



Request for Qualifications #207

City and County of San Francisco

Office of Economic and Workforce Development

for

Consulting Services for Economic and Workforce Development Projects



Request for Qualifications #207

Date of Issue: Friday, September 22, 2017

**Deadline for Responses:
Thursday October 12, 2017 by 5:00 PM.**

**1 complete response package may be submitted via email to
owd.procurement@sfgov.org**

(Preferred Method)

OR

2 copies of the completed response package may be submitted to:

Office of Economic and Workforce Development

1 South Van Ness Avenue, 5th Floor

San Francisco, CA 94103

Attention: Kris Damalas

(Hand Delivery Recommended)

Table of Contents

A. Background	1
B. Project Descriptions	1
C. RFQ Timeline	1
D. Respondents' Questions	2
E. Scope of Work	2
F. Minimum Qualifications	3
G. Content of Response Package	3
H. Supplemental Questions and Information	5
I. Final Submission	6
J. Final Selection	7
K. General Information	7
Conditions of Proposal/Response Package	7
Cancellation	8
Extendibility of Procurement Justification	8
Late or Conditional Proposals.....	8
Awarding of the Contract(s) or Grant(s).....	8
Appeals	9

A. Background

The Office of Economic and Workforce Development (OEWD) supports the City's 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 live, work and do business.

B. Project Descriptions

The OEWD is seeking to develop a list of qualified contractors to provide a variety of consulting services as described in section E of this document. OEWD will select contractors for future projects from among the qualified respondents to this or other active pre-qualified lists. Selections for future projects will be based on the competitive qualifications, experience, and hourly rate quoted in the proposals responding to this RFQ. After the pre-qualified list is established, one or more qualified contractors may be asked to provide further details, portfolios of work and additional price information based on the needs of specific projects. Interested parties may submit one response package for consideration under one or more sub-areas or specialties defined in Section E, Scope of Work, below.

Below is an overview of the types of work being sought in this RFQ. Details on each section can be found in the subsequent pages of this RFQ.

Area number	Title	Subsections/Categories
Area 1	Nonprofit Capacity Building	Yes; subsections a. through q.

OEWD may fund contracts and/or grants under this RFQ 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.

C. RFQ Timeline

RFQ Issued	Friday, September 22, 2017
Question submission period ends	Monday, October 2, 2017; noon local time
Final questions and answers posted	Thursday, October 5, 2017 by end of day
Proposals Due (no exceptions)	Thursday, October 12, 2017; at 5:00 PM
Notifications to Proposers	Tuesday, October 31, 2017 by end of day

Appeal Period Ends (no exceptions)	Five (5) calendar days after notification (anticipated Sunday, November 5, 2017 at 5:00 PM)
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This RFQ will be in effect for two years from the date that notifications are sent to proposers. OEWD may use this RFQ to justify contracts/grants with a term start date within the two year timeframe and for any necessary amendments to those agreements. The term of any agreements (and their amendments) do not need to conclude within the two year timeframe.

Schedule may change if necessary.

Any updates to the schedule or changes to the content of the RFQ will be posted to the RFQ 207 specific page linked to <http://oewd.org/bid-opportunities>. It is the proposer’s responsibility to review all changes posted and adjust responses as needed.

D. Respondents’ Questions

Respondents may request clarification or ask questions about this document by emailing oewd.procurement@sfgov.org through **Monday, October 2, 2017 at noon**. Respondents may alternatively drop off written questions to the Office of Economic and Workforce Development, 1 South Van Ness Avenue 5th Floor, San Francisco, CA before the deadline noted above.

No phone or fax questions will be answered. A consolidated list of questions and answers will be posted to the RFQ 207 specific page linked to <http://oewd.org/bid-opportunities> no later than end of day Thursday, October 5, 2017. Periodic posting of questions and answers may occur prior to that deadline. Proposers are responsible to review the website periodically and incorporate guidance as appropriate.

