

# City and County of San Francisco

## Request for Proposals

**RFP#205**

**Invest In Neighborhoods, Business Development, Economic Development  
and  
Workforce Development  
Grants**



Issued by:

Office of Economic & Workforce Development

Date issued:

Monday April 17, 2017

Proposals due:

Thursday May 18, 2017

*Request for Proposals for Invest In Neighborhoods, Business Development, Economic Development and Workforce Development Grants (RFP#205)*

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- A. Sample Agreement for Grant (Form G-100)
- B. Proposal Budget Template
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## **I. Introduction and Schedule**

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### **A. General**

The City and County of San Francisco's Office of Economic and Workforce Development (OEWD) supports the City's ongoing economic vitality through key programs focused on neighborhood commercial corridors, workforce development, joint development projects, industry focused business recruitment and retention, small business assistance and international business development. OEWD's goal is to work continually to make San Francisco a better place to work and do business.

The Office of Economic & Workforce Development ("OEWD") is issuing this request for proposals ("RFP") for grants to strengthen neighborhood commercial districts by implementing neighborhood improvement projects, providing a variety of technical services related to neighborhood economic development, providing workforce development services through the CityBuild initiative, and providing services through local and international business development initiatives. OEWD has allocated resources to make grants in many different program areas (detailed in section II below).

Unless otherwise noted in the program descriptions, it is anticipated that successful proposals for most program areas will be funded for a term of one year beginning in fiscal year 2017-18 with opportunities to renew or extend programming through fiscal year 2020-2021, subject to OEWD approval and funding appropriation. If a renewal option is exercised, subsequent grant amounts will depend upon the performance of the grantee during the first (or prior) year(s) of the grant and other policy considerations as determined by OEWD. Grantees will be asked at a minimum to submit a final report (format to be determined) of their grant activities and, if OEWD elects to exercise the renewal option(s), a revised scope of work and budget for the grant renewal period(s) for OEWD review. OEWD reserves the right, in its sole discretion, to not exercise a renewal option and, if it exercises the renewal option, to determine any change in the size and scope of the successive grant(s).

## **B. Schedule**

The anticipated schedule\* for awarding grants is as follows:

<u>Proposal Phase</u>	<u>Date</u>
RFP is issued by the City	Monday April 17, 2017
Deadline for submission of written questions	Wednesday April 26, 2017 at Noon
Answers to questions posted online	Friday April 28, 2017 by end of day
Proposals due	Thursday May 18, 2017 by 5PM
Committee Review	May 24- June 22, 2017
Grantee selection and award notification	late June 2017
Projects begin	July 2017 or later

\*Each date is subject to change.

Check: <http://oewd.org/bid-opportunities> for the latest schedule.

## II. Program Areas and Scope of Work

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The Office of Economic and Workforce Development (OEWD) supports San Francisco's ongoing economic vitality by strengthening its neighborhoods, businesses, commercial corridors and workforce. To this end, OEWD provides services throughout the City through several divisions. For the purposes of RFP 205, proposals are being sought in relation to three particular divisions:

- Invest In Neighborhoods (IIN),
- Business Development, and
- Workforce Development

In relation to IIN, the vision is that neighborhood commercial corridors in San Francisco are economically thriving, safe, resilient, sustainable, and meet the needs of local residents and users. In alignment with this vision, IIN's objectives are to strengthen small businesses, improve physical conditions, increase quality of life, and build community capacity.

In pursuit of these objectives, IIN offers programs that are designed to provide focused, customized assistance that meet the specific needs of San Francisco's neighborhood commercial corridors by leveraging existing programs from across multiple City departments and nonprofit partners. There are many programs offered through IIN for which more information can be found at <http://investsf.org/>.

The specific programs under the Invest in Neighborhoods initiative for which proposals are being solicited are described in sections A through N below.

In addition to the IIN programs, the Office of Economic and Workforce Development's Business Development unit and Workforce Development Division are accepting proposals through the RFP to support a variety of programs and initiatives. Each program area is described in detail in the sections below.

Program Area	Title
	<b>Neighborhood Economic and Community Development Programs</b>
A	Bayview Third Street Corridor Management
B	Legal Services for Small Businesses in Bayview and Fillmore
C	Central Market/Tenderloin Social Enterprise Workforce Program
D	Central Market/Tenderloin Coordinated Event Programming
E	Central Market/Tenderloin Communications and Community Engagement
F	Central Market/Tenderloin Small-Scale Beautification Efforts
G	Central Market/Tenderloin Organizational Strategy
H	Greater Chinatown Corridor Manager
I	Chinatown Cultural Event Projects
J	Chinatown Customer Attraction and Marketing Projects
K	Excelsior/Outer Mission Neighborhood Economic Development Projects
L	Neighborhood Nonprofit Capacity Building
M	Neighborhood Seasonal Programs for Balboa, Clement, Mission-Bernal, North Beach, and Sunset Neighborhoods
N	Community Benefit District – Organizational Support Programming
	<b>Business Development Programs</b>
O	Sector-based Business Development
P	ChinaSF: International Business Development – China
Q	SFAsia: International Business Development –Asia (Excluding China)
R	LatinSF: International Business Development – Latin America
S	Music Sector Business Development
T	Lombard Street Community Ambassador Program
U	Distribution and Repair Sector Business Development
V	FashionSF: Business Development – Fashion
W	Production Sector Business Development
	<b>Workforce Development Programs</b>
X	CityBuild – Construction Sector Coordinator
Y	CityBuild – District 10 Resident Outreach and Support

The scope of activities and services described in each program area below is to be used as a general guide and is not intended to be a complete list of all work necessary to meet program area objectives. Nothing herein shall obligate the City to make any grant/contract, or guarantee any proposer the right to any grant/contract money. The City reserves the right not to award grants/contracts based upon the ability of the proposer to meet the City's objectives. Any grant/contract awards, including renewals, are contingent upon budget approval and funding availability. **Proposers may seek funding in more than one area described below, however, a separate application must be filed for each funding area that the organization wishes to provide services for.** Each application will be considered individually and the organization's overall capacity in relation to the number of projects proposed will also be considered when projects and proposals are recommended for funding.

OEWD may fund contracts and/or grants under this RFP with a variety of federal, state or local funding as appropriate including, but not limited to, the Workforce Innovation and Opportunity Act (WIOA), Community Development Block Grant (CDBG), California Career Pathways Trust (CCPT) funds, American Apprenticeship Grants through the Department of Labor, US Small Business Association (SBA) and City general funds.

The initial round of funding is expected to come from local City general funds. OEWD, or other appropriate City Agencies, will disclose any additional regulations or requirements during the negotiation process for grants/contracts that are awarded utilizing this procurement and funded by other local, state or federal programs.

Grant and contract may be used interchangeably in this RFP as may the terms grantee and contractor. The specific type of agreement and relationship between successful bidder(s) and the City will be determined post-award as part of the negotiation process based on applicable requirements and regulations.

## **Neighborhood Economic and Community Development Programs**

### **Program Area A: Bayview Third Street Corridor Management**

Amount: Applicants may propose project budgets up to \$80,000

Scope of Work: The vision for the future of the Bayview district's Third Street is that it will be a vibrant, clean and safe commercial district with a diverse mix of businesses and cultural facilities that meet the daily and entertainment needs of the neighborhood through unique, quality products and opportunities to enjoy visual and performing arts.

OEWD recognizes that in order to realize this vision the work must be community-led with a strong private-public partnership. OEWD is seeking proposals for a nonprofit organization to partner with OEWD on the economic revitalization support to the Third Street commercial corridor from Evans Street to Paul Avenue.

The scope of work for the selected organization(s) in this program area may include, but is not limited to, the following:

- Hiring administrative support staff
- Implementing the Third Street Action Plan
- Conducting merchant engagement and business attraction
- Fostering the community's perception of safety and ownership of Third Street
- Executing marketing efforts and working together with the Bayview Steering committee
- Developing and implementing a community-driven business attraction strategy for Third Street
- Developing and implementing initiatives for the improvement of district safety and cleanliness
- Developing and implementing a corridor beautification strategy that focuses on greening improvements along the corridor
- Developing and implementing a district marketing campaign to promote neighborhood businesses and encourage customers to visit the business district
- Assisting in the development of the Third Street Economic Action Plan
- Leading implementation of identified priorities of the Third Street Economic Action Plan
- Coordinating of and participating in community engagement related to economic revitalization of the district

Preferred Qualifications:

- Proven track record implementing Third Street Economic Action Plan, conducting merchant engagement and business attraction, fostering the community's perception of safety and ownership of Third Street, executing marketing efforts and working together with the Bayview Steering committee
- Feasible and efficient budget

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco

**Program Area B: Legal Services for Small Businesses focused in Bayview and Fillmore Neighborhoods**

Amount: Applicants may propose project budgets up to \$15,000

Scope of Work: OEWD seeks an organization to provide free legal assistance to small businesses to help resolve fundamental business matters to assist with long-term viability.

The scope of work for the grant recipient(s) in this program area may include, but is not limited to, the following: Providing one-on-one attorney consultations and representation to small business owners on



- Work-out plans with creditors
- Tax issues
- Commercial leases

Preferred Qualifications:

- A minimum of five years of experience in providing legal support and services to commercial businesses
- Organization should have a minimum of 10 years in existence
- Key personnel with experience in assisting small businesses avoid default by assessing eligibility and applying for payment agreements with taxing entities such as the federal IRS, City and County of San Francisco Treasurer and Tax Collector, and California Franchise Tax Board —no more than a three-page narrative of directly related experience and include resume(s)
- Feasible and efficient budget

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco.

**Program Area C: Central Market/Tenderloin Social Enterprise Workforce Program**

Amount: Applicants may propose project budgets up to \$50,000

Scope of Work: As part of the Central Market/Tenderloin Strategy, OEWD seeks organizations to assist with the implementation of a multi-faceted public space activation and stewardship effort for the three public spaces linking Market Street to City Hall: United Nations Plaza, Fulton Street between the Library and Asian Art Museum, and Civic Center Plaza. It is expected that this project, as well as those proposed in program areas D, E, F, and G will all be deployed within the three public spaces.

The scope of work for the selected organization(s) in this program area may include, but is not limited to, the following: Pilot and/or expand a social enterprise workforce program aimed at providing area residents, especially homeless adults, with employment or work-experience activities that also enhance quality of life and/or contribute toward positive activation in Civic Center’s public spaces. Example programs could include a litter abatement program, coffee cart, or landscaping stewardship program.

Preferred Qualifications:

- Track record of success in recruiting, training and maintaining homeless or low-income individuals in work or work experience positions, and graduating them to better jobs or work experience programs
- Track record of experience implementing the program elsewhere or in Civic Center

- Strong familiarity with Civic Center, including existing populations that use the public spaces, City agency jurisdictions, fronting properties and institutions, and community stakeholders
- Track record of participation in collaborative initiatives, including those that are cross-sector
- Feasible and efficient budget that includes non-City matching dollars

**Program Area D: Central Market/Tenderloin Coordinated Event Programming**

Amount: Applicants may propose project budgets up to \$50,000

Scope of Work: As part of the Central Market/Tenderloin Strategy, OEWD seeks organizations to assist with the implementation of a multi-faceted public space activation and stewardship effort for the three public spaces linking Market Street to City Hall: United Nations Plaza, Fulton Street between the Library and Asian Art Museum, and Civic Center Plaza. It is expected that this project, as well as those proposed in program areas C, E, F, and G will all be deployed within the three public spaces.

The scope of work for the selected organization(s) in this program area may include, but is not limited to, the following: Develop and implement, or augment, coordinated, regular event programming and activation for the three spaces, in conjunction with a cross-sector committee of institutions currently programming one or more spaces. A focus should be on daily or weekly programming, with a secondary priority of seasonal or one-time events.

**Preferred Qualifications:**

- Track record of experience implementing event programming and activation elsewhere or in Civic Center
- Strong familiarity with Civic Center, including existing populations that use the public spaces, City agency jurisdictions, fronting properties and institutions, and community stakeholders
- Track record of participation in collaborative initiatives, including those that are cross-sector
- Feasible and efficient budget that includes non-City matching dollars

**Program Area E: Central Market/Tenderloin Communications and Community Engagement**

Amount: Applicants may propose project budgets up to \$50,000

Scope of Work: As part of the Central Market/Tenderloin Strategy, OEWD seeks organizations to assist with the implementation of a multi-faceted public space activation and stewardship effort for the three public spaces linking Market Street to City Hall: United Nations Plaza, Fulton

Street between the Library and Asian Art Museum, and Civic Center Plaza. It is expected that this project, as well as those proposed in program areas C, D, F, and G will all be deployed within the three public spaces.

The scope of work for the selected organization(s) in this program area may include, but is not limited to, the following: Coordinate communications and community engagement efforts to support regular programming in the area, including expanding and maintaining a web site, assisting with the coordination and publication of a calendar of events, and coordinating community stakeholder and property owner outreach.

Preferred Qualifications:

- Track record of experience implementing communications and community engagement elsewhere or in Civic Center
- Strong familiarity with Civic Center, including existing populations that use the public spaces, City agency jurisdictions, fronting properties and institutions, and community stakeholders
- Track record of participation in collaborative initiatives, including those that are cross-sector
- Feasible and efficient budget that includes non-City matching dollars

**Program Area F: Central Market/Tenderloin Small-Scale Beautification Efforts**

Amount: Applicants may propose project budgets up to \$50,000

Scope of Work: As part of the Central Market/Tenderloin Strategy, OEWD seeks organizations to assist with the implementation of a multi-faceted public space activation and stewardship effort for the three public spaces linking Market Street to City Hall: United Nations Plaza, Fulton Street between the Library and Asian Art Museum, and Civic Center Plaza. It is expected that this project, as well as those proposed in program areas C, D, E, and G will all be deployed within the three public spaces.

The scope of work for the selected organization(s) in this program area may include, but is not limited to, the following: Implement small-scale beautification efforts aimed at improving the appearance of the three public spaces and/or helping link the spaces together visually, i.e. wayfinding. Beautification efforts may include any medium and could be focused on both the public realm and private property.

Preferred Qualifications:

- Track record of experience developing and implementing small-scale neighborhood beautification efforts elsewhere or in Civic Center

- Strong familiarity with Civic Center, including existing populations that use the public spaces, City agency jurisdictions, fronting properties and institutions, and community stakeholders
- Track record of participation in collaborative initiatives, including those that are cross-sector
- Feasible and efficient budget that includes non-City matching dollars

### **Program Area G: Central Market/Tenderloin Organizational Strategy**

Amount: Applicants may propose project budgets up to \$50,000

Scope of Work: As part of the Central Market/Tenderloin Strategy, OEWD seeks organizations to assist with the implementation of a multi-faceted public space activation and stewardship effort for the three public spaces linking Market Street to City Hall: United Nations Plaza, Fulton Street between the Library and Asian Art Museum, and Civic Center Plaza. It is expected that this project, as well as those proposed in program areas C, D, E, and G will all be deployed within the three public spaces.

