



# Request for Qualifications #210

**City and County of San Francisco**

Office of Economic and Workforce Development

*for*

**Consulting Services for Economic and Workforce Development Projects**



# Request for Qualifications #210

Date of Issue: Friday, October 19, 2018

**Deadline for Responses:**

**Thursday, November 15, 2018 by 5:00 PM**

**1 complete response package may be submitted via email to**

**[oezd.procurement@sfgov.org](mailto:oezd.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

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## A. Background

The City and County of San Francisco’s Office of Economic and Workforce Development (OEWD) supports the City’s ongoing economic and cultural vitality through key programs focused on neighborhood commercial corridors, small business assistance, industry focused business recruitment and retention, international business development, joint development projects, and workforce development. OEWD’s goal is to work continually, across industries and programs, together with diverse community stakeholders, to make San Francisco a better place to live, work, visit and do business. OEWD seeks to support the economic and community vitality of the City and to create equitable pathways for good paying jobs so that all San Franciscans may fulfill their deepest aspirations and benefit from the economic prosperity of our City. Through this Request for Qualifications (RFQ), OEWD seeks to develop a list of qualified contractors to provide a variety of consulting services, with a focus on advancing equity and shared prosperity for all residents.

## B. Project Descriptions

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. 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 Areas defined in Section E, Scope of Work, below, or interested parties may submit separate proposals for each Area of interest. **Please define clearly in the overview of your submission under what Area(s) the package should be reviewed.**

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

Area number	Title	Subsections/Categories
Area 1	Developing and Implementing a Racial Equity, Diversity and Inclusion Plan	Yes; subsections a. through d.
Area 2	Real Estate Analysis and Technical Assistance	None
Area 3	Community Benefit District/Business Improvement District	None
Area 4	Architectural Services	None
Area 5	Logo/Branding Design	None

<b>Area number</b>	<b>Title</b>	<b>Subsections/Categories</b>
Area 6	Photography Services	None
Area 7	Storefront and Corridor Vacancy Assessment and Feasibility Analysis	Yes; subsections a. and b.
Area 8	Commercial Building Assessment	None
Area 9	Real Estate Case Management Services	None
Area 10	Tenant Coordination/Program Management	None
Area 11	Mission Commercial Space Broker Services and Business Attraction Services	None
Area 12	Chinatown Vacancy Activation Pilot	None
Area 13	Architectural and Interior Design Services for Healthy Retail SF Program	None
Area 14	Small Business Services through the SBDC	Yes; subsections a. through bb.
Area 15	Workforce Technical Assistance and Training	Yes; subsections a. through c.
Area 16	Workforce Policy Tracking and Analysis and Designing Workforce Solutions	None
Area 17	City Build As-Needed Training Consultants	None
Area 18	Employment Training Panel (ETP) Technical Assistance and Management	None
Area 19	Economic and Labor Market Analysis	Yes; subsections a. through b.
Area 20	Development Agreement SharePoint Tracking System	None
Area 21	Technology Consultation	Yes; subsections a. through c.

Area number	Title	Subsections/Categories
Area 22	Stakeholder Engagement and Facilitation	Yes; subsections a. through d.
Area 23	Marketing, Branding, Collateral and Website Development	Yes; subsections a. through p.
Area 24	Fiscal Services	None
Area 25	Legal Advice for Cannabis Equity Applicants	None
Area 26	Small Business Needs Assessment	None
Area 27	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, and City general funds.

### C. RFQ Timeline

RFQ Issued	Friday, October 19, 2018
Question submission period ends	Wednesday, October 31, 2018 at noon
Final questions and answers posted	Tuesday, November 6, 2018 by end of day
Proposals Due (no exceptions)	Thursday, November 15, 2018 at 5:00 PM
Notifications to Proposers	Anticipated by close of business Thursday, November 29, 2018
Appeal Period Ends (no exceptions)	Five (5) calendar days after notification date

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. Contractors whose minimum qualifications were confirmed for consulting work through OEWD's Request for Qualifications (RFQ) #204 in Spring 2017 do not need to reapply to this RFQ unless they wish to also prequalify themselves

for the additional project areas outlined on the following pages or reapply under similar areas to extend their prequalified status. The list of prequalified firms created through RFQ 204 will be active until March 2019. Contractors whose minimum qualifications were confirmed for consulting work through OEWD's Request for Qualifications (RFQ) #207 in Fall 2017 do not need to reapply to this RFQ unless they wish to also prequalify themselves for the additional subsections outlined on the following pages or reapply under similar subsections to extend their prequalified status. The list of prequalified firms created through RFQ 207 will be active until October 2019.

**Schedule may change if necessary.**

Any updates to the schedule or changes to the content of the RFQ will be posted to the RFQ 210 specific page linked to <https://oewd.org/bid-opportunities/rfq-210> 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](mailto:oewd.procurement@sfgov.org) through **October 31, 2018 at noon** (preferred method). 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 210 specific page linked to <https://oewd.org/bid-opportunities/rfq-210> no later than end of day **November 6, 2018**. 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. Developing and Implementing a Racial Equity, Diversity and Inclusion Plan**

OEWD is seeking qualified consulting nonprofit and/or for profit firm(s) to: 1) conduct an assessment of department practices regarding racial equity, diversity and inclusion; 2) develop a framework that is built on the central pillars of racial equity, diversity and inclusion; 3) provide training and meeting facilitation on racial equity, diversity and inclusion, and create a plan for subsequent trainings; and 4) develop a Racial Equity Plan based on the framework and assist with implementing the plan across the department's units, programs, policies, and practices.

Activities under this section may include:

#### **A. Assessment and Evaluation**

- Survey and interview all OEWD staff or a diverse subset of staff to assess beliefs, attitudes and practices regarding racial equity;
- Provide a summary of data that protects the identity of individuals who participate;
- Assist in the assessment of components which should be included in a department-wide Racial Equity Plan that will be developed by OEWD's Government Alliance on Racial Equity (GARE) cohort; and
- Assist in the evaluation of OEWD's programs, policies and practices to optimize consistency with the Racial Equity Plan and its principles.

B. Plan Development

- Develop a framework built around racial equity, diversity and inclusion
- Develop a Racial Equity Plan based on the framework
  - Plan and program design will have an emphasis on staff development.

C. Training and Facilitation

- Develop and provide meeting facilitation and training to Racial Equity Working Group members;
- Utilize best practices in establishing a framework which ensures that racial equity, diversity, and inclusion are key values of the department, including developing a shared understanding of key terms and concepts;
- Provide racial equity training and facilitation at all-staff meetings;
- Facilitate the development of a shared vision for a more inclusive and equitable organizational culture; and
- Build staff and organizational capacity, skills and competencies and provide recommendations for developing programs, policies and practices that support and advance racial equity over time.

D. Implementation

- Provide and develop tools and assist in the operationalization of the tools in the Racial Equity Plan to increase inclusion and racial equity across OEWD's programs, policies, and practices.

Minimum Qualifications:

- Expertise with racial equity, diversity and inclusion focused program design and facilitation, organizational development, human resource management, and research and evaluation services.
- Familiarity with Economic and Workforce development principles and concepts.

Preferred Qualifications:

- Familiarity with the social, physical and economic infrastructure of San Francisco's low-income neighborhoods and communities of color.

Supplementary Questions and Requirements:

1. Provide a description of at least 2 similar or relevant projects completed in the last 5 years; include challenges, successes, and impacts of the projects.
2. Provide links to websites and/or attach relevant supplemental materials such as a final report on the effectiveness or impact of prior work experience that is relevant to this area.

**2. Real Estate Analysis and Technical Assistance**

OEWD seeks consultants to provide real estate analysis services for commercial and mixed-use projects, including real estate consulting to nonprofit organizations, owners of community assets, and community groups.

Activities under this section may include:



- Estimate development and operation and maintenance costs for proposed development projects or portions of mixed-use projects (i.e. commercial portion only)
- Review development proposals and business terms for complex real estate projects
- Assess feasibility of different development finance tools, organizational structures, and proposed tenants/uses
- Perform stakeholder research to inform the evaluation of a proposed development project, a potential partnership, a proposed tenant/user, a development financing tool or organizational structure's feasibility
- Facilitate partnership agreements with developers
- Facilitate financing agreements with funders

Minimum Qualifications:

- Experience planning or implementing complex mixed-use real estate projects with multiple partners
- Experience estimating costs, developing pro formas, implementing finance tools, and structuring partnerships
- Track record providing assistance or partnering with nonprofit community organizations and neighborhood stakeholders

Preferred Qualifications:

- Track record working in San Francisco neighborhoods on successful commercial and mixed-use projects
- Track record partnering with the City or other public agencies on real estate projects

Supplementary Questions and Requirements: No supplemental information or questions are required.

