

## Starting RFP Checklist:

- This is the RFP Template for CONTRACTS (P-600)
- CDA language (DAS Only) is highlighted in yellow throughout the document – if RFP is CDA funded, do not remove or edit any of the highlighted language. If not CDA funded, remove or edit as needed.

### General Considerations before Using this Template

**COMPLETE ALL GREEN FIELDS.**  
**DELETE ALL BLUE INSTRUCTIONS AND GUIDANCE PRIOR TO ISSUANCE.**

#### **I. INTENDED USE OF THE RFP TEMPLATE:**

This Request for Proposals (RFP) template is intended for Best Value solicitations, where price is not the only determining factor in selecting one proposal over another.

#### **II. PRIMARY CHAPTER 21 TRANSACTION TYPES**

**"Commodity"** means products, including materials, equipment and supplies, purchased by the City.

- Commodities are generally procured by OCA unless delegated to a department on a case-by-case basis.

**"General Services"** means those services that are not Professional Services. General Services include, but are not limited to, janitorial, security guard, pest control, parking lot management, and landscaping services.

- General Services are generally procured by OCA unless delegated to a department on a case-by-case basis.
- Includes equipment maintenance.

**"Contract"** means an award of funds to a Contractor for, or in furtherance of, a Public Purpose, which is paid from monies deposited in the treasury of the City, and which is not required to be repaid except upon default by the Contractor. "Contract" does not include contracts (1) for public works or improvements under Administrative Code [Chapter 6](#); (2) for the City purchase, sale, lease, use, or development of real property; (3) for the City purchase of Commodities or Services under Administrative Code [Chapter 21](#); or (4) to provide financial assistance such as a loan or loan guarantee, an interest rate subsidy, tax relief, or tax credit. "Grant" also does not include grants or assistance to individuals under City service or assistance programs, rebates or incentives. Departments administering rebate or incentive programs must comply with Section [21G.12](#).

**"Professional Services"** means those services which require extended analysis, the exercise of discretion and independent judgment in their performance, and/or the application of an advanced, specialized type of knowledge, expertise, or training customarily acquired either by a prolonged course of study or equivalent experience in the field. Professional service providers include, but are not limited to, licensed professionals such

as architects, engineers, and accountants, and non-licensed professionals such as software developers and financial consultants. These are Contracts, not Grant Agreements. Please use P-600.

### **The following do not fall under Grants:**

#### **Other Chapter 21 Transactions**

- Equipment Lease Agreements
- Software License and Support Agreements.

#### **Non-Chapter 21 (aka “Non-Purchasing”) Transactions**

- Membership Dues
- Conference Fees
- Regulatory Fees
- Government Licensing Fees
- Federal, State or Regional Parks and Bridges Fees
- Application Fees
- Fines
- Taxes
- Stamps or mailboxes purchased from the United States Postal Service
- Other transactions of similar nature as those above

### **III. RESPONSIBILITY TO MAINTAIN CONFIDENTIALITY**

Any City employee involved in the development of a solicitation (RFP, RFQ, IB, etc.) for a City contract will have access to confidential information regarding the contract requirements, such as product specifications, scope of work, vendor qualifications, and the contractor selection process. Every City employee has a duty to preserve the integrity of the City’s public contracting process. **As such, City employees are restricted from the following:**

1. **Releasing or providing ANY Information concerning the scope of services, minimum qualifications, contractor selection, and/or any other non-public information contained in any solicitation document that could provide an unfair advantage to a prospective bidder/proposer prior to issuance for public bid.** This information must remain confidential until the City awards a contract to the selected contractor(s) or the solicitation is canceled.
2. **Discussing confidential information with City employees that are not assigned to work on this solicitation.** However, consultation with City staff not directly involved in the solicitation may sometimes be required when developing a solicitation. Exercise care when discussing solicitation details with staff you may need to consult with.

#### **Additionally, City employees are responsible for:**

1. **Securing all solicitation-related documents such that they are not knowingly or inadvertently made available to external parties or non-authorized recipients.** This includes, for example, limiting communications regarding content of the solicitation and/or the overall consultant selection process in email communications, which could be sent to non-authorized recipients, and/or password protecting solicitation documents.
2. **Disclosing any potential or actual conflicts of interest related to this RFP throughout the duration of the solicitation to the appropriate authority** (contracting department/division, department head, etc.).

