**Appendix A: Application Questions - Request for Proposals 225**

### This Appendix includes the questions that will be asked in the application to OEWD Request for Proposals (RFP) #225. You may draft your responses on this template, but please enter your responses into the online application by the deadline, Wednesday, February 22, 2023 by 5:00 P.M.

**To access the online application, visit the following website:**

[**https://sf.gov/information/bid-opportunities**](https://sf.gov/information/bid-opportunities)

### The online application will be available starting ~~Tuesday, January 24~~, Thursday, January 26, 2023. Please do not upload this Appendix with your application. Please make sure you upload all required attachments listed on the Proposal Package Checklist found at the end of this document. If you have any questions about the content of this appendix, OEWD is here to help! Please join one of our optional technical assistance sessions or submit questions to oewd.procurement@sfgov.org

**PART I. APPLICANT PROFILE**

In this section, provide all organizational contact information. Note that if you are a **fiscal agent**, you will need to complete an applicant profile for both your organization (“Primary Applicant”) and your subgrantee (“Program Lead”).

* The **Primary Applicant** is the organization or firm that will hold the contractual obligation with the City.
* If you are applying as the fiscal agent for another entity, your application must also identify a **Program** **Lead**, which is the entity delivering services.

Information requested in the **Applicant Profile** section includes:

* Organization name (Name as listed in the [California Secretary of State Registry](https://bizfileonline.sos.ca.gov/search/business))
* Address, website and main phone number
* Executive Director name, contact information
* Proposal point of contact name, contact information
* Type of organization (Nonprofit 501(c)(3), corporation/LLC, or individual sole proprietor)
* Supplier (City vendor) or Bidder Status
* Employer Identification Number (EIN), also known as your agency’s tax ID, as registered with the [Internal Revenue Service](https://apps.irs.gov/app/eos/)
* Your current Organizational Chart (“Org Chart”)
* Information on your Executive Director/CEO’s tenure
* Information on your staff (full time equivalent employees, number of volunteers)
* Information about your Board of Directors (see details below)
* Information on additional organizations involved in delivering the program
* Information on your overall organizational budget (data entry field and file upload)
* Program area in RFP 225 you are applying to.

**Staffing and Board information.**

Your application requires basic information about your staff and board. These questions should be answered for the Primary Applicant and, if that entity is applying solely as the fiscal agent, we will also need Staffing and Board information for the Program Lead.

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| **STAFFING AND BOARD COMPOSITION CHART** |
| **Executive Director Tenure***How many years (or months, if under one year) has your Executive Director/CEO been in this role?* | *Enter your Executive Director/CEO/President’s tenure in years/months.* |
| **Total Number of Full Time Equivalent (FTE) Employees** | *Provide the FTE number for the whole organization, not just the program being proposed.*  |
| **Number of Governing Board Members** *Exclude Advisory/Emeritus members.* |  |
| **List of Current Board Members***The Board of Directors should include San Francisco residents and/or members with knowledge of the needs of low and moderate income San Franciscans from the target neighborhoods/populations described in the RFP. Fiscal sponsors should only list governing Board members; Program Lead organizations can list Advisory Board members, if applicable.*  |
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| Name | Years (or months) on Board | Home Neighborhood\* | Job or Relevant Experience\*\* |
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*\*If the Board Member lives outside of San Francisco please list the city and state.* *\*\*Job or relevant experience can include lived experience, neighborhood knowledge and demographic information as well as professional experience.* |
| **If you are in the process of recruiting new Board members, please describe your efforts to ensure a diverse and equitable board that aligns with the community being served.**(Limit: 1,000 characters) |
| **Total Number of Volunteers** *Please exclude Board members that have been counted above.* | [Volunteers] |

**If you are applying to Program Area A, Nonprofit Sector: Impact Development Grants,** [**click here to skip to program area-specific questions**](#AreaAQuestions)**. The remaining program areas in this RFP will follow the below question set and criteria.**

**PART II. PROJECT DESCRIPTION**

*In preparing your proposal, please address all questions in response to the scope of work. Pay particular attention to and address in full; minimum qualifications, preferred qualifications, and any program area-specific questions.  Proposals are evaluated based on clarity, substance and measurable results.* ***Note: Character limits include spaces.***

Please select a program area, indicate the Project Title, provide a brief (1-2 sentence) summary of the Project, and select the neighborhood(s) you are targeting.