### **3. Community Benefit District/Business Improvement District**

OEWD is seeking Community Benefit District/Business Improvement District (CBD/BID) program support services for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. CBDs/BIDs strive to improve the overall quality of life in targeted commercial districts and mixed-use neighborhoods through a partnership between the City and local communities. OEWD offers programs that help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

Activities under this section may include:

- Development of legal documents for forming or renewing districts; including, but not limited to the Management District Plan and Engineer's Report
- Overall management of CBD/BID from renewal through a successful election
- Working with OEWD to determine the effectiveness of the CBD/BID program or individual CBDs/BIDs
- Strategic planning for the CBD/BID program or individuals CBDs/BIDs

Minimum Qualifications:

- A strong track record of forming and/or managing CBDs/BIDs in San Francisco and/or the State of California
- Previous experience in strategic planning

- Previous experience in reporting the impact and effectiveness of CBDs/BIDs or citywide related programs

Preferred Qualifications:

- Previous work in strategic planning for CBDs/BIDs
- Previous work in reporting the effectiveness of individual CBDs/BIDs and/or citywide related programs
- Registered Supplier with the City and County of San Francisco

Supplementary Questions and Requirements:

1. Provide a list of all CBDs/BIDs your organization formed in the City and County of San Francisco and/or the State of California
2. Provide links to websites or attach an example of a final strategic plan your organization completed on behalf of a CBD/BID
3. Provide links to websites or attach an example of a final report on the effectiveness or impact of individual CBDs/BIDs or on a citywide program.

#### **4. Architectural Services**

OEWD is seeking services from architects to provide design services and technical assistance for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. OEWD offers programs that provide grants and design assistance to improve visual identity, commercial façades, and business interiors to help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

Activities under this section may include:

- Attend meetings with small business owners and OEWD staff to discuss the proposed scope of work and establish the goals and parameters of the project.
- Review historic information, reports, previous building permits and planning requirements for each project. Conduct field measurements and photographing existing conditions.
- Work with OEWD staff and applicant to develop a minimum of two conceptual designs for the improvements.
- Create design development and construction documents drawings. Coordinate revisions with OEWD staff, applicant and Department of Building Inspection (DBI).
- Obtain all required building permit approvals.
- Develop a scope of work for bidding; attend contractors' walk-through; provide assistance during the bidding phase including responding to questions from contractors.
- Review bids and assisting OEWD staff to provide recommendations on choosing lowest price qualified contractor.
- Provide construction administration as needed including site visits, field reports and review and approval of contractor invoices. Answer questions from contractors and OEWD staff.
- Conduct final walk-through with OEWD staff, contractor and applicant upon project completion. Inspect the work for compliance with applicable City guidelines and signing the Certificate of Completion.

Minimum Qualifications:

- Five years verifiable experience providing architectural services to small business and/or building owners similar to the services noted in the application section(s) above
- Licensed architect with the State of California.

- Three commercial façade and/or tenant improvement projects completed in the past 5 years.
- Note: The following Minimum Qualification is only a requirement under limited circumstances and may not be required depending on the type of project and Scope of Work that is negotiated after applicant has been notified that their proposal was successful:
  - If this Minimum Qualification is applicable based on the post-award, final, negotiated Scope of Work, any contractors that the awardee of this RFP uses must be registered in the State Department of Industrial Relations Public Works Contractor database. Contractors responsible for covered construction or maintenance projects must comply with all relevant local, state and federal prevailing wage laws at the point of bidding to be eligible for a contract award. Please visit <http://sfgov.org/olse/prevailing-wage> and <https://www.dir.ca.gov/PublicWorks/Contractor-Registration.html> for more information.

Preferred Qualifications:

- Experience working with small business owners unfamiliar with the design process

Supplementary Questions and Requirements: No supplemental information or questions are required.

## 5. Logo/Branding Design

OEWD is seeking services from branding designers to provide design services and technical assistance for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. OEWD offers programs that provide grants and design assistance to improve visual identity, commercial façades, and business interiors to help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

Activities under this section may include:

- Attend meetings with the applicant and OEWD staff to discuss the proposed scope of work and establish the goals and parameters of the project.
- Research and evaluate the business concept, customer perception, and other brands in the field.
- Work with OEWD staff and applicant to develop a minimum of three conceptual designs for a visual identity that could include logos, color schemes, signage, and environmental graphics.
- Submit digital files of all designs and a visual identity guideline document for the business.
- Communicate with contractors to specify design and material.
- Providing before and after high quality photographs of the project.

Minimum Qualifications:

- Five years of verifiable experience and three commercial space branding projects completed within the past five years.
- Experience designing signage.

Supplementary Questions and Requirements: No supplemental information or questions are required.

## **6. Photography Services**

OEWD is seeking photography services for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. OEWD offers programs that provide grants and design assistance to improve visual identity, commercial façades, and business interiors to help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

Activities under this section may include:

- Conduct and facilitate planning and conceptualization meeting with OEWD staff.
- Review program information, goals, past projects, and communications needs.
- Develop detailed production work plan including shoot times and travel needs.
- Take photos that highlight the work of programs and services to small businesses and commercial corridors.
- Obtain necessary releases from people and property owners included in the shoots.
- Present proof photos for selection by OEWD.
- Edit chosen photos for photo retouching and file conversion to attain the standard and quality required by OEWD.
- Deliver digital files of final images by method approved by OEWD.

Minimum Qualifications:

- Five years verifiable experience providing photography for events, real estate, non-profit, and/or commercial purposes.

Preferred Qualifications:

- Experience working with small business owners.
- Experience working in San Francisco neighborhoods and commercial corridors.

Supplementary Questions and Requirements: No supplemental information or questions are required.

## **7. Storefront and Corridor Vacancy Assessment and Feasibility Analysis**

OEWD seeks economic consulting services to assess corridor and storefront vacancies to inform City engagement to activate commercial storefronts.

Activities under this section may include:

### **A. Storefront Vacancy Assessment and Feasibility Analysis (single storefront)**

- Use observation and key informant interviews (i.e. broker, building manager or landlord) to determine why a space is vacant. The possible factors will be provided by OEWD as a template.

- Use observation and findings about the neighborhood, including adjacent and nearby businesses, to assess the feasibility of the proposed or projected type of business that would occupy the space.
- Write up summary, including list of business types with the highest likelihood for sustainable success, and activation recommendations.

#### B. Corridor Vacancy Assessment

- Use vacancy data and additional data and interviews to analyze a corridor's general conditions, its uses and makeup, existing building/use (sq. ft.) inventory, and vacancies, and determine whether it is a problem and whether it is an opportunity for government intervention to solve.

#### Minimum Qualifications:

- Applicants must be fully established nonprofit or for profit entities eligible to do business with the City and County of San Francisco
- At least three years of experience conducting similar assessments surveying and researching
- Analyzed neighborhood and/or regional economic composition, industry clusters, or local factor conditions
- Performed quantitative or qualitative market research in neighborhoods
- Researched and analyzed real estate market conditions and trends, performed stakeholder interviews and research

#### Supplementary Questions and Requirements:

1. Please describe your understanding of what these assessments may include and for what purpose.

### **8. Commercial Building Assessment**

OEWD is seeking commercial building assessment services to support a business attraction storefront activation program.

Activities under this section may include:

- Conducting site visits
- Determining infrastructure needs (mechanical, electrical, plumbing, accessibility, life safety compliance requirements, etc.) to bring the building up to date and to code to be marketable.
- Providing costs estimates of necessary improvements

#### Minimum Qualifications:

- Applicants must be fully established nonprofit or for profit entities eligible to do business with the City and County of San Francisco
- Experience inspecting and providing assessment of commercial real estate property in San Francisco to determine structural and building systems issues including at a minimum assessment of the building's exterior, electrical, plumbing, HVAC, systems and structural elements
- Experience providing construction cost estimates in San Francisco

Preferred Qualifications:

- Certified commercial property inspector with experience in San Francisco.

Supplementary Questions and Requirements:

1. Please provide an example of commercial building assessment that you have performed for a building in San Francisco.

**9. Real Estate Case Management Services**

OEWD seeks commercial real estate broker services to support a storefront activation and retention program.

Activities under this section may include:

- Work with OEWD to identify and prioritize storefronts to activate
- Work with landlords to fill vacant storefronts.
- Assist tenant pipeline businesses in representing them, negotiating leases, assessing zoning and permitting, and drafting letters of intent.
- Assist existing businesses in representing them, negotiating leases, and drafting letters of intent.
- Provide OEWD with real estate data such as development pipeline information, tenants in the market, and aggregate demand.