Once advertised, immediately direct all inquiries, questions, or other communications with internal or external persons regarding a solicitation to the contract administrator for the solicitation. This ensures fair dissemination of information to all potential bidders. **Any direct communication with bidders/proposers conveying information related to the solicitation is expressly prohibited from the time of developing the solicitation, through advertisement, to award of contract.**

#### **IV. BEST VALUE AND POST AWARD NEGOTIATIONS**

Best Value solicitation is appropriate when factors other than price (e.g. quality, expertise) are also important. Because a Best Value solicitation requires a great deal of judgment, it is imperative that all Best Value solicitations clearly define how such judgement will be exercised and the metrics that will be used to evaluate proposals. While a Best Value solicitation may require that proposers accept all terms and conditions as-is, a department may elect to allow for contract negotiations post-award, *so long as those negotiations do not change the essence of what was requested in the RFP or otherwise impact the selected proposer's score/ranking*. For example, if negotiations lead to City removing from the selected proposer's contract certain tasks that were required from all proposers during the solicitation phase, City should determine what impact this decision would have had if it had been applied to those proposers whose proposals were not accepted. By way of another example, if negotiations lead to a higher price that, if accepted, would revise the selected proposer's score such that it no longer would be ranked first place, the decision to accept the revised pricing should be carefully analyzed to determine its impact on those proposers whose proposals were not accepted.

#### **V. FORMAL vs. INFORMAL SOLICITATIONS & LBE SUBCONTRACTING REQUIREMENTS BASED ON MINIMUM COMPETITIVE AMOUNTS**

The "Minimum Competitive Amount" (MCA) has two primary roles in City contracting: First, it determines to whom a solicitation may be directed. Second, it determines if LBE subcontracting requirements must apply. The MCA is adjusted every few years. Below are the most recent values and their effective dates.

##### **A. Solicitation Audience**

1. **RFPs:** If the anticipated contract will be greater than the MCA, departments must conduct the solicitation publicly. Departments are encouraged to post their solicitation using PeopleSoft to ensure maximum exposure.
2. **Informal Bids (IBs):**
  - a) If the anticipated contract will be less than or equal to the MCA, departments may choose to conduct an "informal" solicitation instead of a public one. Used in this context, informal simply means that the solicitation may be limited to a minimum of three suppliers. ***Where a solicitation was done informally and not through a public solicitation, departments may not amend their resulting contracts for amounts greater than the MCA in effect at the time advertised.***
  - b) Contracts awarded through an informal solicitation are subject to all City contracting requirements based on their respective dollar thresholds.
  - c) **Micro LBE Set Asides and SF First (ONLY FOR GENERAL FUND CONTRACTS).** The MCA was developed with the intent to direct transactions under the MCA to Small and Micro LBEs. Therefore, Departments should first consider if the solicitation can be limited to Micro LBE's as part of the City's Micro LBE Set Aside Program. This program requires, among other things, that departments award to Micro LBEs a minimum of 25% of purchases/contracts greater than \$10,000 but less than or equal to the MCA. If the solicitation is not appropriate for the Micro LBE Set Aside Program, departments should ensure they include Micro and Small LBEs to the full extent possible pursuant to the SF First Program Guidelines. To learn more about the Micro LBE and SF First Programs, contact CMD or [click here](#).

<b>Formal and Informal Solicitations Effective 1/1/2025 (Based on Chapter 14Bs MCA)</b>		
	<b>Informal Solicitation Thresholds</b>	<b>Formal (Public) Solicitation Thresholds</b>
<b>Commodities</b>	< \$230,000	≥ \$230,000

<b>General Services</b>	< \$1,170,000	≥ \$1,170,000
<b>Professional Services</b>	< \$230,000	≥ \$230,000

## **VII. CIVIL SERVICE OR PROP J APPROVAL FOR SERVICES CONTRACTS (NOT GRANTS)**

Where the awarded contract is primarily for services, Civil Service Commission (CSC) or Prop J approval shall be required. Departments must ensure CSC or Prop J approval is obtained prior to the certification of any contract resulting from the solicitation in accordance with CSC guidelines.