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| **Introduction** | **Character Limit** | **Point value** |
| **Project Title** |  100 characters | N/A |
| **Please provide a brief 1-2 sentence summary of the proposed project.** |  350 characters | N/A |
| **Target Neighborhood(s)** | Select from the available options and indicate any additional target neighborhoods you may be focusing on | N/A |

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| **Section 1** | **Point Value** |
| **Applicant Qualifications and Staff Assignments** | **30 points** |

*This section should briefly address the principal objectives of the proposed project, and establish the applicant’s professional qualifications and the experience of proposed partners, sub-contractors and staff. The applicant should detail past experience and track record implementing projects similar to the proposed activities. Details may include how staff will be accessible and available to individuals and/or organizations receiving services, the relevant experience of staff members, and the distribution of workload within the project team. This section should further note how the project team demonstrates a thorough understanding of the economic, social, financial, institutional or other issues that require a solution as well as indicators of community support.*

Specific questions in this area:

1. **Briefly describe your organization’s mission, values, and history providing services to residents and businesses in San Francisco.** (Limit: 2,000 characters)
2. **Describe any past experience successfully implementing similar projects or activities, including grants or contracts with the City of San Francisco or other funders.** You may include details on active/ongoing projects as well as prior/completed projects. Please be sure to highlight successful outcomes for the target populations or neighborhoods in the program area. (Limit: 3,000 characters)
3. **Describe your staffing plan for the proposed project** (Limit: 4,000 characters). Please answer all of the following in this section:
	1. List the names, titles and qualifications of staff, partners, and subcontractors that will make up the project team. If you do not have a person identified yet (e.g. if you have a vacant position), please provide information on the status of the hiring process.
	2. How will work be distributed within the project team?
	3. Are there any specific cultural, linguistic, educational or other skills that will help the project team deliver the proposed project?
4. **Describe the target populations you will serve through this project, your experience serving them, and key needs you hope to address with this funding**. (Limit: 4,000 characters). Highlight the economic, social, financial, institutional or other issues that require a solution. Please also share any work you have done with the relevant communities to confirm that this proposed project is appropriate and necessary. Examples may include:
5. Surveys or focus groups with community members
6. Organizing or advocacy efforts with community members
7. Research or review of data and best practices serving the target populations

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| **Section 2** | **Point Value** |
| **Approach, Activities and Outcomes** | **50 points** |

*This section should outline a plan of action that describes in sufficient detail the specific scope of services applicant(s) propose and how the proposed work will be accomplished. The plan should address all functions and activities for which applicants seek funds. Cite factors that might accelerate or decelerate work, explain rationales for strategies selected, and describe any unique or unusual features of the proposed project, such as design or technological innovations, cost or time saving strategies, or methods to increase engagement of targeted stakeholders in services. Include and make clear the organizations, cooperating entities, consultants or key individuals who will work on the proposed activities, with a brief description of their contributions and qualifications.* ***For Program Areas with Supplementary Questions please address them in this section, unless otherwise noted.***

1. **Clearly state your approach to the project.** (Limit: 4,000 characters). Provide detailed goals and objectives, and describe any evidence-based practices that inform your project design.
2. **Describe the services to be provided.** (Limit: 4,000 characters) For each service component, provide detail on the following, as appropriate: types of activities; number of hours; frequency of services; location(s) of services; and methods that will be used to deliver services.
3. **Describe the qualitative and quantitative outcomes your project proposes to achieve.** (Limit: 3,000 characters). Provide projections of the accomplishments to be achieved for each activity or function proposed, such as the number of activities or steps to be accomplished or number of individuals or businesses to be served. If accomplishments cannot be quantified, list them in chronological order to show a sequence of steps and their projected start and end dates.
4. **Provide a project timeline.** (Limit: 4,000 characters) Please include all major milestones and target dates, as appropriate. Describe any factors that might speed or hinder implementation of the project, and explain how you will manage unanticipated project hurdles, should they arise.
5. **Describe your expertise serving demographic and geographical areas of focus where appropriate, or as required by the program area.** (Limit: 2,000 characters) Describe specific outreach or engagement strategies that you will use to reach target populations identified in the RFP.
6. If required, please respond to any additional **Supplementary Questions and Attachments as required by the Program Area.** (Limit: 3,000 characters for each question)