The scope of work for the selected organization(s) in this program area may include, but is not limited to, the following: Assist the City with the development of an organizational strategy for streamlining near-term and long-term management of the three public spaces. The focus of this scope should include assisting with the formation of a cross-sector steering committee; assisting with the development and management of a subcommittee structure to coordinate activation and stewardship projects; and assisting with the identification of a future organizational structure to manage these spaces in the long-term.

#### **Preferred Qualifications**

- Track record of experience developing collaborative plans for public space improvement efforts, including experience facilitating the development of management organizations
- Strong familiarity with Civic Center, including existing populations that use the public spaces, City agency jurisdictions, fronting properties and institutions, and community stakeholders
- Track record of leadership in collaborative initiatives, including those that are cross-sector
- Feasible and efficient budget

### **Program Area H: Greater Chinatown Corridor Manager**

Amount: Applicants may propose project budgets up to \$100,000

Scope of Work: OEWD is seeking proposals from nonprofit organizations to partner with OEWD to enhance and support the businesses in the Chinatown commercial corridor. OEWD is seeking

partners that will contribute to Chinatown’s ongoing economic vitality through business outreach, community networking, technical assistance, appropriate referrals, legacy business retention and improvement, industry-focused recruitment and development, storefront reactivation, and cultural preservation. It is expected that this project, as well as those proposed in program areas I and J, will all be deployed within the Chinatown Commercial Corridor.

The scope of work for the selected organization(s) in this program area may include, but is not limited to, the following:

- Conducting monthly outreach services to update businesses on vital City programs
- Conducting quarterly vacancy tracking and updating information of commercial inventories
- Providing needed information and referrals, documenting and coordinating service linkage, following up with IIN and businesses regarding service progress
- Developing a community-driven economic development strategy that focuses on business attraction and retention, and preservation of cultural and historical assets in Chinatown
- Implementing community and economic development projects and programs that contribute to the vitality of the neighborhood
- Coordinating and facilitating bi-annual meetings to enhance stakeholders’ engagement towards economic revitalization and community improvement
- Assisting City departments, merchant/neighborhood organizations, property and business owners in promoting and strengthening neighborhood-serving businesses

Preferred Qualifications:

- A minimum of three years of history and/or experience, and success providing business-related supportive services to the Chinatown neighborhood
- A minimum of three years of history and/or experience of administering city-funded economic and/or workforce development programs
- Established relationships with local merchant associations, family associations and community-based organizations—include a list of the associations and organizations in the proposal
- Feasible and efficient budget

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco.

**Program Area I Chinatown Cultural Event Projects**

Amount: Applicants may propose project budgets up to \$50,000

Scope of Work: OEWD is seeking proposals from nonprofit organizations to partner with OEWD to enhance and support the businesses in the Chinatown commercial corridor. OEWD is seeking partners that will contribute to Chinatown’s ongoing economic vitality through business outreach, community networking, technical assistance, appropriate referrals, legacy business retention and improvement, industry-focused recruitment and development, storefront reactivation, and cultural preservation. It is expected that this project, as well as those proposed in program areas H and J, will all be deployed within the Chinatown Commercial Corridor.

The scope of work for the selected organization(s) in this program area may include, but is not limited to, the following:

- Coordinating and facilitating at least two cultural events to promote the Chinatown Neighborhood and small businesses. Events may include culturally-related art, music, and sports festivals
- Developing culturally-appropriate strategies that attract and encourage participants/visitors to better appreciate Chinatown’s cultural and historical assets
- Developing promotional materials, media/marketing opportunities, and merchant/partnership guides to promote local spending
- Obtaining required permits in compliance with all City regulations for public events, public space activation, and other activities
- Assisting local merchants to be prepared for and involved in project activities, e.g., joint-effort to promote events, decorate storefronts, and provide discounts and contributions
- Engaging in neighborhood collaboration to establish a year-round event schedule and strengthen community partnerships

Preferred Qualifications:

- A minimum of two years of history and/or experience, and success providing cultural and/or community events in the Chinatown neighborhood
- A minimum of two years of history and/or experience administering city-funded economic development and/or cultural appreciation projects
- Established relationships with local merchant associations, family associations and community-based organizations—include a list of the associations and organizations in the proposal
- Feasible and efficient budget

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco.

**Program Area J: Chinatown Customer Attraction and Marketing Project**

Amount: Applicants may propose project budgets up to \$25,000

Scope of Work: OEWD is seeking proposals from nonprofit organizations to partner with OEWD to enhance and support the businesses in the Chinatown commercial corridor. OEWD is seeking partners that will contribute to Chinatown’s ongoing economic vitality through business outreach, community networking, marketing assistance, business retention and improvement, and cultural preservation. It is expected that this project, as well as those proposed in program areas H and I, will all be deployed within the Chinatown Commercial Corridor.

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

- Developing and implementing a district marketing campaign to promote neighborhood-serving businesses and to increase customer visits and spending
- Showcase Chinatown business characteristics through artwork exhibitions, social networking and mainstream media
- Engaging merchants, residents, and stakeholders to improve the business environment like media interaction, nightlife, and public accessibility
- Assisting City departments, merchant/neighborhood organizations, property and business owners in promoting and strengthening neighborhood-serving businesses
- Utilizing linguistically- and culturally-appropriate social media tools in association with activities in the Scope of Work

Preferred Qualifications:

- A minimum of two years of history and/or experience, and success implementing marketing campaigns/events in the Chinatown neighborhood
- A minimum of two years of history and/or experience administering city-funded economic development projects
- Established relationships with local merchant associations, family associations and community-based organizations—include a list of the associations and organizations in the proposal

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco.

**Program Area K: Excelsior/Outer Mission Neighborhood Economic Development Projects**

Amount: Applicants may propose project budgets up to \$50,000

Scope of Work: OEWD is seeking proposals from nonprofit organizations to partner with OEWD to enhance and support the businesses and economic development activities along the Excelsior/Outer Mission Commercial Corridors. OEWD is seeking partners that will contribute to

the Excelsior/Outer Mission's ongoing economic vitality by strengthening small businesses, improving physical conditions, increasing the quality of life, and building community capacity.

The scope of work for the selected organization(s) in this program area may include, but is not limited to, the following:

- Physical improvements, e.g., public art installations, neighborhood landmarks, outdoor furniture and amenities, lighting installations
- Outdoor space activation, e.g., performances, physical exercise activities, public marketplace, or other activities, occurring in a public plaza or other public space
- Neighborhood beautification projects, e.g., awning/window sign improvements, sidewalk cleaning, graffiti and vandalism abatement program
- Branding or marketing campaigns, e.g., shop local campaign, banners
- Events, e.g., neighborhood street fair or festival, art walk, local event series
- Economic development planning and studies, e.g., merchant survey, cultural district planning, retail strategy development

Preferred Qualifications:

- Knowledge of the Excelsior/Outer Mission Neighborhoods
- Feasible and efficient budget

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco.

**Program Area L: Neighborhood Nonprofit Capacity Building**

Amount: Applicants may propose project budgets up to \$50,000

Scope of Work: OEWD is seeking proposals from nonprofits or other eligible technical assistance providers to develop strategies and implement activities that build the capacity of community-based entities. These may include Neighborhood Steering Committees, Community Development Corporations, Community Benefit Districts, and Merchant Associations that are seeking to strengthen their neighborhoods and commercial districts. OEWD is seeking partners who can provide technical assistance in the areas of Nonprofit Management, Commercial District Revitalization, Community Organizing and Engagement, and Leadership Development.

The scope of work for the selected organization(s) in this program area may include, but is not limited to, the following:

- Providing technical assistance to build capacity of nonprofit, community-based organizations to strengthen neighborhoods and commercial districts
- Assessment of nonprofits to determine needs, opportunities, and specific service plans
- Guiding nonprofits to implement stronger controls and management processes



- Assisting nonprofits with developing and implementing commercial district revitalization initiatives
- Assisting nonprofits with developing and implementing stronger community engagement strategies
- Assisting and providing support in execution and implementation of neighborhood economic development activities.
- Assisting nonprofits with identifying, planning, and implementing leadership development opportunities within their organizations

Preferred Qualifications

- 3 years of providing assistance to nonprofit community organizations
- 3 years of experience in the community and economic development field
- Has provided technical assistance to at least 2 low-capacity organizations
- Has previously partnered at least once with a local public agency(ies)
- Feasible and efficient budget

**Program Area M: Neighborhood Seasonal Programs**

Amount: Applicants may propose project budgets up to \$25,000

Scope of Work: Proposals are being sought by OEWD from community organizations to support catalytic seasonal programming in the Neighborhood Commercial Districts, listed below, that will contribute to neighborhood vitality by strengthening small businesses, improving physical conditions, increasing quality of life, and building community capacity.

- Balboa - Balboa Street from Arguello Boulevard to 10<sup>th</sup> Avenue
- Clement - Clement Street from 25<sup>th</sup> Avenue to 35<sup>th</sup> Avenue
- Mission-Bernal - Mission Street from Cesar Chavez to Bosworth
- North Beach - Columbus Street from Broadway to Greenwich, Grant from Columbus to Greenwich, Greenwich from Grant to Columbus, and the streets in between
- Sunset – Irving from 19<sup>th</sup> Avenue to 27<sup>th</sup> Avenue; Noriega from 19<sup>th</sup> Avenue to 33<sup>rd</sup> Avenue and from 45<sup>th</sup> to 47<sup>th</sup>, Taraval from 19<sup>th</sup> Avenue to 27<sup>th</sup> Avenue

The scope of work for the selected organization(s) in this program area may include, but is not limited to, the following:

- Community Safety/Crime Prevention
- Engaging Non-English-Speaking Stakeholders through relevant activities
- Installing public art, murals, neighborhood landmarks
- Neighborhood Beautification
- Neighborhood Events (e.g., festivals, art walks, etc.)
- Neighborhood Marketing and Branding Campaigns

- Property Owner Engagement
- Public Space Activation (e.g., street fairs, outdoor markets, public performances)
- Public Space Improvements and Renovations

Preferred Qualifications:

- A minimum of one year of experience in the type of program/project proposed
- The organization has existed for a minimum of one year
- Experience managing the type of program/projects proposed in San Francisco
- Key personnel with experience in the type of program/project proposed
- Feasible and efficient budget

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco.

**Program Area N: Community Benefit District- Organizational Support Programming**

Amount: Applicants may propose project budgets up to \$40,000

Scope of Work: The purpose of this program area is to provide funding to existing Community Benefit Districts (CBDs) to strengthen the organizational effectiveness of the CBD's management corporation. The CBDs can assist groups with strategic planning, retail strategy, business attraction, retailing, volunteer management, and improved fundraising.

The scope of work for the selected organization(s) in this program area may include, but is not limited to, the following:

- Strategic Planning and/or implementation of strategic plans
- Economic Development Planning (e.g., merchant survey, retail strategy, and/or implementation of economic development plans)
- Retail attraction/broker services
- Commercial District Activation (e.g., art walk, local event series, performances, physical exercise activities, public marketplace, or other activities, occurring in a public plaza or other public space)
- Training for CBD staff

Programs or projects proposed under this program area should meet each of the following criteria and address, as appropriate, each in the proposal:

- Targets a specific existing Community Benefit District (CBD).
- Spurs economic activities, supports existing businesses, improves physical conditions, increases quality of life, or builds community capacity within the CBD Boundary.
- Completion of proposed project by June 30, 2018.

- Leverages private resources, including financial commitments, in kind donations, volunteer time, etc.

Minimum Qualifications:

Applicant must be an established Community Benefit District listed at <http://investsf.org/cbds/>

## **Business Development Programs**

### **Program Area O: Sector Based Business Development**

Amount: Applicants may propose project budgets up to \$40,000 for 12 months

Scope of Work: OEWD developed sector based business development initiatives based on target industries identified in the City's Economic Strategy. The goal of OEWD's sector strategies is to attract, retain, and support the start and growth of businesses in targeted industries, driving job creation and retention, in addition to promoting tourism, local exports and investment.

OEWD seeks an organization to support business attraction and retention of key industry sectors by conducting business outreach, education, business development support – including shop local programs, coalition building and real estate location assistance to businesses in target sectors currently operating in, or wanting to relocate to, the City of San Francisco. Target sectors include small businesses, life sciences, health care, nonprofits, tourism, financial and professional services, education, technology, clean technology and others as identified by OEWD.

The selected organization will work closely with OEWD on the following activities:

- Outreach: Conduct direct, proactive, iterative business outreach to businesses in target sectors. Identify businesses at risk of leaving San Francisco, business expansion opportunities, and businesses looking to move to San Francisco. Assist small businesses in developing and maintaining a coordinated communication system across small businesses and with government.
- Real Estate Assistance: Provide real estate assistance by helping businesses understand the local real estate market; support businesses searching for space in the city and connect businesses to real estate professionals. Provide OEWD with real estate data such as development pipeline information, tenants in the market, and aggregate demand.
- Information Clearinghouse: Serve as an information clearinghouse on resources for businesses. Coordinate efforts to connect businesses to identified local service providers (i.e. legal, finance, marketing, potential partners, etc.). Serve as an information clearinghouse regarding local policy development that may impact businesses.

- Connect to Assistance Programs: Educate and connect organizations to relevant City, State, Federal and other assistance programs including tax incentives, financing programs, and workforce development services.
- Local Purchasing Campaigns: develop, support and execute outreach campaigns to encourage and facilitate local shopping by customers as well as B2B purchasing relationships
- Information Resources: Provide information through print, web and social content which supports business outreach, assistance, attraction and retention. This could include case studies, fact sheets, presentations, and multi-media.
- Sector-wide Efforts: Support sector-wide efforts that benefit businesses across target sectors. Activities could include supporting networking activities (i.e. focus groups, etc.); addressing sector-wide challenges (i.e. need for early stage incubator space, etc.); and pursuing other catalytic opportunities (i.e. grants, etc.).
- Refer to the City: Refer business issues to OEWD or relevant City department.
- Reporting: Track, measure and regularly report on outcomes.

Preferred Qualifications:

- A minimum of two years of experience in the type of program/project proposed
- The organization has existed for a minimum of two years
- Experience managing the type of program/projects proposed in a City of similar or greater size than San Francisco
- Key personnel with experience in the type of program/project proposed

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco.

**Program Area P: ChinaSF International Business Development – China**

Amount: Applicants may propose project budgets up to \$140,000 for 12 months

Scope of Work: OEWD launched ChinaSF in 2008 with the vision of making San Francisco the premiere business gateway between the US and China. As a collaboration between the City and the private sector, the purpose of ChinaSF is to drive economic development and job creation. ChinaSF achieves this through the recruitment of Chinese based companies to locate, invest or expand in San Francisco and working with San Francisco based companies to expand their business in China by marketing their services and/or products, in addition to promoting tourism, local exports and investment.