## **VIII. FORM SFEC-126F2 DUE 30 DAYS FROM RECEIPT OF PROPOSALS (ONLY IF >\$10 MILLION)**

Under San Francisco Campaign & Governmental Conduct Code Section 1.126(f)(2), a City department must notify the Ethics Commission if it receives a proposal for a contract that:

- (A) has a value of \$100,000 or more in a fiscal year; and
- (B) will require the approval of a City elective officer (or a board on which a City elective officer serves or a state agency on whose board the officer’s appointee serves).

Departments may designate any employee in the department to file Form SFEC-126f2 on the department’s behalf. It is also possible to have one employee initiate and complete the form and another employee sign and file the form; however, a single employee may act in both the initiator and signer role.

Form SFEC-126f2 must be filed with the Ethics Commission within **thirty days** of the department receiving the proposal. To learn more about Form SFEC-126F2, [click here](#).

## **X. CYBERSECURITY RISK ASSESSMENT**

The following represent additional cybersecurity risk to the City:

1. **Any transaction (Technology and Non-Technology) granting a contractor access to Level 3-5 data:** Contractors that have access to and/or store Level 3-5 **CITY** data on their systems during the performance of the contract. Level 3-5 data includes sensitive and compliance related data, such as HIPAA, CJIS, and IRS data. Please refer to COIT data classification standard: <https://sf.gov/resource/2021/data-classification-standard>.
2. **Purchasing Cloud Services for CITY:** This includes all forms of cloud computing, including but not limited to: Software as a Service (SaaS), Platform as a Service (PaaS), and Infrastructure as a Service (IaaS).
3. **Purchasing Operational Technology Systems for CITY.** Operational technology or OT is a category of computing and communication systems used to manage, monitor and control industrial operations with a focus on the physical devices and processes they use. OT is the hardware and software that keeps such things as factories, power plants, building, facility equipment, etc. running.
4. **Technical Services that Enable Access to City Systems:** These include all instances where a non-City employee is given access of any kind to City networks or systems (e.g., IT support, software installation, etc.).

## **REVISION HISTORY**

- 11/6/25 – Updated Section I.A.3 and I.G for DEI and Target Population Language (VL) – RD
- 11/21/25 – Revised Organizational Capacity #3 & #4 (Section IV.B); Combined items c. & d. (Section III.C.6.) jgg
- 11/25/25- I.A.3. – Changed name to “Cultural Competency” and changes to section III.C.5.d and IV.B.4.
- 12/8/25 – Revised wording for Organizational Capacity: III.C.5.d; IV.B.4; and X.Org. 4 (per CAT) jgg
- 12/12/25 – Added instructions for I. H. Eligibility jgg
- 1/13/26 – Updated HCAO language – LL
- 1/16/26 – Updated CDA/Federal instructions & language in Section VIII. F. – jgg

2/5/26 – Updated Sections III.C.5/IV. B. 3/X. Organizational 3; changed dates instructions for Evaluation and Award Notice; fixed Footer issue on pg 1; updated received/submitted language on Cover page/Section I. E. chart/Section III. A; added 3pm **PST**; changed Respondent to Proposer throughout; changed font per CAT - jgg

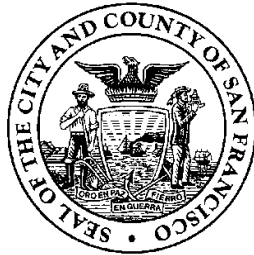
2/5/26 – Revised Format (pg 5) to read **12-point sans serif font (i.e. Calibri, Tahoma, Helvetica)** - jgg

2/12 – revised CDA language/instructions (I.C. & VIII.F) and removed one (1) from proposal format (III.A) – LL

3/18 – Updated HCAO instructions – jgg

**City and County of San Francisco  
Human Services Agency**

**Request for Proposals [#XXX] for:  
[Project Description]**



Request for Proposals Issued: [DATE]  
Pre-Proposal Conference: [DATE and TIME]  
Deadline for Proposals: *min 21 days; 45 for DAS* [DATE, 3:00pm PST]

➔ **REMINDER TO UPDATE THE TABLE OF CONTENTS BEFORE PUBLISHING. HOVER ANYWHERE OVER THE TABLE WITH YOUR MOUSE AND CLICK THE RIGHT BUTTON ON YOUR MOUSE TO BRING UP THE UPDATE MENU. – RIGHT CLICK, THEN CLICK “UPDATE FIELD”, THEN CLICK “UPDATE PAGE NUMBERS ONLY”.**