E. Scope of Work

OEWD seeks to develop a list of qualified consultants in the following areas:

1. Nonprofit Capacity Building Services

OEWD is seeking nonprofit organizational development consultants to guide organizational diagnostic assessments, provide business counseling and identify capacity-building resources including service providers and/or training services. Specifically, OEWD is seeking consultants with expertise in one or more of the following areas, as they relate to nonprofit capacity building:

- a. Organizational needs assessment & market analysis
- b. Strategy, vision & impact
- c. Leadership coaching
- d. Fund development & resource generation
- e. Board development
- f. Equity, diversity & cultural competence
- g. Staff recruiting, development and retention
- h. Financial planning, budgeting, oversight & operations

- i. Succession planning
- j. Risk assessment
- k. Organizational design & change management
- l. Mergers and strategic restructuring
- m. Evaluation and infrastructure for ongoing program & organizational assessment
- n. Volunteer management
- o. Technological infrastructure
- p. Nonprofit establishment and formation
- q. Industry specific expertise (i.e. economic development, workforce, arts, education...etc.)

Activities under this section may include:

- Guiding organizational leadership in a diagnostic assessment of organizational capacity
- Developing and implementing individualized capacity-building plans and scopes of work for nonprofit clients
- Directing nonprofit clients to training programs and service providers, assisting with evaluation of proposals
- Providing direct services to clients
- Tracking and reporting on impact of the work being provided

The Business Development Division has a standard cap of \$150 hourly rate for consulting (firms with extensive and/or specialized experience may be paid more).

F. Minimum Qualifications

In order for the application to be considered responsive to this RFQ, the contractor must possess and address in their response the following minimum qualifications:

- 3 years verifiable experience providing coaching, business development, capacity building and/or training services to nonprofit clients and a minimum of 10 nonprofit clients directly assisted.

G. Content of Response Package

Submissions in reply to this RFQ must be in the form of a “response package” containing the all required information and supporting documents. Respondents are required to provide all information requested below and to clearly address the minimum qualifications noted above for all specialties or subcategories of interest. In your response, please indicate “N.A.” if a required response packet item is not applicable to you. The list of required items as well as recommended order can be found below.

UNEXPLAINED OMISSIONS IN THE RESPONSE PACKAGE MAY DISQUALIFY THE ENTIRE SUBMISSION PACKAGE FOR REVIEW.

Submission Requirements

Responders may pick between the two options below.

- 1) 1 complete response package may be submitted via email to owd.procurement@sfgov.org. To the extent possible the entire response packet should be submitted as one file attachment. If items (portfolio pictures, etc) are too large to combine into a single file, additional compressed files containing supplemental materials may be submitted. Response packet files must be either MSWord or PDF; picture files may be png or jpeg.

(Preferred Submission Method)

OR

- 2) 2 hard copies of the complete response package may be submitted to:
Office of Economic and Workforce Development
1 South Van Ness Avenue, 5th Floor
San Francisco, CA 94103
Attention: Kris Damalas, RFQ 207

To the extent possible, information in the response package should be presented in the following sequence:

1. Response cover letter with contact information, including an email address for the respondent. Cover letter must identify the specialties or subsection(s) of interest (subsections a through q in section E).
2. Resume(s) of your (or key staff) experience, education, and other factors relevant to the services described in this RFQ. Be sure to include information about work similar to this project, as well as any related completed projects, education, and training.
3. A statement listing all contracts (both public and private) relevant to services solicited that have been completed during the last five (5) years. The statement must also list any failure or refusal to complete a contract, including details and dates.
4. A list containing at least 3 professional references who can verify the respondent's previous experience and outcomes. The list should include at a minimum: name of reference, title, company, phone number, address, and email address as well as relationship to the project. If letters of reference are submitted, current contact information for each reference is still required.
5. Provide a statement, written solely by the respondent, addressing the following items:
 - a) Summary of skills, resources, and experience relevant to this contract. Be sure to address all of the minimum qualifications listed in this RFQ.
 - b) Current City supplier number that has passed all necessary approval steps (including equal benefits status confirmation from the Contract Monitoring Division of the General Services Administration) or confirmation that the respondent does not anticipate issues in obtaining a number and complying with the City requirements. More information on how to become a City bidder (initial step) and progress to a fully compliant and approved City supplier (required prior to contracting) can be found at <https://sfcitypartner.sfgov.org/> Please refer

- to the Final Selection and General Information sections below for additional information if your agency is not currently an approved City vendor.
- c) Confirmation that the firm and respondent are not suspended, debarred or otherwise excluded from participation in federal or local assistance programs.
 6. A response document answering all supplemental questions questions below.
 7. A list or table containing the names of at least 10 nonprofit clients assisted by your organization along with beginning and end dates for each engagement and, if applicable, which specialities or subareas from page 3 (a through q) were part of the support provided to each nonprofit client.
 8. Samples of prior work.
 9. Any other relevant addenda which the respondent wishes to submit to demonstrate their qualifications.