OEWD seeks an organization to support business attraction and retention of businesses based in China by conducting business outreach, education, business development support, and real estate location assistance to China-based businesses operating in, or wanting to relocate to, the

City of San Francisco. The selected organization will work closely with OEWD on the following activities:

- Offices: Provide direct business assistance by operating and maintaining offices in Beijing and Shanghai staffed by Chinese / English bilingual employees of the selected Contractor. Promote San Francisco and the city's key value proposition to Chinese businesses
- Business Attraction: Build relationships and identify leads in target sectors and convert these leads into decisions by Chinese companies to locate or expand operations in San Francisco. Promote San Francisco and the city's key value proposition to Chinese businesses. Conduct direct, proactive, iterative business outreach to Chinese businesses that may be considering expanding to San Francisco, have opened in San Francisco or who may be interested in investing in San Francisco.
- Support San Francisco Organizations: Work with San Francisco-based companies to provide resources and information to assist in expanding their business in China.
- Real Estate Assistance: Provide real estate assistance by helping businesses understand the local real estate market; support businesses searching for space in the city and connect businesses to real estate professionals. Provide OEWD with real estate data such as development pipeline information, tenants in the market, and aggregate demand.
- Information Clearinghouse: Serve as an information clearinghouse on resources for businesses. Coordinate efforts to connect businesses to identified local service providers (i.e. legal, finance, marketing, potential partners etc.).
- Connect to Assistance Programs: Educate and connect organizations to relevant City, State, Federal and other assistance programs including tax incentives, financing programs, and workforce development services.
- Information Resources: Provide information through print, web and social content which supports business outreach, assistance, attraction and retention. This could include case studies, fact sheets, presentations, and multi-media.
- Sector-wide Efforts: Support sector-wide efforts that benefit businesses across target sectors and regions. Activities could include supporting networking activities (i.e. focus groups, etc.); addressing sector-wide challenges (i.e. need for early stage incubator space, etc.); and pursuing other catalytic opportunities (i.e. grants, export efforts etc.).
- Partnerships: Coordinate and partner with San Francisco and Bay Area based trade and investment organizations representing the targeted countries and regions in order to build cooperative economic development programs and projects.
- Refer to the City: Refer business issues to OEWD or relevant City department.
- Reporting: Track, measure and regularly report on outcomes.

Preferred Qualifications:

- A minimum of two years of experience in the type of program/project proposed
- The organization has existed for a minimum of two years

- Experience managing the type of program/projects proposed in a city of similar or greater size than San Francisco
- Key personnel with experience in the type of program/project proposed

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco.

**Program Area Q: SFAsia International Business Development –Asia (Excluding China)**

Amount: Applicants may propose project budgets up to \$130,000 for 12 months

Scope of Work: Building on the success of the ChinaSF initiative, in 2014 OEWD launched SFAsia, an organization to support business attraction and retention of businesses based in Asia by conducting business outreach, education, business development support, and real estate location assistance to Asia-based businesses operating in, or wanting to relocate to, the City of San Francisco.

San Francisco has well-established Sister City relationships with Bangalore, Manila, Osaka, Seoul, Ho Chi Minh City and Taipei, providing the City with the connections to capitalize on opportunities across the continent, including but not limited to Malaysia, Indonesia, The Philippines, Thailand, Vietnam, Japan, South Korea and India.

In addition to promoting tourism, local exports and investment, OEWD seeks an organization to support business attraction and retention of businesses based in Asia by conducting business outreach, education, business development support, and real estate location assistance to Asian-based businesses operating in, or wanting to relocate to, the City of San Francisco. The selected organization will work closely with OEWD on the following activities:

- Business Attraction: Build relationships and identify leads in target sectors and convert these leads into decisions by Asian companies to locate or expand operations in San Francisco. Promote San Francisco and the city’s key value proposition to Asian businesses. Conduct direct, proactive, iterative business outreach to Asian businesses that may be considering expanding to San Francisco, have opened in San Francisco or who may be interested in investing in San Francisco.
- Support San Francisco Organizations: Work with San Francisco based companies to provide resources and information to assist in expanding their business in Asia.
- Real Estate Assistance: Provide real estate assistance by helping businesses understand the local real estate market; support businesses searching for space in the city and connect businesses to real estate professionals. Provide OEWD with real estate data such as development pipeline information, tenants in the market, and aggregate demand.

- Information Clearinghouse: Serve as an information clearinghouse on resources for businesses. Coordinate efforts to connect businesses to identified local service providers (i.e. legal, finance, marketing, potential partners etc.).
- Connect to Assistance Programs: Educate and connect organizations to relevant City, State, Federal and other assistance programs including tax incentives, financing programs, and workforce development services.
- Information Resources: Provide information through print, web and social content which supports business outreach, assistance, attraction and retention. This could include case studies, fact sheets, presentations, and multi-media.
- Sector-wide Efforts: Support sector-wide efforts that benefit businesses across target sectors and regions. Activities could include supporting networking activities (i.e. focus groups, etc.); addressing sector-wide challenges (i.e. need for early stage incubator space, etc.); and pursuing other catalytic opportunities (i.e. grants, export efforts etc.).
- Partnerships: Coordinate and partner with San Francisco and Bay Area based trade and investment organizations representing the targeted countries and regions in order to build cooperative economic development programs and projects.
- Refer to the City: Refer business issues to OEWD or relevant City department.
- Reporting: Track, measure and regularly report on outcomes.

Preferred Qualifications:

- A minimum of two years of experience in the type of program/project proposed
- The organization has existed for a minimum of two years
- Experience managing the type of program/projects proposed in a city of similar or greater size than San Francisco
- Key personnel with experience in the type of program/project proposed

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco.

**Program Area R: LatinSF International Economic Development – Latin America**

Amount: Applicants may propose project budgets up to \$130,000 for 12 months

Scope of Work: In 2014 OEWD also launched LatinSF, a new initiative that extends the ChinaSF model with a focus on attracting Latin American organizations to San Francisco and to help San Francisco organizations expand or export into the Latin American market. With 15% of the city’s population being of Latin American descent and with dynamic economies with growing middle classes in the region, Latin America is a natural focus for our international efforts. In addition to promoting tourism, local exports and investment, OEWD seeks an organization to support business attraction and retention of businesses based in Latin America by conducting business outreach, education, business development support, and real estate location

assistance to Latin American-based businesses operating in, or wanting to relocate to, the City of San Francisco.

The selected organization will work closely with OEWD on the following activities:

- Business Attraction: Build relationships and identify leads in target sectors and convert these leads into decisions by Latin American companies to locate or expand operations in San Francisco. Promote San Francisco and the city's key value proposition to Latin American businesses. Conduct direct, proactive, iterative business outreach to Latin American businesses that may be considering expanding to San Francisco, have opened in San Francisco or who may be interested in investing in San Francisco.
- Support San Francisco Organizations: Work with San Francisco based companies to provide resources and information to assist in expanding their business in Latin America.
- Real Estate Assistance: Provide real estate assistance by helping businesses understand the local real estate market; support businesses searching for space in the city and connect businesses to real estate professionals. Provide OEWD with real estate data such as development pipeline information, tenants in the market, and aggregate demand.
- Information Clearinghouse: Serve as an information clearinghouse on resources for businesses. Coordinate efforts to connect businesses to identified local service providers (i.e. legal, finance, marketing, potential partners etc.).
- Connect to Assistance Programs: Educate and connect organizations to relevant City, State, Federal and other assistance programs including tax incentives, financing programs, and workforce development services.
- Information Resources: Provide information through print, web and social content which supports business outreach, assistance, attraction and retention. This could include case studies, fact sheets, presentations, and multi-media.
- Sector-wide Efforts: Support sector-wide efforts that benefit businesses across target sectors and regions. Activities could include supporting networking activities (i.e. focus groups, etc.); addressing sector-wide challenges (i.e. need for early stage incubator space, etc.); and pursuing other catalytic opportunities (i.e. grants, etc.).
- Partnerships: Coordinate and partner with San Francisco and Bay Area based trade and investment organizations representing the targeted countries and regions in order to build cooperative economic development programs and projects.
- Refer to the City: Refer business issues to OEWD or relevant City department.
- Reporting: Track, measure and regularly report on outcomes.

Preferred Qualification:

- A minimum of two years of experience in the type of program/project proposed
- The organization has existed for a minimum of two years
- Experience managing the type of program/projects proposed in a city of similar or greater size than San Francisco
- Key personnel with experience in the type of program/project proposed



Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco.

**Program Area S: Music Sector Business Development**

Amount: Applicants may propose project budgets up to \$20,000

Scope of Work: San Francisco's music sector – which includes, among other subsectors, the City's live music venues, recording studios, rehearsal spaces, music technology companies, instrument retailers, artist managers, booking agents, attorneys and other support services – is a key contributor to the \$6 billion local nightlife industry and \$1.1 billion local outdoor festival industry, as well as a vital piece of the City's fabric as an arts and culture hub for residents and tourists alike.

OEWD seeks an organization to support the San Francisco music sector by delivering outreach, education, and business development support to music businesses operating in, or wanting to launch in or relocate to San Francisco.

The selected organization will work closely with OEWD on the following activities:

- Outreach and Engagement: Conduct direct, proactive, iterative outreach to San Francisco music businesses. Work to strengthen engagement between local music businesses, musicians, and music consumers. Identify business expansion opportunities, businesses looking to move to San Francisco, and businesses at risk of leaving San Francisco.
- Needs Assessment: Conduct ongoing collection and assessment of music business needs and opportunities. Convey issues to OEWD staff and, where appropriate, develop recommendations for strategies to address industry needs.
- Information Clearinghouse: Serve as an information clearinghouse on resources for music businesses. Coordinate efforts to connect businesses to potential partners, business development opportunities, government programs and other resources.
- Resource Development: Provide information through print, web and social content that supports music industry outreach, assistance, attraction and retention. This could include promotional materials, case studies, fact sheets, presentations, and multimedia resources.
- Awareness Campaigns: Develop, support and execute outreach campaigns to build awareness of local music industry, promote consumption of local music by customers, and foster new B2B relationships involving local music businesses.

- Sector-Wide Efforts: Develop sector-wide efforts that benefit music businesses across the City. Activities could include networking opportunities, programs to address sector-wide or subsector-specific challenges, or other catalytic opportunities.
- Reporting: Track, measure and regularly report on outcomes

Preferred Qualifications:

- A minimum of one year of experience in the type of program/project proposed
- The organization has existed for a minimum of one year
- Experience managing the type of program/projects proposed in a city of similar or greater size than San Francisco
- Key personnel with experience in the type of program/project proposed

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco.

**Program Area T: Lombard Street Ambassador Program**

Amount: Applicants may propose project budgets up to \$280,000 for 12 months

Scope of Work: During the high tourist season Lombard Street between Hyde and Leavenworth Street becomes inundated with visitors who want to visit what has become an iconic public landmark attraction. The objective of the Community Ambassador Program is to create a more civil and safe environment for the residents and the visitors in this unique area. The Office of Economic & Workforce Development (“OEWD”) is seeking a Community Benefit District to oversee a Community Ambassador Program to manage the Lombard Street public visitor attraction as well as the upkeep of the gardens located along the crooked street portion of Lombard between Hyde and Leavenworth Streets in San Francisco.

The selected Community Benefit District will work closely with OEWD on the following activities:

- Coordinating with MTA and SFPD to develop appropriate pedestrian and vehicle safety rule talking points and information materials for the public related to transportation, traffic and public safety/crime.
- Coordinating with MTA and SFPD on their enforcement of violations of pedestrian and vehicle transportation and public safety rules.
- Coordinating with area residents to develop expectations, talking points and information materials related to quality of life issues.
- Attend program team meetings with SFPD, MTA, Supervisor Farrell’s Office and Community Stakeholders to evaluate and modify as needed the Lombard Street Community Ambassador Program over time.

- Educating and providing direction to visitors about pedestrian and vehicle traffic safety rules and about allowable paths of travel and parking rules.
- Educating visitors about auto theft, crime and other relevant public safety issues.
- Educating visitors about area resident expectations regarding quality of life issues.
- Providing directions and other friendly hospitality assistance and referrals to visitors.
- Facilitation of gardening services in coordination with the neighbors.
- Reporting: Track, measure and regularly report on outcomes.

Minimum Qualifications:

Applicant must be an established Community Benefit District listed at <http://investsf.org/cbds/>

**Program Area U: Distribution & Repair Sector Business Development**

Amount: Applicants may propose project budgets up to \$45,000 for 12 months

Scope of Work: The goal of OEWD’s sector strategies is to attract, retain, and support the start and growth of businesses in targeted industries, driving job creation and retention, in addition to promoting tourism, local exports and investment. Distribution and Repair Sector Business Development is a technical assistance program to help strengthen San Francisco’s distribution and repair sector and encourage businesses to start, stay, and grow in San Francisco.

The selected organization will work closely with OEWD on the following activities:

- Outreach: Conduct direct, proactive, iterative business outreach to businesses in target sectors. Identify businesses at risk of leaving San Francisco, business expansion opportunities and businesses looking to move to San Francisco. Assist small businesses in developing and maintaining a coordinated communication system across small businesses and with government. Maintain and expand database of distribution and repair businesses and supporting services in San Francisco.
- Real Estate Assistance: Provide real estate assistance by helping businesses understand the local real estate market; support businesses searching for space in the city and connect businesses to real estate professionals. Provide OEWD with real estate data such as development pipeline information, tenants in the market, and aggregate demand.
- Information Clearinghouse: Serve as an information clearinghouse on resources for businesses. Coordinate efforts to connect businesses to identified local service providers (i.e. legal, finance, marketing, potential partners etc.). Serve as an information clearinghouse regarding local policy development that may impact businesses.
- Connect to Assistance Programs: Educate and connect organizations to relevant City, State, Federal and other assistance programs including tax incentives, financing programs, and workforce development services.

- **Information Resources:** Provide information through print, web and social content which supports business outreach, assistance, attraction and retention. This could include case studies, fact sheets, presentations, and multi-media.
- **Workforce:** Connect businesses that are in need of additional staff or sub-contractors with appropriate candidates or organizations. Create opportunities for workforce skills development.
- **Refer to the City:** Refer business issues to OEWD or relevant City department.
- **Sector-wide Efforts:** Support sector-wide efforts that benefit businesses across target sectors. Activities could include supporting networking activities (i.e. focus groups, etc.); addressing sector-wide challenges (i.e. need for early stage incubator space, etc.); and pursuing other catalytic opportunities (i.e. grants, etc.).
- **Reporting:** Track, measure and regularly report on outcomes

**Preferred Qualifications:**

- A minimum of one year of experience in the type of program/project proposed
- The organization has existed for a minimum of one year
- Experience managing the type of program/projects proposed in a city of similar or greater size than San Francisco
- Key personnel with experience in the type of program/project proposed

**Program Area V: FashionSF: Business Development – Fashion**

Amount: Applicants may propose project budgets up to \$59,500 for 12 months

**Scope of Work:** FashionSF is a fashion-based business development program. The goal of FashionSF is to support the expansion of existing designers and manufacturers in the apparel and accessory sector and facilitate and support new company startup and growth.

