

City and County of San Francisco



Request for Proposals (RFP) #218

Nonprofit Sustainability Initiative Real Estate Acquisition and Capital Needs Assessment

Issued by:	Office of Economic and Workforce Development (OEWD)
Date issued:	Friday, November 5, 2021
Proposals due:	Wednesday, November 24, 2021 by 5:00 P.M. Only E-mailed Submissions will be accepted in accordance with public health and accessibility guidelines. Complete submissions must be e-mailed to: owd.procurement@sfgov.org
Questions about this RFP?	All questions and technical assistance requests for this RFP may be e-mailed to: owd.procurement@sfgov.org
Need the RFP or application materials in alternative formats for persons with disabilities? Please send an e-mail to: owd.procurement@sfgov.org	

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I. Introduction, Overview and Schedule

COVID-19 has had a profound impact on our local and global economy. Since the onset of the public health crisis in San Francisco in March 2020, tens of thousands of local jobs have been lost and countless businesses closed, many permanently. Every corner of society and the economy has been impacted, though not all evenly. San Francisco nonprofits have worked tirelessly, often with minimal resources, to continue to deliver critical services to support the most vulnerable in our communities.

The funding in this Request for Proposals (RFP) will provide direct financial assistance to nonprofits for expenses related to space acquisition, and professional services related to acquisition planning and capital needs assessment. These investments are key to the ongoing sustainability of the City's nonprofit sector, and resources will be prioritized for organizations that substantially serve communities of color, low-income populations, and marginalized populations.

The total amount of funding anticipated for the initial grant award is \$4,516,000 over a 2-year grant term. Year 2 funds will be subject to approval in the City's Fiscal Year 2022-23 budget and resulting grant awards may be adjusted commensurate with the outcome of the budget process.

Through this RFP, we ask our partners to consider and submit proposals that appropriately adapt their services and activities to a current and future reality defined by COVID-19. We look forward to receiving your proposals, as our partnership with you and your organizations will strengthen our collective efforts in realizing an equitable recovery for San Francisco's diverse communities.

About the Nonprofit Sustainability Initiative

The Office of Economic and Workforce Development (OEWD) is committed to supporting the long-term health of San Francisco's nonprofit sector. Through its Business Development Division OEWD provides assistance to nonprofits including:

- **Business Development:** Access to an extensive network of nonprofit resources and referrals, focused to the needs of the individual business, as well as training and education referrals suited to the arts, education, social service, community development and other nonprofit industry clusters.
- **City Liaison:** Specialized assistance in navigating city government including permitting and zoning questions and assistance, single point of contact at the city to coordinate services.
- **Workforce Services:** Assistance with employee recruitment, subsidized job training for new hires and skills upgrading, specialized assistance in navigating city government including workforce requirements for the City's nonprofit vendors.
- **Real Estate:** Site selection, relocation and expansion assistance with guidance towards areas which are zoned and appropriate for nonprofit uses including social service, health clinics, childcare, arts and/or institutional use.

For more information about services offered through the Nonprofit Sustainability Initiative, contact Lex Leifheit, Senior Business Development Manager, at Lex.Leifheit@sfgov.org.

A. Eligible Applicants

You are eligible to apply if you:

- Are a nonprofit 501(c)(3) organization, registered with the Internal Revenue Service and in good standing with the State of California's Registry of Charitable Trusts.
- Are not debarred or suspended from participation in local, State or Federal programs;
- Meet all minimum qualifications as described in Section II below;
- Can comply with all local, state or federal laws and regulations if funded. Please see **Appendix D** and **Appendix E** for more information about general terms and conditions of City funding opportunities.

Please note that we are not accepting applications from Fiscal Sponsors for this RFP.

B. Available Funding

The initial round of funding is expected to come from the local City funds ("General Fund"). OEWD may also award a variety of federal, state or local funding including, but not limited to:

- Department of Labor - Workforce Innovation and Opportunity Act (WIOA), American Apprenticeship Grant, Emergency Funds, etc.
- US Small Business Association (SBA)
- Housing and Urban Development - Community Development Block Grant (CDBG)
- Other city, state, federal and non-government sources, such as contributions from private foundations

The funding amounts listed in this RFP are anticipated initial funding awards, based on current budget availability. Actual awards will be determined by the number of responsive proposals that meet OEWD strategies and objectives, and funding may be less or more. Please submit budget requests according to the limits in this RFP, however, OEWD may negotiate different funding allocations and project goals before finalizing awards. Should additional funding become available, award amounts may be increased significantly beyond the originally anticipated amount.

This RFP, and the proposals received as a result of it, may be used to justify funding decisions for other similar services and/or other funding that becomes available through OEWD or any other City department. OEWD, or other City agencies, will disclose any additional regulations or requirements during the negotiation process for grants or contracts that are awarded through this RFP and funded by other local, state, federal or non-city sources.