Minimum Qualifications:

- At least three years of experience providing real estate or broker services for commercial properties.
- Success providing real estate services to small businesses with varying needs.
- Experience working in San Francisco neighborhood commercial real estate market

Preferred Qualifications:

- California licensed real estate broker

Supplementary Questions and Requirements:

1. Describe recruitment methods for attracting neighborhood serving businesses.
2. Describe how you interpret broker services and business attraction services.
3. Describe accomplishments and successes in supporting small businesses within San Francisco
4. Describe your experience in negotiating leases and drafting letters of intent
5. Describe research and sources of information to be used to ensure that negotiated rents are reasonable
6. Describe your experience partnering with property owners, businesses, nonprofits, leasing agents, residents and the City to implement cultural and/or economic development strategies.
7. Describe your knowledge of challenges and opportunities in leasing spaces for small businesses in San Francisco.

**10. Tenant Coordination/Program Management**

OEWD is seeking a project manager to provide direct real estate services and manage a program that coordinates and supports storefront activation services.

Activities under this section may include:

- Partner and work closely with City team and neighborhood stakeholders to identify neighborhood business retention and attraction efforts and priorities.
- Coordinate with OEWD to prioritize corridors and storefronts for activation and retention based on assessment reports
- Facilitate coordination with Community based organization partners, vacancy assessments, and real estate brokers.
- Conduct direct, proactive, iterative business outreach to businesses that may be considering expanding to San Francisco, have opened in San Francisco or who may be interested in investing in San Francisco
- Provide real estate services and direct case management for up to 25 storefronts
  - Assist businesses in representing them, negotiating leases, and drafting letters of intent.
- Coordinate Tenant Pipeline
- Maintain and manage a pipeline of vacant commercial storefronts. Various sources exist to collect vacancy information, but maintaining and becoming familiar with key and important vacancies will be important to filling them.
- Coordinate within OEWD, other City agencies, and grantee organizations to share vacancies with their clients who are seeking new spaces
- Consider creating a new clearinghouse for temporary or “pop up” users of commercial space
- Assess prospective tenants in leveraging existing service providers
- Assist with Existing Business Retention efforts
- Manage a list of priority businesses for retention services.
- Leverage existing programs to remove leasing barriers and incentivize business owners and property owners to agree to lease terms.

Minimum Qualifications:

- Experience working with real estate, construction-related parties, including but not limited to architects, designers, landlords, brokers, contractors, small business tenants, and City permitting agencies, to fill a vacant storefront.
- Minimum 3 years in real estate experience working with small businesses.

Preferred Qualifications:

Building Assessments

- Certified commercial property inspector with experience in California.

Real Estate Services

- California licensed real estate broker
- Five or more years in real estate matching experience working with small businesses

Supplementary Questions and Requirements:

1. Describe a program or project you have managed that involves multiple stakeholders and involves real estate matters.

2. Describe how you interpret broker services and business attraction services.
3. Describe accomplishments and successes in supporting small businesses within San Francisco
4. Describe your experience partnering with property owners, businesses, nonprofits, leasing agents, residents and the City to implement cultural and/or economic development strategies.
5. Describe your knowledge of challenges and opportunities in leasing spaces for small businesses in San Francisco.

## **11. Mission Commercial Space Broker Services and Business Attraction Services**

OEWD is seeking proposals for a nonprofit or for profit organization to partner with OEWD to support commercial space broker services and business attraction in the Mission District with a focus on Mission Street and 24<sup>th</sup> Streets. The vision for the future of the Calle 24 Commercial Corridor is that it will be an economically vibrant community that is inclusive of diverse income households, businesses and institutions that preserve the cultural and historic integrity of the neighborhood commercial district. In addition Mission Action Plan 2020 produced by the Planning Department states that the goal for Economic Development strategies are to stem the loss of and promote community businesses that serve low to moderate income households.

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 to hire a consultant to conduct commercial space broker and business attraction services to ensure a viable pipeline of neighborhood serving businesses into existing and future storefront vacancies.

Please refer to referenced Mission strategies; in addition you may refer to Mission District Economic Development Reports links on our website: <https://oewd.org/reports-and-plans>

A strong proposal shall demonstrate:

- Knowledge of Mission Action Plan 2020 led by the Planning Department and Calle 24 Latino Cultural District economic development goals and priorities
- Knowledge of economic development activities in the Mission
- A supportive structure that will guide and support a consultant to conduct the work

The budget may reflect compensation for the consultant position as well as operational activities.

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

- Manage a list of new viable businesses to fill existing and upcoming vacancies
- Develop and manage relationships with property owners, businesses and community partners that maintain a pipeline of businesses for vacancies
- Assist pipeline businesses in representing them, negotiating leases and formulating letters of intent
- Collect and report on real estate market trends and prices for the area
- Leverage resources to support business in securing location
- Assist existing businesses in lease review and negotiating leases
- Assist businesses in connecting with partners, so they can be an accessible place for the low to moderate income community
- Maintain communication and report to OEWD and partners



- Communicate activities, milestones, accomplishments and areas of concern or need for strengthening
- Ensure activities are aligned with Calle 24 Latino Cultural District and Mission Action Plan 2020 Economic Development priorities

Minimum Qualifications:

- Applicants must be fully established nonprofit or for profit entities eligible to do business with the City and County of San Francisco
- List prior experience in order to be a qualified applicant.
- A track record of success working in the Mission neighborhood
- Bilingual capabilities English/Spanish

Preferred Qualifications:

- Experience partnering with businesses, nonprofits, residents and the City to implement cultural and/or economic development strategies.

Supplementary Questions and Requirements:

1. Describe recruitment methods for attracting neighborhood serving businesses.
2. Describe how you interpret broker services and business attraction services support Calle 24 Latino Cultural District and Mission Action Plan 2020 economic development goals.
3. Describe proposed indicators that will be used to show progress of services
4. Describe accomplishments and successes in supporting small businesses within the Mission District
5. Describe your experience in negotiating leases and drafting letters of intent
6. Describe research and sources of information to be used to ensure that negotiated rents are reasonable
7. Describe your experience partnering with property owners, businesses, nonprofits, leasing agents, residents and the City to implement cultural and/or economic development strategies.
8. Describe your knowledge of challenges and opportunities in leasing spaces for small businesses in the Mission.

## **12. Chinatown Vacancy Activation Project**

Proposals are being sought by OEWD from nonprofit organizations to address storefront vacancies in Chinatown by identifying storefront vacancy best practices; developing storefront activation strategies; and implementing individualized action plans. Strategies are intended to reduce commercial vacancies, recruit new businesses, enhance the marketing of vacant spaces, facilitate lease negotiations, assist with permitting processes, and generally improve the neighborhood vitality in the Chinatown commercial corridor.

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

- Developing tenant attraction strategies or storefront activation strategies that center around Chinatown's unique character, needs and challenges
- Including local stakeholders, merchant associations, and business and property owners in identifying and prioritizing needs and risks in action planning
- Implementing individualized action plans for vacant storefronts to attract tenants or program the space for temporary activations during tenant transition periods

- Managing a mini-grant program (two-thirds of budget) that provides legal and/or permitting assistance
- Utilizing linguistically- and culturally-appropriate tools and resources in association with developing strategies and implementing action plans

Minimum Qualifications:

- Applicants must be fully established nonprofit entities eligible to do business with the City and County of San Francisco
- Experience developing corridor improvement strategies and implementing action plans
- Experience administering city-funded economic and/or workforce development programs
- Established relationships with local stakeholders, merchant associations, business and property owners

Preferred Qualifications:

- Qualified staff with knowledge of commercial leasing and business accounting

Supplementary Questions and Requirements:

1. What experience does your organization have developing corridor improvement strategies? In addition to any other details about experience, include a list of relevant projects with the title of the project; nature of the project; neighborhood served; the names of the organizations, resident and/or merchant groups, small businesses, etc. you worked with; the dates for and number of year(s) that the project spanned, and the funding source(s).
2. What experience does your organization have administering City-funded economic and/or workforce development programs? In addition to any other details about experience, include a list of relevant projects with the title of the project; nature of the project; neighborhood served; the names of the organizations, resident and/or merchant groups, small businesses, etc. you worked with; the dates for and number of year(s) that the project spanned, and the funding source(s).
3. Provide a list of local stakeholders, merchant associations, business and property owners with which your organization has established relationships.

