

Request for Qualifications #214

City and County of San Francisco

Office of Economic and Workforce Development

for

Consulting Services for Economic and Workforce Development Projects



Request for Qualifications #214

Date of Issue: Wednesday, February 26, 2020

**Deadline for Responses:
Thursday, April 9, 2020 by 5:00 PM**

**1 complete response package may be submitted via email to
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: Marissa Bloom, Contracts and Grants Administrator (RFQ 214)

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) advances equitable and shared prosperity for San Franciscans by growing sustainable jobs, supporting businesses of all sizes, creating great places to live and work, and helping everyone achieve economic self-sufficiency. OEWD programs are responsible for strengthening San Francisco's many diverse neighborhoods and commercial corridors, creating a business climate where companies can grow and prosper, and ensuring a continually high quality of life for all San Franciscans.

OEWD provides one point of contact for a variety of essential City programs and services, to include:

- Business attraction and retention, with an emphasis on key industry clusters
- Small business assistance and nonprofit support
- Workforce development, including job training for today's jobs and tomorrow's opportunities
- Public and private projects such as affordable housing, job creation, economic development, and open space creation and management
- Neighborhood development, including commercial corridor stabilization and revitalization
- Film and television production
- International trade and commerce, fostering Sister Cities and increasing business opportunities

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 use the Proposal Packet Checklist (Appendix A) to clearly identify the Area(s) under which the package should be considered.**

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 under Section E.

Area number	Title	Subsections/Categories
Area 1	Leadership and Professional Development Services	None
Area 2	Real Estate Case Management Services	None
Area 3	Small Business Consulting and Training Services through the SBDC	Yes; subsections a. through g.
Area 4	Employment Training Panel (ETP) Technical Assistance and Management	None
Area 5	Marketing, Branding, Collateral and Website Development	Yes; subsections a. through p.
Area 6	Videography Services	None
Area 7	Fiscal Services	None
Area 8	Grant Development Services	None
Area 9	Research and Evaluation of Workforce Development Programs	Yes; subsections a. through c.
Area 10	Planning and Designing Workforce Services	None

Area 11	Developing and Implementing a Racial Equity, Diversity and Inclusion Plan	Yes; subsections a. through d.
Area 12	Community Outreach and Education Services	None
Area 13	Community Benefit District/Business Improvement District	None
Area 14	Architectural Services	None
Area 15	Logo/Branding Design	None
Area 16	Tenant Coordination/Program Management	None
Area 17	Development Agreement Obligation Tracking System	None

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), American Apprenticeship Grants through the Department of Labor, and City general funds.

C. RFQ Timeline

RFQ Issued	Wednesday, February 26, 2020
Bidders Conference	Tuesday, March 10, 2020 at 3:30 PM (SEE DETAILS BELOW)
Question submission period ends	Thursday, March 12, 2020 at 5:00 PM
Final questions and answers posted	By close of business Friday, March 13, 2020
Proposals Due (no exceptions)	Thursday, April 9, 2020 at 5:00 PM
Notifications to Proposers	Anticipated by close of business Monday, April 20, 2020
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) #210 in Fall 2018 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 210 will be active until December 2020.

Schedule may change if necessary.

Any updates to the schedule or changes to the content of the RFQ will be posted to the RFQ 214 specific page linked to <https://oewd.org/bid-opportunities/rfq-214>. It is the proposer's responsibility to review all changes posted and adjust responses as needed.

D. Respondents' Questions

OEWD will hold a Bidders Conference to review program needs and expectations for interested respondents, and to provide clarity on the application and evaluation processes. Though not required, interested parties are encouraged to attend the Bidders Conference. This meeting is scheduled for:

DATE: Tuesday, March 10, 2020
TIME: 3:30 PM – 5:00 PM
LOCATION: Please click here to access the
Webinar: <https://norcalsbdc.zoom.us/j/659267496>
Meeting ID: 659 267 496

If you require an accommodation due to a disability, please contact 415-701-4848 or TDD 800-735-2929 (CRS), or email oewd.procurement@sfgov.org at least 3 business days prior to the meeting to ensure availability.