H. Supplemental Questions and Information

Area 1 Nonprofit Capacity Building program services: Please answer the following questions and provide samples of work as part of the response package.

1. Explain your ability to guide organizational diagnostic assessments and develop nonprofit capacity building plans.
2. Describe your experience in providing counseling in both one-on-one settings and small group settings.
3. Describe your knowledge of appropriate nonprofit resources and service providers to which nonprofit boards and senior staff would be directed.
4. Indicate the languages you (or key staff) speak and the proficiency with which you speak them:
 - a. Level 1 – Elementary proficiency
 - b. Level 2 – Limited working proficiency
 - c. Level 3 – Professional working proficiency
 - d. Level 4 – Full professional proficiency
 - e. Level 5 – Native or bilingual proficiency
5. Describe your rapport or approach with clients. How do you communicate effectively with nonprofit organizations and engage the cooperation of board members and other key stakeholders in the implementation process?
6. Describe your success in helping nonprofit clients accomplish specified goals.
7. What knowledge and experience do you possess for dealing with clients' capacity challenges and producing results of a desired level? Please provide specifics related to all subareas a through q for which you would like this application to be considered.
8. Explain one or more past issues or problems that a client experienced and how you were able to help or advise them.
9. Are you willing to be compensated at or under the Business Development Division's hourly rate cap of \$150 per hour?
 - a. Yes

- b. Yes for some but not all contracts (Please answer question below)
- c. No (Please answer question below)

What is your firm's blended hourly rate?

I. Final Submission

As noted above, respondents may pick between the two options below for submitting a response packet

- 1) 1 complete response package may be submitted via email to owd.procurement@sfgov.org. To the extent possible, the entire response packet should be submitted as one file attachment. If items (portfolio pictures, etc) are too large to combine into a single file, additional compressed folders containing supplemental materials may be submitted. Submission files must be either MSWord or PDF; picture files may be png or jpeg. (Preferred Submission Method)

OR

- 2) 2 hard copies of the complete response package may be submitted to:
Office of Economic and Workforce Development
1 South Van Ness Avenue, 5th Floor
San Francisco, CA 94103
Attention: Kris Damalas, RFQ 207

If emailing the response package, 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.

Response package must be received no later than **5:00 PM, Thursday October 12, 2017** . No exceptions.

Postmarks will not be accepted in lieu of this requirement. Submissions by fax will not be accepted. Respondents will be issued a receipt upon submission of a package. This receipt does not verify that the package accepted is correct, complete or meets the minimum qualifications. Upon review, OEWD will send announcement letters to all parties notifying them of their status. If hand delivering, applicants should allow adequate time for parking, locating the office, obtaining approval and a visitor's badge from security staff, and other possible delays.

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

J. Final Selection

The selection process will include an initial screening of the responses based on the minimum qualifications. All qualified written responses will then be evaluated by OEWD staff as specific projects arise. The Department has the option of conducting oral interviews as part of the evaluation process.

Receipt of a notification letter confirming the respondent met the minimum qualifications as set forth in the RFQ is not a promise to contract for services. Contractor(s) receiving prequalification letters may be subsequently contacted by the department to discuss specific opportunity(ies) that coincide with the respondent's qualifications *when and if* they arise.

As noted previously, proposers are not required to be fully approved City suppliers in order to apply to this RFQ, however, OEWD can only contract for services with fully compliant and approved City suppliers. If a respondent has not completed the required steps and OEWD cannot confirm compliance within 6 months after the notification letter is sent then the potential contractor may be removed from the pre-qualified list by OEWD. In that instance, the contractor may subsequently submit proof of confirmed compliant supplier status to be reinstated to the pre-qualified list. In no instance can OEWD contract for services with an organization which has not completed all steps of the supplier process. More information on how to become a City bidder (initial step) and progress to a fully compliant and approved City supplier (required prior to contracting) can be found at <https://sfcitypartner.sfgov.org/>

If the Department opts to conduct interviews to assess respondents' ability to provide the services, the Department may elect to interview only the most qualified respondents (based on the minimum qualifications and supplemental materials submitted).