**13. Architectural and Interior Design Services for Healthy Retail SF Program**

OEWD is seeking services from architects to be primary contact for the store operator for store reset/redesign activities. Architect would collaborate with OEWD and the San Francisco Department of Public Health (SFDPH) to ensure corner stores have the opportunity and support needed to provide healthier options such as fresh produce, low salt and sugar alternatives, etc. by initiating contact with the store operator to redesign stores through the Healthy Retail SF Program.

Activities under this section may include:

- Ensuring corner stores have the opportunity and support needed to provide healthier options in two main areas:
  - Physical Changes (i.e. equipment such as produce refrigeration, shelving)
  - Business Operations (i.e. securing loans, Point of Sale system support, providing trainings & other resources)
- Assessing potential stores interested in the program for viability

- Attending meetings with the business and OEWD staff to discuss the proposed scope of work and establish the goals and parameters of the project.
- Reviewing historic information, reports, previous building permits and planning requirements for each project. Conducting field measurements and photographing existing conditions.
- Creating design development and construction documents drawings/schematics. Coordinating revisions with OEWD staff, business and Department of Building Inspection.
- Obtaining all required building permit approvals.
- Providing construction administration as needed including site visits, field reports and review and approval of contractor invoices. Answering questions from contractors and OEWD staff.
- Creating or providing visual signage that promotes healthy products in participating stores
- Maintaining a comprehensive budget and work plan
- Coordinating store reset/redesign activities with members of the Healthy Retail SF Program team (OEWD, Consultants and others) to include:
  - Order/purchase all necessary equipment for store reset/redesign
  - Communicate necessary information between OEWD, Store Operator, and the community
  - Take pre/post reset/redesign photos
  - Planning and coordination of the schematic/reset planning meeting(s)
  - Schedule and coordinate meetings between the produce consultant, store owner and others to conduct trainings about produce maintenance and merchandising.
  - Help develop and monitor the activities of the Individual Development Plan (IDP), related to the Physical Environment of the store, including but not limited to:
    - Assist with planning of a launch/Grand Re-Opening Event
    - As needed, provide information to report cards and provide input into yearly IDPs
    - Monitor any additional physical requirements specifically identified in the IDP, such as ensuring participating store has proper electrical outlets, storage space, etc.
    - Assist the store operator in the ordering and sourcing of fruits and vegetables and the appropriate products based on customer surveys conducted in the participating stores' community.
- Coordinating and providing additional equipment, technical assistance and/or support (if appropriate) as part of participating stores' annual incentive

Minimum Qualifications:

- Experience with Architectural and Interior Design Services
- Providing before and after high quality photographs and measurements of the project
- Experience working with small market and corner store operators
- Ability to invoice monthly
- Note: The following Minimum Qualification is only a requirement under limited circumstances and may not be required depending on the type of project and Scope of Work that is negotiated after applicant has been notified that their proposal was successful:
  - If this Minimum Qualification is applicable based on the post-award, final, negotiated Scope of Work, any contractors that the awardee of this RFP uses must be registered in the State Department of Industrial Relations Public Works Contractor database. Contractors responsible for covered construction or maintenance projects must comply with all relevant local, state and federal prevailing wage laws at the point of bidding to be eligible

for a contract award. Please visit <http://sfgov.org/olse/prevaling-wage> and <https://www.dir.ca.gov/PublicWorks/Contractor-Registration.html> for more information.

Preferred Qualifications:

- Providing construction administration service
- Design assistance to improve visual identity, commercial façades, and business interiors to help small businesses
- Providing technical assistance to City of San Francisco (City) staff members, and property and business owners

Supplementary Questions and Requirements:

1. Please provide examples of similar projects worked on and completed.
2. Outline the process to complete the project, steps taken to address challenges and how successes were celebrated.

**14. Small Business Services through the Small Business Development Center (SBDC)**

The San Francisco Small Business Development Center (SBDC), a program within OEWD, is seeking business consultants to provide business counseling and training services. Specifically, SBDC is seeking consultants with expertise in one or more of the following areas, as they relate to small business operations:

- a. advertising, marketing, sales and branding
- b. commercial lease negotiations
- c. small business establishment and formation
- d. contracting
- e. customer creation and retention
- f. financial management and analysis
- g. franchising
- h. human resource management
- i. inventory management
- j. loan packaging
- k. product development
- l. profitability tactics
- m. social media management
- n. space planning and analysis
- o. visual merchandizing
- p. technology
- q. web and graphic design
- r. strategy
- s. accounting and bookkeeping
- t. business taxes
- u. government contracting
- v. importing/exporting
- w. financing/capital
- x. commercial real estate
- y. e-commerce
- z. grant writing

- aa. Industry specific expertise (i.e. manufacturing, restaurant, retail...etc.)
- bb. Produce handling and marketing

Activities under this section may include:

- Developing and conducting training programs for small businesses in 1:1 and/or group settings.
- Directing small business clients to appropriate business resources for their needs
- Coordinating and maintaining regular contact with OEWD staff and the SBDC director
- Developing individual service plans and scopes of work for clients
- Tracking and reporting on economic impact of the work being provided

Additional information for this Section:

- Services may be required to be provided in a variety of languages including Spanish, Tagalog, Traditional Chinese, and other languages as needed.
- Some services may be required to be provided in the evenings or on weekends to accommodate client needs.
- The SBDC has a standard \$70 hourly rate for consulting (CPAs and Attorneys may be paid up to \$100 per hours)

Minimum Qualifications:

- 3 years verifiable experience providing business consulting and training services to small business clients and a minimum of 10 small business clients consulted and/or trained

Supplementary Questions and Requirements: Please answer the following questions and provide samples of work as part of the response package.

1. Explain your ability to develop and conduct training programs.
2. Describe your experience in providing counseling in both one-on-one settings and small group settings.
3. Describe your knowledge of appropriate business resources to which business owners would be directed.
4. Explain your capabilities in coordinating and maintaining regular contact with OEWD staff and the SBDC director.
5. Indicate the languages you 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
6. Describe your rapport or approach with clients. How do you communicate effectively with entrepreneurs and engage the cooperation of business owners in the implementation process?
7. Describe your success in helping business clients accomplish specified goals.
8. What knowledge and experience do you possess for dealing with clients' technical problems and producing results of a desired level? Please provide specifics related to all Area 3, subareas a through bb for which you would like this application to be considered.

9. Explain one or more past issues or problems that a client experienced and how you were able to help or advise them.
10. Are you willing to be compensated in accordance with SBDC's standard hourly rate of \$70 per hour?
  - a. Yes
  - b. Yes for some but not all contracts (Please answer question below)
  - c. No (Please answer question below)
    - i. If you are not willing to be compensated in accordance with SBDC's standard hourly rate of \$70 per hour, what is your blended hourly rate?

## **15. Workforce Technical Assistance and Training**

OEWD seeks consultants to provide technical assistance to nonprofit community-based workforce entities to build capacity of organizational staff to improve overall workforce programming.

Activities under this section may include:

### **A. Workforce Development Program Design**

Advising and recommending effective and sustainable employment service models for specific populations, including (but not limited to): at-risk and in-risk young adults, transitional age youth, women, Veterans, re-entry, residents of public housing, individuals with barriers to employment, and the long-term unemployed.

Planning and implementing new workforce initiatives and innovative models that have proven success in connected job seekers to viable employment, including (but not limited to): accelerated learning/skills development, project-based learning, experiential learning, competency-based training and assessment, prior learning assessments, apprenticeship, learning labs and learning networks, and innovation process strategies.

### **B. Training and Technical Assistance on Regulatory Compliance**

Providing technical assistance and training to service providers on administrative compliance with the State and Federal fund sources with an emphasis on Workforce Innovation and Opportunity Act (WIOA) funds and appropriate activities

### **C. Training of Best Practices in Workforce Development**

Design, develop, deploy and/or facilitate trainings for best practices in workforce programming. Trainings may be delivered online or in person and include interactive, highly participatory activities on topics promoting skills development in one or more of the following areas:

- Implementing workforce development best practices
- Client customer service – motivational interviews and strength-based interviews
- Effective case management to enhance participant success
- Competency based assessments
- Retention best practices
- Strategies for effective job development and employer engagement
- Strategies to utilize external resources outside of workforce system to support clients
- Using Labor market Information (LMI) to best inform programming

- Common measures to identifying “job readiness” across workforce system
- Innovation to incentivizing participants to submitting required documentation (i.e. employment/education verification)
- Employment matching based on skills, interests and sustainable wage occupations
- Strategies for removing employment barriers

Additional Information for this Section:

Audience may be as large as 100 and from a variety of levels (direct staff, management and leadership) within OEWD-funded workforce system service providers.

