not select multiple program areas.**

**Staffing and Board information.**

Your application requires basic information about your staff and board. These questions should be answered for the Primary (Lead) Applicant and, if that entity is applying solely as the fiscal agent, we will also need Staffing and Board information for the Program Lead.

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| **STAFFING AND BOARD COMPOSITION CHART** | |
| **Executive Director Tenure** *How many years (or months, if under one year) has your Executive Director/CEO been in this role?* | *Enter your Executive Director/CEO/President’s tenure in years/months.* |
| **Total Number of Full Time Equivalent (FTE) Employees** | *Provide the FTE number for the whole organization, not just the program being proposed.* |
| **Number of Governing Board Members**  *Exclude Advisory/Emeritus members.* |  |
| **List of Current Board Members** *The Board of Directors should include San Francisco residents and/or members with knowledge of the needs of low and moderate income San Franciscans from the target neighborhoods/populations described in the RFP. Fiscal sponsors should only list governing Board members; Program Lead organizations can list Advisory Board members, if applicable.* | |
| |  |  |  |  | | --- | --- | --- | --- | | Name | Years (or months) on Board | Home Neighborhood\* | Job or Relevant Experience\*\* | |  |  |  |  | |  |  |  |  | |  |  |  |  | |  |  |  |  | |  |  |  |  | |  |  |  |  |   *\*If the Board Member lives outside of San Francisco please list the city and state.*  *\*\*Job or relevant experience can include lived experience, neighborhood knowledge and demographic information as well as professional experience.* | |
| **If you are in the process of recruiting new Board members, please describe your efforts to ensure a diverse and equitable board that aligns with the community being served.**  (Limit: 500 characters) | |
| **Total Number of Volunteers**  *Please exclude Board members that have been counted above.* | [Volunteers] |

**PART II. PROGRAM DESCRIPTION**

After selecting the program area you are applying under (remember, you may not select more than one program area per proposal), the application will open up Part II for you to complete. First, you will be asked to provide a title for your proposed program and to provide a brief (1-2 sentence) summary of the services you will provide. These questions are not scored.

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| **Introduction** | **Character Limit** | **Point value** |
| **Program Title** | 100 characters | N/A |
| **Please provide a brief 1-2 sentence summary of the proposed program.** | 350 characters | N/A |

*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.*

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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 program, 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 programs 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 assigned staff and partners. This section should further note how the proposed program demonstrates a thorough understanding of the economic, social, financial, institutional or other issues that require a solution as well as indicators of community support.*

Specific questions in this area:

1. **Briefly describe your organization’s mission, values, and history providing services to residents and businesses in San Francisco.** (Limit: 3,000 characters)
   * If applying as a fiscal sponsor or collaboration, please be sure to include brief descriptions of each organization involved in this proposal.
2. **Provide a brief overview of the proposed program.** (Limit: 3,000 characters)
   * Summarize the objectives of the proposed program, and establish clear connections between the issues/need for assistance and specific objectives that will be implemented through Job Centers/Access Points, programs and service modules to address them.
   * The overview should also address how the proposed program is aligned with and leverages the mission, programs, and expertise of the applicant or collaborative partnership.
3. **Describe the target populations you will serve through this proposed program, your experience serving them, and key needs you hope to address with this funding**. (Limit: 3,000 characters). Highlight the economic, social, financial, institutional or other issues that require a solution. Please also share any work you have done with the relevant communities to confirm that this proposed program is appropriate and necessary. Examples may include:

* Surveys or focus groups with community members
* Organizing or advocacy efforts with community members
* Research or review of demographic data, studies, or assessments and best practices serving the target population(s). See Appendix F, Socioeconomic Neighborhood Profiles, San Francisco neighborhood and demographic data.

1. **Describe your staffing plan for the proposed program** (Limit: 4,000 characters). Please answer all of the following in this section:
   * List the names, titles and qualifications of staff, partners, and subcontractors that will make up the proposed program team, including the person (or people) who will play the primary role in delivering services, e.g. your Program Director. 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.
   * How will work be distributed within the program team?
   * Share any specific cultural, linguistic, educational or other skills that will help the team deliver the proposed program.
2. **Describe any past experience successfully implementing similar workforce development programs or activities, including grants or contracts with the City of San Francisco or other funders.** You may include details on active/ongoing proposed programs as well as prior/completed proposed programs. Please be sure to highlight successful outcomes for the target populations or neighborhoods in the program area. (Limit: 2,000 characters)