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**Attachments**

Attachment 1: Contract Agreement (form P-600)

Attachment 2: Budget Forms (11-24) [Provide budget Form if different from standard form]

Attachment 3: Appendix J – Privacy and Confidentiality [Attach if data sharing or city system access is required]

Attachment 4: Other Supporting Documentation from Program [suggest inserting a link instead of attachments]

# I. INTRODUCTION AND SOLICITATION SCHEDULE

## A. Introduction

### 1. General

The San Francisco Human Services Agency (SFHSA) announces its intent to seek proposals from organizations interested in providing [Generally describe the nature of the project, or services desired].

### 2. Background

[Insert Background]

### 3. Cultural Competency

The Department is committed to a culture of inclusion in which our differences are celebrated. A guiding principle in our work is that everyone should have equitable access to what they need in order to thrive, no matter their race, age, ability, gender, sexual orientation, ethnicity, or country of origin. We believe that a diverse and inclusive workforce will produce more creative and innovative outcomes for the organization, and ultimately, its clients. The Department is committed to addressing the disparate impact of historical limits on access to governmental services, advancing equity in all aspects of our work, ensuring access to services, and providing support to all communities to ensure their ability to succeed and thrive.

Through this request for proposals, the Department seeks to partner with community-based organizations that share these commitments to ensuring access to services to all eligible people, including but not limited to those who have been historically underserved and who have faced challenges due to language, socioeconomic, gender, racial, ability, and other barriers.

The Department asks that respondents to this request for proposals share details about their organizational and programmatic operations that relate to diversity, equity, and inclusion. This may include a description of the organization's plans, strategies, and activities to ensure that it provides equitable access to job applicants and program participants. It may also include a description of the organization's efforts to review its policies and practices through the lens of diversity, equity, and inclusion to identify areas for improvement. Additional examples of information that may be provided include: the organizational mission and/or inclusion statements; non-discrimination policy documents; community outreach plans; communication strategies to address program recipients who have historically been excluded from participation; and staff training activities regarding diversity, equity, and inclusion.

Proposers should not submit, and the City will not consider any demographic data about the racial, age, ability, gender, sexual orientation, ethnic, or national origin of Proposer's staff, leadership, and/or board of directors.

### 4. Selection Overview

The City shall award a contract to one/multiple (pick one) Proposer(s) that meet(s) the Minimum Qualifications of this Solicitation and obtain(s) the highest-ranking scores. Responsive Proposals will be evaluated by a panel ("Evaluation Panel") consisting of one or

more parties with expertise related to goods and/or services being procured through this Solicitation. The Evaluation Panel may include staff from various City departments. Proposals will be evaluated based on the criteria outlined herein.

### **B. Anticipated Term**

A contract awarded pursuant to this Solicitation shall have a tentative term of four (4) years from [start date] to [end date] (If term is not for full 4 years, may want to add “with an option to extend for XXX additional year(s) through end date”), subject to annual availability of funds, annual satisfactory of contractor performance, and need. SFHSA reserves the right to enter into contracts of a shorter duration. [Maximum of 4 years]

### **C. Anticipated Not to Exceed Amount**

**The total estimated annual funding for this RFP is approximately [\$XXX,XXX] per year, which may increase or decrease depending on funding availability. The funding amounts listed in this RFP are anticipated initial funding awards, based on current budget availability.** The source of funding for these services is state, federal, and local funds. Funding for this RFP may include California Department of Aging (CDA) funds. If so, contractors will be required to follow CDA rules and regulations referenced in Section VIII. F. Actual awards will be determined by the number of responsive proposals that meet the Department’s strategies and objectives, and funding may be less or more. **Please submit budget requests according to the limits in this RFP.** SFHSA may negotiate different funding allocations, contract terms, and project goals before finalizing awards. Should additional funding become available, award amounts may be increased significantly beyond the originally anticipated amount at a level commensurate to the details in the RFP.

