



# City and County of San Francisco

## MAYOR'S OFFICE OF HOUSING AND COMMUNITY DEVELOPMENT

**Deadline Extended**

### REQUEST FOR QUALIFICATIONS (RFQ)

#### RFQ Name – SoMa Fund Strategic Investment Planning Process

For questions, email [CommDevRFP@sfgov.org](mailto:CommDevRFP@sfgov.org)

##### Background

The mission of the Mayor's Office of Housing and Community Development (MOHCD) is to support San Franciscans with affordable housing opportunities and essential services to build strong communities. The department is organized into four divisions: Housing, Community Development, Homeownership and Below Market Rate (HBMR) programs, and Fiscal/Administrative.

The SOMA Community Stabilization Fund, a MOHCD Community Development program, was created to stabilize the South of Market community and promote equity through funding recommendations and priorities that mitigate the impact of development. The Fund's investments are directed toward housing, economic and workforce development, community cohesion and physical infrastructure improvements.

##### Intent of this RFQ

MOHCD is pleased to announce its request for a qualified Proposer or Proposers to support MOHCD's SoMa Fund strategic planning process which includes, data analysis, data collection, tool development and community engagement planning services, investment strategy development, and drafting of plans.

##### Schedule: All times listed below are in Pacific Standard Time \*

RFQ issued	March 17, 2023
Webinar	March 22, 2023 at 11:00 am
Response to Questions Posted	March 31, 2023 at 5:00pm
Deadline for RFQ response	<b>May 5th, 2023 5:00pm</b> <b>EXTENDED</b>
Potential interview and reference checks	May 8th- May 12th
Authorization of Expenditures (Board of Supervisors)	June 2023
Award notification	June 2023
<b>Tentative Contract term begins</b>	July 1, 2023

\* Each date subject to change. Check website for latest schedule.

##### RFQ Questions and Communications

To ensure fair and equal access to information about this RFQ, written questions must be emailed to [CommDevRFP@sfgov.org](mailto:CommDevRFP@sfgov.org)

**Questions in writing must be received before 5:00 pm PST on 3/29/2023.** No questions will be accepted after this time with the exception of City vendor compliance or Contract Monitoring Division (CMD) requirement questions.

A summary of the questions and answers pertaining to this RFQ will be posted on the MOHCD website at <https://sf.gov/departments/mayors-office-housing-and-community-development> by Friday, March 31, 2023 at 5:00 pm.

# 1. Introduction

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General terms used in this RFQ. The “Proposer” or “Respondent” refers to any entity submitting a response to this Request for Qualifications (“RFQ”) to be considered for inclusion on a pre-qualified consultant list. The “Contractor” refers to the Proposer(s) awarded contracts for services under this RFQ.

## 1.1 Statement of Need and Intent

What is the City seeking? MOHCD is seeking a qualified Proposer or Proposers to support MOHCD’s SoMa Fund strategic planning process which includes, data analysis, data collection, tool development and community engagement planning services, investment strategy development, and drafting of plans. Building upon previous Strategic Plans completed in 2008 and 2011, as well as a recent Strategic Assessment (2022) of the SoMa Fund’s last ten years of investments, the selected proposers will develop a new Strategic Plan to provide guidance for the next five years of investments.

Proposers must have experience working with public and private entities, as well as the general public. Qualifying Proposers will have expertise in survey development and qualitative and quantitative data analysis, communications and outreach strategy development and implementation. Proposers may submit an RFQ for one or more projects.

## 1.2 Background of Mayor’s Office of Housing and Community Development

San Francisco is the fourth largest city in California and serves as a center for business, commerce and culture for the West Coast. The City and County of San Francisco (the “City”) established by Charter in 1850, is a legal subdivision of the State of California with the governmental powers of both a city and a county under California law. The City’s powers are exercised through a Board of Supervisors serving as the legislative authority, and a Mayor and other independent elected officials serving as the executive authority.

The mission of the Mayor’s Office of Housing and Community Development (MOHCD) is to support San Franciscans with affordable housing opportunities and essential services to build strong communities. The department is organized into four divisions: Housing, Community Development, Homeownership and Below Market Rate (HBMR) programs, and Fiscal/Administrative.

The Community Development division works with a broad network of community-based partners to create an inclusive and equitable City where all residents can thrive. Specifically, MOHCD’s Community Development division:

- Manages local General Fund money to support programs that meet the essential needs of the city’s most vulnerable residents.
- Administers major federal grant programs, including the U.S. Department of Housing and Urban Development’s (HUD) Community Development Block Grant (CDBG) program and its Housing Opportunities for Persons with AIDS (HOPWA) program.
- Manages Housing Trust Fund to support housing stability services, as well as the Complete Neighborhoods program that supports community amenities in neighborhoods impacted by increased housing density.