Applicants should demonstrate in their response the following specifics in regards to capacity building and training around workforce development:

- A successful track record providing assistance to workforce community organizations
- Success in increasing capacity of community organizations and their staff
- A successful track record working with low-capacity organizations
- A successful track record on providing trainings on workforce best practices
- A successful track record working in San Francisco and partnering with the City or other public agencies on similar strategies
- Experience in developing and facilitating training curriculum around workforce development best practices

Minimum Qualifications:

- Minimum of 5 years verifiable experience providing similar services (capacity building and training of workforce best practices) as those noted in the application area.

Preferred Qualifications:

- Experience in providing similar services to workforce providers in San Francisco

Supplementary Questions and Requirements: Please answer the following questions and provide samples of work as part of the response package.

1. Please provide an example of capacity building efforts with low capacity organizations.
2. Please provide examples of trainings you provided around workforce best practices.
3. Please provide 2 letters of recommendation from workforce organizations for whom you have provided capacity building.

**16. Workforce Policy Tracking and Analysis and Designing Workforce Solutions**

OEWD seeks consultants to track policies developing at the Federal or State level that effect or could influence San Francisco’s Workforce System, particularly as it relates to changes in funding for Workforce Development; new initiatives within Workforce Development at the State or Federal level; changes in legislated hiring or other HR requirements impacting employers; new or different regulations impacting the hospitality, technology, construction, or healthcare industries; credentials and/or certifications being developed for new and emerging industries relevant to the San Francisco labor force; etc.

Activities under this section may include:

- Providing research on policy, funding, and legislative changes impacting Workforce Development on the Federal and State Level, particularly (but not exclusively) those of WIOA.
- Tracking proposed funding changes, program planning requirements, and workforce related regulations in key sectors that will assist San Francisco’s workforce system manage local in a way that best serves job-seekers and employers.
- Conducting research on the value of certificate programs versus college degrees for growth sectors like technology and advanced manufacturing.
- Researching on best practices and models developed in peer cities designed to address poverty and high unemployment in cities with great wealth disparity.
- Creating recommendations for implementing workforce policies and suggest directives to guide local programming; simplify local directives and policies so they can be shared and implemented by local system workforce providers.
- Researching the impacts of Artificial Intelligence (A/I) and Robotics have on the workforce, and in particular industries, and what training needs to be in place for entry level positions in those sectors.
- Tracking the efforts of the newly formed American Workforce Policy Advisory Board.

Minimum Qualifications:

- Minimum of 5 years verifiable experience providing similar services (policy tracking and analysis) as those noted in the application area

Preferred Qualifications:

Applicants should demonstrate in their response the following specifics in regards to workforce development policy tracking and analysis:

- Demonstrated understanding of workforce development policy landscape at the State and Federal level
- Established expertise in labor market and industry-driven credentialing programs
- Verifiable experience in providing policy analysis, best practices, comparative analysis, etc. for workforce development policy and legislation at the local, state, or federal level
- A successful track record of quantitative and qualitative analysis of industry and occupational trends that predict changes in hiring and HR practices
- A successful track record working in San Francisco and partnering with the City or other public agencies on similar strategies

Supplementary Questions and Requirements: No supplemental information or questions are required.

**17. City Build As-Needed Training Consultants**

OEWD seeks consultants to provide technical assistance to help craft and implement construction training curricula for as-needed CityBuild special trainings, including project-specific trainings such as the 2017 and 2018 Chase Center Trainings.

Activities under this section may include:

- Working with OEWD and CityBuild staff to develop detailed curricula for construction training modules tailored to meet industry and project-specific needs
- Assisting OEWD and CityBuild in implementing the Multi-Craft Core Curriculum in as-needed trainings



- Coordinating with jointly-administered apprenticeship programs to match training curricula to meet direct entry and preferred entry requirements
- Delivering construction training services at CityBuild-specified sites in the City and County of San Francisco

Additional information for this Section: Applicants should demonstrate in their response the following specifics::

Applicants should demonstrate in their response the following specifics: a successful track record providing assistance to OEWD, CityBuild, or any other Workforce Investment Board-affiliated pre-apprenticeship program in the nine-county Bay Area; a successful track record working in San Francisco; and a successful track record training disadvantaged jobseekers for success in jointly-administered training programs.

Minimum Qualifications:

- 3 years verifiable experience providing similar services as those noted in the application area
- Experience in delivering the Multi-Craft Core Curriculum is highly desired, though not required

Supplementary Questions and Requirements: No supplemental information or questions are required.

**18. Employment Training Panel (ETP) Technical Assistance and Management**

OEWD is seeking consultants to assist the department with the administration of existing and future California State Employment Training Panel (ETP) grants.

Activities under this section may include:

- Collecting and submitting training data to ETP via its online system, on a monthly basis.
- Establishing a system and procedures for ensuring the documentation of training. This may be done by way of electronic or paper training records.
- Establishing a system and procedures for the collection of enrollment information, including required trainee demographic data.
- Acting as a liaison between OEWD and participating employers when necessary.
- Establishing and maintaining the management of an information database to report on the status of ETP training.
- Creating monthly summary reports on the overall progress of the contract.
- Preparing a cash flow plan.
- Enrolling trainees through the ETP on-line system.
- Uploading documentation of training hours to the ETP online system.
- Conducting quality control review of records to ensure they meet ETP standards for completeness and consistency with ETP contract and regulatory requirements.
- Assisting and advising OEWD in documenting employment retention.
- Attending ETP monitoring meetings and to the extent permitted by ETP represent OEWD at said meetings.
- Preparing requests for contract amendments and modification when necessary.
- Preparing invoices for review and approval by OEWD.

- Assisting OEWD with assessing training programs fit for ETP funding, writing applications, and speaking to the panel on the merits of the programs and applications.
- Providing technical assistance workshops and ETP information sessions as needed by OEWD
- Assisting OEWD with outreach and providing technical assistance to local businesses interested in obtaining ETP funding for skill advancement opportunities within their

Minimum Qualifications:

- 5 years verifiable experience in providing similar services as those noted in the application area above.
- Specific workforce development related experience is highly desirable.

Supplementary Questions and Requirements: No supplemental information or questions are required.

## **19. Economic and Labor Market Analysis**

OEWD seeks consultants to provide Economic and Labor Market Analysis consulting.

Activities under this section may include:

### **A. Workforce Development**

OEWD is seeking consultants to provide economic consulting for labor market analysis. Consultants in this service will help OEWD make informed plans, choices, and decisions for a variety of purposes, including informing business investment decision making, career planning and preparation, education and training offerings, job search opportunities, hiring strategies, and public workforce investments. Among other tasks, consultants may be asked to review and analyze labor market data in order to identify emerging sectors, understand the health of existing sectors, identify where workforce investments are warranted, and measure changes in sector health in areas receiving City workforce investments.

The requested services may include analysis of community workforce skills and capabilities, employment opportunities and projections, skills and competencies required, career lattices, and sector/industry specific career development opportunities. The consultant may analyze current workforce development practices and make recommendations for industry-specific programming. These services may have a local, state, or nationwide focus, and will be based on research, labor market analysis, and stakeholder engagement (City, education, labor, etc.).

The consultant may also perform statistical analysis of employee wage data within or across sectors, industries, or employers, employee wage data for disparities based on race/ethnicity, gender, and/or race and/or gender-based discrimination among employees within or across sectors, industries, or employers.

The consultant may produce relevant reports, charts, tables, and other data visualization products. Firms may be asked to evaluate proposed intervention strategies for OEWD based on labor market projections and existing or planned training practices.

Respondents must demonstrate successful experience in providing economic consulting services. Experience may include, but is not limited to, workforce development, research and analysis of industries, markets and communities, as well as assistance with implementation of economic strategies and recommendations. Respondents will ideally have experience working with municipalities (or similar government agencies) on complex economic projects.

## **B. Economic Development**

OEWD is seeking consultants to provide economic consulting for economic development. Consultants in this service area will help OEWD conduct economic development analyses of local and/or regional markets, including analysis of economic, real estate, and industry/sector factors.

The requested services may include economic development strategy development, business attraction and retention, neighborhood and/or regional economic composition and performance, surplus and leakage analysis, sector analysis, analysis of local factor conditions, and small business and neighborhood corridor best practices. These services may have a local, regional or nationwide focus, and will be based on research, analysis, and stakeholder engagement.

Among other tasks, consultants may be tasked with survey design and implementation, stakeholder engagement, performance measurement, and make recommendations for industry- or neighborhood-specific programming. The consultant may be tasked with program implementation or marketing. The consultant may be asked to produce relevant reports, charts, tables, and other data visualization products.

