



# OEWD RFP #211

*Business Development, Economic Development  
and Workforce Development Grants*

## Bidders Conference

February 15, 2019, 1:30 P.M. – 3:00 P.M.

San Francisco Public Library, Main Branch  
Latino/Hispanic Community Room



# Presentation Overview

- Welcome & Programming Overview
- Program Area Details
  - *Business Development (Areas A through F)*
  - *Workforce Development (Areas G through J)*
- City Contracting Requirements
- RFP 211 Timeline and Web Resources
- Questions and Answers



# About OEWD

- OEWD's **Mission** is to advance equity and shared prosperity for all San Franciscans by:
  - growing sustainable jobs,
  - supporting businesses of all sizes,
  - creating great places to live and work, and
  - helping everyone achieve economic self-sufficiency.



# About this RFP

The **\$3.6 Million** investment in this RFP touches numerous aspects of San Francisco's diverse economy, with a focus on **advancing equity** and **shared prosperity** for **all residents**

- The RFP contains **10 distinct program areas** - grouped under two major headings of:
  - Business Development Programs (Areas A through F)
  - Workforce Development Programs (Areas G through J)
- A chart showing all the distinct areas, anticipated number of awards, anticipated total funding and eligible applicant notes can be found on **page 7** of the RFP.



# Program Areas

## Business Development Division

Program Area	Title	Anticipated # of Awards	Anticipated Total Funding Available for Initial Project Term
	<a href="#"><u>Business Development Programs</u></a>		
<b>A</b>	<a href="#"><u>Business Succession Planning</u></a>	1 or more	\$25,000
<b>B</b>	<a href="#"><u>Entrepreneur and Independent Contractor Pilot Program</u></a>	1 or more	\$55,000
<b>C</b>	<a href="#"><u>Administering Music Venue Sound Mitigation Assistance Program</u></a>	1	\$150,000
<b>D</b>	<a href="#"><u>Nonprofit Succession Planning Program</u></a>	1 or more	\$100,000
<b>E</b>	<a href="#"><u>Nonprofit Space Stabilization Program</u></a>	1 or more	\$675,000
<b>F</b>	<a href="#"><u>Nonprofit Space Investment Fund</u></a>	1 or more	\$2,125,000



## **Program Area Details: Business Development Programs Programs A to F**

### **A – Business Succession Planning - \$25,000**

- Seeking proposals from firms or individuals with substantial experience in business succession planning. The goals of this grant are threefold: 1) Prevent the loss of employment in communities because of business closures, 2) Stabilize communities by strengthening businesses that anchor neighborhoods, and 3) Build community wealth and equity by sharing wealth and ownership with employees.
- The Scope of Work for the selected organization(s) in this program area may include, but is not limited to the following:
  - 1-2 Educational workshops about succession planning and structure types (for public or city departments).
  - Consultations for businesses interested in succession planning. Not limited to any one type of entity structure.
  - In depth feasibility studies for businesses looking to transition to employee ownership
  - Long term plan for supporting/advising businesses after they have completed ownership transition.
  - Conduct succession opportunity analysis for specific neighborhoods/regions within San Francisco.
- May apply up to \$25,000
- Open to both Nonprofit and For-profit organizations



## **Program Area Details: Business Development Programs Programs A to F**

### **B – Entrepreneur and Independent Contractor Pilot Program - \$55,000**

- Seeking pilot proposal(s) to develop services that bolster economic development services for entrepreneurs and independent contractors.
- Examples of pilot proposals that would fall into this category include:
  - Projects that bring existing resources as well as new services together into programming that builds community and reaches a more diverse set of stakeholders with programming to address topics such as financial education, contract negotiation, benefits consultations and legal resources.
  - Curriculum that increases awareness and utilization of benefits such as unemployment insurance, health insurance and paid leave.
  - Programs that create networking opportunities for independent contractors that result in greater support for independent contractors, stronger data to inform future program development, and increased community capacity by cultivating local leaders and strengthening relationships among community members and the City.
- May apply up to \$55,000
- Open to Nonprofit organizations