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| **Section 3** | **Character Limit** | **Point Value** |
| **Performance Measurement and Reporting** | **6,000 characters** | **10 points** |

For this section, provide a narrative – limited to 6,000 characters – describing the following:

* How data on project activities and outcomes will be collected and reported.
* Measures that will be developed and/or used to determine the extent to which the project has achieved its stated objectives
* How data will be used to determine whether the needs identified are being met and whether project results are being achieved
* Any processes and procedures that are or will be in place to determine whether the project is being conducted in a manner consistent with the work plan and how effectiveness and efficiency will be improved
* How the outcomes proposed and measured will demonstrate positive impact based on the Scope of Work outlined within the program area.

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| **Section 4** | **Character Limit** | **Point Value** |
| **Financial Management and Budget** | **6,000 characters** | **10 points** |

Please provide a brief narrative – limited to 6,000 characters – detailing the financial management of the Primary Applicant organization. In this section, you should respond to the following, as applicable:

* Describe the key features of your organization’s financial tracking system and confirm it is capable of generating all financial information needed for required reports, including data needed to monitor, evaluate and if necessary, modify program performance.
* Describe in detail any cost allocation plan utilized when costs are chargeable to more than one cost category, or to more than one program and/or funding source.
* If proposing a management fee/fiscal fee, identify the amount as well as how the requested percentage was identified.
* Provide a narrative justification for items in the budget. Note, if the program area you are applying to includes the possibility of a multi-year grant award, please share any major budget changes (above 10% for any individual line item) that you expect to incur in future program years.
* Provide details on any matching or leveraged funds including anticipated source, amount, and restrictions.  Although not required, matching funds are encouraged for all program areas.

**Note: in addition to your written narrative (limited to 6,000 characters), make sure to upload a proposed budget for the project using the budget template available on the RFP 225 website (“Appendix B”).**

**Questions specific to Program Area A – Nonprofit Sector: Impact Development Grants**

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| **Section 2** | **Point Value** |
| **Eligibility** | **Not scored** |

**Please answer the following questions related to eligibility for this program area.** If you have a question about eligibility, please refer to the program guidelines. Written questions can be submitted by the deadline indicated in the Request for Proposals, and drop-in virtual assistance is available as indicated in the RFP.

1. Is the applicant organization tax-exempt and in good standing under Section 501(c)(3) of the Internal Revenue Service Code, and with the State of California? (Yes/No)
2. Does the applicant have a business bank account? (Yes/No)
3. Is the applicant, or organization leading the project, part of another City agency or department? (Yes/No)
4. Is the organization leading the proposed project San Francisco-based, and able to demonstrate consistent programmatic history and public benefit to the City of San Francisco, its neighborhoods and communities over the last two (2) year, since January 2021s? (Yes/No)
5. Does the organization leading the proposed project have average revenue of less than $15 million, over the past two completed fiscal years, excluding any one-time COVID regranting funds? (Yes/No)
6. Is any partner in the application in default on any grants or loans from (1) OEWD; (2) other City departments (including but not limited to the Arts Commission, Department of Early Childhood, the Department of Children, Youth and Their Families, Mayor’s Office of Housing and Community Development, Grants for the Arts); (3) Northern California Grantmakers Arts Loan Fund; (4) Community Vision Capital and Consulting; (5) Community Arts Stabilization Trust; and/or (6) other City-contracted grantmaking intermediaries. (Yes/No)
7. Does the organization leading the proposed project have an open grant or award recommendation exceeding $25,000 in total allocation for: commercial real estate, capital, core support or capacity/exploration exceeding $25,000 from an entity referenced above, that is supported by City funds? (Yes/No)

**If your organization meets all of the above eligibility requirements, you will be taken to another page in the application to complete Supplemental Questions. If your organization does not meet the eligibility requirements, the screen will read as follows:**