Grounded in its Consolidated Plan and other City and community initiated strategic priorities, MOHCD provides more than \$300 million through competitive procurements to support community organizations and programs. MOHCD is the administrator of the SoMa Community Advisory Committee and a lead partner and investor in the community development stabilization funding specifically earmarked for investment in the SoMa planning areas.

MOHCD’s investments support the city’s most vulnerable residents by providing much needed services, strengthening civil society, and advancing individual and collective opportunity. It is imperative for the office to be intentional and explicit in meeting its goals of reducing racial disparities in service delivery and increasing social and economic opportunities within San Francisco.

### Racial Equity

In partnership with city and community leaders, MOHCD seeks to advance opportunities and improve programmatic outcomes for Black, Brown, and low-income residents. As such, MOHCD assesses programs, contracts, and procurements to ensure they advance the city’s racial equity goals and will be working closely with Contractors to monitor the impact of investments. Capacity building will be provided, as well as clear information and the creation of channels to give and receive feedback to ensure that all parties are aligned in the expectation to create an inclusive and equitable City where all residents can thrive. MOHCD also affirms its commitment to centering its work on culturally responsive solutions

developed by the people most impacted by social inequities. Furthermore, MOHCD seeks a contracting team that reflects the diversity of the City and, in particular, hire both residents and small businesses that are from the City’s most disadvantaged neighborhoods.

## 2. Scope of Work

This scope of work is a general guide to the work MOHCD expects to be performed and is not a complete listing of all services that may be required or desired.

To minimize duplication of effort and to allow MOHCD to coordinate data requests and data available for the project solicited within this RFQ, as well as for previous and future projects, the selected Contractors' findings and data may be shared by MOHCD with other City contractors, as deemed appropriate by the City.

With whom will the Contractors work? Selected Contractor(s) will work closely with the staff at MOHCD to provide the services requested.

### Services

The final terms of conditions of each awarded contract are subject to negotiation. Through this RFQ process, MOHCD is seeking proposals for the following one or more opportunities:

	Title	Term	Total Funding
1.	Community Engagement Process and SoMa Community Stabilization Fund Strategic Plan	12 months (with an option to extend the term for additional 12 months)	\$99,500

### 1. STRATEGIC PLANNING DEVELOPMENT DELIVERABLES

- a. **Literature Review** – Collect and review existing SoMa plans, including but not limited to the SoMa Community Stabilization Fund Strategic Plans (2008, 2011), Central SoMa Plan, Rincon Hill Plan, Cultural History, Housing, and Economic Sustainability Strategies (CHHESS) Reports for Cultural Districts within the boundaries of SoMa (SoMa Pilipinas, Leather and LGBTQ Cultural District, and Compton’s Transgender Cultural District), and Western SoMa Community Plan.
- b. **The Community Engagement Process**
  - i. **Facilitation** – Selected consultants will implement a robust community engagement effort that includes community focus groups, interviews, presenting recommendations, building community leadership, and addressing community-defined needs. The proposed approach would include in-person/hybrid focus groups (estimated up to 10), on-line meetings (estimated 4) and a hybrid on-line engagement process (e.g. in-person and on-line recruitment).
  - ii. **Center Resident Voices** – Ensure resident voices are provided the opportunity to define outcomes and priorities for the Fund. Foster community ownership of the Fund that will have both short and long-term impact.
  - iii. **Community Building** – Include children, youth, families and seniors in the outreach and planning process. Encourage community cohesion through relationship building and use the planning process as an opportunity for community empowerment.
- c. **Community Advisory Committee (CAC)**
  - i. **Reporting** – Selected consultants will provide periodic updates on the Community Engagement Process and the development of Impact and Evaluation Framework
  - ii. **Engagement** – Engage CAC members in the process of activating community voices by seeking connections to community groups and inviting members to participate in focus groups and community meetings.
- d. **Plan Development**
  - i. Develop a strategic investment plan based on findings from the community engagement process and literature review. The plan should include an outreach summary report for the completed community engagement plan as well as an impact and evaluation framework, as described below.

### 2. IMPACT AND EVALUATION FRAMEWORK DELIVERABLES

- a. **MOHCD's Grant Management System** – Work with MOHCD staff to understand the scope and confinements to MOHCD's Grant Management System (GMS).
- b. **Developing Performance Measures** – Building upon a review of best practices and the existing GMS system , develop performance indicators to be included in the Strategic Investment Plan.
- c. **Iteration** – As measures are developed within the Strategic Plan, provide updates to the CAC and incorporate feedback as appropriate.