Respondents must demonstrate successful experience in providing economic consulting services. Experience may include, but is not limited to, economic development, research and analysis of industries, markets and communities, as well as assistance with implementation of economic development strategies and recommendations. Respondents will ideally have experience working with municipalities (or similar government agencies) on complex economic projects.

### Minimum Qualifications:

- 3 years verifiable experience in providing similar services as those noted in the application area above.

Supplementary Questions and Requirements: No supplemental information or questions are required.

## **20. Development Agreement SharePoint Tracking System**

OEWD seeks consultants to provide technical assistance to build a SharePoint-based centralized multi-agency Development Agreement (DA) Obligations Tracking System which would track requirements in these unique agreements so that the City can more easily monitor and track these obligations. DAs are legal agreements between the City and private entities approved by the Board of Supervisors. OEWD seeks to develop this singular, comprehensive system to house and organize the conditions, requirements and mitigations specified in DAs. To this end, OEWD seeks to develop a website to house approved agreements and a centralized database system embedded there for tracking and enforcing DAs. In order to be effective as a tool for monitoring and enforcing DAs, the

SharePoint system should include a database management system that has several characteristics. Specifically, the database should:

- Be easily and conveniently accessible to users in multiple departments;
- Be flexible and robust enough to accommodate the wide variety and complexity that exists among DA requirements;
- Have advanced features such as custom reporting and automation of certain tasks (e.g., email notification of deadlines and milestones); and
- Have security and access controls adequate to preserve the integrity of the data.

Activities under this section may include:

- Scoping meetings: Conduct one-on-one technical sessions with staff from OEWD and six to eight participating agencies to develop custom applications and functions/procedures for the purpose of interfacing with a centralized database for tracking and enforcing the conditions, requirements, mitigations, and obligations.
  - Building the tracking system: Working directly with an OEWD project manager, draft the system and make adjustments, as necessary. Assist with integration directly with FAMIS/FSP, Accela PPTS, mapping software, City Outlook Directory, and other applicable systems, as necessary, or indirectly through data exporting/importing. Create and adhere to a project schedule for building and launching this system.
- Roll-out: Launch the new DA Obligations Tracking System. Provide on-going support and development through beta-testing.
  - Designing maintenance protocols: Draft protocols for OEWD and other stakeholders to utilize after roll-out stage. Develop department-specific work flows for custom reporting and automation of tasks. Create security and access controls to allow for the adequate preservation of integrity of inputted data. Build document management capabilities to upload and retrieve relevant files.

Additional information for this Section: Applicants should demonstrate in their response the following specifics:

- A successful track record in organizing and facilitating multi-stakeholder projects
- Technical expertise needed for all aspects of building the DA Obligations Tracking System

Minimum Qualifications:

- Three years verifiable experience providing similar services as those noted in the application area.
- Demonstrated experience in developing at least two similar SharePoint obligation-tracking systems/databases.

Supplementary Questions and Requirements: No supplemental information or questions are required.

## **21. Technology Consultation**

OEWD seeks consultants to design, develop, and deploy computer solutions to reduce costs, increase access, and improve outcomes.

Activities under this section may include:

- A. As-needed Technology Consultation services including:
  - Assisting with identifying, purchasing and implementing new systems or upgrades to current systems
  - Developing electronic forms and workflows to support process automation
  - Integrating data from other systems as necessary to support process automation and reporting
  - Analyzing of business practices and associated tracking mechanisms, to include identification of current-state efficiency gaps and future-state recommendations.
  - Data de-duplicating and clean-up.
  - Collecting, documenting, and confirming functional requirements.
  - Creating, customizing, deploying or providing recommendations on technical and procedural systems for improved information sharing.
  - Automating of core departmental processes.
  - Creating, customizing, deploying or providing recommendations on technology solutions to integrate and consolidate current OEWD systems.
  - Providing end-user training and creating guide materials related to improvements.
  
- B. Developing a cloud-based, interactive data management system to track workforce-related data, specific to the construction Industry. System includes a project management tool, and the ability to track worker demographics and employer information. The system should allow users to generate customizable reports to view all data points and its relationships, with ability to export raw data as Excel and PDF file formats.
  
- C. Improving and expanding job-matching technology for the workforce portfolio. Improve and expand existing Salesforce-based job matching tool focused on connecting pre-qualified job seekers with employment opportunities.

Additional information for this Section: Applicants should demonstrate in their response the following specifics:

- A successful track record partnering with the City or other public agencies; the City currently uses the following system as part of its business operations: PeopleSoft, MS Office, SharePoint, DocuSign, Tableau, ArcGIS, Adobe, Drupal

Minimum Qualifications:

- 5 years verifiable experience providing similar services with systems as those noted in the application area(s) above.

Supplementary Questions and Requirements: No supplemental information or questions are required.

## **22. Stakeholder Engagement and Facilitation**

OEWD is seeking consultants to provide stakeholder outreach, engagement, and facilitation services for external-facing events, as well as facilitation services (both internal and external) related to event planning, promotion, retreats, and day-of event support. Services include, but are not limited to managing engagement processes and data collection plans, reporting results and

recommendations, and managing collaboration and partnership between stakeholders and members of the public.

Activities under this section may include:

- A. Stakeholder Outreach Services. Firms prequalified for work in this Service Area may be requested to provide outreach services to stakeholders (e.g., staff, customers/users, community groups, Board of Supervisors, City commissions, general public). Services may include, but are not limited to, designing, producing, managing outreach tools and strategies, presenting, and providing technical assistance, such as:
- Designing, developing, and implementing multi-media promotion strategies
    - Electronic outreach (e.g., e-newsletters, project websites)
    - Social media (e.g., Facebook, Twitter, blogs, cell phone apps)
    - Print and other promotional material: (e.g., mailings, reports, posters, advertisements, signage, etc.)
  - On-the-ground community outreach (e.g., tabling at community events, attending community groups' meetings, door-to-door flyering)
  - Media relations (e.g., media advisories, TV/radio/billboard advertisements, ethnic news media outreach)
    - Development and distribution of press releases
  - Communication plans
  - Translation and interpretation for non-English speaking populations. If applicable, respondents should make sure to indicate in which language(s) they are able to offer outreach services.
- B. Stakeholder engagement, research, and analytical services. The purpose of these services is to collect, analyze, and use stakeholder input to inform city departmental planning, decision-making, and process improvement efforts. Services may include, but are not limited to, the following:
- Design, conduct, and manage data collection plans to collect input from stakeholders using data collection methods, such as:
    - Surveys (e.g., online, mail, phone, in-person)
    - Opinion polling (and other large, random sample, statistically significant surveying)
    - Focus groups: for the purpose of collecting input and ideas from stakeholders as well as capturing different opinions and necessary information.
  - Design, conduct, and manage data analysis plans to analyze stakeholder input:
    - Collect, compile, and transmit data into usable formats
    - Develop and execute data analysis using quantitative and qualitative methods
    - Create data analysis reports, including summary reports and detailed final reports, and display results in various formats, e.g., PowerPoint, interactive/web-friendly, etc.
    - Develop recommendations and implementation plans based on findings and analysis
    - Present findings and recommendations to staff, commissioners or elected officials
    - Design, conduct and manage secondary research and data analysis to support primary research methods and findings, e.g., literature review, contextual research, market research, GIS mapping, US census data analysis.

- Conducting interviews with targeted employers or industry groups to obtain information on how to best position marketing initiatives and communicate benefits to the business community.
  - Collecting, compiling, and transmitting data captured during the above activities and presenting the findings as required for the project.
- C. Facilitation services between stakeholders and/or to provide assistance at public-facing events. The purpose of this service is to encourage collaboration and partnership between stakeholders, large working groups, and members of the public. Services may include, but are not limited to, the following:
- Planning, coordinating, and managing meetings and workshops between stakeholders, including but not limited to:
    - Working groups; for the purpose of creating recommendations and identifying solutions around a subject area or issue.
    - Conducting Stakeholder strategic planning sessions
    - Designing, conducting, and managing stakeholder facilitation processes, including coordination, communication, strategic advising, consensus-building, and conflict resolution services.
  - Collecting, compiling, and transmitting data captured during the above activities and presenting the findings as required for the project.
- D. Facilitation of groups with a focus on retreats, focus groups, and working group conferences and/or large scale project management with an emphasis on event planning, promotion, and day-of support.