## **Program Area Details: Business Development Programs Programs A to F**

### **C – Administering Music Venue Sound Mitigation Assistance Program- \$150,000**

- Seeking proposals from nonprofit organizations to serve as an intermediary to administer a sound mitigation assistance program for entertainment venues citywide.
- This program will provide grants of up to \$25,000 to existing entertainment venues to support new sound mitigation construction projects.
- The selected organization will put out a call for proposals from the owners of music venues located in San Francisco, and applications will be reviewed by a panel consisting of City agency staff, the intermediary's staff and other experts from related fields.
- The selected organization will administer funds by providing direct financial assistance to venues, particularly those that, among other considerations, demonstrate a commitment to hiring local musicians and a pressing need for sound mitigation work.
- May apply up to \$150,000
- Open to Nonprofit organizations





## Program Area Details: Business Development Programs Programs A to F

### D – Nonprofit Succession Planning Program - \$100,000

- Seeking proposals from an intermediary or intermediaries to provide leadership development, board recruitment, succession planning and related support services to nonprofit organizations deeply rooted in low-income and historically underserved communities, using a community-focused cohort model.
- The scope of work for the recipient(s) in this program area may include (but is not limited to) the following:
  - Technical Assistance: Nonprofit Workshops (up to \$40,000 of total proposal for each fiscal year)  
The selected intermediary/ies will work with City agency staff to design a minimum of two workshops for nonprofit directors, staff and board leadership.
  - Small Group Consultation: Succession Planning (up to \$50,000 of total proposal)  
The selected intermediary/ies will assist approximately 1-2 nonprofits with imminent executive leadership transition.
  - Evaluation and Documentation (up to \$10,000 of total proposal for each fiscal year)  
The intermediary will provide written bi-annual fiscal and programmatic updates to OEWD along with invoices for reimbursement based on ongoing performance.
- May apply up to \$100,000
- Open to Nonprofit organizations



## Program Area Details: Business Development Programs Programs A to F

### E – Nonprofit Space Stabilization Program - \$675,000

- The objective of the Nonprofit Sustainability Initiative is to ensure access to quality of life resources as well as education, health and human services for residents in San Francisco by supporting and stabilizing nonprofit businesses. OEWD will select an intermediary to meet the objectives described above by providing technical and financial assistance for nonprofits at risk of displacement as well as those experiencing barriers to growth due to the high cost of real estate.
- The scope of work for the recipient(s) in this program area may include (but are not limited to) the following:
  - Technical Assistance (11% - 20% of total budget request)  
Intermediary/ies will address nonprofit instability and seed growth by providing real estate assistance.
  - Direct Financial Assistance (\$500,000 each fiscal year)  
The selected intermediary/ies will put out a call for proposals from nonprofits based in San Francisco, and applications will be reviewed by a panel consisting of City agency staff, the intermediary's staff and other experts from related fields.
  - Intermediary's Administration (8%-15% of total budget request)
- May apply up to \$675,000
- Open to Nonprofit organizations



## Program Area Details: Business Development Programs Programs A to F

### F – Nonprofit Space Investment Fund - \$2,125,000

- Seeking proposals from nonprofit organizations to provide direct financial assistance to nonprofits for expenses related to space acquisition.
- The scope of work may include (but are not limited to) the following:
  - Direct Financial Assistance (\$2,000,000 of total budget request each fiscal year)

The selected intermediary/ies will put out a call for proposals from nonprofits based in San Francisco, and applications will be reviewed by a panel consisting of City agency staff, the intermediary's staff and other experts from related fields. The selected intermediary or intermediaries will administer funds by providing technical assistance and direct financial assistance to nonprofits, particularly those that have previously lacked large non-municipal contributions, but have secured some recent public or philanthropic investments; demonstrate success in pursuing community engagement strategies; show support for their efforts from multiple sectors; and are deeply rooted in historically underserved communities. Eligible expenses will be proposed by the intermediary/ies and may include but are not limited to costs for acquisition deed-restricted nonprofit space.
  - Intermediary's Administration (\$125,000 of total budget request each fiscal year)
- May apply up to \$2,125,000
- Open to Nonprofit organizations