Reviewers will rate with the following items in mind:

* The application demonstrates an understanding of the goals, objectives and outcomes listed in the RFP.
* The proposed program will contribute to achieving the goals and objectives stated in the RFP.
* The application presents a clear description of the proposed project, including a clear statement of goals and objectives.
* The application demonstrates a thorough understanding of the economic, social, financial, institutional or other issues that require a solution.
* The application suggests compelling, clear and feasible strategies to deliver services in a manner that will achieve strategic goals and updated vision for workforce services presented in the RFP.
* The applicant(s) individually and collectively have relevant experience with the development, administration, implementation, management and measurement of workforce development services.
* Each participating organization possesses the organizational capacity to fulfill its assigned roles and functions effectively.
* The program director and key project staff demonstrate sufficient relevant knowledge and experience to effectively institute and manage a project of the size, scope and complexity proposed. Roles, responsibilities and time commitments or all staff are clearly defined and appropriate to successful implementation of the proposed program.
* The proposed program would involve the collaboration of partner organizations, cooperating entities, consultants or key individuals who would maximize the effectiveness and efficiency of service delivery. If a collaborative application is proposed, letters of commitment or memoranda of understanding describe organizations’ specific activities and the role, capacity, and contributions each partner will make to the proposed program.

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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) propose 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 slow down work, explain rationales for strategies selected, and describe any unique or unusual features of the proposed program, 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.* ***For Program Areas with Supplementary Questions please address them in this section, unless otherwise noted.***

1. **Clearly state your approach to the proposed program.** (Limit: 4,000 characters). Provide detailed goals and objectives and describe any evidence-based practices that inform your proposed program design.
2. **Describe the services to be provided.** (Limit: ~~5,000~~ *10,000* characters) For each service component, provide detail on the following, as appropriate: types of activities; number of hours; frequency of services; location(s) of services; and methods that will be used to deliver services. If proposing with multiple program partners, be clear on who will lead elements of your service plan.
3. **Describe the qualitative and quantitative outcomes your program proposes to achieve.** (Limit: 5,000 characters). Provide proposed projections of the accomplishments to be achieved for each activity or function proposed, such as the number of activities or steps to be accomplished or number of individuals or businesses to be served. If accomplishments cannot be quantified, list them in chronological order to show a sequence of steps and their proposed start and end dates.
4. **Provide a program timeline.** (Limit: 3,000 characters) Please include all major milestones and target dates, as appropriate. Describe any factors that might speed or hinder implementation of the proposed program and explain how you will manage unanticipated proposed program hurdles, should they arise.
5. If required, please respond to any additional **Supplementary Questions as required by the Program Area.** (Limit: 5,000 characters)

Reviewers will rate with the following in mind:

* The application presents a plan of action that describes in sufficient detail the specific scope of services applicant(s) propose and how the proposed work will be accomplished. Project strategies are logically linked to performance outcomes.
* All required services, strategies, preferred qualifications, and any Supplementary Questions are completely and appropriately addressed.
* The application describes a process by which the services will be planned, provided and improved.
* The application presents a reasonable timeline for implementing the proposed program including major milestones and target dates. It addresses factors that might speed or slow implementation and explains how these factors would be managed.
* The plan describes the population to be served and how the proposed program will address the barriers and limitations such individuals may experience, including special needs.
* The project would be culturally appropriate for and responsive to target populations.
* The design of the project reflects current knowledge on effective practices supported by applicants’ experience, research and literature.
* The proposed program reflects performance targets appropriate for the program and the participants served and is within a range consistent with the recommendations chart.
* The proposal demonstrates a sound management plan for achieving the objectives of the proposed program on time and within budget, including clearly defined milestones, timelines and activities for accomplishing project tasks and ensuring project quality. Roles and responsibilities of the lead agency and key partners are clearly defined.
* The proposal demonstrates clear linkages and mutually beneficial relationships between the proposed program and other system partners including other program areas described in this RFP, complementary services offered by other City Departments, or other relationships explicitly noted within the program area under which the proposal is submitted.

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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 proposed program activities and outcomes will be collected and reported.
* Measures that will be developed and/or used to determine the extent to which the proposed program has achieved its stated objectives.
* How data will be used to determine whether the needs identified are being met and whether proposed program results are being achieved
* Any processes and procedures that are or will be in place to determine whether the proposed program 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.