The selected organization will work closely with OEWD on the following activities:

- **Outreach:** Conduct direct, proactive, iterative business outreach to businesses in target sector. Identify businesses at risk of leaving San Francisco, business expansion opportunities and businesses looking to move to San Francisco. Assist small businesses in developing and maintaining a coordinated communication system across small businesses and with government.
- **Real Estate Assistance:** Provide real estate assistance by helping businesses understand the local real estate market; support businesses searching for space in the city and connect businesses to real estate professionals. Provide OEWD with real estate data such as development pipeline information, tenants in the market, and aggregate demand.
- **Information Clearinghouse:** Serve as an information clearinghouse on resources for businesses. Coordinate efforts to connect businesses to identified local service providers (i.e. legal, finance, marketing, potential partners etc.). Serve as an

information clearinghouse regarding local policy development that may impact businesses.

- **Connect to Assistance Programs**: Educate and connect organizations to relevant City, State, Federal and other assistance programs including tax incentives, financing programs, and workforce development services.
- **Information Resources**: Provide information through print, web and social content which supports business outreach, assistance, attraction and retention. This could include case studies, fact sheets, presentations, and multi-media.
- **Workforce**: Connect businesses that are in need of additional staff or sub-contractors with appropriate candidates or organizations. Create opportunities for workforce skills development.
- **Sector-wide Efforts**: Support sector-wide efforts that benefit businesses across target sectors. Activities could include supporting networking activities (i.e. connecting designers to local manufacturers, etc.); addressing sector-wide challenges (i.e. need for early stage incubator space, etc.); and pursuing other catalytic opportunities (i.e. grants, etc.).
- **Refer to the City**: Refer business issues to OEWD or relevant City department.
- **Marketing**: Identify opportunities for made in San Francisco designers to be highlighted in different media outlets, social, print, television, etc.
- **Reporting**: Track, measure and regularly report on outcomes.

**Preferred Qualifications:**

- A minimum of one year of experience in the type of program/project proposed
- The organization has existed for a minimum of one year
- Experience managing the type of program/projects proposed in a city of similar or greater size than San Francisco
- Key personnel with experience in the type of program/project proposed

**Minimum Qualifications:**

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco.

**Program Area W: Production Sector Business Development**

Amount: Applicants may propose project budgets up to \$59,800 for 12 months

**Scope of Work:** The goal of OEWD's sector strategies is to attract, retain, and support the start and growth of businesses in targeted industries, driving job creation and retention, in addition to promoting tourism, local exports and investment. We are seeking an organization to provide assistance to help strengthen San Francisco's production sector and encourage businesses to start, stay, and grow in San Francisco. Manufacturing has a great history in San Francisco and is

in the midst of a resurgence. The City wants to do whatever it can to support this and sees this body of work as a key component of that support.

The selected organization will work closely with OEWD on the following activities:

- **Outreach**: Conduct direct, proactive, iterative business outreach to businesses in target sector. Identify businesses at risk of leaving San Francisco, business expansion opportunities and businesses looking to move to San Francisco. Assist small businesses in developing and maintaining a coordinated communication system across small businesses and with government.
- **Real Estate Assistance**: Provide real estate assistance by helping businesses understand the local real estate market; support businesses searching for space in the city and connect businesses to real estate professionals. Provide OEWD with real estate data such as development pipeline information, tenants in the market, and aggregate demand.
- **Information Clearinghouse**: Serve as an information clearinghouse on resources for businesses. Coordinate efforts to connect businesses to identified local service providers (i.e. legal, finance, marketing, potential partners etc.). Serve as an information clearinghouse regarding local policy development that may impact businesses.
- **Workforce**: Connect businesses that are in need of additional staff or sub-contractors with appropriate candidates or organizations. Create opportunities for workforce skills development.
- **Connect to Assistance Programs**: Educate and connect organizations to relevant City, State, Federal and other assistance programs including tax incentives, financing programs, and workforce development services.
- **Local Purchasing Campaigns**: Develop, support and execute outreach campaigns to encourage and facilitate local shopping by customers as well as B2B purchasing relationships
- **Information Resources**: Provide information through print, web and social content which supports business outreach, assistance, attraction and retention. This could include case studies, fact sheets, presentations, and multi-media.
- **Sector-wide Efforts**: Support sector-wide efforts that benefit businesses across target sectors. Activities could include supporting networking activities (i.e. focus groups, etc.); addressing sector-wide challenges (i.e. need for early stage incubator space, etc.); and pursuing other catalytic opportunities (i.e. grants, etc.).
- **Marketing**: Identify opportunities for made in San Francisco production businesses to be highlighted in different media outlets, social, print, television, etc.
- **Refer to the City**: Refer business issues to OEWD or relevant City department.
- **Reporting**: Track, measure and regularly report on outcomes.

**Preferred Qualifications:**

- A minimum of one year of experience in the type of program/project proposed

- The organization has existed for a minimum of one year
- Experience managing the type of program/projects proposed in a city of similar or greater size than San Francisco
- Key personnel with experience in the type of program/project proposed

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco.

**Workforce Development Programs**

The Department of Labor, State of California, and several national organizations have studied the positive effects of performance-based contracting models and encouraged adoption of them where possible. OEWD is committed to continuing to explore and refine best practice models and to negotiate performance tied funding as appropriate with grantees funded through this RFP for the Workforce Development program areas. For the initial year of funding, OEWD is interested in piloting performance based contracting with providers receiving funding for Comprehensive Access Point (CAP) and Neighborhood Access Point (NAP) services procured under RFP 121.

OEWD may expand performance based contracting models into other program areas during the lifetime of this RFP, including the Workforce Development areas described below. Specific terms, conditions, and payment triggers will be discussed with grantees as appropriate and codified in the resulting grant agreements.

**Program Area X: CityBuild – Construction Sector Coordinator**

Amount: Applicants may propose project budgets between \$750,000 and \$1,680,000 for 12 months to support 300-500 clients.

Scope of Work: Sector Workforce Programs are designed to improve the responsiveness of San Francisco’s workforce system to the demands of these significant and growing industries, providing employers with skilled workers and expanding employment opportunity for residents through a dual customer approach. These programs deliver a full spectrum of services necessary to develop job-seekers’ industry-relevant skills, experience and knowledge, and to help them secure unsubsidized employment within that sector. Sector Workforce Programs include the following components solicited through this RFP:

**Sector Coordinators** manage and coordinate all activities and services provided through a Sector Workforce Program, and are responsible for the connection of participants to sector-related, unsubsidized employment.

The Construction Sector Coordinator serves as the lead coordinator of the CityBuild Sector Workforce Program. In close consultation with OEWD, the Construction Coordinator manages and coordinates all activities and services provided through the CityBuild Workforce Program, a partnership that includes employers, training providers, community-based training organizations, secondary and post-secondary educational institutions, unions, sector associations, workforce system partners, and other stakeholders. In collaboration with OEWD, the Construction Sector Coordinator is also responsible for the connection of both training and direct placement of program participants to sector-related, unsubsidized employment.

The Construction Sector Coordinator must collaborate with OEWD, Occupational Skills Training (OST) Construction Sector Providers and Sector Bridge Programs (if applicable) to create a seamless delivery model for all employer and job-seeker customers, and a “hub” for jobseekers interested in pursuing a career in the relevant sector. Staff must serve as sector subject matter experts; with a dual-customer approach, staff must serve both jobseekers and employers in order to effectively support the industry’s workforce supply and demand needs.

The Sector Coordinator must facilitate connections to OEWD’s workforce system, including the Comprehensive Access Points (CAP), Neighborhood Access Points (NAP), Sector Access Points (SAP), Job Readiness Services (JRS), Young Adult Access Points, and Business Services providers. The CAP and NAPs may be leveraged to provide space and logistical coordination for sector-specific outreach, orientations, vocational assessment, or employment and hiring fairs, as appropriate.

Sector Workforce Programs are designed to provide job-seekers with a full spectrum of services necessary to develop skills, gain industry experience and knowledge, and secure industry-specific employment. Sector Workforce Programs provide job preparation, vocational training, credentialing and certification, employment assistance, job retention, and other services to develop a pipeline of skilled and prepared workers for industries that can offer job-seekers career development opportunities and advancement. Together, the various components of a Sector Workforce Program provide all the services required of Sector Coordinator but contextualized to impart sector-specific information and align the skills imparted with the requirements of the sector.

Applicants for the Sector Coordinator, must address how the following services will be offered to participants as part of a comprehensive Sector Workforce Program and as part of San Francisco’s broader workforce system.

Through a coordinated approach, all Sector Workforce Program providers must deliver or make accessible the full range of services described below:

### **Citywide Outreach and Recruitment**

Conduct Citywide outreach and recruitment services to expose San Francisco residents to the two construction sector trainings (CityBuild Academy and Construction Administration and



Professional Services Academy) and enhance general awareness of the services available at through the workforce system. Identify appropriate/eligible participants to be enrolled in CityBuild Academy (CBA) and Construction Administration and Professional Services Academy (CAPSA), including low-income, unemployed, underemployed, and underserved populations. Standard marketing tools such as brochures, email blasts, public speaking presentations, ads, one on one outreach and flyers should be utilized to attract individuals eligible for services to CBA and CAPSA. In addition, outreach and recruitment materials and strategies may be tailored to CBA and CAPSA target population (e.g., reentry, veterans, low income, etc.). Grantees may receive participant referrals from OEWD, other workforce system providers, and partnering agencies under an agreed-upon referral process. Outreach and recruitment efforts must also be coordinated with other partners in the workforce system, including OEWD-funded programs and other San Francisco workforce and community stakeholders; competitive proposals will have existing or propose plans to establish formal partnerships and Memoranda of Understanding (MOUs) with these entities.

### **Information, Orientation, Assessment, and Enrollment**

*Information:* The Construction Sector Coordinator must provide participants with information on employment opportunities and how to access services within the larger public workforce system, including those made available by other workforce providers and Core Partners, if the prospective customer is not deemed eligible for CBA or CAPSA. Information on employment opportunities should include employment statistics, labor market (local/state/national) information, training opportunities, job vacancy listings, required job skills, and available services. Information on unemployment claims, eligibility for TANF employment activities, and financial aid assistance for training and education programs should also be provided. Information regarding supportive services, including childcare and transportation, must also be accessible. Information can be made available in a self-service resource room, through individualized referrals, and/or in group workshops. All CityBuild specific materials need to be approved by OEWD 72 hours prior to anticipated public posting or distribution.

*Orientation:* The sector must coordinate and provide orientations at sites designated by OEWD, as described in the outreach plan and the larger workforce system, including those provided by other agencies and organizations. Information should be provided on how to access CBA and CAPSA trainings, benefits of a construction career in construction, and the eligibility and expectations for successful training participation. Orientations should take place at the Access Points and other places designated by OEWD. They can occur regularly in a group workshop format or take place individually as part of intake. Outreach materials should include the Orientation dates, if scheduled, address and times. All CityBuild specific orientation materials and presentations must be approved by OEWD 72 hours prior to anticipated public presentation or distribution.

*Comprehensive Assessment:* Comprehensive Assessment activities assist participants in determining their skill level, interests, aptitudes, and abilities as they begin to define or redefine career goals. Assessment also identifies barriers to employment that are relevant to

the individual participant and any needed supportive services are identified during the assessment process. Assessment helps determine the incoming participants' eligibility and appropriateness for required and optional workforce programs and supportive services. An objective assessment must examine a participant's:

- Education
- Basic skills
- Occupational skills
- Prior work experience
- Interests
- Employability
- Aptitudes
- Supportive services need
- Developmental needs

The Construction Sector Coordinator must conduct a comprehensive objective assessment of each participant's experience and interests, unless the participant has been referred by another provider with a current assessment. The Sector Coordinator must also make a more in-depth technical assessment available to any participant who is interested in receiving such service. All technical assessments must be approved by OEWD; currently-approved assessment tools include ACT's job skills assessment system, Work Keys, Key Train, National Career Readiness Certificate, CASAS and TABE. The Sector Coordinator that conducts on-site technical assessments must identify the type and depth of comprehensive assessment to be conducted, and provide guidance and referrals based upon the nature of the barriers identified during counseling and any prior assessments.

*Enrollment/ Case File Development:* Enrollment activities must establish documentation of eligible individuals' participation in a program or service. Prior to enrollment, the grantee must work with the potential participant to determine eligibility, complete required forms, and conduct required assessments. These and any additional forms required to facilitate or provide services must be completed and/or entered into OEWD's data tracking systems by the grantee and managed with the case file. All documents must be signed, where applicable, and kept in the case file, including electronic documents.

### **Job Readiness Training**

JRT should inform job seekers about the construction industry, the training opportunities available through CityBuild Academy and Construction Administration and Professional Services Academy; be relevant and customized to the learning needs of the individual or target population and be delivered in a culturally competent and culturally sensitive manner. All JRT must follow an OEWD-approved presentation and format. In addition, a physical education component needs to be incorporated. Training should include topics such as:

- Learning and communication skills
- Self-assessment tools
- Job search skills
- Job-seeker portfolio development (e.g., resume, applications, online profiles)
- Interview skills
- Resume writing
- Employers' expectations
- Appropriate work attire
- Managing a work life
- Computer literacy for the job search and on the job
- Life skills, including: achieving goals, developing positive support systems, and balancing obligations at work and home.

### **Referral to Training and other System Services**

*General Workforce System Referrals:* For those jobseekers that require supportive or direct services to achieve their employment objectives, the Sector Coordinator must have the ability to successfully refer and connect individuals to required services. Referral services must provide job-seekers with information on how to access services within and across the larger workforce system and other barrier removal services. Referral services must include guided referral to services and workforce programs for which individuals are eligible and prepared and which are most appropriate to their goals, abilities and needs, based on the results of assessment.

The Sector Coordinator must:

- Be a receiver and provider of referrals to and from other wrap-around and workforce services providers.
- Document all referrals for services.
- Provide updates to referring and receiving agencies on client progress/challenges, as appropriate.

Proposers must identify the types of services they propose to provide access to by referral and, as appropriate, identify service providers with whom they have established referral relationships.

*Training Referrals:* When assessment identifies a jobseeker's need for and interest in CBA or CAPSA, the Sector Coordinator may refer the individual to the appropriate training. The Sector Coordinator must inform individuals of available training subsidies, and explore sources of income for the participant while they are in training.