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| **Your responses indicate that you do not meet the eligibility requirements for Program Area A - Nonprofit Sector – Impact Development Grants. If you have a question about eligibility, please refer to the program guidelines. Written questions can be submitted by the deadline indicated in the RFP, and drop-in virtual assistance is available as indicated in the RFP. Contact OEWD at** **oewd.procurement@sfgov.org** **with any questions.** |

Add language to let them know they can go back

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| **Section 3** | **Point Value** |
| **Supplemental Organization and Project Information** | **Not scored** |

*Nonprofit Sector: Impact Development Grants are intended to provide early-stage capital to tax-exempt, not-for-profit businesses that need investment to act upon a high-impact opportunity. Eligible organizations may apply to receive multi-year support for one-time, short-term expenses related to the planning and pre-development phases of a specific business opportunity or commercial real estate project.*

*The answers below should clearly represent and reflect the past impact and efforts of the organization that is leading the proposed project. If the application is fiscally sponsored and questions are not clearly answered on behalf of the organization leading the proposed project, the application may receive a lower score.*

1. Which type of opportunity are you proposing to further develop? (select from drop-down list: Commercial Real Estate, Operating Business Opportunity)
2. Please provide a brief description of the real estate project or business opportunity you propose to develop. [40 words]
3. Project Address (if known)
[Street Address]
San Francisco, CA [Zip Code]
4. Project Tract (if known)
5. Healthy Places Priority: Is project located in one of the lowest three quartiles indicated by the California [Healthy Places Index](https://www.healthyplacesindex.org/) (HPI)? (Yes/No)
	* *Neighborhood by neighborhood, the HPI maps data on social conditions that drive health—like education, job opportunities, and clean air and water. This data is used to identify health, economic, education and other inequities that shape well-being. Visit* [*https://www.healthyplacesindex.org/*](https://www.healthyplacesindex.org/) *to view your project’s area or address*.

To locate your Project Tract in the Healthy Places Index, look for the search box in the upper-right corner of your screen (see highlight in image below). You can look up your specific site address and it will provide you with an HPI score.



**If you answer Yes to question 5**, the application will advance to Question 6. If you answer No, you will see the following message before you can proceed:

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| **To support this program area’s intended impact, HPI priority will apply to projects clearly focused in census tracts that fall at our below the 75th percentile of the Healthy Places Index and receive an average review panel score of at least 70 out of 100. Projects based in other San Francisco neighborhoods that receive a review panel score of at least 70 out of 100 will be considered as available funding allows.** |

1. Which neighborhood is the project located in? (pick from available drop-down menu options)
2. Excluding any COVID-19 regranting funds, what was the annual revenue for the organization leading the proposed project:

7a. In the most recently completed fiscal year:

7b. In the previously completed fiscal year:

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| **Section 4** | **Point Value** |
| **Supplemental Organization and Project Information** | **100 Points** |

**Category: *Who/Beneficiaries (15 points)***

1. **Question**: Describe your organization’s connection to Black, Indigenous, People of Color (POC), LGBTQI+, Women, and/or Disabled San Francisco communities. (200 words, 15 points)

*This RFP seeks to fund applicants that are deeply rooted in Black, Indigenous, POC, LGBTQI+, Women, and/or Disabled San Francisco communities, as demonstrated by a history and mission that prioritizes services to one or more of these communities.*

**Category: *You/Organization* (15 points)**

1. **Question**: Describe the services and resources you have consistently provided to low-income San Francisco residents since December 2020, including economic mobility services, resources and/or training opportunities. What was the impact of your services for low-income communities? How did your organization support the communities described in Question #1? (250 words)

*In this question, please clearly describe your core services and resources, and describe the impact of those activities for low-income San Franciscans since December 2020. Additionally, demonstrate an understanding of the impact of those activities for the communities listed in Question 1 (Black, Indigenous, POC, LGBTQI+, Women and/or Disabled San Franciscans.*

**Category: *What + How (70 points)***

1. **Question**: Summarize your organization's project, how it is connected to economic mobility and opportunities, and how is it connected to the project type you selected: either 1) Commercial Real Estate, or 2) Operating Business Opportunity (200 words, 10 points))
2. **Question**: Describe how the funds will help your organization fulfill a current need to advance your project? (150 words 15 points)
3. **Question**: Describe how this funding will set your organization up for long- or short-term success? (150 words, 15 points)
4. **Question**: Capital for Communities Scorecard (30 points)

Follow the directions at <http://www.urban.org/C4CScorecard> to complete a project scorecard, answering all questions truthfully and to the best of your knowledge and ability. Attach all pages of the completed scorecard to this application. Please note that the scorecard is intended as a tool to spark discussion and clarify project strengths, as well as areas for improvement, that could be supported by the grant. To access the scorecard, you will need to enter an email address and a survey link will be sent to you.