Reviewers will rate with the following items in mind:

* Applicant addresses how data on project activities, outputs and outcomes will be collected and reported.
* Applicant demonstrates they have or will develop the capacity to collect and manage timely data submissions.
* The application provides an appropriate and feasible plan describing how data will be used to determine whether the needs identified are being met and whether project results are being achieved.
* The application provides an appropriate plan describing ways the agency would adjust strategies or services to address under performance, implementation delays, or other issues that may impede service delivery.

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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.  Applicants must follow the guidelines established in the Office of Management and Budget (OMB) circular or Code of Federal Regulations applicable to their type of organization.
* Provide a narrative justification for items in the budget. If proposing a fiscal fee, please identify how the requested percentage was identified.
* Identify the staff positions at your organization that are authorized to receive or deposit grant funds, issue financial documents, checks or other instruments of payment for workforce development program costs. The individuals in these positions must be bonded in a minimum amount of the contract award should WIOA funds be part of the award.
* Confirm that all financial and program records, including any supporting documents, will be retained for at least three years from the date of the Workforce Investment Board’s (WIB) submission of close-out reports or for at least 3 years from the close of the grant term, whichever is later. In addition, if any litigation, claims or audits are begun prior to expiration of the three-year period, all records shall be retained until such litigation, claims or audits relating to the records have been resolved. Confirm that records relating to non-expendable personal property that are authorized to be purchased with grant funds will be retained for at least three years after the final disposition of the property.
* Confirm that the actual and accrued expenditures will be reported on invoices and that reconciliation between actual and accrued expenditures will be conducted on a payment-by-payment basis.
* Confirm that your agency will utilize generally accepted accounting principles in order to account for and control all grant funds.
* Any program income received as a result of OEWD grant awards must be reported to OEWD and used prior to payment of any City funds. Confirm that your agency will track and report any program income earned as a result of the grant award and that it will be used for job training purposes only. The use of program income against workforce development services must be documentable and traceable through the financial system. It must be reported as part of the invoice.
* In order to ensure fiscal accountability and prevent waste, fraud and abuse in programs administered under WIOA, applicants shall have a procurement system, which adequately provides, maximum, free, and open competition. To accomplish this, applicants must have a system which: 1) provides for full and open competition, 2) has written procedures for procurement transactions, and 3) has a code of ethical standards, which adequately provide for the avoidance of any conflict of interest. To evaluate this, please confirm that your organization will comply with the WIB’s/OEWD’s procurement policies and directives for materials, supplies, and services.
* Provide details on any matching or leveraged funds including anticipated source, amount, and restrictions.  Although always encouraged, matching funds may be required by some program areas. Refer to the program area descriptions in Section II of the RFP to determine if a match is required.

**Note: in addition to your written narrative (limited to 4,000 characters), make sure to upload a proposed budget for the proposed program using the budget template available on the RFP 122 website (“Appendix B”).**

Reviewers will rate with the following items in mind:

* The proposal provides a detailed narrative budget justification presenting reasonable costs related to the activities proposed.
* Applicants’ fiscal controls and accounting procedures conform to requirements and would ensure the prudent use, proper and timely disbursement and accurate accounting of funds awarded under this RFP.
* Agency’s funding is diverse enough to suggest sustainability and the organization appears able to operate a cost-reimbursement based contract.

**Proposal Package Checklist**

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

**Appendix B, Proposed Budget** template– Please list your proposed program budget on this template and upload it where prompted before you submit your application.

**Additional required attachments:**

**Organizational Budget** (no template) – Overall organizational budget for the Primary Applicant and Program Lead, if applicable (no template provided)**.** Please upload organizational budget(s) where prompted before you submit your application.

**Organizational Chart** (no template) – Organizational chart for the Primary Applicant and Program Lead, if applicable (no template provided)**.** Please upload organizational chart(s) where prompted before you submit your application.

**Supplementary Questions and Attachments** – Reference whether **Supplementary Questions and Attachments** are requested for the Program Area(s) to which your organization is responding and include those items in the Proposal Package submission. Note that some areas require items such as letters of support, Memoranda of Understanding (MOUs) or work samples.

**When you have completed your proposal, please make sure to click “Submit” on the final screen.**

If you have submitted successfully by the deadline, you will see a confirmation screen.

You may follow up with OEWD at [oewd.procurement@sfgov.org](mailto:oewd.procurement@sfgov.org) if you have any questions or need technical assistance with your submission. If you have submitted a proposal in error and need to re-file your proposal, please contact [oewd.procurement@sfgov.org](mailto:oewd.procurement@sfgov.org) and let us know which proposal should be considered.