- Develop and execute a communication and outreach strategy, including meeting facilitation to ensure the engagement of a representative, inclusive and diverse set of South of Market (SoMa) stakeholders. This strategy would embody an equity framework that accounts for disparities in race, gender and other protected categories, as well as for persons with potential barriers to community engagement.
- Gather and assist in the analysis of local data resources and best practices literature;
- Develop survey and other data collection tools and analyze information gathered from public and private Contractors and the general public as part of the SoMa Fund strategic planning process;
- Develop a needs analysis report based on findings from the community engagement process, secondary data analysis, and information and data from other City departments related to needs;
- Develop an outreach summary report for the completed community engagement process;
- Develop a plan for and facilitate strategy refinement workshops for the SoMa Fund Strategic Plan based on findings from the community engagement process, secondary data analysis as well as information and data from other City departments related to needs;
- Develop the SoMa Community Stabilization Fund Strategic Plan, based on findings from the community engagement process, secondary data analysis, and information and data from other City departments.

#### **RFQ Timeline**

RFQ issued	March 17, 2023
Webinar	March 22, 2023 at 11:00 am
Response to Questions Posted	March 31, 2023 at 5:00 pm
Deadline for RFQ response	April 14, 2023 5:00 pm
Potential interview and reference checks	April 24-28
Authorization of Expenditures (Board of Supervisors)	May 2023
Award notification	June 2023
<b>Tentative Contract term begins</b>	July 1, 2023

### 3. Response Requirements

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#### 3.1 Time and Place for Submission of Responses

Responses and all related materials must be received by **5:00 pm on Friday, April 14, 2023**. Responses must be emailed to [CommDevRFP@sfgov.org](mailto:CommDevRFP@sfgov.org) in a **single email**. Late submissions will not be considered. An email will be sent to confirm successful submission within three business days after the submission.

**3.2 Submission Elements** The following items must be included in your response and clearly labeled. When submitting package via email, subject line should be labeled **SoMa Strategic Plan RFQ 2022 Proposal**.

Complete, but concise responses, are recommended for ease of review by the evaluation team. Responses should provide a straightforward, concise description of the Proposer's capabilities to satisfy the requirements of the RFQ. All parts, pages, figures, and tables should be numbered and clearly labeled, in 11 font, 8x11/12 pages.

- 1) Cover Sheet Template (no page limit) - Applicants will use the Coversheet Template found in Appendix A to provide key information about the proposing agency and the types of services they will provide
  - a) Proposer information
  - b) Checklist for all required documents
  - c) Reference and Liability Form
- 2) Cover Letter (no page limit) - Please submit a letter of introduction signed by an individual authorized to obligate the Respondent to fulfill the commitments contained in the Qualification Statement. The letter must include the following:
  - a) Statement identifying the Lead Respondent is responding to this RFQ;
  - b) Brief overview of the Qualification Statements principal elements;
  - c) Demonstrated understanding of the City project objectives;
  - d) Statement of the Respondent's overall ability and qualifications to conduct the work;
  - e) Statement that the Respondent agrees to comply fully with the terms and conditions of the Agreements that can be found at [General Contract Terms and Conditions](#).
  - f) Statement that the Respondent agrees to fully comply with all applicable San Francisco laws as outlined in Section 3.
- 3) Qualification statement (7 pages max) – Provide sufficient information in the Qualifications Statement for the Selection Panel to evaluate the Respondent's ability to successfully complete the tasks outlined in the various scopes of service. Include in this section all of the following:
  - a) Demonstrated Experience of performing complex assignments
  - b) Describe Respondent background qualifications as outlined in section 3, commitment, strength, and technical capabilities to fulfill all services specified and required, to successfully complete the work;
  - c) Describe not more than three (3) projects completed in the last five (5) years similar in size and scope prepared by your firm including client, reference and telephone numbers, staff members who worked on each project, budget, schedule and project summary. Descriptions should be limited to one (1) page for each project; and
  - d) If joint consultants or sub-consultants are proposed, provide the above information for each. Note that full contact information for each of the three projects must be included and the City reserves the right to conduct reference checks on any of the project owners.
- 4) Project Approach and Scope of Work (10 pages max)
  - a) Describe the service your firm proposes to provide and how it will be provided. It is not necessary to address every item, however, Respondent must identify items that will and will not be provided and include any proposed enhancements.
  - b) For each of the services and activities that your firm proposes to provide to the City. Include the following information:
    - i) Overall approach for meeting the goals and objectives of the City's scope of service;
    - ii) Team organization, availability of individuals identified in the Qualifications Statement;
    - iii) Approach for coordinating/managing all work activities to meet project milestones and deliverable due dates;
    - iv) Processes/measures for controlling cost and schedule, tracking delivery/performance and maximizing QA/QC;
    - v) Approach for monitoring expended labor hours and tracking various factors affecting overall cost; and