*Sector Workforce Program Referrals:* The Sector Coordinator should develop and maintain effective partnerships and referral relationships with other OEWD's Sector Coordinators and their related Occupational Skills Training and Sector Bridge programs. Sector Workforce

Programs also include Healthcare, Hospitality/Retail, and Information & Communications Technology (ICT) sectors. Job-seekers with interest in one of OEWD's targeted sectors must be referred to a Sector Coordinator orientation as an entry-point into Sector Workforce Programs.

### **Individual Planning and Case Management**

The Sector Coordinator is required to provide individual employment planning and case management services to interested program participants. These services are intended to ensure that:

- The program experience and outcomes for each participant are aligned with the unique educational and occupational goals of the participant; and
- Services are provided in a manner that addresses the individual needs of each participant, including services designed to help individuals overcome barriers to post-secondary or employment success.

*Individual Employment Planning:* The Sector Coordinator must develop Individual Employment Plans (IEPs) that, at a minimum, (1) identify the participant's employment goals and appropriate achievement objectives, including any industry sector of interest and potential career pathways, (2) identify any barriers to achieving these goals, and (3) identify an appropriate combination of services and skill development to help the participant achieve his/her employment goals, including providing information on supportive services, eligible providers of training services, Sector Workforce Programs, and career pathways to attain career objectives. As appropriate to a participant's goals and needs, individual planning should involve case management staff from relevant service providers to ensure that no services are duplicated.

*Case Management:* The Sector Coordinator must provide ongoing and integrated case management services to prepare job-seekers for training, and successful job search and employment.

Case management should:

- Provide one-on-one as well as small group career and motivational counseling, including review of IEP and BESI goals and steps to achieve them.
- Assist the participant with overcoming barriers, including connections to other resources and support services available through the workforce system.
- Follow up on referrals and connections to education, training and employment, and advocate on behalf of the participant, as needed.
- Monitor the participant's progress, and continuously modify the IEP to reflect changes in the participant's needs and goals.

### **Supportive Services**

Participants in need of support to enter, participate and succeed in workforce services must be provided or connected to supportive services. ***Supportive services must be provided directly by***

***the Construction Sector Coordinator.*** If necessary, the Construction Sector Coordinator, in collaboration and jointly, may provide supportive services directly or through referrals to the CAP or other providers. The Sector Coordinator must work with participants to address those life issues impacting the participants' ability to obtain or retain employment.

The Sector Coordinator must provide accurate information relating to the availability of supportive services in the local area, and referral to such services as appropriate. Supportive services should tie into services available through the Sector Coordinator and its partners as much as possible, and should be delivered in a culturally competent and culturally sensitive manner. The grantee must identify, assemble, and facilitate access to resources needed by job-seekers to mitigate barriers and meet minimum eligibility requirements for training and/or employment opportunities.

Supportive services may include (but are not limited to):

- Tuition or training expenses
- Testing fees
- Child care services
- Transportation assistance
- Driver's license acquisition or driving record remediation
- Drug testing
- Assistance with work-related expenses (uniforms, supplies, tools, etc.)

Applicants must identify the supportive services they propose to provide, and indicate whether the services will be provided directly by the applicant or by an organization partnering in the application. Successful applicants may also indicate the documentation that participants must supply to qualify to receive the proposed supportive services.

### **Direct Job Search, Employment, and Retention Services –CAPSA ONLY**

The Construction Sector Coordinator must provide job-ready participants with job search, employment, and retention services that help them find and secure employment, assess their progress, and determine need for additional services to help them adjust to their new work environment. Job-seekers with limited barriers to employment may be prepared to advance directly to job search services upon enrollment. The intensity of job search, employment, and retention services will depend upon the assessed job-seeker's individual needs and priorities.

*Job Search and Employment:* Job search services prepare jobseekers to conduct an effective job search, and make them aware of available employment opportunities as they conduct their searches. The Construction Sector Coordinator must provide a variety of job search services, inclusive of but not limited to the following:

- Provide information and assistance regarding job search strategies, resume development, and interviewing techniques, including individual and small group counseling and coaching.
- Provide computer access and assistance to support the job search.
- Develop and maintain employer relationships and generate employment leads.
- Coordinate with OEWD CityBuild’s Employment Network Services, Business Services staff/providers to leverage employer relationships (with large, regional employers), First Source local hiring agreements, on-the-job training opportunities, hiring tax credits, federal bonding program services, and other business service strategies to maximize employment opportunities.

Connecting job-seekers to viable employment opportunities is a key responsibility of the Access Point and its staff. The Construction Sector Coordinator must market job-seekers to local employers and facilitate the application and hiring process to the extent feasible. The Sector Coordinator must maintain rosters of referral-ready participants who can quickly be contacted when appropriate employment opportunities become available.

*Retention Services:* The Construction Sector Coordinator must track retention of a jobseeker in employment or vocational training for a year following exit. Documenting retention can be accomplished through communication with employers and/or with participants. At minimum, the Sector Coordinator must document retention of all participants receiving staff-assisted placement services at the second and fourth quarters following their exit from workforce services and/or programs to determine whether a program participant is still on the job and/or needs additional support to achieve positive program participation and employment outcomes. Retention services must identify and address barriers that may jeopardize the participant’s new employment, offer coaching and referrals to help participants address new or on-going barriers to employment, and provide reemployment services if the participant has quit or been terminated.

### **Sector Coordinator Service Description**

In addition to providing services for all of the required activities noted above, the Construction Sector Coordinator grantees must also deliver the following:

- Collaborate with all of the Sector Workforce Program partners, and act as the lead in service coordination and implementation of program activities, including initial outreach, recruitment, assessment and referral for Sector Workforce Program services.
- Create and implement a business plan for the Sector Workforce Program that includes a detailed business strategy, program implementation strategy, and fund development strategy for the long-term sustainability of the Sector Workforce Program.

- In coordination with OEWD staff, conduct program design, coordination, and implementation activities to complement and enhance existing sector program models, incorporating existing OEWD strategies, priorities, program structures, eligibility requirements and/or other specific policies and procedures.
- Deliver Sector Workforce Program Orientations that provide an overview of the industry, occupational and career pathway information, and detailed information about services and trainings provided through Sector Workforce Programs. The Construction Sector Coordinator will be responsible for conducting regular orientations citywide at various NAPs, CAPs, SNAPs, and other events and sites as directed by OEWD. Orientations will provide a clear process of referrals to training programs through Sector Workforce Programs and next steps for assessment and enrollments. Coordinators will be required to submit data on orientations on a monthly basis, including location of orientation, attendee information, services offered, and proof of client follow-up.
- The Construction Sector Coordinator will conduct sector-specific assessment to determine a participant's skill level, interests, aptitude and ability, barriers to employment, and work tolerances required for sector-specific employment; and to inform the referral of orientation customers to appropriate trainings. The grantee will assess eligibility for CityBuild Workforce Programs and, if the workforce system customers do not meet minimum qualifications, provide referrals to services for other necessary employment resources. Sector-specific assessment must reference and complement assessments delivered by the CAP and other workforce system partners. The Coordinator will be responsible for providing in-depth case management to CityBuild Program participants, and will ensure that participants have all barriers mitigated prior to training completion.
- In coordination with OEWD CityBuild staff, develop relationships with industry partners to plan and implement specialized trainings to enhance the skills development of CityBuild Academy and Construction Administration and Professional Services Academy (CAPSA) Trainees.

The Construction Sector Coordinator must:

- Assist OEWD with the management and coordination of CityBuild trainings.
- Work with OEWD to develop and implement Job Readiness Trainings (JRT) for both CBA and CAPSA
- Coordinate recruitment and outreach efforts for enrollment into either CBA or CAPSA: must designate at least one staff member to conduct outreach full-time

- Maintain active knowledge of all City resources (including Access points) in order to provide appropriate referrals to clients
- Develop internships and employment opportunities for Construction Administration and Professional Services trainees. [Note: CityBuild Academy graduate referrals to potential job openings will be led by OEWD staff.]
- Work with OEWD and other partners to establish special training initiatives and projects with targeted employers (Metropolitan Transportation Agency, San Francisco Airport, San Francisco Port Authority, San Francisco Public Utilities Commission, etc.)
- Provide OEWD with monthly reports detailing outreach/recruitment, case management, and internship facilitation efforts; share all requested client information with OEWD.
- Identify one staff member to work fulltime and solely on CityBuild and CAPSA programs and serve as the primary administrative conduit to OEWD/CityBuild.
- Provide training to staff and staff of all subcontractors on CityBuild policies and procedures, orientation materials and practices, and case management skills development. Also, the grantee must provide ongoing training and support to new staff and partners.

Programs or projects proposed under this program area should meet each of the following criteria and address, as appropriate, each in the proposal:

- Clear understanding of the relevant industry sector (construction), including previous experience operating a large-scale workforce program in this industry.
- Ability to propose and implement a service model with strong training (occupational and sector JRT) and direct connections to viable employment opportunities for the new and existing workforce.
- Demonstrated history of successful connection of trainees to training-related employment.
- Strong and existing sector employer relationships and ability to prove employer commitment via MOUs.
- Applicants are strongly encouraged to partner with local community college(s), other post-secondary institutions and General Education Development testing training to provide potential trainees with a direct referral if needed.



- Applicants must demonstrate that the proposed services are aligned to industry standards for the occupations identified.
- Located in, or with demonstrated accessibility by public transportation, and equipped with staffing, training rooms, computers and other equipment, and resources that enable the delivery of a wide range of workforce and other services offered in both self-service and staff-assisted capacities.
- Pre-existing relationships and referral networks with a wide range of workforce, education, and supportive service providers in San Francisco.
- Experience utilizing OEWD-approved assessment tools to evaluate the needs of job-seekers with a wide range of abilities and backgrounds.
- Pre-existing relationships with employers in industries generating significant employment opportunities in San Francisco-CAPSA ONLY.
- Comprehensive understanding of the unique needs of San Francisco’s job-seekers and employers.
- History of successful participant recruitment and retention strategies that are appropriately aligned with program model and goals.
- Demonstrated experience providing one-on-one case management services that prepare individuals to gain credentials and industry-recognized degrees and to enter and succeed in post-secondary education and the workplace.
- Demonstrated experience and expertise delivering JRT.
- High level of financial/accounting capacity

Specific questions to be addressed in the application for this program area:

1. Describe how you will work with OEWD in the engagement of industry, including outreach and coordination for any employer advisory or industry focus groups currently conducted by your organization for a given sector. Explain how you will align these engagement efforts with WISF sector committees and OEWD staff to avoid duplication of services. Identify and specify your capacity to designate a staff member to performing full-time outreach and recruitment efforts for the industry trainings. Also identify and specify one staff member to lead organizational Coordinator efforts, and work directly with OEWD. Note, Coordinator lead must work solely on CityBuild Workforce programming.

2. Describe your experience and/or how you plan to partner with local community colleges in order to expose jobseekers to higher education, career pathways and credentials. Be specific in your response and explain what this experience will entail for a jobseeker.
3. Provide a detailed explanation for how you will coordinate service provision with other educational, community-based or training partners providing workforce services in the sector through outreach, orientation and referral for service. In your response, please include a summary of the organizations with whom you currently partner or intend to partner with for such services, the scope of these services and any formal agreements planned or in place to deliver services.
4. Provide detail around your organizational ability to provide monthly narrative reports and client data to OEWD. Describe your communication plan with OEWD.

Preferred Qualifications:

- Demonstrated success in providing employment services and employment barrier remediation services.
- Demonstrated ability to leverage other services and resources.
- Established relationships with citywide service providers and resources.

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco.

**Program Area Y: CityBuild – District 10 Resident Outreach and Support**

Amount: Applicants may propose project budgets up to \$300,000 for 12 months to support 750-1000 clients.

Scope of Work: The San Francisco Public Utilities Commission (SFPUC) is seeking the services of a qualified proposer(s) to assist the SFPUC with providing outreach and recruitment services, and barrier mitigation services to economically disadvantaged residents, as defined by the City and County of San Francisco, who live in District 10. The proposer(s) shall assist the SFPUC with identifying, recruiting, screening for qualifications and appropriateness of residents who live in the Southeast section of the City. In addition, proposer will provide light case management services and referral services for individuals with barriers to employment.

The Office of Economic and Workforce Development (OEWD) will administer the grant on behalf and with the direction of the SFPUC. OEWD seeks to fund proposals to provide outreach and recruitment, and barrier mitigation services including:

**Outreach and Recruitment Services**

- Develop an outreach services strategy plan to deliver extensive outreach and recruitment services to at least 750 unduplicated economically disadvantaged individuals who live in District10
- Facilitate a series of outreach efforts to identify pipeline components such as, but not limited to, strategies to:
  - Market career opportunities that may be available on the sites to community residents
  - Encourage women and under-represented candidates to consider these occupations
  - Ensure information disseminated is culturally competent and relevant to diverse groups
- Track individuals who express and demonstrate an interest in careers in vocational work.
- Provide monthly qualitative and quantitative participant and service status reports

### **Barrier Mitigation Services**

- Provide assessments and functional/work capacity evaluations to determine abilities, skills and interests related to employment.
- Advise participants on employment and training opportunities that are consistent with their assessed abilities, skills, and interests.
- Provide light case management for 125 to 250 unduplicated individuals who have at least one barrier to employment and reside in District 10. Barriers to employment include but are not limited to:
  - No High School Diploma or GED
  - Suspended or no driver's license
  - Substance abuse concerns, i.e. unable to pass an industry drug test
  - Basic skills deficient
  - Homeless
  - Unpaid union dues
  - No construction experience
  - Health and/or behavior health concerns
  - Lack of job readiness skills
  - Lack of childcare
  - First time transition into the workforce
  - Limited work skills and experience
  - Academic skills lower than 8<sup>th</sup> grade proficiency
  - Re-entry/re-alignment after extended unemployment or under-employment
  - Personal or family concerns
- Assist participants in creating strategies to develop their strengths and overcome barriers to learning

- Provide or link participants to appropriate and relevant resources to address barriers to employment
- Monitor participant progress and adjust the barrier mitigation services plan as necessary
- Must ensure at least 75% of the participants with barriers to employment are able to resolve them and are work-ready
- Provide information on how to access services within the larger public workforce system
- Participate in regular meetings with City staff and CBO partners
- Implement tracking system to be provided to OEWD monthly

**Measures**

<b>Measures</b>	<b>Goal</b>
Outreach and recruitment to unduplicated economically disadvantaged individuals who live in District 10	750-1000 individuals
Participants enrolled in light case management services	125 - 250 participants enrolled in services
Referred to barrier removal services	75% of participants enrolled
Barriers removed and work ready	75% of participants of participants referred to barrier removal services
Placement in unsubsidized employment, workforce training services, or post-secondary education	50% of participants enrolled

**Reporting**

Contractor will be responsible for submitting periodic performance reports to OEWD as required by funding source guidelines and/or upon OEWD request.

Preferred Qualifications

- Demonstrated success in providing employment services and employment barrier remediation services.
- Demonstrated ability to leverage other services and resources.
- Established relationships with citywide service providers and resources.