**Only for Nonprofits:** SFHSA will add Cost Of Doing Business (CODB) escalators to reflect the approved City Budget to the awarded annual amount set forth by the Controller’s Office Indexed Rate after contract award. CODB may be adjusted annually as authorized by the San Francisco Board of Supervisors. For the purpose of this solicitation, proposers should submit a flat annual budget that is listed in the prior paragraph. Proposers acknowledge that City budget decisions are subject to the discretion of its Mayor and Board of Supervisors and are not entitled to CODB. Proposers assume all risk of possible non-appropriation or non-certification of funds. For more information regarding the Controller’s Policy on Multi-Year Contracting with Inflation Rates for Nonprofit Suppliers Issued: <https://openbook.sfgov.org/webreports/details3.aspx?id=3366>

All decisions regarding the size, length, and scope of future funding awards are subject to SFHSA approval and budget availability. Some of the service areas may not be funded initially, but the Department may award unfunded proposals within the term of this RFP if funds become available that align with the services proposed. Future funding is not guaranteed, and funding amounts and terms will depend upon the performance of the contractor during the initial award period, as well as other policy considerations as determined by SFHSA. SFHSA reserves the right, in its sole discretion, to not renew funding awards.

**D. Cooperative Agreement**

Any other City department, public entity or nonprofit made up of multiple public entities, may use the results of this Solicitation to obtain some or all of the commodities or services to be provided by proposer under the same terms and conditions of any contract awarded pursuant to this Solicitation.

**E. Solicitation Schedule**

The anticipated schedule for this Solicitation is set forth below. These dates are tentative and subject to change.

Pre-Proposal conference – approx. one week after the RFP issue date

Letter of intent deadline – approx. two weeks after the RFP issue date (not common)

Deadline for submission of questions – 2-3 days after bidders conference

Proposals due – approx. 4 weeks after RFP issue date

Evaluation of Proposal – Estimate range only

Notice of Award – Estimate range only

Proposal Phase	Tentative Date
Request for Proposals Issued	[DATE]
Pre-Proposal Conference (virtual)	[DATE and TIME]
Letter of Intent Deadline	[DATE] at 3:00pm PST
Deadline for Written Questions	[DATE] at 3:00pm PST
Deadline for Proposals	[DATE] at 3:00pm PST
Tentative Evaluation of Proposals	[DATE]
Tentative Notice of Award	[DATE]
Tentative Date Services Begin	[DATE]

**F. Definitions (include the following as applicable; add more as needed)**

CARBON	SFHSA’s web-based Contracts Administration, Reporting, and Billing Online system
City	City and County of San Francisco, a municipal corporation
DAS	Department of Disability and Aging Services
Service Unit	Required if CDA funding
SFHSA	San Francisco Human Services Agency

**G. Target Population**

**USE THE LANGUAGE BELOW TO THE EXTENT YOU WANT TO INCLUDE TARGET POPULATION LANGUAGE IN RFPs OR APPENDIX A/SCOPE OF WORK.**

- **DAS RFPs – DO NOT REVISE LANGUAGE WITHOUT CAT APPROVAL**
- **DHS RFPs – REVISE AS NEEDED**

This program is designed to serve all people regardless of race, gender, ethnicity, or social economic status. To ensure outreach efforts are made to reach the most vulnerable people who can benefit from this program, Contractor shall ensure that program services are accessible to:

1. Persons with low to moderate income
2. Persons who are socially isolated
3. Persons with limited English-speaking proficiency

4. Persons from communities of color or communities that have historically been under-served
5. Members of the LGBTQIA+ community
6. Persons at risk of institutionalization

**H. Program Eligibility (if this section does not apply, just delete H entirely)**

[Description of Program Eligibility]

**II. SCOPE OF WORK**

The Scope of Work is to be used as a general guide and is not intended to be a complete list of all work necessary to complete the project. Proposers should use this description when designing their proposed programs. However, proposers may suggest modifications and/or additions that will, in their estimation, make the program more feasible, effective, and sustainable. The description below outlines the key program elements and services the selected vendor(s) will provide.

**A. Description of Services**

[Describe in detail the service or work that is being contracted for.]

[List work tasks below]

- 1.
- 2.

The minimum units of services to be provided through this funding is [insert number]. [Make sure to define Service Unit in the definitions section above.]

**B. Objectives**

Proposers should state in measurable, quantifiable terms the service and outcome objectives they will achieve in providing these services. The major purpose of objectives is to measure quantity, quality, and impact of services. In measuring these areas, a balance should be created between the value of the information and the time/effort required to collect the information. The objectives stated in the proposal may be incorporated as part of the program's evaluation plan. The objectives specified here should align with the services to be provided.