- vi) Any special expertise to be provided for the various services requested.
- c) Include a critical path and milestones for key deliverables

- 5) Project Team Expertise/Skills of Assigned Staff (5 pages max) - Provide the following information:
  - a) Proposed team structure – include background, expertise, and authority of the staff person(s) who would prepare deliverables, depending on the scope of work, and key person on each proposed project team (e.g. who would be the key contact on the team to provide services). Include clarity, appropriateness, and value of the project leader's and background, expertise, and authority to represent the firm, and demonstrated ability to solve problems;
  - b) Explain the role of each additional person on the team will play in the applicable scope of work. Include background, expertise, and authority of the staff person(s) who would prepare deliverables, depending on the scope of work. Relevance of staff roles and responsibilities, experience, education and other qualifications of staff to services requested under this RFQ;
  - c) Written assurance that the key individuals listed and identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the City's prior approval;
  - d) Disclose whether any proposed staff have ever been removed or asked to resign from an engagement;
  - e) Provide resumes in Exhibit B to contain sufficient information in the Qualification Statement for the Selection Panel to evaluate the ability and experience of each key/lead team member to successfully fulfill their roles, and complete the scope of services.
- 6) Fee proposal – include costs (i.e. staffing, hours and deliverables) for services listed in #4. (no page limit)
- 7) Supporting documents (no page limit)
  - a) Exhibit A - Organizational Chart - The Organizational Chart must illustrate the team structure of all proposed staff specified by name and title as Exhibit A of the submitted Qualification Statement.
  - b) Exhibit B – Resumes for key persons on all project teams

Submission package must contain all elements, and be labeled correctly. Each document should include signatures, where applicable.

Respondents are advised to review all links found in the Cover Sheet Template Contract Requirements (Section 3) before beginning to work on Qualifications Statement or Project Approach, to ensure that City's requirements can be met.

## 4. Contract Requirements

### 4.1 Vendor Status

Proposer must fulfill the City's administrative requirements for doing business with the City and become a compliant vendor prior to contract award. Fulfillment is defined as completion, submission and approval by applicable City agencies of the forms and requirements referenced in RFQ. Proposer must fulfill the City's administrative requirements for doing business with the City and become a compliant supplier prior to contract award. The City highly recommends that Contractors at the time of Response submission fulfill the administrative requirements for doing business with the City. Please go to [Qualify to Do Business](#) for more information and supplemental forms.

If you are new to contracting with the City and County of San Francisco, we strongly encourage you submit your compliance forms at the time of the proposal submission.

### 4.2 Standard Contract Provisions

The successful Respondent will be required to enter into a contract substantially in the form of the Agreement for Professional Services. Failure to timely execute the contract, or to furnish any and all insurance certificates and policy endorsement, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another firm and may proceed against the original selectee for damages. Here is a sample of [it](#). Respondent are urged to pay special attention to the requirements of Administrative Code Chapters 12B and 12C, Nondiscrimination in Contracts and Benefits, (§10.5 in the Agreement); the Minimum

Compensation Ordinance (§10.7 in the Agreement); the Health Care Accountability Ordinance (§10.8 in the Agreement); the First Source Hiring Program (§10.9 in the Agreement); and applicable conflict of interest laws (§10.2 in the Agreement), as set forth in labeled paragraphs below.

#### **4.3 Nondiscrimination in Contracts and Benefits**

The successful Respondent will be required to agree to comply fully with and be bound by the provisions of Chapters 12B and 12C of the San Francisco Administrative Code prior to contract being awarded. Generally, Chapter 12B prohibits the City and County of San Francisco from entering into contracts or leases with any entity that discriminates in the provision of benefits between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of employees. The Chapter 12C requires nondiscrimination in contracts in public accommodation. Additional information on Chapters 12B and 12C is available on the CMD's website at [www.sfcmd.org](http://www.sfcmd.org).

#### **4.4 Minimum Compensation Ordinance (MCO)**

The successful Respondent will be required to agree to comply fully with and be bound by the provisions of the Minimum Compensation Ordinance (MCO), as set forth in S.F. Administrative Code Chapter 12P. Generally, this Ordinance requires contractors to provide employees covered by the Ordinance who do work funded under the contract with hourly gross compensation and paid and unpaid time off that meet certain minimum requirements. For the contractual requirements of the MCO, see §47.