Nonprofit organizations funded by OEWD under this RFP may also be eligible to apply for funding under OEWD's nonprofit capacity fund. The goal of OEWD's nonprofit capacity fund is to maintain continuity of economic and workforce development services by potentially assisting OEWD's nonprofit suppliers with one-time, as-needed funds to support administrative operations and organizational effectiveness (e.g. leadership transition, strategic partnership). The fund is dependent on funding availability, and limited to nonprofit organizations who are currently funded by OEWD for the specific purpose of providing economic and workforce development services. When funding becomes available, eligible

nonprofit organizations currently funded by OEWD will be notified of the opportunity to apply for funding.

C. Technical Assistance

OEWD is committed to ensuring all applicants have a fair chance to compete for this funding. In recognition of the current public health climate, all technical assistance will be provided online/by phone. If you have any questions about this RFP, or need assistance with the application, please get in touch with our office at the following email address: oe wd.procurement@sfgov.org

D. Service Period

Successful proposals will be funded for a term of **two (2) years**, beginning in fiscal year 2021-2022. In some cases, the City may renew or extend programming through fiscal year 2024-2025. All decisions regarding the size, length, and scope of future funding awards are subject to OEWD approval and budget availability. Future funding is not guaranteed, and funding amounts and terms will depend upon the performance of the grantee during the initial award period, as well as other policy considerations as determined by OEWD. Grantees will be asked at a minimum to submit a final report of their activities and, if OEWD elects to renew the award, a revised scope of work and budget for the renewal period(s) for OEWD review. OEWD reserves the right, in its sole discretion, to not renew funding awards.

E. Schedule

The anticipated schedule for awarding initial funding is as follows:

Proposal Phase	Date
RFP is issued by the City	Friday, November 5, 2021
Deadline for submission of written questions*	Friday, November 12, 2021
Answers to questions posted online	Tuesday, November 16, 2021 by end of day
Proposals due	Wednesday, November 24, 2021 by 5:00 P.M.
Committee Review	November 29, 2021 through December 3, 2021
Grantee Selection and award notification	Anticipated December 6, 2021
Protest period ends	5 business days after award notification
Projects begin	Projects anticipated to start in January 2022 or later

Each date is subject to change. For the latest schedule, check: <http://oewd.org/bid-opportunities/RFP-218>

*Note: Substantive questions regarding the program area in this RFP – such as clarifying questions regarding the eligibility of proposed projects – must be submitted by November 16, 2021. Purely technical questions regarding how to complete or submit the RFP application packet will be answered until the proposal submission deadline. Send an email to oewd.procurement@sfgov.org if you have technical assistance needs.

II. Program Area and Scope of Work

Program Area: Nonprofit Sustainability Initiative: Real Estate Acquisition and Capital Needs Assessment

Anticipated Number of Awards: 1

Amount: Total amount of funding available under this program area is projected to be \$4,516,000 over a 2-year grant term. OEWD anticipates allocating funding of \$2,316,000 in Fiscal Year 2022-23 and \$2,200,000 in Fiscal Year 2023-24 for grants to be awarded under this program area. Budget targets for distinct pieces of work are described below.

Proposers should demonstrate compliance with these limits as part of their budget narrative. Final funding awards will be determined by the number of responsive proposals that meet departmental strategies and objectives, and actual funding may be less or more.

Eligible Neighborhood(s): Citywide

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

Scope of Work:

OEWD is seeking proposals from **nonprofit organizations** to provide direct financial assistance to nonprofits for expenses related to space acquisition, and professional services related to acquisition planning and capital needs assessment. The scope of work for the recipient(s) in this program area may include (but are not limited to) the following:

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

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

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

Activities under this section may include:

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

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

Minimum Qualifications

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

Preferred Qualifications

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

III. Application Process

A. How to Apply

Complete applications shall include all of the items listed in the Proposal Package Checklist, below. Instructions and tips on completing all Proposal Package documents are included following the Checklist and all templates noted can be downloaded from <http://oewd.org/bid-opportunities/RFP-218>.

Proposal Package Checklist - The following items must be completed and included in the application package.

Templates provided as Appendices to RFP 218:

- Appendix A, Application** template – This template includes the question set that all applicants must respond to.
- Appendix B, Proposed Budget** template – Please list your proposed project budget on this template and submit it with your application.
- Appendix C, Staffing and Board** template – Please provide staffing and board detail in this template and submit it with your application.

Additional required attachments:

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

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

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

Additional Reference Materials, Requirements and Guidelines

The following documents are for reference only.

Appendix D, City Grant Terms (Form G-100), contains the standard requirements that apply to all nonprofit organizations doing business with the City.

Appendix E, Applicant Requirements and Guidelines

Appendix E is a reference document which outlines additional details related to the following topics:

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

Appendix F, Supplier Registration Instructions, provides registration instructions to Applicants who are not current City Suppliers (vendors).