The final selection of all contractors for projects, based upon the written response (and possibly an interview), will be made by the Director of OEWD.

K. General Information

Conditions of Proposal/Response Package

1. The proposal may not be altered in any way after submission.
2. Respondent agrees that the Proposal and all materials submitted in response to the City and County of San Francisco Request for Qualifications to provide Consulting Services for the Office of Economic and Workforce Development RFQ #207 become the property of the City, and may be returned only at the option of the City and at the Respondent's expense. All proposals submitted may be subject to the "Sunshine Ordinance" and copies provided to the public upon written request (except certain confidential financial information).
3. The contractor must comply with the City and County ordinances and contracting requirements. For more detailed information on these requirements, see the Office of Contract Administration website at <http://sfgov.org/oca/general-contract-terms-conditions> . City contracting requirements include general liability, workers compensation, and auto insurance coverage, compliance with the equal benefits ordinance, and attainment of a current San Francisco business tax certificate among other items.

4. Though it is not a requirement that all respondents are currently approved suppliers, respondents must become a compliant City supplier for OEWD to enter into a contract for services. This process can take a few weeks or several months; the timeline is often dependent on the complexity of the proposer's benefits package for employees. If proposer is not already an approved City supplier, the process should be started immediately.
5. Respondent agrees that all costs incurred in developing this proposal are the Respondent's responsibility and at the Respondent's cost.
6. Respondent 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 Qualifications to provide Consulting Services for the Office of Economic and Workforce Development RFQ #207. Respondent 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. Respondent understands and agrees that minor defects may be waived at the discretion of the City.

Cancellation

The procurement process for this RFQ or any of its component areas or modules may be delayed, suspended, or canceled if the City determines that such action is in the best interest of the City.

Extendibility of Procurement Justification

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

Late or Conditional Proposals

1. Any proposal received at the office designated in this RFQ after the exact time specified for receipt will **not be considered**.
Respondents must allow adequate time for parking, locating the office, obtaining approval and a visitor's badge from security staff to deliver the proposal, server delays (if submitted electronically) and other possible delays.
2. Any proposal may be rejected if it is conditional, incomplete, or deviates from specifications stated in this RFQ. Minor deviations may be waived at the discretion of the City.

Awarding of the Contract(s) or Grant(s)

1. All respondents will be notified in writing of the results of the evaluation of their submitted package. Receipt of a notification letter confirming the respondent met the minimum qualifications as set forth in the RFQ **is not a promise to contract for services**.
2. The tentative award(s) may be conditioned on inclusion of changes/additional terms. Negotiations over specific terms and language may be required before submission to the Civil Service Commission for approval, if applicable.
3. If OEWD is unable to negotiate a satisfactory agreement with a qualifying respondent(s), OEWD may terminate negotiations with that respondent and proceed to negotiate with other qualified

respondents. This process may be repeated until a satisfactory contractual agreement has been reached.

4. Final award of any contract(s) solicited under this RFQ may be subject to approval by the Civil Service Commission.
5. In accordance with S.F. Administrative Code Section 67.24(e), contractors' bids, responses to RFPs/RFQs 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.
6. OEWD may fund contracts and/or grants under this RFQ 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) funds, and City general funds. Additional terms and conditions may be required by specific fund sources and will be disclosed to and negotiated with potential contractors/grantees during the funding phase of projects.

Appeals

1. Following the review and announcement of qualified bidders, the OEWD will accept appeals regarding the determination of pre-qualified contractors.
2. Appeals must be in writing and addressed to:

Office of Economic and Workforce Development
1 South Van Ness Avenue, 5th Floor
San Francisco, CA 94103
Attention: Kris Damalas, Contracts and Performance Director
3. The reason for the appeal must include citation of law, rule, regulation or practice upon which the appeal is based.
4. Appeals must be received within 5 calendar days from the date of the notification letter or notice of non-selection.
5. If the City determines that a meeting with the respondent is necessary, such meeting will be scheduled within five (5) business days of the receipt of an appeal to review and attempt to resolve the appeal. If the City determines that a meeting with the respondent is not necessary, at a minimum, the respondent will receive a written response to the appeal within 10 business days of the submission of a timely appeal.
6. The decision of the Director of the Office of Economic and Workforce Development on all appeals is final and any affected parties will be notified in writing of the outcome.