# Program Areas

## Workforce Development Division

Program Area	Title	Anticipated # of Awards	Anticipated Total Funding Available for Initial Project Term
	<u><a href="#">Workforce Development Programs</a></u>		
G	<u><a href="#">Workforce Barrier Remediation: Online Bachelor's Degree Pilot Program</a></u>	1	\$35,000
H	<u><a href="#">Information and Communications Technology (ICT) Sector Coordinator</a></u>	1	\$300,000 to 375,000
I	<u><a href="#">CityBuild In-Custody Occupational Skills Training Provider</a></u>	1	\$60,000
J	<u><a href="#">Designing a Bay Area Technology Apprenticeship Approach</a></u>	1	\$25,000



## Program Area Details: Workforce Development Programs Programs G to J

### G – Workforce Barrier Remediation: Online Bachelor's Degree Pilot Program – \$35,000

- OEWD is seeking proposals from organizations to partner with OEWD to enhance and support educational advancement goals through an online bachelor's degree pilot program.
- The Scope of Work may include, but is not limited to the following:
  - **Program Design and Enrollment:** Applicant must have established curricula for an online bachelor's degree with flexible pacing to accommodate learners of different abilities and time constraints.
  - **Individual Support and Academic Counseling:** The Applicant or its key partners must provide individualized academic planning and coaching for socio-emotional support to participants during their academic experience.
  - **Support Groups:** The Applicant must participate in OEWD-hosted support groups to establish cohort-based support and networking opportunities.
  - **Reporting:** The Applicant, OEWD, and participants will engage in the appropriate HIPPA, FERPA, City disclosures and waivers to permit participant data sharing across agencies and organizations. Applicant must provide monthly reports on participant progress and pacing, as well as any information necessary for program evaluation and for any administrative functions.
- May apply up to \$35,000
- Open to both Nonprofit and For-profit organizations



## **Program Area Details: Workforce Development Programs Programs G to J**

### **H – Information and Communications Technology (ICT) Sector Coordination - \$300,000 to \$375,000**

- The ICT Sector Coordinator (“Coordinator”) serves as the lead coordinator of a Sector Workforce Program in the local technology industry. In close consultation with OEWD, the Coordinator manages and coordinates activities and services provided through the citywide Information & Communications Technology (ICT) Sector Workforce Program, TechSF, a partnership that includes employers, training providers, community-based training organizations, secondary and post-secondary educational institutions, sector associations, workforce system partners, and other stakeholders. The ICT Sector Coordinator is also responsible for connecting program participants to sector-related, unsubsidized employment.
- The scope of work may include (but are not limited to) the following:
  - Job Placement Services
  - Apprenticeship Support
  - Participant Outreach and Recruitment
  - Participant Intake, Assessment, Referral and Job Readiness Training
  - OEWD ICT Sector Strategic Support
- Applicants may propose project budgets between \$300,000 to \$375,000
- Open to both Nonprofit and For-profit organizations



## **Program Area Details: Workforce Development Programs Programs G to J**

### **I – CityBuild In-Custody Occupational Skills Training Provider – \$60,000**

- Seeking proposals from organizations to partner with OEWD, CityBuild and the San Francisco Sheriff's Department on a tailored transitional job training and placement program inside San Francisco County Jail #2 (425 7<sup>th</sup> Street, San Francisco) and #5 (1 Moreland Drive, San Bruno) designed to provide access to construction apprenticeship opportunities upon release.
- The Scope of Work for the selected organization in this program area may include, but is not limited to the following:
  - Working with OEWD and CityBuild to implement the CityBuild In-Custody Occupational Skills Training (OST) program curricula
  - Assisting OEWD in fully implementing the AFL-CIO Building Trades Department's Multi-Craft Core Curriculum ("MC3") as a component of the training programs.
  - Providing MC3-certified instructors to deliver training services to at least two (2) 6-week CityBuild In-Custody cohorts per year
  - Coordinating with jointly-administered apprenticeship programs to ensure that training modules meet direct entry and preferred entry requirements
  - Providing feedback regarding candidate performance and experience to OEWD, CityBuild, labor unions, and our network of non-profit service providers
- May apply up to \$60,000
- Open to Nonprofit and Educational Institutions