Respondents may additionally request clarification or ask questions about this solicitation by emailing oewd.procurement@sfgov.org through **Thursday, March 12, 2020 at 5:00 PM** (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 214 specific page linked to <https://oewd.org/bid-opportunities/rfq-214> no later than end of day **Friday, March 13, 2020**. 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. Leadership and Professional Development Services

OEWD is seeking the expertise of a qualified consultant to support organizational development, individual leadership enhancement and growth of highly functional teams within the department. The selected consultant will provide on call organizational development and executive coaching services, including but not limited to, working with OEWD staff to assess, clarify, and synchronize various viewpoints that align with OEWD's strategic plan and vision, provide executive coaching to individuals and teams, and facilitate team building activities to promote growth and better communication within the agency.

Activities under this section may include:

- On call evaluation, learning and training services in leadership development, team development, systems integration, performance evaluation, feedback and enhancement, communication techniques and strategies for successful project management and team engagement.
- Providing tools, which should be intuitive and simple to use, to members of the OEWD executive team to use to continue organizational development with their staff, and training for OEWD staff in the use of those tools
- Facilitation services and executive coaching to support culture change within OEWD
- Reports, presentations, or other activities for OEWD staff, boards/commissions and stakeholders, as determined by OEWD.

Minimum Qualifications:

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

Preferred Qualifications:

- Similar projects or contracts completed within the past 5 years.
- Experience working with government agencies or municipalities
- Experience working with diverse groups of stakeholders and executives with varying management styles

Supplementary Questions and Requirements:

No supplemental information or questions are required.

2. 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 3 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.

3. Small Business Consulting and Training Services through the 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. **Financial Management;** including, but not limited to:
 - Loan Packaging
 - Financial Analysis
 - Profitability Tactics
 - Financing/Capital
 - Grant Writing
- b. **Marketing and Sales;** including, but not limited to:
 - Advertising, Sales And Branding

- Customer Creation And Retention
- Marketing Strategy
- E-Commerce
- Web And Graphic Design
- Visual Merchandizing
- Social Media Management
- c. **Legal Support**; including, but not limited to:
 - Commercial Lease Negotiations
 - Small Business Establishment And Formation
 - Franchising
 - Human Resource Management
- d. **Accounting**; including, but not limited to:
 - Accounting And Bookkeeping
 - Business Taxes
- e. **Procurement**; including, but not limited to:
 - Certifications
 - Government Contracting
 - Corporate Contracting
- f. **Management/Operations**; including, but not limited to:
 - Inventory Management
 - Restaurant Management
 - Grocery Store Management
 - Industry Specific Expertise (I.E. Manufacturing, Retail, Hospitality...Etc.)
- g. **Other**; including, but not limited to:
 - Product Development
 - Space Planning And Analysis
 - Technology
 - Importing/Exporting
 - Commercial Real Estate

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 (Filipino), 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 \$75 hourly rate for consulting (CPAs and Attorneys may be paid up to \$100 per hour)

Minimum Qualifications:

- 3 years verifiable experience providing business consulting and training services to small business clients and a minimum of 5 small business clients consulted and/or trained

Supplementary Questions and Requirements:

Please answer the following questions and provide samples of work, if available, 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. Please provide specifics related to all subareas (A-G) under which you would like this application to be considered.
3. Explain your capabilities in coordinating and maintaining regular contact with OEWD staff and the SBDC director.
4. 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
5. 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?
6. Describe your success in helping business clients accomplish specified goals.
7. Are you willing to be compensated in accordance with SBDC's standard hourly rate of \$75 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 \$75 per hour, what is your blended hourly rate?

4. 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.

Preferred Qualifications:

- Specific workforce development related experience is highly desirable.

Supplementary Questions and Requirements:

No supplemental information or questions are required.