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco

**III. Application Process and Guidelines**

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**A. Questions and Inquiries**

Any questions or clarifications should be directed to the department's procurement team via email to [owd.procurement@sfgov.org](mailto:owd.procurement@sfgov.org) . Questions should be submitted in writing, no later than Noon, Wednesday April 26, 2017.

Applicants are encouraged to submit questions to OEWD prior to the deadline. A summary of all questions and answers pertaining to this RFP will be posted at OEWD's bid opportunities website, <http://owd.org/bid-opportunities> by end of day Friday April 28, 2017. The department may make interim postings of Q&As before the deadline; interested parties are encouraged to check the site often for these interim postings.

## **B. Applicant Requirements and Guidelines**

The following are the requirements and guidelines for applicants:

- Eligible Applicants
- Organizational Capacity
- Board of Directors/Leadership/Stability
- General City Grant Requirements
- Additional Local Requirements
- Extendibility of Procurement Justification
- Collaborations
- Conditions of Proposal

### **Eligible Applicants**

Eligible applicants include all of the following, unless otherwise noted:

- 501(c)(3), 501(c)(4), 501(c)(6) registered non-profit corporations. Applicants should have a Board of Directors with a minimum of 3 members that reflect the diversity of the program(s) and clients being served;
- Governmental entities, including public agencies, commissions or authorities that are independent of the City and County of San Francisco's government;
- Churches that meet the requirements of IRC section 501(c)(3), regardless of their application and recognition from the IRS;
- Institutes of higher education; and
- Private businesses and other entities properly recognized by the State of California, who are eligible to do business in San Francisco, and meet the vendor requirements set forth below.

Please note that certain program areas may only seek applications from specific entities (e.g. nonprofit organizations or established Community Benefit District Management Corporations). Refer to the minimum qualifications in each program area to clarify eligibility.

### **Organizational Capacity**

Qualified applicants must demonstrate the capacity for each program area outlined within the specific program description sections above. All qualifications and additional questions requested should be addressed in the proposal response.

### **Board of Directors/Leadership/Stability**

- a) Board (if applicable) and staff must have broad-based experience and skills to satisfactorily manage and guide the organization
- b) The Board of Directors (if applicable) must provide vision, oversight and direction to the organization
- c) The Board of Directors (if applicable) should include San Francisco residents or demonstrate knowledge of the needs of low and moderate income San Franciscans. Representation on the board of low income residents and from the target neighborhood/population is encouraged.

### **General City Grant Requirements**

This RFP uses the words grant and contract interchangeably. The actual form of agreement and specific language will be determined by the City during the negotiation process.

All applicants must comply with each of the following:

- a) Applicants should demonstrate a history of meeting outcome requirements for other similar programs.
- b) Successful applicants must comply with all applicable local government regulations.
- c) Successful applicants must comply with all reporting and monitoring requirements to capture the overall efficacy of this funding opportunity and of the specific program(s).
- d) Successful applicants must provide proof of insurance during the grant negotiation process.
- e) Successful applicants must either be an approved City vendor or be able to meet all City vendor requirements and not be on the City, State or Federal Debarred or Suspended lists. Unless approved by OEWD, all applicants must be able to become an approved City vendor within ten days of notice of award. Sub-grantees are not required to be City-approved vendors; only the lead organization or fiscal sponsor must be City-approved. Vendor application packets can be obtained from the Office of Contract Administration at City Hall, Room 430, and 1 Dr. Carlton B. Goodlett Place San Francisco, California 94102 or downloaded from their website at <http://sfgov.org/oca/qualify-do-business>.
- f) Successful applicants must meet all of the following conditions:
  - (i) Are not listed on the General Services Administration's List of Parties Excluded from Federal Procurement or Non-procurement Programs in accordance with Executive Orders 12549 and 12689, "Debarment and

Suspension.” This list includes the names of parties debarred, suspended, or otherwise excluded by agencies, and the names of contractors declared ineligible under statutory or regulatory authority other than Executive Order 12549;

- (ii) Have not, within the previous three years, been convicted or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (iii) Are not presently indicted or otherwise criminally or civilly charged by a government entity (Federal, State or Local) with commission of any of the offenses enumerated in subsection above; and,
- (iv) Have not, within the previous three years, had one or more public transactions (Federal, State or local) terminated for cause or default; or
- (v) Are otherwise not presently debarred, suspended, proposed for debarment, or declared ineligible or voluntarily excluded from covered transactions by any Federal department or agency.

#### **Additional Local Requirements**

Funds are subject to numerous local requirements which are listed below:

- a) **Accessibility:** Programs and services must be accessible to persons with disabilities. Program access can be achieved in many cases without having to alter the existing facility.
- b) **Non-Discrimination:** Agencies must comply with federal and San Francisco Contract Monitoring Division (CMD) prohibitions against discrimination in fair housing and equal employment opportunity, and in awarding grants. Agencies must also comply with the Equal Benefits Ordinance for domestic partners. Additional information concerning these items can be found on the CMD website at <http://sfgsa.org/index.aspx?page=6125>
- c) **Environmental Review:** If required, agencies must complete this review before funds can be utilized.
- d) **Procurement:** Projects must comply with federal conflict of interest regulations, and regulatory procedures for obtaining and granting for goods and services.
- e) **Ineligible Reimbursements:** Funds for activities occurring prior to the commencement date of the grant agreement cannot be reimbursed.
- f) **Religious Activity:** Funds may not be used for religious purposes or for the improvements of property owned by religious entities except where the grant recipient is a secular non-profit organization with a long term lease.
- g) **Political Activity:** No federal funds received through this RFP shall be used to provide financial assistance for any program that involves political activities. Grantee shall comply with the provisions of the Hatch Act (U.S.C. 1501-1508 and 7324-7328), which limit the political activities of employees whose principal

employment activities are funded in whole or in part with Federal funds. In addition, proposers must comply with Section 1.126 of the San Francisco Campaign and Governmental Conduct Code. Details can be found at: <http://sfgov.org/oca/general-contract-terms-conditions>

### **Extensibility of Procurement Justification**

This RFP procurement process, and the proposals received as a result of it, may be used to justify grant funding decisions for other similar services and/or other funding that becomes available through OEWD or any other City Department.

### **Collaborations**

Collaborative consortia, joint ventures or a team of organizations with complementary skills and experience are permitted and highly encouraged to respond to this RFP.

- a) **Lead Applicant:** Proposals from collaborative consortia, joint ventures, or teams must designate a lead agency that will serve as the fiscal agent for the partners. This lead agency or organization will be responsible and accountable for effectively and efficiently planning, managing and delivering the services and activities described in this RFP, while providing excellent customer service and achieving the granted performance outcomes. The lead agency must also demonstrate the management and financial capability needed to effectively and efficiently deliver the program proposed and account for the grant funds. The lead applicant may or may not provide services other than oversight (i.e. a fiscal agent).
- b) **Sub-granting/Program Leads:** Applicants may include sub-grant arrangements with other organizations; however, these arrangements must be made prior to submission of the proposal. Confirmation of a memorandum of understanding or other formal agreement between the applicant and sub-grantee may be requested by OEWD during or after the review process.
- c) **Severability of Collaborative Proposals:** OEWD, and/or any other City departments who use this RFP solicitation as a procurement process for other funds, reserve the right, at their own discretion, to fund select activities or partners, (and remove or eliminate others) within a proposal submitted by a collaborative or group of agencies.

### **Conditions of Proposal**

- a) A proposer may revise a proposal on the proposer's own initiative at any time before the deadline for submission of proposals. The proposer must submit the revised proposal in the same manner as the original. A revised proposal must be received on or before the proposal due date. In no case will a statement of intent to submit a revised proposal, or commencement of a revision process, extend the proposal due date for any proposer.
- b) Applicant agrees that submission of a proposal properly completed and signed off by an owner or officer of the proposing firm, agency, or organization who is duly authorized to bind the applicant, shall constitute an agreement 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 lead agency to ensure that all named partners are in agreement with the proposal prior to submission. The Proposal shall be binding for no less than one hundred twenty (120) days. The grantee must comply with City and County ordinances and contracting requirements. For more detailed information, see the Office of Contract Administration website at <http://sfgov.org/oca/general-contract-terms-conditions>. The grant requirements include general liability and auto insurances, compliance with equal benefits ordinance, and current SF business tax certificate, if applicable.

- c) Applicant agrees that all costs incurred in developing this proposal are the Applicant's responsibility and at the Applicant's cost.
- d) Applicant agrees to provide adequate staff to carry out the project and to work with City staff in ensuring that all provisions in the grant agreement are met, including timely reporting using City client and cost tracking and reporting systems.
- e) Applicant understands and agrees that any proposal may be rejected if it is conditional, incomplete, and/or deviates from the specifications contained in this City and County of San Francisco Request for Proposals. Applicant further understands and agrees that the City's representatives have the right to reject any or all proposals or to waive deviations, which are immaterial to performance. Applicant understands and agrees that minor defects may be waived at the discretion of the City. The waiver will not excuse an applicant from full performance if Applicant should be awarded the grant. Justification supporting the reason for any type of rejection will be submitted to the Applicant.
- f) In accordance with San Francisco Administrative Code Section 67.24(e), bids, responses to RFPs and all other records of communications between the City and persons or firms seeking grant shall be open to inspection immediately after a grant has been awarded. Nothing in this provision requires the disclosure of a private person's or organization's net worth or other proprietary financial data submitted for qualification for a grant or other benefits until and unless that person or organization is awarded the grant or benefit. Information provided which is covered by this paragraph will be made available to the public upon request.

#### **IV. Proposal Submission Requirements**

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##### **A. Time and Place for Submission of Proposals**

**Proposals must be received by 5:00 p.m. on Thursday May 18, 2017.** Postmarks will not be considered in judging the timeliness of submissions.

## **Submitting**

When you are satisfied with your completed application, save your final version and email it to: [owd.procurement@sfgov.org](mailto:owd.procurement@sfgov.org)

***along with all relevant or requested supplemental materials***

You will receive an automated response to indicate that your submission was received. You will be responsible for ensuring that all required questions have been addressed and that all supplemental materials have been submitted on or before the deadline. The receive date and time will be established by the date/time assigned by the City email server. Early submission is highly encouraged.

You may alternatively hand-deliver or mail one signed original application and all supplemental materials, along with a CD or USB drive with electronic versions of the application and all supplemental materials, to:

**Office of Economic and Workforce Development (OEWD)**

**Attn: Kris Damalas**

**1 South Van Ness Avenue, 5<sup>th</sup> Floor**

**San Francisco, CA 94103**

Proposals delivered in person may be left with OEWD's front desk receptionist. Proposals that are hand delivered will be issued a date/time stamped receipt from the receptionist to document the submission's timeliness. Please do not mail or deliver proposals to OEWD's City Hall offices.

Any submittals delivered by mail or in person must be in a sealed envelope clearly marked **RFP#205**. Proposals that are submitted by fax will not be accepted. Late submissions will not be considered.

Proposers may seek funding in more than one area described in this RFP, however, a separate application must be filed for each funding area that the organization wishes to provide services for.

## **B. Proposal Package Checklist**

All templates noted below can be downloaded from OEWD's website at <http://owd.org/bid-opportunities>. The following items must be included in the submittal package:

- A project proposal using the application template provided
- A proposed project budget using the application template provided
- A Staffing and Board Composition Chart for the Lead Applicant and Program Lead, if applicable, using the template provided

- A Submission Authorization Form signed by the Lead Applicant’s Executive Director or CEO and the Program Lead’s Executive Director or CEO, if applicable.
- An overall Organizational Budget for the Lead Applicant and Program Lead, if applicable
- An organizational chart for the Lead Applicant and Program Lead, if applicable
- Optional, but encouraged, letters of support (up to 4)

Only applications submitted using the approved template will be considered for funding. A Word-version form of the application is available for download at <http://oewd.org/bid-opportunities>

Proposal Packages submitted electronically should be formatted into 1 PDF, including the application and any additional supplemental forms.

Hardcopies of templates and related forms are available upon request.

If you need to cancel and resubmit your application, please resubmit an entire package with a replacement application and all supplemental materials. In the body of the email or on a coversheet within the envelope please reference the original application, including submission date, time, and originating email address or original drop off person. All submissions, original or replacement, must be received by the deadline stated in the RFP. No late submissions will be considered.

## **V. Project Proposal Content**

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The proposal submitted must be clear and concise. It must demonstrate an understanding of the initiative’s objectives and clearly respond to a program area. The written proposal should include the following information, in the order specified below on the template provided for download at <http://oewd.org/bid-opportunities>. The City reserves the right to deem any proposal nonresponsive if it is not presented in the format required below.

*Note that the sections below are not available for direct data entry. Please download the fillable Word application template available at <http://oewd.org/bid-opportunities>*



## **Application: Request for Proposals 205**

### **City and County of San Francisco**

Office of Economic and Workforce Development



## APPLICATION DETAILS AND INSTRUCTIONS

### Brevity

There are character counts for narrative responses as a way to help you write informative, yet concise answers.

### Style Guide

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

- Be sure your email address is correct so that you will receive submission confirmations and RFP notices.
- You may type directly into the form below 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 as PDF prior to submission, formatting such as bullets, numbering, icons, images, etc. may be lost.

### Submitting

When you are satisfied with your application, save your final version and email it to:

[owd.procurement@sfgov.org](mailto:owd.procurement@sfgov.org)

You will receive an automated response to indicate that your submission was received. You will be responsible for ensuring that all required questions have been addressed and that all supplemental materials have been submitted on or before the deadline. The receive date and time will be established by the date/time assigned by the City email server. Early submission is highly encouraged.

You may alternatively hand-deliver or mail one signed original application and all supplemental materials, along with a CD or USB drive with electronic versions of the application and all supplemental materials, to:

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1 South Van Ness Avenue, 5<sup>th</sup> Floor  
San Francisco, CA 94103

Proposals delivered in person may be left with OEWD's front desk receptionist. Please do not mail or deliver proposals to OEWD's City Hall offices. If you need to cancel and resubmit your application, please resubmit an *entire package with a replacement application and all supplemental materials*. In the body of the email (or on a coversheet within the envelope of the new submission), please reference the original application, including submission date, time, and originating email address or drop off person. All submissions, original or replacement, must be received by the deadline stated in the RFP. No late submissions will be considered.