For the amount of hourly gross compensation currently required under the MCO, see [www.sfgov.org/olse/mco](http://www.sfgov.org/olse/mco). Note that this hourly rate may increase on January 1 of each year and that contractors will be required to pay any such increases to covered employees during the term of the contract. Please go to [Minimum Wage Ordinance](#) for information.

#### **4.5 Health Care Accountability Ordinance (HCAO)**

The successful Respondent will be required to agree to comply fully with and be bound by the provisions of the Health Care Accountability Ordinance (HCAO), as set forth in S.F. Administrative Code Chapter 12Q. Contractors should consult the San Francisco Administrative Code to determine their compliance obligations under this chapter. Please go to [Health Care Accountability Ordinance \(HCAO\)](#) for more information.

#### **4.6 First Source Hiring Program (FSHP)**

If the contract is for more than \$50,000, then the First Source Hiring Program (Admin. Code Chapter 83) may apply. Generally, this ordinance requires contractors to notify the First Source Hiring Program of available entry-level jobs and provide the Workforce Development System with the first opportunity to refer qualified individuals for employment.

Contractors should consult the San Francisco Administrative Code to determine their compliance obligations under this chapter. Additional information regarding the FSHP is available on the web at <http://www.workforcedevelopmentsf.org/> and from the First Source Hiring Administrator, (415) 401-4960.

#### **4.7. Administrative Code Chapter 12X**

If awarded a Resulting Contract when selected from the Prequalified Pool, Proposer may be subject to the requirements of Administrative Code Chapter 12X, which prohibits the City from entering into a contract with a Proposer that has its headquarters in a state with laws that perpetuate discrimination against LGBTQ people; restrict abortion prior to the viability of the fetus; or suppress voting rights. The list of Covered States is available [here](#). When permitted, City, in its sole and absolute discretion, may elect to obtain a waiver to the requirements of Chapter 12X based on one or more exceptions permitted thereunder.

#### **4.8 Subcontracting**

Applicants may include subcontracting arrangements with other agencies; however, these arrangements must be made prior to submission of the proposal. Confirmation of a memorandum of understanding or other formal agreement between the applicant and subcontractor may be requested by MOHCD.



#### 4.9 Collaboratives

Collaboratives, i.e. joint ventures or a team of organizations with complementary skills and experience, are permitted to respond to this RFQ. Proposals from collaboratives must designate a lead agency to serve as the fiscal sponsor for the partners. The lead agency will be responsible for effectively planning and managing the delivery of services described in this RFQ. The lead agency must also demonstrate the management and financial capability needed to oversee the delivery of the proposed services and account for the contract funds for all collaborative partners.

#### 4.10 Contract Award

The selection process will include an evaluation of the minimum qualifications and written responses by MOHCD staff. MOHCD has the option of conducting oral interviews as part of the evaluation process. MOHCD will select the finalists with whom MOHCD staff shall commence contract negotiations. The selection of a proposal shall not imply acceptance by MOHCD of all terms of the proposal, which may be subject to further negotiation and approvals before MOHCD may be legally bound thereby. If a satisfactory contract cannot be negotiated in a reasonable time, MOHCD, in its sole discretion, may terminate negotiations and begin contract negotiations with another qualified proposer.

#### 4.11 LBE Sub consulting Participation Requirement

The LBE subcontracting goal for this solicitation is 0 percent.

#### 4.12 Rating Bonus

LBE Bid Discounts/Rating Bonuses shall be applicable to both the creation of the Prequalified Pool and selection from the Prequalified Pool once created, in accordance with the values shown below. Where the awarding Department's evaluation process for creating a Prequalified Pool takes into account pricing and/or involves scoring each Proposer, the rating bonus or bid discount, as the case may be, shall apply at each phase of the selection process for creating the Prequalified Pool. Additionally, where the awarding Department's evaluation process for selecting from a Prequalified Pool takes into account pricing and/or involves scoring, the rating bonus or bid discount, as the case may be, shall apply at each phase of the selection process for selecting from the Prequalified Pool.

1. A 10% bonus to a Small or Micro LBE—including Non-Profit; or a joint venture between or among LBEs; or
2. A 5% bid discount will be applied to an SBA-LBE, except that the 5% discount shall not be applied at any stage if it would adversely affect a Small LBE or Micro-LBE bidder; or
3. A 5% bonus to a joint venture with LBE participation that equals or exceeds 35%, but is under 40%; or
4. A 7.5% bonus to a joint venture with LBE participation that equals or exceeds 40%.

**Joint Venture Rating Bonus** If applying for a rating bonus as a joint venture, the LBE must be an active partner in the joint venture and perform work, manage the job and take financial risks in proportion to the required level of participation stated in the Proposal, and must be responsible for a clearly defined portion of the work to be performed and share in the ownership, control, management responsibilities, risks, and profits of the joint venture. The portion of the LBE joint venture's work shall be set forth in detail separately from the work to be performed by the non-LBE joint venture partner. The LBE joint venture's portion of the contract must be assigned a commercially useful function.