5. 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 engaging and 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 media channels.
- o. Conducting door-to-door outreach to disseminate information about OEWD
- p. Developing a Marketing and Branding Strategy Plan that includes:
 - A Style & Marketing Guide (these could be two separate activities)
 - Marketing Toolkit
 - Strategy for outreach to employers, providers, job seekers and other stakeholders through print, digital and social media channels

Minimum Qualifications:

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

Supplementary Questions and Requirements:

No supplemental information or questions are required.

6. Videography Services

OEWD is seeking videography 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 technical assistance for existing and aspiring entrepreneurs, in addition to 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.
- Capture video 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 videos for selection by OEWD.
- Edit video to attain the standard and quality required by OEWD.
- Deliver digital files of final video and raw footage by method approved by OEWD.

Minimum Qualifications:

- 5 years verifiable experience providing videography 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. 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.

8. Grant Development Services

OEWD seeks consultants to assist with grant development and program sustainability planning with a focus on prospect research, program development, and proposal writing.

Activities under this section may include:

- Sector programming sustainability including strategy development, service and training system analysis, and program design analysis.
- Sector assessment including developing criteria for selecting sectors, researching labor markets, and identifying demand for workers.
- Sustainability planning for current and/or future OEWD programs.
- Working with OEWD to identify grants and funding resources to support OEWD current and/or future programs and services.
- Writing grant proposals and coordinating with OEWD partners.

Minimum Qualifications:

- At least 5 years verifiable experience in providing similar services as those noted in the application area above, with at least 3 projects completed within the past 10 years.
- At least 3 years verifiable experience in providing the services noted in the application area above in one or more of OEWD's areas of focus, including neighborhood commercial corridors, small business assistance, industry focused business recruitment and retention, international business development, joint development projects, and workforce development.
- A proven track record of success in winning or assisting others to win competitive procurements or grants.

Preferred Qualifications:

- Similar projects or contracts completed within the past 5 years.
- At least 3 years of experience working with state and federal grant solicitations.

Supplementary Questions and Requirements:

Your Appendix B submission, (e) "Statement of Contracts", must include a description of at least three (3) projects that the organization has worked on within the past 10 years, providing the services noted in the application area above. For each project or contract, provide the following information:

- 1) Name of the client, if applicable,
- 2) The project scope and deliverables,
- 3) The budget and length of time of the project and if the project was completed on schedule and within budget, and
- 4) The methods and strategies your firm employed to complete the projects.

9. Research and Evaluation of Workforce Development Programs

OEWD seeks consultant(s) to provide research and evaluation services for City of San Francisco staff members, property and business owners, Community Based Organizations, and other organizations on an as-needed basis. OEWD tracks the effectiveness of programming and tests, implements, and recommends new and emerging workforce development programs, tools, and policies for the San Francisco Workforce Development System. In pursuit of this mission, OEWD seeks skilled researchers and evaluators to explore topics related to workforce innovation and performance.

Activities under this section may include:

- a. Research services, including
 - Design and review of research proposals;
 - Qualitative research;
 - Quantitative research;
 - Participatory research;
 - Technical assistance on research and methodology;
 - Submission and dissemination of research findings and analysis through reports, publications, or other presentations; and
 - Peer review of research conducted by OEWD staff.
- b. Evaluation and program design services, including
 - Design and review of evaluation frameworks and plans, including program logic models and key performance indicators;
 - Technical assistance on programs, tools, and policies;
 - Formative evaluation;
 - Summative evaluation;
 - Cost-benefit analysis;
 - Meta-analysis;
 - Design randomized control trials to measure policy and program impact;
 - Submission and dissemination of research findings and analysis through reports, publications, or other presentations; and
 - Peer review of evaluation protocols conducted by staff.
- c. Professional development services related to research and evaluation, including
 - Developing training resources and/or delivering training on research design, research methodology, evaluation design, and evaluation methodology, and

- Developing training resources and/or delivering training on survey design and data collection, data processing, data analysis, data mining, statistical analysis, data linkages and data management with emphasis on longitudinal and/or departmental data sets.

Minimum Qualifications:

- Minimum of (5) years verifiable experience providing similar services as those noted in the application area.
- Project Lead has a Master's or Ph.D. in research and evaluation, public policy, public administration, economics, education, social welfare, or other applicable focus area.