## Program Area Details: Workforce Development Programs Programs G to J

### J – Designing a Bay Area Technology Apprenticeship Approach- \$25,000

- OEWD is seeking proposals from organizations to partner with OEWD to design a prototype of a Bay Area tech apprenticeship network. The selected contractor will support OEWD with research on apprenticeship models and with convening key partners to design and implement a regional tech apprenticeship system to create a replicable and scalable model for tech apprenticeship.
- The Scope of Work may include, but is not limited to the following:
  - **Summary of Best Practices Research:** Conduct background research on existing apprenticeship models domestically and internationally and analyze fit for Bay Area adoption.
  - **Landscape Analysis of Bay Area apprenticeships:** Identify stakeholders in the region who are already implementing tech apprenticeships or are interested in doing so. Use this info to id a pilot set of existing apprenticeships that can be harmonized across companies at the occupation level.
  - **Stakeholder Convenings and Network Building:** Support OEWD with convening K-12 education providers, regional community colleges, training providers, employers, industry champions, and workforce development boards to discuss promising approaches for a sustainable Bay Area tech apprenticeship network.
  - **Recommendations:** Use gathered information to develop recommendations for a Bay Area tech apprenticeship approach that is sustainable and scalable.
- May apply up to \$25,000
- Open to both Nonprofit and For-profit organizations



# City Contracting Requirements

- **Business Tax Compliance**
- **Equal Benefits (12B) Compliance**



# City Contracting Requirements: Business Tax Compliance

- To become a Supplier, you must complete Business Tax Registration with the Treasurer and Tax Collector's Office

Business Tax Registration: <https://newbusiness.sfgov.org/vendor/>

- All San Francisco businesses must renew their business registration annually by May 31. For more information, see [https://sftreasurer.org/RG2019\\_instructions](https://sftreasurer.org/RG2019_instructions).



# **City Contracting Requirements: Equal Benefits (12B) Compliance**

**Equal Benefits compliance information and  
assistance in completing the online 12B Declaration:**

**Equal Benefits Unit  
415-581-2310  
[cmd.equalbenefits@sfgov.org](mailto:cmd.equalbenefits@sfgov.org)**



# City Contracting Requirements: Equal Benefits (12B) Compliance

- **Equal Pay for Equal Work**
- **City Suppliers offer the same benefits**
  - ✓ **Employees with spouses**
  - ✓ **Employees with domestic partners**
- **Domestic Partners: same-sex and opposite-sex couples registered with any state or local government entity**
- **Suppliers: Includes For-Profit, NFP, Grantees, JVs**



# City Contracting Requirements: Equal Benefits (12B) Compliance

- **Employment Benefits = 30% of total compensation**
- **Applies to all benefits**
  - ☐ Health/Dental/Vision Insurance
  - ☐ Pensions/Retirement
  - ☐ Bereavement/Family Medical/Military Leave
  - ☐ Employee Assistance
  - ☐ Dependent Life Insurance
  - ☐ Long-term Disability Survivor Benefits
  - ☐ Accidental Death & Dismemberment Training Benefits



# City Contracting Requirements: Equal Benefits (12B) Compliance

## TWO STEPS

- **Complete the online 12B Declaration**
- **Provide supporting documentation**
  - ✓ **Verification of equal benefits**  
*(memorandum or policies)*
  - ✓ **Verification of employee count**  
*(W-3 Form, DE 1 Form, DE 9C Form,  
Form SS-4, Form 1096,  
OSHA Form 300A)*