You can download the question set for the scorecard from this website: <https://www.urban.org/sites/default/files/2022-09/Capital_for_Communities_Scorecard_Questions_v2.pdf>.

Once you have completed the scorecard, **upload the PDF** of your results with your RFP 225 proposal.

**Note: in addition to answering the above questions, make sure to upload a proposed budget for the project, within the boundaries listed in the RFP and using the budget template available on the RFP 225 website (“Appendix B”).**

**Proposal Package Checklist**

The following items must be completed and included in the application package.

[ ]  **Appendix B, Proposed Budget** template– Please list your proposed project budget on this template and upload it where prompted before you submit your application.

Additional required attachments:

[ ]  **Organizational Budget** (no template) – Overall organizational budget for the Primary Applicant and Program Lead, if applicable (no template provided)**.** Please upload organizational budget(s) where prompted before you submit your application.

[ ]  **Organizational Chart** (no template) – Organizational chart for the Primary Applicant and Program Lead, if applicable (no template provided)**.** Please upload organizational chart(s) where prompted before you submit your application.

[ ]  **Supplementary Attachments** – Reference whether **Supplementary Attachments** are requested for the Program Area(s) to which your organization is responding and include those items in the Proposal Package submission. Note that some areas require items such as letters of support or MOUs.

**Additional items required under Program Area A, Nonprofit Sector Impact Development Grants, are listed below:**

[ ]  **Completed** **Capital for Communities Scorecard.** Click here to access the scorecard: [**https://www.urban.org/C4CScorecard**](https://www.urban.org/C4CScorecard)

 [ ]  **Proof of good standing with the Internal Revenue Service (IRS).** Search for your organization here: <https://apps.irs.gov/app/eos/>

 [ ]  **Proof of good standing as a tax-exempt entity with the** **State of California**. Search for your organization here: <https://bizfileonline.sos.ca.gov/search/business>

 [ ]  **Proof of San Francisco corporate address** (see Program Area A for detailed information on what to provide)

 [ ]  Most recent signed copy of your organization’s **IRS 990 or 990EX** from the last two (2) completed fiscal years

If you are a **fiscal sponsor** applying to Program Area A, you must also attach the following:

[ ]  **Appendix F, Fiscal Sponsor Letter of Agreement (Area A) –** This form is only required if you are a fiscal sponsor to another organization and applying to Program Area A

[ ]  **Fiscally sponsored lead’s** **Profit and Loss Statements** and **Balance Sheets** for the last two (2) completed fiscal years. These should be distinct from the fiscal sponsor’s financial statements.

**Submitting your Proposal**

**When you have completed your proposal, please make sure to click “Submit” on the final screen.** You will receive an error notification pop-up if any corrections need to be made before your proposal is submitted to the City. If an error exists, the system will take you to the page in the application with the first error, and provide a description of the issue(s). Please pay attention to the page numbers in the top-right side of your screen; if there are additional errors on any pages in your application, those pages will be highlighted in red:



After making all necessary corrections and pressing “Submit” again, you will be able to review your application and confirm that it is accurate and complete. You can also print your submission for your records.

**After reviewing your submission, press “Confirm” in the bottom-left corner of the screen to make your final submission, which must occur before the deadline.** The system locks out at the deadline, when confirmation and submission will no longer be possible. After you click “Confirm”, the application will be locked and further edits will not be possible. After successful submission, you will see a confirmation screen, and the Primary Point of Contact Email Address will receive a time-stamped confirmation email.

You may follow up with OEWD at oewd.procurement@sfgov.org if you have any questions or need technical assistance with your submission. If you have submitted a proposal in error and need to re-file your proposal, please contact oewd.procurement@sfgov.org and let us know which proposal should be considered.