Preferred Qualifications:

- Verifiable ability to manage research projects within time and financial constraints.
- Project Lead has a peer-reviewed publication demonstrating research and evaluation skills.

Supplementary Questions and Requirements:

No supplemental information or questions are required.

10. Planning and Designing Workforce Services

OEWD seeks consultants to provide support in planning and designing workforce services, including advising on:

- Customer-centered approaches to defining user segments, including participants, industry advisors, and employers; customer and employer engagement. Infrastructure for collection and analysis of real-time data from industry, educational partners, service providers, and the broader labor market.
- Planning and design of system infrastructure that encourages stakeholder collaboration, experimentation, user feedback, and user/customer-centered design.
- Identifying and prioritizing opportunities to improve the public workforce system.
- Designing, developing, deploying, and evaluating workforce tools.
- Developing workforce partnerships and collaborations.
- Design thinking strategies, including empathic discovery, creative problem solving, prototyping and customer-centered research processes.
- Accelerated learning and skills development.
- General workforce focused and sector contextualized curriculum development.
- Career and education assessment and planning.
- Project based and on-site learning models.
- Linking learning and work.
- Workforce Innovation and Opportunity Act regulation technical assistance
- Workforce policy analysis and technical assistance

Activities under this section may consist of:

- Identification of stakeholders; collecting input and providing analysis on preliminary goals from stakeholders.
- Collecting data on strategies, strengths, weaknesses, and opportunities.
- Identifying and working toward decision points/priorities, outcomes, timeline, and project deliverables.
- Summarizing methods of implementing proposed recommendations, ways to measure progress, and providing updates including specifying persons responsible, timeframes, and measurable objectives.
- Leading rapid prototyping sessions and design processes.
- Leading and conducting customer-centered research projects.
- Creating experience maps.

Minimum Qualifications:

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

Preferred Qualifications:

- Specific workforce development related experience is highly desirable

Supplementary Questions and Requirements:

No supplemental information or questions are required.

11. 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.

12. Community Outreach and Education Services

OEWD seeks consultants to assist with community outreach and education services to inform and gather input from residents regarding OEWD programs, services, and events.

Activities under this section may include:

- Promoting OEWD programs, services, and events door-to-door, publicly, in meetings, online, through social media, in print, and through other methods of outreach.

- Organizing community meetings and listening sessions to discuss OEWD programs and services.
- Participating in community meetings to educate groups and individuals about OEWD programs and services
- Assisting with OEWD-hosted public events by supporting guest registration, providing helpful information, troubleshooting, providing programming, helping with logistics, and any other task required for successful events.
- Educating community members about OEWD programs and services, as well as OEWD partnerships such as Opportunities for All.
- Developing and helping develop marketing collateral that can be used to increase awareness of OEWD programs, services, and events.

Minimum Qualifications:

- At least 3 years verifiable experience in providing similar services as those noted in the application area above.
- At least 2 years verifiable experience in providing the services noted in the application area above in one or more of OEWD's areas of focus, including neighborhood commercial corridors, small business assistance, industry focused business recruitment and retention, international business development, joint development projects, and workforce development.
- At least 1 year verifiable experience in providing similar services as those noted in the application area above in the City and County of San Francisco.

Preferred Qualifications:

- At least 2 years verifiable experience providing the services noted in the application area above to San Francisco's disadvantaged and underrepresented communities and community members.
- At least 1 year verifiable experience providing the services noted in the application area above in multiple languages.

Supplementary Questions and Requirements:

Your Appendix B submission, (e) "Statement of Contracts", must include a description of at least 3 projects or contracts that the organization has worked on in the past in providing the services noted in the application area above. For each project or contract, provide the following information:

- 1) Name of the client, if applicable,
- 2) The project scope and deliverables,
- 3) The budget and length of time of the project and if the project was completed on schedule and within budget, and
- 4) The methods and strategies the organization employed to complete the projects.

13. 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.

14. 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:

- 5 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.

15. 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 business/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 the business/applicant to develop a minimum of 3 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:

- 5 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.