# City Contracting Requirements: Equal Benefits (12B) Compliance

- 1 Have your username and password ready.  
*Tip: If you do not have a username and password, contact the User Support Desk at [Dtis.helodesk@sfgov.org](mailto:Dtis.helodesk@sfgov.org)*
- 2 Have the verification of employee count and verification of equal benefits ready.
- 3 Go to the Supplier Portal at <https://sfcitypartner.sfgov.org/>
- 4 Click the Sign In button (if you are already registered) or click the Register as a Sourcing Bidder button and log in.
- 5 Under Supplier Home, click the Click here to go to the Supplier WorkCenter link.
- 6 Click the arrow next to CCSF Certifications to see a drop-down menu.
- 7 Select 12B Declaration.
- 8 Ensure the SetID field is set to SHARE.
- 9 Click the Add A New Value tab.
- 10 Under Declaration Type, select Supplier if you have a Supplier ID.  
If you do not have a Supplier ID, select Bidder. (Bidder numbers start with "B")
- 11 Enter your Supplier ID. If you do not have a Supplier ID, enter your Bidder ID.
- 12 Follow the prompts to complete the 12B Declaration.  
*IMPORTANT: Failure to attach the required supporting documentation will prevent compliance.*
- 13 Click the Save button.  
*Tip: Note the Declaration Number at the top of the page in case you need to contact the Equal Benefits Unit.*
- 14 Click the Submit button.



# **City Contracting Requirements: Supplier Compliance**

**For general questions regarding the Supplier  
registration process, contact the User Support Desk  
415-944-2442 [sfcitypartnersupport@sfgov.org](mailto:sfcitypartnersupport@sfgov.org)**



# City Contracting Requirements: Supplier Compliance

## Steps to Becoming a City Supplier

[sfcitypartner.sfgov.org](http://sfcitypartner.sfgov.org)

A completed W-9 form (the W-9 Form can be found at [irs.gov](http://irs.gov).) Federal Tax Identification Number or Social Security Number; Official Name of Company, as listed on W-9

### New to City Business?

If you are new to doing business with the City of San Francisco, you should start by registering in our system as a bidder. Our easy 5 step instructions are below. If you are already a supplier with a supplier i.d. number, go [here](#).

1

#### Gather Your Info

- A completed W-9 form (the W-9 Form can be found at [irs.gov](http://irs.gov).)
- Federal Tax Identification Number or Social Security Number
- Official Name of Company, as listed on W-9
- Business Type, Contact Name and Address

2

#### Register

- Go to the supplier portal. You will create a username for logging into our system while registering as bidder.
- After completing this step you will receive a Bidder ID and password to the portal.
- You can then log in using this password and your username.

3

#### Contact User Support

- After registering as a Bidder, contact User Support by email or by phone to let them know your intent to become a supplier and receive a Supplier ID.
- User Support will assign your ticket to Supplier Management.

4

#### Complete Compliance

- To become a Supplier, you must complete Business Tax Registration with the Treasurer and Tax Collector's Office (see link below).
- Suppliers must also submit a 12B Compliance Declaration.
- Bidders can submit the 12 Compliance Declaration by logging onto the Supplier Portal

5

#### Confirmation

- Once your business registration is processed and 12B Compliance Declaration is approved, the City will convert your profile from bidder to supplier and send you a Supplier ID number via email.
- Please allow 3 business days to receive a Supplier ID number.



# City Contracting Requirements: Supplier Compliance

<https://sfcitypartner.sfgov.org/Vendor/BecomeSupplier> has the following instructions:

## Already a Supplier?

If you are already a supplier with a supplier ID, you already have an account in our system and should NOT register as a bidder. Please call User Support at 415-944-2442 to activate your account.

Not sure? Call User Support and they can look you up in our system.