Activities under this section may include:

- Creating and presenting retreat plans, agenda and materials for Department, board, or commissions
- Facilitating capacity building workshops for workforce professionals and organizations
- Logistics planning and coordination
- Creating, presenting, tracking, and analyzing pre and post group survey materials
- Obtaining, analyzing and reporting on direct feedback from participants as well as setting effectiveness measurement systems to develop strategies for continual process improvement and improved efficiencies
- Summarizing proposed recommendations, including specifying measurable objectives, timeframes, and key personnel
- methods of implementing these recommendations, and ways to measure progress and provide updates
- Collecting, compiling, and transmitting data captured during the above activities and presenting the findings as required for the project.

Minimum Qualifications:

- Respondents must have experience working with municipalities (or similar government agencies) on stakeholder outreach, engagement, facilitation and/or related research and analysis.

Supplementary Questions and Requirements: No supplemental information or questions are required.

### **23. Marketing, Branding, Collateral and Website Development**

OEWD is seeking consultants to assist with establishing consistent and effective messaging among OEWD's programs and initiatives.

Activities under this section may include:

- a. Analyzing stakeholders and how they affect messaging across all channels (website, print collateral, social media, etc.).
- b. Analyzing and providing recommendations about how, through messaging and information design, OEWD can create better access to OEWD services for San Francisco residents, including underserved populations. This may include strategy for creating print and web materials that are user/customer focused. Provide OEWD with manual of best practices on how to create user/customer centered content.
- c. Designing research and analysis to better understand our customers/clients, including current challenges and barriers, socioeconomic context, etc.
- d. Data visualization
- e. Creating, presenting, implementing, and analyzing the effectiveness of a media outreach plan including recommendations on translation and interpretation service needs.
- f. Analyzing current web, digital, and/or paper collateral and recommendations for additional pieces to effectively market services to the public, other City departments, and community stakeholders.
- g. Branding strategy to better integrate OEWD messaging and design across all channels (print, digital, social media, etc.) This may include design of logos, collateral, style guidelines, and other support materials to market services to the public, other City departments, and community stakeholders.
- h. Photographing events, programs, clients, and service providers for print and online marketing
- i. Analyzing of stakeholders and how they affect messaging in all available media (website, print collateral, etc.).
- j. Creating, presenting, implementing, and analyzing effectiveness of a media outreach plan including recommendations on translation and interpretation service needs.
- k. Creating, implementing, and potentially consolidating appropriate website(s) to market services to the public, other City departments, and community stakeholders.
- l. Designing and producing logos, collateral, and other support materials to market services to the public, other City departments, employers and community stakeholders.
- m. Developing a Content strategy and developing print and web materials that are user/customer focused. Provide OEWD with manual of best practices for creating user/customer centered content.
- n. Creating a unified OEWD Workforce Development brand and graphic system for collateral across print, digital and social medial channels.
- o. Conducting door-to-door outreach to disseminate information about OEWD
- p. Developing a Marketing and Branding Strategy Plan that includes:
  - o A Style & Marketing Guide (these could be two separate activities)
  - o Marketing Toolkit
  - o Strategy for outreach to employers, providers, job seekers and other stakeholders through print, digital and social media channels

Minimum Qualifications:



- Three years verifiable experience providing similar services as those noted in the application area.

Supplementary Questions and Requirements: No supplemental information or questions are required.

## **24. Fiscal Services**

OEWD seeks consultants to assist OEWD directly, individual grantees, or other system service providers which the department deems in need of assistance with fiscal operations.

Activities under this section may include:

- Training and coaching staff and leadership to improve fiscal operations of the designated organization.
- Reviewing, analyzing and documenting current practices; updating policy and procedures as necessary.
- Reviewing monthly invoices from grantees against Federal, State, local or other applicable regulations to confirm funding is being spent according to appropriate requirements.
- Developing or revising fiscal policies and procedures for administration of federal workforce funds, local city grant dollars, or a combination of both.
- Developing or revising cost allocation plans and functional budgets in partnership with one or more nonprofit agencies receiving a variety of Federal, State and local funding.
- Technical development of administrative procedures and policies related to financial management, cost allocation and monitoring.
- Creation of financial reports and documents.
- Providing training to service providers on financial compliance with the Workforce Innovation and Opportunity Act (WIOA), H1B retraining funding or other regulated funds.
- Conducting financial compliance reviews of WIOA service providers.
- Summarizing methods of implementing proposed recommendations, ways to measure progress, and provide updates including specifying persons responsible, timeframes, and measurable objectives.

Minimum Qualifications:

- 3 years verifiable experience in providing similar services as those noted in the application area above.

Supplementary Questions and Requirements: No supplemental information or questions are required.

## **25. Legal Advice for Cannabis Equity Applicants**

OEWD is seeking consultants to provide legal advice to small businesses and individuals, regarding the laws and regulations generally applicable to participation in San Francisco's Equity Program (Police Code section 1604).

OEWD seeks providers that demonstrate familiarity with the local, California, and federal laws and regulations and the knowledge, experience, and ability to provide one-on-one consultation, and to develop educational materials to clarify the laws and regulations generally applicable to participation in San Francisco's Equity Program (Police Code section 1604). Providers should be prepared and able to provide legal advice, including updates on current legal and legislative

developments. That advice should cover, but should not necessarily be limited to, the following general categories: license and permitting, banking, compliance audits, zoning, and tax and compliance.

Providers who demonstrate the qualifications and capacities to provide the professional assistance will be placed on a qualified provider list. On an as-needed basis, OEWD will use the list to match technical assistance providers to eligible clients.

Minimum Qualifications:

- Applicants must be fully established nonprofit or for profit entities eligible to do business with the City and County of San Francisco
- Experience with success providing similar services to small businesses or individuals

Preferred Qualifications:

- Knowledge of San Francisco's neighborhoods and small business infrastructure
- Experience working in a government and/or non-profit setting interacting with the development and implementation of programs that serve disadvantaged clients.
- Experience providing legal advice to inexperienced small business owners seeking to enter heavily-regulated industries

Supplementary Questions and Requirements:

1. Please provide a description of your firm's qualifications, including an understanding of laws pertinent to the San Francisco Equity Program, and having an approach, contracts, and experience providing comparable services in the industry or a related industry
2. Describe your past and present experience providing legal advice and developing education materials in any of the areas listed above. Please identify all areas of expertise. Include experience and approach working with historically marginalized individuals with a complex range of needs. Specify if this experience is directly tied to the cannabis industry.
3. Please share two examples of similar projects worked on and completed. Provide the scope, process and approach, staffing, outcomes, and timeline to complete similar scoped/size project.
4. Provide an example of how you explained a complex situation so that your client or audience who are not familiar with the industry technical terms understood what you were explaining. Provide the background, complex situation/regulation, your approach and actions, clarifying language and tools, and the results.
5. Provide a list of staff and significant subcontractors that would work on this project, including their qualifications, relevant experience, roles and responsibilities, and other projects they will be working on during the proposed timeline, along with percentage of time committed;
6. Provide a cost estimate and blended rate per hour for each scope of work element; and
7. Provide at least two professional references that can verify your firm's past experience and outcomes.

## **26. Small Business Needs Assessment**

OEWD is seeking consultants demonstrating successful experience in providing economic consulting services to conduct a small business needs assessment with updated data and conduct a deeper analysis that sheds light on the effectiveness of OEWD's services, investments and

programmatic impact on small businesses; and identifies gaps in services and needed investments for businesses and business districts.

The study will inform our strategy for local and federal funding and intra-agency coordination for small business support services. The questions we would like the study to address are:

- What is OEWD doing to support small businesses?
- What's working/not working?
- Are we serving the small business community needs?
- How should we programmatically implement the recommendations from OEWD's 2017 retail study related to the national changing face of retail and its impacts locally?
- What unique challenges are encountered by women-owned businesses, minority-owned businesses, and low-income business owners, and what can be done to help address these challenges?

The research study will use a mixed-methods approach to evaluate OEWD's small business programs. The method may include an analysis of public and proprietary data, survey, and focus groups. The data analysis should be conducted first and will help shape the survey questions and focus group sessions. Focus groups of diverse stakeholders who have both engaged and not engaged in City-sponsored programs will go deeper and fill in gaps where information is missing from the data and survey.

Activities under this section may include:

- Identification, mapping, and relationship of existing services to support small businesses and entrepreneurs at different stages of small business development from pre-startup to expansion and growth.
- Analysis of quantitative data collected and provided (service provider reporting, OpenSF public data, local and state revenue streams, and other sources), and recommendations on what we should collect in the future to conduct annual program and service evaluation.
- Stakeholder research/survey and statistical evaluation of the effectiveness of programs to serve small businesses and microenterprises (what do the numbers mean, how significant are they, and what do they imply about the ways the City could operate and improve?).
- Recommendations and opportunities to increase the efficiency, effectiveness, accessibility, and coordination of the programs funded and services provided with a focus on businesses that are owned by, employ, or serve low- to moderate- income persons.
- Inventory of effective tools other entities (i.e. Cities, States, Federal Government, Non-profits, etc.) are using to help address the unique challenges faced by women, minority, and low-wealth small business owners. Of these tools, what is OEWD actively using, and what should be adopted or enhanced?