16. 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
- 5 or more years in real estate matching experience working with small businesses

Supplementary Questions and Requirements:

Please answer the following questions and provide samples of work, if available, as part of the response package

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.

17. Development Agreement Obligation Tracking System

OEWD seeks consultants to create a modern, user-friendly, automated, and elegant digital solution to track project development and developer obligations as stated in Development Agreements (DAs). DAs are legal agreements between the City and private entities approved by the Board of Supervisors that lay out numerous obligations on the part of the developer and the City. The technological solution should have the following characteristics at minimum:

1. Be easy to use for the front-end users and for back end data maintenance;
2. Be easy and low cost to learn and maintain over time;
3. Be developed on the City's SharePoint platform or be a better stand-alone solution, or compatibly integrated with SharePoint where user needs dictate;
4. Start with an existing DA Monitoring staff spreadsheets and workflows of summarized obligations in excel spreadsheets;
5. Include a set of automatic reports designed and developed for specific reporting requirements, using both web-based access with digital visualization and PDFs for easy distribution;
6. Be accessed automatically over the Web with APIs as well as import/export data to other commonly-used data management programs (e.g., Excel) and to include geospatial identifiers (e.g., parcel numbers, digitized project boundary, and land use plan);
7. If practical, capacity to leverage the investment in this digital monitoring tool by being easily used or integrated through data services with other city users, data on land use, total units approved and built, by type, location and timing.

To this end, OEWD seeks to partner with the SF Planning Department to develop a database linked with services that can report out via a website on the status of obligations associated with approved agreements, for enhanced tracking and enforcing of DA obligations. In order to be effective as a tool for monitoring and enforcing DAs, the 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 obligations and requirements;
- Have advanced features such as custom reporting and automation of certain tasks (e.g., email advance 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 SF Planning Department 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 and the SF Planning Development Performance Coordinator, create 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:

- Demonstrated experience in providing similar services as those noted in the application area.
- Demonstrated experience in developing at least two similar obligation-tracking systems/databases, especially with Microsoft SharePoint and/or Access, that are elegant, easy to learn and use, and low cost for the tool's on-going maintenance.

Supplementary Questions and Requirements:

No supplemental information or questions are required.

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 17 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 submit via one of the two submission options below. Option 1 is the preferred method.

Option 1: Email Submission

A complete response package may be submitted via email to 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. **The file size limitation for the City server is 34MB.**

OR

Option 2: Hard Copy Submission

A 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: Marissa Bloom, Contracts and Grants Administrator (RFQ 214)

Option 2 is the recommended option if your response package contains large files (pictures, multiple attachments, etc) as the file size limitation for the City server is 34MB.

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

1. **Appendix A: Proposal Packet Checklist**

Please use required template; if you have any trouble using the file, please call (415) 701-4887 or email: owd.procurement@sfgov.org

Appendix A: Proposal Packet Checklist requests that applicants provide contact information, including an email address and phone number for the primary contact at your firm. The checklist also requests basic information such as the location of the applicant's headquarters, type of entity (nonprofit, for-profit, sole proprietorship, etc), whether the firm is a certified San Francisco Local Business Enterprise, and whether the firm is a current San Francisco Bidder or Supplier in good standing. Finally, the checklist asks applicants to identify the area(s) under which the application should be considered.

There are a total of 17 distinct program areas in RFQ 214. If responding to any of the areas that contain subsections, please be sure to indicate the subsection(s) of interest on the checklist.

2. **Appendix B: Qualifications Statement** (no template provided): Provide a statement, written solely by the respondent, addressing the following items:

(a) ***Project Team***

Please provide 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 prequalified term (if known), along with percentage of time available to commit to the project(s) proposed. Be sure to address how staff meet the minimum qualifications listed in this RFQ and include details about any related completed projects, education, and training. If available, please attach the current resume(s) for all members of your Project Team with your response packet.