## Links

Business Tax Registration: <https://newbusiness.sfgov.org/vendor/>

12B Compliance Program: <http://sfgov.org/cmd/12b-equal-benefits-program>

Go To Supplier Portal: <https://sfsupplierportal.sfgov.org>

How to Register as a Bidder in the System: <http://citysystemtraining.sfgov.org/Functional/VM/Bidder%20and%20Supplier%20Activites/Publishing%20Content/PlayerPackage/data/toc.html>



# RFP 211 Timeline & Web Resources

- **February 6:** RFP published on OEWD website
- **February 15:** Bidders Conference
- **February 19:** Deadline to submit questions (5 pm)
- **February 22:** Q & A Final Posting
- **March 5:** **Proposals due by 5pm Deadline**



# RFP 211 Timeline & Web Resources

**Deadline for Responses:  
Tuesday, March 5, 2019 by 5:00 PM.**

**1 complete response package may be submitted via email to  
[oewd.procurement@sfgov.org](mailto:oewd.procurement@sfgov.org)  
(Preferred Method)**

**OR**

**1 copy** of the completed response package including all supplementary materials may be hand-delivered by the deadline or received by OEWD by mail by the deadline at the following address:

Office of Economic and Workforce Development  
1 South Van Ness Avenue, 5th Floor  
San Francisco, CA 94103  
Attention: Contracts and Grants Director

**HAND DELIVERY RECOMMENDED IF SUBMITTING HARD COPY**



# RFP 211 Timeline & Web Resources

Website: <http://oewd.org/bid-opportunities/rfp-211>

## Document Downloads

### Full RFP 211

#### Appendices:

- A. Sample Agreement for Grant (Form G-100)
- B. Budget Template
- C. Application Request for Proposals 211
- D. Staffing and Board Composition Chart Template
- E. Submission Authorization Form
- F. Supplier Registration Instructions
- G. For RFP 211 Area E (Nonprofit Space Stabilization)
- H. For RFP 211 Area F (Nonprofit Space Investment)
- I. Sample Jail Clearance Application for Area I  
(CityBuild In-Custody Occupational Skills Training Provider)



# Questions & Answers

1. Fill out your question card(s). Staff will pick them up.
2. Additional questions may be asked via email by the deadline to [owd.procurement@sfgov.org](mailto:owd.procurement@sfgov.org)
  - Please put “RFP #211” and area of interest in the Subject Line
  - Questions may be submitted up until **Tuesday, February 19, 5 pm**
  - Questions and answers will be posted on OEWD website by Friday, February 22:

<http://owd.org/bid-opportunities/rfp-211>

Updates will be posted ongoing



# Questions & Answers:

## Please cite Program Area (A to J), if applicable

Program Area	Title	Anticipated # of Awards	Anticipated Total Funding Available for Initial Project Term
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B	<u>Entrepreneur and Independent Contractor Pilot Program</u>	1 or more	\$55,000
C	<u>Administering Music Venue Sound Mitigation Assistance Program</u>	1	\$150,000
D	<u>Nonprofit Succession Planning Program</u>	1 or more	\$100,000
E	<u>Nonprofit Space Stabilization Program</u>	1 or more	\$675,000
F	<u>Nonprofit Space Investment Fund</u>	1 or more	\$2,125,000

Program Area	Title	Anticipated # of Awards	Anticipated Total Funding Available for Initial Project Term
	<b><u>Workforce Development Programs</u></b>		
G	<u>Workforce Barrier Remediation: Online Bachelor's Degree Pilot Program</u>	1	\$35,000
H	<u>Information and Communications Technology (ICT) Sector Coordinator</u>	1	\$300,000 to 375,000
I	<u>CityBuild In-Custody Occupational Skills Training Provider</u>	1	\$60,000
J	<u>Designing a Bay Area Technology Apprenticeship Approach</u>	1	\$25,000



# Thank you!

- Visit the **Bid Opportunities** page on our website ([oewd.org/bid-opportunities](https://oewd.org/bid-opportunities)) to review and apply for current funding opportunities. The direct link to the RFP 211 page is:

[oewd.org/bid-opportunities/rfp-211](https://oewd.org/bid-opportunities/rfp-211)

- **Connect with OEWD** if you have any suggestions or questions related to our current procurement or programs:

[oewd.procurement@sfgov.org](mailto:oewd.procurement@sfgov.org) or (415) 701-4848