### Due Date

Applications will be accepted until **5 P.M.PST on Thursday May 18, 2017.**

### Questions

If you have any questions when completing this application, please email [owd.procurement@sfgov.org](mailto:owd.procurement@sfgov.org) by **12:00 noon PST Wednesday April 26, 2017**. A list of substantive questions and answers will be posted to the OEWD website (link below) for review by all interested parties by 6 P.M. Friday April 28, 2017. Questions of a technical nature concerning the application, forms, or website may continue to be addressed until the application due date. See RFP for full terms, conditions, and instructions. All materials related to this RFP are available at <http://owd.org/bid-opportunities/rfp-205>



<b>PART I. LEAD APPLICANT PROFILE</b>	
<p>This section should include information for the Lead Applicant. The Lead Applicant is the entity that will hold the contractual obligation for the proposed project. If you are applying as the fiscal agent for another entity, please include your information here and list information on the Program Lead in the next section.</p> <p>All fields marked by an asterisk (*) are mandatory; enter 0 or N/A if not applicable.</p>	
<b>Lead Applicant Name*</b> (75 characters) <i>e.g. Name as shown on your 501(c)(3), 501(c)(4), or 501(c)(6) letter and to whom contributions are payable</i>	[Lead Applicant Name]
<b>Doing Business As (DBA) or Also Known As (AKA), if applicable</b> (50 characters)	[DBA or AKA - limit 50 characters]
<b>Address*</b> <i>Headquarters Street Address with Suite #, if needed</i>	[Street Address]  [City], [State] [Zip]
<b>Web Address*</b>	[Website]
<b>Main Phone including area code*</b>	[Main Phone]
<b>Executive Director/CEO Name*</b>	[ED/CEO Name]
<b>Executive Director/CEO Title*</b>	[ED/CEO Title]
<b>Executive Director/CEO Direct Phone*</b>	[ED/CEO Phone]
<b>Executive Director/CEO Email*</b>	[ED/CEO Email]
<b>City and County of San Francisco Vendor Number*</b>	[123456] or <input type="checkbox"/> Not a current City vendor
<b>Type of Entity</b>	<input type="checkbox"/> Nonprofit <input type="checkbox"/> For-profit <input type="checkbox"/> Community Benefit District (CBD)

<b>CONTACT &amp; GENERAL INFORMATION: PROGRAM LEAD</b>	
<p>This section only applies if the Lead Applicant is acting solely as the Fiscal Agent.</p>	
<b>Program Lead</b>	[Program Lead Name]
<b>Program Lead Address</b> <i>Local Headquarters Street Address with Suite #, if needed</i>	[Street Address]  [City], [State] [Zip]
<b>Web Address</b>	[Website]
<b>Main Phone including area code</b>	[Main Phone]

<b>Program Lead Executive Director/CEO Name*</b>	[ED/CEO Name]
<b>Program Lead Executive Director/CEO Direct Phone*</b>	[ED/CEO Direct Phone]
<b>Program Lead Executive Director/CEO Email*</b>	[ED/CEO Email]
<b>City and County of San Francisco Vendor Number*</b>	123456 or <input type="checkbox"/> Not a current City vendor
<b>Type of Entity</b>	<input type="checkbox"/> Nonprofit <input type="checkbox"/> For-profit <input type="checkbox"/> Community Benefit District (CBD)

**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.

<b>Primary Point of Contact Name*</b>	[Contact Name]
<b>Primary Point of Contact Title*</b>	[Contact Title]
<b>Primary Point of Contact Direct Phone*</b>	[Contact Phone]
<b>Primary Point of Contact Email*</b>	[Contact Email]

**OTHER PROGRAM AGENCIES**

If this application includes other agencies as partners, subgrantees or advisors, please list them below.

[Agency Name]	Suggested Relationship
[Agency Name]	Suggested Relationship
[Agency Name]	Suggested Relationship
[Agency Name]	Suggested Relationship
[Agency Name]	Suggested Relationship

**TOTAL AGENCY BUDGET (7/1/2015-6/30/2016)**

\*Note: Please remember to include detailed budget(s) as supplemental materials.

<b>Lead Applicant Total Budget*</b>	<b>Program Lead Total Budget (if applicable)</b>
[\$Lead Applicant Budget]	[\$Program Lead Budget]

### PROGRAM AREA FOR THIS APPLICATION

From the dropdown list below, please choose the program area for this proposal. Proposers may seek funding in more than one area described below, however, a separate application must be filed for each funding area that the organization wishes to provide services for.

**\*\*Select Area from Drop Down List\*\***



### PART II. PROJECT DESCRIPTION

The project description (proposal) provides information on which the application will be evaluated and ranked in competition with other applications for funds available through this RFP. It should be concise and complete. In preparing the project description, applicants should provide information responsive to pertinent requirements set forth in the scope of work. Pay particular attention to and address in full; minimum qualifications, specific questions, and other items detailed in each program area. Project descriptions are evaluated based on clarity, substance and measurable results, not length.

#### **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. This section should further note how the project team demonstrates a thorough understanding of the economic, social, financial, institutional or other issues that require a solution as well as indicators of community support.

[Overview - limit 4000 characters]

#### **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 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.

#### **Specific recommendations:**

- For Program Areas with specific questions please address them in this section, unless otherwise noted.
- Describe the services to be provided. For each service component provide detail on the types of activities, number of hours, frequency, location and methods that will be used to deliver services as appropriate.
- Address the qualitative and quantitative outcomes your program proposes to achieve. Provide 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 projected start and end dates.
- Include and make clear the organizations, cooperating entities, consultants or key individuals who will work on the proposed activities, with a short description of the nature of their contributions and qualifications.
- Address demographic and geographical areas of focus where appropriate, or as required by program section above.
- Provide specific details regarding your past performance as a provider of similar services including any current and/or on-going grants or contracts with the City of San Francisco or other funders.

[Approach, Activities and Outcomes - limit 10,000 characters]



**Performance Measurement and Reporting (15 points)**

Provide a narrative addressing how data on project activities and outcomes will be collected and reported. Describe measures that will be developed and/or used to determine the extent to which the project has achieved its stated objectives and describe how data will be used to determine whether the needs identified are being met and whether project results are being achieved. Describe 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. Describe how the outcomes proposed and measured will demonstrate positive neighborhood development impact.

[Performance Management and Reporting - limit 4000 characters]

**Financial Management and Budget (15 points)**

Please provide a brief narrative detailing the financial management of the organization  
Specific recommendations:

- 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. Although encouraged for all requests, matching funds may be required by some program areas. Please refer to the program descriptions in Section II of the RFP to determine if a match is required.
- Provide a proposed budget for the project using the template available on the OEWD bid opportunities website at <http://oewd.org/bid-opportunities/rfp-205>

[Financial Management and Budget - limit 4000 characters]

### SUPPLEMENTAL MATERIALS CHECKLIST

All required appendix templates are available for download at: <http://oewd.org/bid-opportunities/rfp-205> . All documents below must be submitted along with your complete application unless otherwise noted. If you are unable to provide a mandatory supplemental document for any reason, submit a statement in its place explaining why the information is not available.

**Applications and all supplemental materials are due no later than 5:00pm PST on Thursday, May 18, 2017.**

Please check the boxes under "Submission Method" to confirm whether you are sending the attachment via email or in hardcopy. Email submissions must be sent to: [oewd.procurement@sfgov.org](mailto:oewd.procurement@sfgov.org) . Please make sure to reference your agency name and "RFP 205" in the subject line. Alternative submissions may be accepted (see the Proposal Submission Requirements in the RFP for details).

Supplemental Materials	Submission Method
<p><b>Appendix A: Sample Agreement for Grant (Form G-100)</b>                      Note that terms and conditions within the City's standard grant boilerplate may change as new legislation is enacted or to reflect specific regulations and requirements of the moneys funding the grant's programming. The template available for download at <a href="http://oewd.org/bid-opportunities/rfp-205">http://oewd.org/bid-opportunities/rfp-205</a> should only be used as a general guide.</p>	<p><i>Not required: for review only.</i></p>
<p><b>Appendix B: Proposal Budget Template</b>                      Include a budget for your proposed project activities using the Excel template provided. No other budget formats will be accepted.</p>	<input type="checkbox"/> Email <input type="checkbox"/> Hardcopy
<p><b>Appendix C: Proposal Application for RFP 205</b>                      Please be sure to fill out all required fields in this application.</p>	<input type="checkbox"/> Email <input type="checkbox"/> Hardcopy
<p><b>Appendix D: Staffing and Board Composition Chart</b>                      Submit staffing/board information for the Lead Applicant and Program Lead, if applicable.</p>	<input type="checkbox"/> Email <input type="checkbox"/> Hardcopy
<p><b>Appendix E: Submission Authorization from Executive Director/Chief Executive Officer</b>                      This form must be signed by the Lead Applicant Executive Director or Chief Executive Officer and the Program Lead Executive Director or Chief Executive Officer, if applicable.</p>	<input type="checkbox"/> Email <input type="checkbox"/> Hardcopy
<p><b>Organizational Budget</b>                      Please include an overall organizational budget for the Lead Applicant and the Program Lead, if applicable. (no specific template provided)</p>	<input type="checkbox"/> Email <input type="checkbox"/> Hardcopy
<p><b>Organizational Chart</b>                      Please include an organizational chart for the Lead Applicant and Program Lead, if applicable. (no specific template provided)</p>	<input type="checkbox"/> Email <input type="checkbox"/> Hardcopy
<p><b>Letters of Support</b>                      Please include letters of support (maximum of 4) if indicated in the program area as a requirement. Letters of support are encouraged for all areas, however, if the program area does not require that you demonstrate support from other entities, agencies or communities, and you do not wish to provide letters of support, please check "N/A".</p>	<input type="checkbox"/> Email <input type="checkbox"/> Hardcopy <input type="checkbox"/> N/A

## **VI. Evaluation and Selection Criteria**

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Proposals will be reviewed by a Review Committee. The Review Committee may consist of non-City staff and other individuals who have experience in the service areas requested in this RFP. Proposals will be evaluated using the criteria and process outlined below as a framework. Nothing herein shall obligate the City to make any grant, or shall guarantee any proposer the right to any grant money. The City reserves the right not to award grants based upon the ability of the proposer to meet the City's objectives and budgetary priorities.

### **A. Review Process**

The City will verify that the proposals have met all the requirements to be considered responsive. Failure to comply with the proposal requirements contained in this RFP may result in elimination of that proposal from consideration. All responsive proposals will then be submitted to the Review Committee for scoring.

1. The City may contact the applicants to clarify any portion of the proposal. All questions to the applicants will be submitted in writing and the answers, in writing, will be submitted, along with the proposals, to the Review Committee for scoring.
2. Any attempt by an applicant to contact a member of the Review Committee during the proposal review process (other than submitting clarification questions or responding to any City-initiated contact) may result in the elimination of that proposal from consideration.
3. There are two review pathways, as follows:
  - a. For program areas A through N (Invest in Neighborhoods Programs), there are two tiers of review.
    - i. Tier 1 Review - the review committee will review and score all responsive proposals. All proposals receiving a minimum score of 50 points on a 100 point scale will advance to the Tier 2 review process. To ensure a competitive pool of providers, the top 3 scoring proposals from program area A through N will advance to the Tier 2 Review process, regardless of score.
    - ii. Tier 2 Review – an additional review committee will review and score all proposals that advance from the Tier 1 review. Each proposal will be ranked according to neighborhood need, project feasibility, and fulfillment of key department priorities.
  - b. For program areas O through Y, the review committee will review and score all responsive proposals. Proposals will be ranked based on the review committee's scores.
4. After the Review Committee(s) has/have concluded the evaluation and scoring of the proposals, the results will be submitted to the Director of OEWD, and the appropriate oversight bodies, if appropriate, for review and determination of the award.
5. The tentative awardees whose proposal(s) are determined to meet the needs of the City will be recommended to negotiate a grant.
6. All applicants will be notified of the results of the evaluation.

7. The tentative award may be conditioned on inclusion of changes/additional terms. Negotiations over the specific terms and language may be required before submission to the Civil Services Commission for approval, if applicable.
8. If the City is unable to negotiate a satisfactory agreement with the winning applicant(s), the City may terminate negotiations with that applicant and proceed to negotiate with other qualified applicants in the order of their ranking in the evaluation process. This process may be repeated until a satisfactory grant agreement has been reached.
9. Final award of the grant may be subject to approval by the Civil Service Commission, Board of Supervisors, Mayor, or other governing body.

### **B. Minimum Qualifications**

Any proposal that does not demonstrate that the proposer meets the requirements described in Section III by the deadline for submittal of proposals will be considered non-responsive and will not be eligible for funding consideration.

### **C. Selection Criteria**

Applications competing for financial assistance will be reviewed and evaluated using the criteria described in this section. Point values indicate the relative importance placed on each section and points will be allocated based on the extent to which the application addresses the criteria listed. Applicants should prepare their proposals with these criteria in mind. Depending on the number and quality of proposals, applicants may be invited to be interviewed by the committee to make a final selection. Each application will be considered individually and the organization's overall capacity in relation to the number of projects proposed will also be considered when projects and proposals are recommended for funding.

#### **Applicant Qualifications and Staff Assignments (30 points)**

- a. The applicant's professional qualifications and the experience of proposed partners, sub-contractors and staff
- b. Experience and track record implementing projects to the proposed activities
- c. Clarity and feasibility of proposed staffing assignments, taking into consideration accessibility, availability and workload
- d. The application demonstrates a thorough understanding of the economic, social, financial, institutional or other issues that require a solution.
- e. Demonstration of community support

#### **Approach, Activities, and Outcomes (40 points)**

- a. The proposed project will contribute to achieving the goals and objectives stated in the RFP.
- b. The application presents a clear description of the proposed project, including a clear statement of goals and objectives

- c. 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.
- d. The application presents a reasonable timeline for implementing the proposed project including major milestones and target dates. It addresses factors that might speed or hinder implementation and explains how these factors would be managed.
- e. The design of the project reflects current knowledge on effective practices supported by applicants' experience, research and literature.
- f. The proposed project 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 specific activities and the role, capacity, and contributions each partner will make to the proposed project is detailed.
- g. The proposed project reflects performance targets appropriate for the program.
- h. The proposal demonstrates the organization's capacity to carry out the proposed project by connecting current or previous experience with the proposed programming.

**Performance Measurement and Reporting (15 Points)**

- a. Applicant addresses how data on project activities, outputs and outcomes will be collected and reported.
- b. Applicant demonstrates they have or will develop the capacity to collect and manage data.
- c. 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.

**Financial Management and Budget (15 Points)**

- a. A detailed narrative budget justification presenting reasonable costs in view of activities proposed and expected results.
- b. Budget conformed to the template provided and agency's overall budget is of a size to reasonably expect successful delivery of the program.
- c. Applicants' fiscal controls conform to requirements and would ensure the prudent use, proper and timely disbursement and accurate accounting of funds awarded under this RFP.
- d. Additional resources are available to ensure implementation and sustainability of programming.

### **Additional evaluation criteria for Program Areas A – N**

As noted above, in addition to the initial review, evaluation, and ranking of proposals by a first-tier review committee, proposals meeting a minimum threshold will advance to a second round of review and ranking. In the second round, proposals will be evaluated on how well each demonstrates that it meets neighborhood need, project feasibility, and fulfillment of key department priorities.