(b) ***Compensation Statement***

Provide the estimated cost per hour for providing the services proposed (blended rate preferred). If you are proposing to assign multiple staff at different pay scales, please provide the name and title of each project team member and confirm the estimated hourly rate for

each one. If your rate is subject to annual increases, please provide the estimated increase and confirm whether the increase will occur on the calendar year or on your firm's fiscal year. If you prefer to be compensated in another way (e.g. you offer a fixed rate per workshop), please provide the estimated cost of each deliverable in this statement.

(c) ***Supplier Status***

The Proposal Packet Checklist asks you to list your San Francisco Supplier or Bidder ID number. If you are not a current City Supplier in good standing, please describe what stage you are in the process and confirm that you do not anticipate that your firm will have a problem complying with the Supplier process. 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) ***Debarment/Suspension Confirmation***

A statement confirming that the firm and respondent are not suspended, debarred or otherwise excluded from participation in federal or local assistance programs.

(e) ***Statement of Contracts***

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, and should include a description of challenges, successes, and impacts of the project(s).

(f) ***Supplementary Statement***

Please make sure to respond to all **supplementary questions** applicable to the area(s) under which you are applying. If you would like to be considered under multiple areas, please reference specific program area numbers and titles in your Supplementary Statement.

3. **Professional References**

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.

4. **Additional Addenda**

All additional addenda requested in the Supplementary Questions and Requirements section of this RFQ for the area(s) under which your firm is applying (e.g. work samples). Applicants may also attach any other relevant addenda such as reference letters or photographs of past projects (not required unless detailed in the specific program area).

H. Supplementary Questions and Requirements

In addition to addressing the minimum qualifications above, respondents to certain areas within the RFQ must also answer a set of supplementary questions. Please consult the specific program area outlined in Section E to confirm whether additional questions, work samples or other addenda may be required under the section.

I. Final Submission

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

- 1) **Preferred Submission Method:** 1 complete response package may be submitted via email to owwd.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. **The file size limitation for the City server is 34MB.**

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: Marissa Bloom, Contracts and Grants Administrator (RFQ 214)

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, April 9, 2020**. 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 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/pages/become-a-supplier.aspx>. 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 the above website. 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 #214 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 <https://sfgov.org/oca/office-contract-administration-oca>. 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 <https://sfcitypartner.sfgov.org/pages/become-a-supplier.aspx>. 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 #214. 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, and signing in with 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. Once the prequalified pool is established, the City will contact prequalified Suppliers at any point within the qualification period (2 years) to discuss contracting opportunities and may solicit additional proposals for specific scopes of work, which will be scored by a panel determined by OEWD, in consultation with the Contract Monitoring Division. Depending on the contract amount for each subject area listed above in Section B and source(s) of funding, each subject area may be subject to Chapter 14B requirements. Whereas, an LBE rating bonus may be applicable and be applied at each stage of the selection process and an LBE subcontracting participation requirement may also be applicable. All applicants are encouraged to review the terms and conditions related to the Local Business Enterprise programs, accessible online at: <https://sfgov.org/cmd/14b-local-business-enterprise-ordinance>
3. Subject to certain exceptions, respondents are hereby advised that contracts issued through this RFQ are subject to the requirements of Administrative Code Chapter 12X, which prohibits the City from entering into a contract with a Supplier that has its headquarters in a state that has enacted a law or laws that perpetuate discrimination against LGBT people and/or has enacted a law that prohibits abortion prior to the viability of a fetus, or a contractor that will perform any or all of the work on the contract in such a state. Chapter 12X requires the City Administrator to maintain a list of such states, defined as "Covered States" under Administrative Code Sections 12X.2 and 12X.12. The list of Covered States is available on the website of the City Administrator at: <https://sfgsa.org/chapter-12x-state-ban-list>.

Respondents will be required to certify compliance with Chapter 12X as part of the proposal to this RFQ as well as any subsequent proposals or quotes submitted during the selection process, unless the City determines that a statutory exception applies.
4. 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.
5. 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.
6. Final award of any contract(s) solicited under this RFQ may be subject to approval by the Civil Service Commission.
7. 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.

8. 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), , 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: Marissa Bloom, Contracts and Grants Unit, RFQ 214
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.