#### **CMD Forms Due with Proposal**

The CMD Forms listed below are due with the proposal.

- Form 2A CMD Contract Participation
- Form 3 CMD Non-Discrimination Affidavit
- Form 4 CMD Joint Venture Form (if applicable)
- Form 5 CMD Employment Form

The forms are located in CMD Attachment #2, which can be accessed at the CMD Website:  
<https://sf.gov/resource/2022/lbe-contract-requirements>



Failure to complete, sign, and submit each of the required CMD forms may result in the response package being deemed non-responsive and rejected.

**CMD Contact**

If you have any questions concerning the CMD forms or requirements, please contact James Chung, the CMD Contract Compliance Officer for this RFQ at (415) 617-9962 or [james.chung@sfgov.org](mailto:james.chung@sfgov.org).

**4.14 Chapters 12B and 12C Requirements (Equal Benefits)**

Effective June 1, 1997, Chapter 12B of the San Francisco Administrative Code was amended to prohibit the City from entering into contracts or leases with any entity that discriminates in the provision of benefits between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of employees. All proposing firms should be in the process of becoming compliant with Chapter 12B if not already compliant. The HRC has developed rules of procedure and various resource materials explaining the equal benefits program. These materials are available by calling the CMD Equal Benefits Section at (415) 581-2310 or by visiting the CMD website at [www.sfgov.org/cmd](http://www.sfgov.org/cmd).

## 5. Evaluation Criteria

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This section describes the guidelines used for analyzing and evaluating the responses and for Respondents. It is MOHCD's intent to pre-qualify three to five Proposers that will provide the best overall service packages to MOHCD. Consultant firms selected for pre-qualification are not guaranteed a contract. This RFQ does not in any way limit MOHCD's right to solicit contracts for similar or identical services if, in MOHCD's sole and absolute discretion, it determines the pre-qualified list is inadequate to satisfy its needs.

### 5.1 Evaluation Team

City staff and representatives with expertise in strategic planning, community engagement, analysis of fair housing and HIV housing, will serve as the Evaluation Team responsible for evaluating Proposers. Specifically, the team will be responsible for the evaluation and rating of the responses for pre-qualification, for conducting reference checks, and for interviews, if desired by MOHCD.

### 5.2 Qualifications

Any response that does not demonstrate that the Proposer meets the qualifications described above by the response deadline may be considered non-responsive and may not be evaluated or eligible for award of any subsequent contract(s).

Qualifying Proposers will have expertise in survey development and qualitative and quantitative data analysis, communications and outreach strategy development and implementation. Experience and/or familiarity with the South of Market neighborhood residents, small businesses, nonprofits and schools are preferred.

Proposers receiving a contract from this RFQ must be approved City suppliers or have started the process of becoming a City Supplier at time of proposal submission. See Section 3.

- MOHCD contracts are administered on a cost reimbursement basis. Contractors are reimbursed after invoicing for expenses incurred.
- No City agencies or departments may apply for funding under this RFQ.
- Additional requirements may be detailed under each funding opportunity description in Section 2.

### 5.3 Evaluation Criteria

Each RFQ response will be evaluated in accordance with the criteria below for each scope of work they seek to qualify for. If a Proposer applies for multiple projects, submit separate proposals for each project. Proposer with highest scores will be considered for the contract.

#### Written Response Evaluation (100 points)

- A. Qualification Statement (25 points)
  - a) Demonstrated experience of performing complex assignments
  - b) Describe and summarize Respondent's background qualifications as outlined in section 4.2, commitment, strength, and technical capabilities to fulfill all services specified and required, and successfully accomplish the work;
  - c) Proven ability to successfully meet the proposed scope of work outlined in this RFQ for the project which the Proposer is applying under.
  - d) Describe not more than three (3) projects completed in the last 10 years similar in size and scope prepared by your firm (or as an employee) including client, reference and telephone numbers, staff members who worked on each project, budget, schedule and project summary.
- B. Project Approach and Scope of Work (25 points)
  - e) Describe which services in Section 2 your firm proposes to provide and how each will be provided. It is not necessary to address every item, however, Respondent must identify items that will and will not be provided and include any proposed enhancements.
  - f) For each of the services and activities that your firm proposes to provide to the City. Include the following information:

- Overall approach for meeting the goals and objectives of the City's scope of service;
- Approach for coordinating/managing all work activities to meet project milestones and deliverable due dates;
- Processes/measures for controlling cost and schedule, tracking delivery/performance and maximizing QA/QC;
- Approach for monitoring expended labor hours and tracking various factors affecting overall cost; and
- Any special expertise to be provided for the project(s).