### **Applicant Qualifications and Neighborhood Connection (15 points)**

1. Demonstrates capacity to implement projects related to the proposed activities
2. Demonstrates an understanding of community and economic development principles
3. Demonstrates an understanding of the neighborhood and connection to the needs and goals of the neighborhood

### **Program Goals and Objectives (35 points)**

1. The proposed project will contribute to achieving Invest In Neighborhood goals and objectives
2. The proposed project demonstrates clear community support
3. The proposal demonstrates an understanding of community stakeholders and community organizations, and possible considerations for project implementation
4. The design of the project reflects deep knowledge and understanding of the neighborhood and/or City
5. The proposed project is innovative and creative in implementing a solution to meet neighborhood needs

## **VII. Terms and Conditions for Receipt of Proposals**

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### **A. Errors and Omissions in RFP**

Proposers are responsible for reviewing all portions of this RFP. Proposers are to promptly notify OEWD, in writing, if the proposer discovers any ambiguity, discrepancy, omission, or other error in the RFP. Any such notification should be directed to OEWD promptly after discovery, but in no event later than five working days prior to the date for receipt of proposals. Modifications and clarifications will be made by addenda as provided below.

### **B. Inquiries Regarding RFP**

Inquiries regarding the RFP, and all notifications of intent to request written modification of or clarification of or objections to the RFP, must be directed by email to the department's procurement team at [owd.procurement@sfgov.org](mailto:owd.procurement@sfgov.org). Substantive responses to any such inquiries will be posted on OEWD's website: <http://owd.org/bid-opportunities>.

### **C. Objections to RFP Terms**

Should a proposer object on any ground to any provision or legal requirement set forth in this RFP, the proposer must, not more than ten calendar days after the RFP is issued, provide

written notice to OEWD setting forth with specificity the grounds for the objection. The failure of a proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

#### **D. Change Notices**

OEWD may modify the RFP, prior to the proposal due date, by issuing Change Notices, which will be posted on OEWD's website. The proposer shall be responsible for ensuring that its proposal reflects any and all Change Notices issued by OEWD prior to the proposal due date regardless of when the proposal is submitted. Therefore, the City recommends that the proposer consult the OEWD website frequently, including shortly before the proposal due date, to determine if the proposer has downloaded all Change Notices.

#### **E. Proposal Clarification**

At any time during the proposal evaluation process, OEWD may require a proposer to provide oral or written clarification of its proposal. OEWD reserves the right to make an award without further clarifications of proposals received.

#### **F. Errors and Omissions in Proposal**

Failure by OEWD to object to an error, omission, or deviation in the proposal will in no way modify the RFP or excuse the vendor from full compliance with the specifications of the RFP or any contract awarded pursuant to the

#### **G. Financial Responsibility**

The City accepts no financial responsibility for any costs incurred by a firm in responding to this RFP. Submissions of the RFP will become the property of the City and may be used by the City in any way deemed appropriate.

#### **H. Proposer's Obligations under the Campaign Reform Ordinance**

Proposers must comply with Section 1.126 of the S.F. Campaign and Governmental Conduct Code, which states:

“No person who contracts with the City and County of San Francisco for the rendition of personal services, for the furnishing of any material, supplies or equipment to the City, or for selling any land or building to the City, whenever such transaction would require approval by a City elective officer, or the board on which that City elective officer serves, shall make any contribution to such an officer, or candidates for such an office, or committee controlled by such officer or candidate at any time between commencement of negotiations and the later of either (1) the termination of negotiations for such contract, or (2) three months have elapsed from the date the grant is approved by the City elective officer or the board on which that City elective officer serves.”

If a proposer is negotiating for a contract that must be approved by an elected local officer or the board on which that officer serves, during the negotiation period the proposer is prohibited from making contributions to:

- The officer's re-election campaign.
- A candidate for that officer's office.
- A committee controlled by the officer or candidate.

The negotiation period begins with the first point of contact, either by telephone, in person, or in writing, when a contractor approaches any city officer or employee about a particular contract, or a city officer or employee initiates communication with a potential contractor about a contract. The negotiation period ends when a contract is awarded or not awarded to the contractor. Examples of initial contacts include: (1) a vendor contacts a city officer or employee to promote himself or herself as a candidate for a contract; and (2) a city officer or employee contacts a contractor to propose that the contractor apply for a contract. Inquiries for information about a particular contract, requests for documents relating to a Request for Proposal, and requests to be placed on a mailing list do not constitute negotiations.

Violation of Section 1.126 may result in the following criminal, civil, or administrative penalties:

1. Criminal. Any person who knowingly or willfully violates section 1.126 is subject to a fine of up to \$5,000 and a jail term of not more than six months, or both.
2. Civil. Any person who intentionally or negligently violates section 1.126 may be held liable in a civil action brought by the civil prosecutor for an amount up to \$5,000.
3. Administrative. Any person who intentionally or negligently violates section 1.126 may be held liable in an administrative proceeding before the Ethics Commission held pursuant to the Charter for an amount up to \$5,000 for each violation.
4. For further information, proposers should contact the San Francisco Ethics Commission at (415) 581-2300.

### **I. Sunshine Ordinance**

In accordance with S.F. Administrative Code Section 67.24(e), contractors' bids, responses to RFPs and all other records of communications between the City and persons or firms seeking contracts shall be open to inspection immediately after a contract has been awarded. Nothing in this provision requires the disclosure of a private person's or organization's net worth or other proprietary financial data submitted for qualification for a contract or other benefits until and unless that person or organization is awarded the contract or benefit. Information provided which is covered by this paragraph will be made available to the public upon request.

### **J. Public Access to Meetings and Records**

If a proposer is a non-profit entity that receives a cumulative total per year of at least \$250,000 in City funds or City-administered funds and is a non-profit organization as defined in Chapter 12L of the S.F. Administrative Code, the proposer must comply with Chapter 12L. The proposer must include in its proposal (1) a statement describing its efforts to comply with the Chapter 12L provisions regarding public access to proposer's meetings and records, and (2) a summary of all complaints concerning the proposer's compliance with Chapter 12L that were filed with the City in the last two years and deemed by the City to be substantiated. The summary shall also describe the disposition of each complaint.



If no such complaints were filed, the proposer shall include a statement to that effect. Failure to comply with the reporting requirements of Chapter 12L or material misrepresentation in proposer’s Chapter 12L submissions shall be grounds for rejection of the proposal and/or termination of any subsequent Agreement reached on the basis of the proposal.

**K. Reservations of Rights by the City**

The issuance of this RFP does not constitute an agreement by the City that any contract will actually be entered into by the City. The City expressly reserves the right at any time to:

1. Waive or correct any defect or informality in any response, proposal, or proposal procedure;
2. Reject any or all proposals;
3. Reissue a Request for Proposals;
4. Prior to submission deadline for proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this RFP, or the requirements for contents or format of the proposals;
5. Procure any materials, equipment or services specified in this RFP by any other means;
6. Determine that no project will be pursued; or
7. Cancel the procurement action in its entirety

**L. No Waiver**

No waiver by the City of any provision of this RFP shall be implied from any failure by the City to recognize or take action on account of any failure by a proposer to observe any provision of this RFP.

**VIII. Grant Award**

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OEWD anticipates making the following initial awards through this RFP. All awards are contingent upon budget approval and funding availability.

<b>Program Area</b>	<b>Anticipated Number of Awards</b>	<b>Anticipated Total Funding</b>	<b>Eligible Applicant Notes</b>
<b>Neighborhood Economic and Community Development Programs</b>			
<b>A</b>	<b>1</b>	<b>\$80,000</b>	<b>Nonprofits only</b>
<b>B</b>	<b>1</b>	<b>\$15,000</b>	<b>Nonprofits only</b>
<b>C</b>	<b>1</b>	<b>\$50,000</b>	<b>open</b>
<b>D</b>	<b>1</b>	<b>\$50,000</b>	<b>open</b>

E	1	\$50,000	open
F	1	\$50,000	open
G	1	\$50,000	Nonprofits only
H	1	\$100,000	Nonprofits only
I	1-2	\$50,000 each award	Nonprofits only
J	1-3	\$50,000 each award	Nonprofits only
K	1-2	\$50,000 each award	Nonprofits only
L	1-2	\$50,000 each award	open
M	1-8	\$25,000 each award	Nonprofits only
N	1-2	\$40,000 each award	CBD only
<b>Business Development Programs</b>			
O	1	\$40,000	Nonprofits only
P	1	\$140,000	Nonprofits only
Q	1	\$130,000	Nonprofits only
R	1	\$130,000	Nonprofits only
S	1	\$20,000	Nonprofits only
T	1	\$280,000	CBD only
U	1	\$45,000	open
V	1	\$59,500	Nonprofits only
W	1	\$59,800	Nonprofits only
<b>Workforce Development Programs</b>			
X	1	\$750,000 - \$1,380,000	Nonprofits only
Y	1-2	\$300,000	Nonprofits only

## **IX. Grant Requirements**

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### **A. Standard Grant Provisions**

The successful proposer will be required to enter into an agreement with the City prior to performing services. It is anticipated that the form to be used will be an agreement substantially in the form of the Grant Agreement, attached hereto as Appendix A (“Agreement”). The actual form of agreement and specific language will be determined by the City during the negotiation process.

Failure to timely execute the contract, or to furnish any and all insurance certificates and policy endorsement, surety bonds or other materials required in the contract or by OEWD, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another organization.

Proposers are urged to pay special attention to the requirements of Administrative Code Chapters 12B and 12C, Nondiscrimination in Contracts and Benefits; the Minimum Compensation Ordinance; the First Source Hiring Program; and applicable conflict of interest laws.

#### **B. Nondiscrimination in Contracts and Benefits**

The successful proposer will be required to agree to comply fully with and be bound by the provisions of Chapters 12B and 12C of the San Francisco Administrative Code. Generally, Chapter 12B prohibits the City and County of San Francisco from entering into contracts or leases with any entity that discriminates in the provision of benefits between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of employees. The Chapter 12C requires nondiscrimination in contracts in public accommodation. Additional information on Chapters 12B and 12C is available at <http://sfgov.org/cmd/12b-equal-benefits-program>.

#### **C. Minimum Compensation Ordinance (MCO)**

The successful proposer will be required to agree to comply fully with and be bound by the provisions of the Minimum Compensation Ordinance (MCO), as set forth in San Francisco Administrative Code Chapter 12P. Generally, this Ordinance requires contractors to provide employees covered by the Ordinance who do work funded under the contract with hourly gross compensation and paid and unpaid time off that meet certain minimum requirements.

For the amount of hourly gross compensation currently required under the MCO, see [www.sfgov.org/olse/mco](http://www.sfgov.org/olse/mco). Note that this hourly rate may increase on January 1 of each year and that contractors will be required to pay any such increases to covered employees during the term of the contract. Additional information regarding the MCO is available on the web at [www.sfgov.org/olse/mco](http://www.sfgov.org/olse/mco).

#### **D. First Source Hiring Program (FSHP)**

If the contract is for more than \$50,000, then the First Source Hiring Program (Admin. Code Chapter 83) may apply. Generally, this ordinance requires contractors to notify the First Source Hiring Program of available entry-level jobs and provide the Workforce Development System with the first opportunity to refer qualified individuals for employment.

Contractors should consult the San Francisco Administrative Code to determine their compliance obligations under this chapter. Additional information regarding the FSHP is available on the web at <http://oewd.org/employer-services>

### **E. Conflicts of Interest**

The successful proposer will be required to agree to comply fully with and be bound by the applicable provisions of state and local laws related to conflicts of interest, including Section 15.103 of the City's Charter, Article III, Chapter 2 of City's Campaign and Governmental Conduct Code, and Section 87100 et seq. and Section 1090 et seq. of the Government Code of the State of California. The successful proposer will be required to acknowledge that it is familiar with these laws; certify that it does not know of any facts that constitute a violation of said provisions; and agree to immediately notify the City if it becomes aware of any such fact during the term of the Agreement.

Individuals who will perform work for the City on behalf of the successful proposer might be deemed consultants under state and local conflict of interest laws. If so, such individuals will be required to submit a Statement of Economic Interests, California Fair Political Practices Commission Form 700, to the City within ten calendar days of the City notifying the successful proposer that the City has selected the proposer.

## **X. Protest Procedures**

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### **A. Protest of Non-Responsiveness Determination**

Within five calendar days of the City's issuance of a notice of non-responsiveness, any respondent that has submitted a proposal and believes that the City has incorrectly determined that its proposal is non-responsive may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth calendar day following the City's issuance of the notice of non-responsiveness. The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the respondent, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

### **B. Protest of Grant Award**

Within five calendar days of the City's issuance of a notice of intent to award the grant, any firm that has submitted a responsive proposal and believes that the City has incorrectly selected another proposer for award may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth calendar day after the City's issuance of the notice of intent to award.

The notice of protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP

provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

### **C. Delivery of Protests**

All protests must be received by 5:00 p.m. on the due date. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date the City received the protest. Protests or notice of protests made orally (e.g., by telephone) or fax will not be considered. Scanned signed appeal letters may be submitted via email to [owd.procurement@sfgov.org](mailto:owd.procurement@sfgov.org). Letters transmitted electronically must be sent in PDF format and be signed by an individual authorized to negotiate or sign agreements on behalf of the submitting organization.

If the City determines that a meeting with the party submitting the appeal is necessary, such meeting will be scheduled within ten (10) calendar days of the receipt of a protest to review and attempt to resolve the protest. If the City determines a meeting is not necessary to address the appeal presented, the agency can anticipate a response letter from the City within 10 calendar days of submission of the letter of appeal.

#### **Protests must be delivered to:**

Contracts and Performance Director  
Office of Economic and Workforce Development, Workforce Development Division  
One South Van Ness Avenue, 5<sup>nd</sup> Floor  
San Francisco, CA 94103

Or via email at: [owd.procurement@sfgov.org](mailto:owd.procurement@sfgov.org)

All appeal determinations made by the Director of OEWD are final.

### **Appendix A: Sample Agreement for Grant (Form G-100)**

Note that terms and conditions within the City's standard grant boilerplate may change as new legislation is enacted or to reflect specific regulations and requirements of the moneys funding the grant's programming. The actual form of agreement and specific language will be determined by the City during the negotiation process.

The template available for download at <http://oewd.org/bid-opportunities/rfp-205> should only be used as a general guide.

### **Appendix B: Proposal Budget Template**

Include a budget for your proposed project activities using the Excel template, available for download at

<http://oewd.org/bid-opportunities/rfp-205>

No other budget formats will be accepted.

### **Appendix C: Proposal Application**

The application is available for download at:

<http://oewd.org/bid-opportunities/rfp-205>

### **Appendix D: Staffing and Board Composition Chart**

A template Staffing and Board Composition Chart is available for download at:

<http://oewd.org/bid-opportunities/rfp-205>

### **Appendix E: Submission Authorization Form**

A Word version of this form is available for download at:

<http://oewd.org/bid-opportunities/rfp-205>