The study should begin in January 2019. The completion of the study, including recommendations, should be done by August 2019 in time for the Community Development Block Grant (CDBG) Request for Proposals for FY2020-2025, which is anticipated for November 2019.

#### Minimum Qualifications:

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

- At least three years of experience must have been in conducting similar studies surveying and researching concerning small businesses.
- Experience may include, but is not limited to: research and analysis of industries, markets and communities, as well as assistance with implementation of economic strategies and recommendations.
- Experience in one or more of the following topics:
  - Economic development strategy
    - Analyzed neighborhood and/or regional economic composition and performance, the structure and competitiveness of an industry or industry clusters, or local factor conditions, or
    - Conducted surplus and leakage analysis
    - Developed an economic strategy that included all of the following: sector analysis, analysis of local factor conditions, and research on best practices in areas that may include small business development, local hiring, and procurement policy
    - Performed quantitative or qualitative market research in neighborhoods to inform economic development strategy recommendations;
    - Performed follow-up activities to either (1) implement the recommended programs and strategies resulting from the tasks listed above, including but not limited to the development of marketing strategies
  - Economic research
    - Prepared and implemented survey or interview research designs concerning business and consumer behavior, or
    - Performed econometric analysis of statistical data related to urban policy issues.
- Fiscal analysis
  - Performed professional and technical analysis in analyzing and forming revenue forecasts at local and state levels. The sources of revenue streams may include property taxes, sales taxes, income taxes, bond issuance, or any other types of public financing mechanisms, or
  - Compiled and analyzed employment data at both macro and detailed industry levels and produced employment projections based on trend as well as statistical analysis.
- Small Business Program evaluation
  - Assessed and evaluated business assistance programs
  - Conducted impact evaluation
  - Performed stakeholder research that was used to inform the evaluation of a proposed business project or program.

Preferred Qualifications:

- Experience working with municipalities
- Experience working with similarly scoped study in the Bay Area in the last 5 years
- Staff (subcontractor staff) with diverse language and cultural competency

Supplementary Questions and Requirements:

1. Please share at least two examples of similar projects worked on and completed. Provide the scope, budget, process and approach, staffing, outcomes, and timeline to complete similar scoped/size project.

2. Describe your knowledge of challenges and opportunities for small businesses in San Francisco.
3. Describe research and sources of information to be used to support this project

## **27. Nonprofit Capacity Building**

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

Additional information for this Section: 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). Applicants should demonstrate in their response the following specifics:

### 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.

Supplementary Questions and Requirements: 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?

## F. Minimum Qualifications and Preferred Qualifications

In order for an application to be considered responsive to this RFQ, the contractor must possess and address in their response the minimum qualifications as specified in Section E of this RFQ. The minimum qualifications are specific to each Area and are described in Section E of this RFQ. Meeting minimum qualifications for each Area of interest is required in order for the application to be considered responsive.

If any preferred qualifications are specified in Section E of this RFQ, please also address these preferred qualifications in your response if you meet the preferred qualification. Please note that meeting preferred qualifications (if any) is not required, but is desirable. Not all Program Areas in Section E include preferred qualifications.

## G. Content of Response Package

Submissions in reply to this RFQ must be in the form of a “response package” containing the response and all required supporting information and documents. Respondents are required to provide all information requested below and to clearly address the minimum qualifications noted in Section E for each Area of interest. In your response, please indicate “N.A.” if the statement is not applicable to you. Note that some Areas in Section E may require additional documents or answers to supplemental questions to be submitted as part of the response package. Additional questions and/or requirements, if any, are included in Section E by program area, under the subtitle “Supplementary Questions and Requirements”.

This RFP includes a total of 27 different program areas. Applicants may respond to multiple program areas through one application package or applicants may submit separate application packets to address each program area under which your firm would like to be considered. **Please identify clearly in the cover letter which Area or Areas from Section E, Scope of Work, that the response package should be considered under.** If responding to an Area or Areas that have SubSections, please also be sure to indicate the Subsection(s) of interest from the list of Subsections.

Please refer to the table in Section B of this RFQ for a list of all of the different program areas included in this RFQ. This table also shows if the Area includes any Subsections.

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

### Submission Requirements

Responders may pick between the two options below. Option 1 is the preferred method.

- 1) 1 complete response package may be submitted via email to [owd.procurement@sfgov.org](mailto:owd.procurement@sfgov.org). The entire response packet should ideally 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) 1 hard copy 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: Contracts and Grants Director, RFQ 210

All information in the response package must be presented in the following sequence:

1. Response cover letter with contact information, including an email address, for the respondent. Cover letter must identify and address the Area(s) under which the application should be considered. There are a total of 27 Areas in RFQ210. If responding to any of the following Areas, please be sure to indicate the Subsection(s) of interest since each of the Areas listed below have Subsections:
  - Area 1 (Developing and Implementing a Racial Equity, Diversity and Inclusion Plan),
  - Area 7 (Storefront and Corridor Vacancy Assessment and Feasibility Analysis),
  - Area 14 (Small Business Services through the SBDC),
  - Area 15 (Workforce Technical Assistance and Training),
  - Area 19 (Economic and Labor Market Analysis),
  - Area 21 (Technology Consultation),
  - Area 22 (Stakeholder Engagement and Facilitation),
  - Area 23 (Marketing, Branding, Collateral and Website Development), and
  - Area 27 (Nonprofit Capacity Building)
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. The statement should include a description of challenges, successes, and impacts of the project(s).
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. A list of staff that would work on this project, including their qualifications, relevant experience, and other projects they will be working on during the proposed timeline, along with percentage of time committed. Be sure to address all of the minimum qualifications listed in this RFQ.
  - b. An estimated cost per hour for providing the services listed in this RFQ.
  - c. Successful applicants must either be an approved City Supplier (previously "vendor") or be able to meet all City Supplier 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 supplier within ten days of notice of award. If an awardee is not able to become an approved Supplier within this timeframe, OEWD may rescind an award offer and negotiate with other high ranked approved suppliers so as not to delay important programming. Sub-contractors are not required to be City-approved Suppliers; only the lead organization or fiscal sponsor must be City-approved. 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/>
- d. 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 applicable to the area(s) under which the applicant is applying.
  7. All additional addenda requested in the Supplemental Questions and Information section of this RFQ for the area(s) under which your firm is applying.
  8. Any relevant addenda which the respondent wishes to submit such as a portfolio including samples of prior work (if not required).

## H. Supplemental Questions and Information

In addition to addressing the minimum qualifications above, respondents to certain areas within the RFQ must also answer a set of supplemental questions

## I. Final Submission

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

- 1) **Preferred Submission Method:** 1 complete response package may be submitted via email to [owd.procurement@sfgov.org](mailto:owd.procurement@sfgov.org). The entire response packet should ideally 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.

OR

- 2) **Alternative Method:** 1 hard copy 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: Contracts and Grants Director, RFQ 210

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 in hand at the OEWD office located at 1 South Van Ness Avenue, 5th Floor, San Francisco, CA 94103 no later than **5:00 PM, Thursday, November 15, 2018**. 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. 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. Successful applicants must either be an approved City Supplier (previously "vendor") or be able to meet all City Supplier 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 Supplier within ten days of notice of award. In no instance can OEWD contract for services with an organization which has not completed all steps of the Supplier process as outlined at <https://sfcitypartner.sfgov.org/>. 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/>. It is the proposer's responsibility to complete all steps with the various City departments as outlined on the website noted.

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), if the number of responses is high.

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.  
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 #210 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).
2. The contractor must comply with the City and County ordinances and contracting requirements. For more detailed information, see the Office of Contract Administration website at <http://sfgsa.org/index.aspx?page=359>. 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.

3. Though it is not a requirement that all respondents are currently approved Supplier of the City, 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. Possession of a City Supplier number is not enough to be eligible for City contracts. Interested parties must also complete the business tax declaration (or exemption) process, confirmation of equal benefits status, and other steps outlined on <http://sfgsa.org/index.aspx?page=4762>. As of January 2012, all Suppliers are also required to accept electronic payments. More information on this requirement can be found at the link above.
4. Respondent agrees that all costs incurred in developing this proposal are the Respondent's responsibility and at the Respondent's cost.
5. 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 #210. 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, 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, 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 proposal process and selections of 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: Contracts and Grants Director, RFQ 210
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.