B. Project Team Expertise/Skills of Assigned Staff (30 points)

- a) Proposed team structure - include background, expertise, and authority of the staff person(s) who would prepare deliverables, depending on the scope of work, and key person on each proposed project team (e.g. who would be the key contact on the team to provide services). Include clarity, appropriateness, and value of each person's role, authority to represent the firm, and demonstrated ability to solve problems;
- b) Proposed team structure – include background, expertise, and authority of the staff person(s)
- c) Written assurance that the key individuals listed and identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the City's prior approval;
- d) Disclose whether any proposed staff have ever been removed or asked to resign from an engagement;
- e) Provide resumes in Exhibit B to contain sufficient information for the Selection Panel to evaluate the ability and experience of each key/lead team member to successfully fulfill their roles, and complete the scope of services.

C. Fee Proposal (10 points)

1. Appropriateness and reasonableness of fees.

D. Innovation (10 points)

1. Response conforms with RFQ requirements and concisely but comprehensively addresses RFQ requirements;
2. Response presents and innovative approach to meeting the project deliverables, grounded in knowledge of the SoMa community. .

MOHCD will average the initial reviewers scores for each proposal to generate its final score. This will ensure all proposals have a final score out of 100 points. Final scores allow MOHCD to develop a final ranking of eligible proposals for each funding opportunity.

MOHCD will release intent to award letter in June 2023.

## 5.4 Contractor Selection Processes

Proposers with highest score will be eligible for potential contract negotiations with MOHCD. Due to the specific nature of the services to be performed, MOHCD reserves the right to contract with any, all or none of the qualified Proposers.

### Selection Interviews

Following MOHCD's determination, MOHCD may invite qualified Proposers to interview with MOHCD for specific projects or MOHCD may select specific prequalified Proposers directly for negotiations without additional selection processes. MOHCD has sole and absolute discretion over whether interviews will be conducted or not to select pre-qualified Proposers for contract negotiations. If interviews are conducted, points awarded for interviews will be separate from the points awarded during the pre-qualification process. The pre-qualified Proposer's lead staff members who would be responsible for the proposed project on a day-to-day basis should be present for the interview.

### Reference Checks

Reference checks may be used to determine the applicability of Proposer's experience to the services MOHCD is requesting and the quality of services and staffing provided to prior clients, as well as adherence to schedules/budgets and Proposer's problem-solving, project management, and communication abilities, as well as performance on deliverables and outcomes, as well as effectiveness in meeting or exceeding project objectives. Please see Attachment I, Section 14, Release of Liability.

### Other Terms and Conditions

If a satisfactory contract cannot be negotiated in a reasonable time with any Proposer, then MOHCD, in its sole discretion, may terminate negotiations and begin contract negotiations with any other remaining qualified Proposers.

MOHCD, in its sole discretion, has the right to approve or disapprove any staff person assigned to a Proposer's projects before and throughout the contract term. MOHCD reserves the right at any time to approve, disapprove, or modify proposed project plans, timelines and deliverables.

## **6. Protest Procedures**

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### **6.1 Protest of Non-Responsiveness Determination**

Proposals will be determined as non-responsive if they are incomplete, or undelivered. If we determine your proposal to be non-responsive, we will inform you. Applicants may appeal a determination of non-responsiveness to this RFQ by submitting notice by email to MOHCD setting forth the grounds for the appeal by no later than five (5) business days after receiving MOHCD's determination.

### **6.2 Protest of Selection of Consultant**

Contractors will be notified if a proposal was not selected for an award. If there is disagreement with the decision, Contractors may file a formal appeal within five (5) business days of the award announcement. MOHCD must receive the appeal on or before the fifth business day.

The appeal must include a written statement of each of the grounds for appeal. An individual authorized to represent the Proposer must submit the appeal by email to [CommDevRFP@sfgov.org](mailto:CommDevRFP@sfgov.org). The appeal must cite all applicable laws, rules, procedures, or provisions that we did not follow faithfully, as documented in this RFQ. The appeal must specify facts and evidence enough for us to determine its validity. Disagreements about program quality or value do not constitute grounds for appeal. Failure to object or appeal in the manner and within the times set forth above will constitute a complete and irrevocable waiver of any appeal of MOHCD's decision.

### **6.3 Delivery of Protests**

MOHCD will only accept appeals of non-responsiveness or an award decision by email. It is the responsibility of applicants to ensure email delivery prior to the deadline specified.