B. Proposal Package Submission

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

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

If you discover an error in your submission and need to submit a revised proposal, compile all items on the Proposal Package Checklist, follow the same steps as outlined above, and ensure that the revised submission is submitted before the deadline. Please also contact owd.procurement@sfgov.org and confirm when that you are replacing your prior submission so that OEWD is able to identify the correct proposal that the Review Committee receives.

Again, all submissions, including all appendices, must be received by 5:00 p.m. on Wednesday, November 24, 2021 to be considered as part of the Proposal Review Process. **Early submission is highly encouraged.**

If you have any challenges with the application templates, please contact the Contracts and Grants Division at owd.procurement@sfgov.org. The team will assist with technical issues until the submission deadline.

C. Best Practice Tips

- Use the Proposal Package Checklist to ensure your proposal is complete.
- Carefully review the minimum qualifications in the program area(s) you are interested in. Note that you may be eligible for some programs and not others.
- Write as clearly and succinctly as possible and respond directly to the questions as asked. Do not submit extra materials not requested.
- No links to outside materials should be included in proposals, as the Review Committee will not review any websites, articles, videos, or documents during the review process.
- Include all requested files as attachments with your proposal prior to submission; these attachments will not be accepted after the deadline. **Note that the City server file size limit for attachments is 34MB.**

IV. Proposal Review Process

First, OEWD will review all proposals to determine if they are complete and eligible. Incomplete, late or otherwise ineligible proposals will not be considered and applicants will be notified if their proposals have been disqualified.

Next, a Review Committee will read and score all complete and eligible proposals. The Review Committee may consist of City and non-City staff and other individuals who have experience in the Program Area in this RFP. If applicants are current OEWD grantees or contractors, OEWD may consider prior performance in our review.

At the discretion of the City, the review process may require applicants to make an oral presentation before the panel and/or require the panel to conduct a site visit of the applicant's facility or proposed project area.

Selection Criteria

Applications 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 awarded 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 review 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)

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

Approach, Activities, and Outcomes (40 points)

- The proposed project will contribute to achieving the goals and objectives stated in the RFP.
- The application presents a clear description of the proposed project, including a clear statement of goals and objectives
- The application presents a plan of action with details on the specific scope of services applicant(s) propose and how the proposed work will be accomplished.
- 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.
- The design of the project reflects current knowledge on effective practices supported by applicants' experience and/or research and literature.
- The proposed project would involve the collaboration of partner organizations, 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.
- The proposed project reflects performance targets appropriate for the program.
- 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)

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

- Applicant provides a detailed budget narrative presenting reasonable costs that relate to activities proposed.
- The proposed budget is submitted on the required template and applicant's overall budget is of a size to reasonably expect successful delivery of the program.
- Applicant maintains strong fiscal controls and would ensure the prudent use, proper and timely disbursement and accurate accounting of funds awarded under this RFP.
- Additional resources are available to ensure implementation and sustainability of programming.

Clarifications

The City may contact 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. 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.

Selection

After the Review Committees 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 necessary, for review and determination of the award. The tentative awardees whose proposal(s) are determined to meet the needs of the City will be recommended to negotiate a grant. If an applicant submits multiple proposals, the organization's overall capacity in relation to the number of projects proposed will also be considered when proposals are recommended for funding. All applicants will be notified of the results of the evaluation.

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 Service Commission for approval, if applicable. 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. Final award of the grant may be subject to approval by the Civil Service Commission, Board of Supervisors, Mayor, or other governing body.

Applicants who do not receive an award may appeal the decision. Applicants who receive a grant will be contacted to begin the grant negotiation process.

V. Protest Process

A. Protest of Non-Responsiveness Determination

If your proposal is deemed non-responsive, you will receive notice from the City explaining the reason for removing it from consideration. 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. The protest must be received by the City on or before the fifth business 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 applicant, 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 business days of the City's issuance of a notice of intent to award the grant, any applicant 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. The notice of protest must be received by the City on or before the fifth business 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 applicant, 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. OEWD highly recommends submitting the protest via email. If a protest is mailed in hard copy, 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 protest letters may be submitted via email to oewd.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 protesting organization.

Protests must be addressed to:

Contracts and Grants Division
Office of Economic and Workforce Development
One South Van Ness Avenue, 5th Floor
San Francisco, CA 94103

Following the City's receipt of a timely protest, the City may decide to schedule a meeting to review and attempt to resolve the protest. The meeting will be scheduled within ten (10) calendar days of the receipt of the protest, in a format that follows public health and accessibility guidelines. If the City determines a meeting is not necessary to address the protest, the protestor can anticipate a written response from the City within 10 calendar days of submission of the letter of protest. **All protest determinations made by the Director of OEWD are final.**