A panel selected by MOHCD will review all eligible appeals, and the panel decisions will be final. If necessary, we will schedule a meeting with the Proposer within ten (10) calendar days of receiving the appeal.

**MOHCD**  
**SoMa Community Stabilization Fund**  
**5-year Strategic Planning Process**  
**Coversheet Template**

**Part I - Proposer Information**

Name of Firm:	
Headquarter Address:	
Phone No.:	
Toll Free Phone No.:	
Contact Name & Title:	
E-mail:	
SF Supplier ID:	
Federal Tax ID:	
Payment Terms:	
Person Preparing Bid:	
Local Representative Name and Number:	

**Main Point of Contact:**

Telephone:	
Fax:	
Email:	

## Part II - Proposer Questionnaire

Question	Yes	No
<b>1. Have you registered as a Supplier, through the Supplier Portal (<a href="https://sfcitypartner.sfgov.org/">https://sfcitypartner.sfgov.org/</a>)?</b> If yes, what is your Supplier ID ? _____		
<b>2. Has your company enrolled with Paymode-X to receive electronic payments from the City?</b> <a href="https://www.paymode.com/city_countyofsanfrancisco">https://www.paymode.com/city_countyofsanfrancisco</a>		
<b>3. Have you registered your business with the San Francisco Treasurer &amp; Tax Collector as required prior to submission of any Proposal?</b>  Enter your Business Tax Registration ID here: _____		
<b>4. Are you claiming LBE/SBE preference on this solicitation per Chapter 14B?</b> Note: To claim LBE/SBE preference for this solicitation, you must be certified in the following certification categories by the Proposal Due Date: SBE /LBE San Francisco CMD LBE Certification Program † SBE State of California, General Services SBE Program DBE California Unified Certification Program (CUCP) DBE Program		
<b>5. Have you submitted with your Proposal all the <u>Minimum Qualification Statement</u> outlined in the accompanying solicitation document?</b> If you reply NO to any document, please explain.		
<b>6. Have you submitted with your Proposal a <u>Fee Proposal</u> that complies with the requirements of the accompanying solicitation document?</b> If you reply NO to any document, please explain.		
<b>7. Have you submitted with your Proposal, the <u>Proposal Approach and Scope of Work</u> that complies with the requirements of the accompanying solicitation document?</b> If you reply NO to any document, please explain.		
<b>8. Have you submitted with your Proposal all the <u>Required Supporting Documentation</u> outlined in the accompanying solicitation document?</b> If you reply NO to any document, please explain.		
<b>9. Have you submitted with your Proposal the following documents?</b> <ul style="list-style-type: none"> <li>Form 2A CMD Contract Participation</li> <li>Form 3 CMD Non-Discrimination Affidavit</li> <li>Form 4 CMD Joint Venture Form (if applicable)</li> <li>Form 5 CMD Employment Form</li> </ul>		

**Part III**  
**Proposer References**

All proposers, including current Contractor, must provide references for at least **three (3)** organizations of the approximate size and volume comparable to commodities and/or services described in this Solicitation. Upon request, successful proposer(s) may also be required to submit a letter of reference from each reference listed within five (5) days of notification. Failure to do so may result in rejection of proposal.

1.	Name of Company	
	Address (street, city, state, zip)	
	Contact Name	
	Phone No.	
	Email	
	Number of Years Providing Service	
2.	Name of Company	
	Address (street, city, state, zip)	
	Contact Name	
	Phone No.	
	Email	
	Number of Years Providing Service	
3.	Name of Company	
	Address (street, city, state, zip)	
	Contact Name	
	Phone No.	
	Email	
	Number of Years Providing Service	



**Part IV**

**Proposer Release of Liability for References**

The undersigned hereby fully and forever release, exonerate, discharge and covenant not to sue the City, its commissions and boards, officers and employees, and all individuals, entities and firms providing information, comments, or conclusions ("Reference Information") in response to inquiries that the City may make regarding the qualifications or experience of a Prime proposer, proposed joint venture partner, proposed subconsultant or proposed key/lead team member in connection with the selection process for **SoMa Fund Strategic Planning Process** from and for any and all claims, causes of action, demands, damages, and any and all liabilities of any kind or description, in law, equity, or otherwise arising out of the provision of said Reference Information. This Release and Waiver is freely given and will be applicable whether or not the responses by said individuals, entities or firms are accurate or not, or made willfully or negligently.

Company Name

Signature of Authorized Representative of Company

Date

Print Name and Title

**Part V.**  
**Proposer Certification of Truth, Accuracy, and Completeness**

I certify that based on information and belief formed after reasonable inquiry, the statements and information contained in this document are true, accurate, and complete.

Company Name

Signature of Authorized Representative of Company

Date

Print Name and Title