**1. Services Objectives**

Choose one of the following options: Option 1 if you want proposers to develop their own specific service objectives. Option 2 if the service objectives are set by program.

[Option 1] As part of the proposal, the proposer will be required to develop specific service objectives that measure the quantity and other aspects of services. The objectives should state the target quantities and match the program services as proposed.

[Option 2] During the contract term, Proposer shall meet the following service objectives:

a. [Insert Service objectives]

**2. Outcome Objectives**

Choose one of the following options: Option 1 if you want proposers to develop their own specific outcome objectives. Option 2 if the outcome objectives are set by program.

[Option 1] As part of the proposal, the proposer will be required to develop specific outcome objectives that demonstrate and measure the impact, outcomes, or results of services. Both quantitative and qualitative analysis shall be applied to measure program efficiency and effectiveness. The outcome objectives specified below will be required for each contract.

[Option 2] During the contract term, Proposer shall meet the following outcome objectives:

**a. [Insert Outcome objectives]**

**C. Reporting Requirements**

**1. [Insert Reporting Requirements]**

**III. SUBMISSION REQUIREMENTS**

**A. Time and Place for Submission of Proposals**

Proposers shall submit an electronic pdf copy of the proposal and an electronic Excel copy of the budget to [\[Contract Manager's Email\]](#) and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org). Electronic file title should include RFP number, agency name, number of files submitted i.e. 1 of 4. Proposals must be received by 3:00pm PST on [\[insert date\]](#). Late proposals, supplemental documents, or revisions will not be accepted after the deadline.

**Disclaimer:** Proposers are solely responsible for ensuring that their proposals and all required documents are successfully received by SFHSA by the stated deadline. Email transmission delays, file size limitations, or technical issues on the proposer's side will not justify late receipt. SFHSA strongly recommends submitting proposals well in advance of the deadline and confirming receipt with both designated email addresses. Proposals received after the deadline will not be accepted.

**Department staff will confirm receipt of all proposal submissions within one (1) business day after the deadline for receipt noted above.**

**B. Format**

Proposals must be created using a word processing software (e.g. Microsoft Word or Excel); typed in a 12-point sans serif font (i.e. Calibri, Tahoma, Helvetica); text should be double-spaced and unjustified (i.e., with a ragged-right margin); page margins should be at least 1" on all sides (excluding headers and footers).

**C. Content**

Organizations interested in responding to this RFP must submit the following information, in the order specified below. All proposals for funding must be developed using the format below. This is necessary so that all proposals can receive fair and equal evaluation. Incomplete Proposals or Proposals not following the required format may result in not being considered for funding. Information must be at a level of detail that enables effective evaluation and comparison between proposals by the Proposal Evaluation Panel. The proposer must ensure that the proposal addresses the Selection Criteria.

**1. Table of Contents**

Each proposal package should contain a complete table of contents showing page numbers. All pages in the package must be numbered consecutively, and major sections must be

indexed.

**2. RFP Cover Page – (use form provided in Section IX)**

Submit the cover page signed by a person authorized to obligate the organization to perform the commitments contained in the proposal. Submission of this document will constitute a representation by the organization that the organization is willing and able to perform the commitments contained in the proposal.

**3. Minimum Qualifications – up to 3 pages**

All agencies submitting proposals for funding must provide a *Minimum Qualifications Documentation* describing in detail how the responding agency meets each of the Minimum Qualifications. Any proposals failing to demonstrate these qualifications will be considered non-responsive and will not be eligible for proposal review/award. (refer to section IV, Item A)

**4. Contracts/Grants (both public and private) – up to 2 pages**

Agencies should submit a statement listing relevant contracts and grants with a description of the services which have been completed during the last three (3) years. The statement must also list any failure or refusal to complete a contract or grant, including details and dates. Include any unresolved and/or outstanding findings from any program or fiscal/compliance visits done by the City. If no outstanding issues exist, provide a statement that your agency is in full compliance with program and fiscal monitoring. Provide disclosure of any litigation including proposer, subcontracts, or any principal officers thereof in connection with any contract or grant.

**5. Organizational Capacity – up to 5 pages (not including resumes/job descriptions)**

Description of your agency's ability to deliver the services proposed in this RFP. In addition, please address the following: [these should align with sections IV.B and X; wording for anything in yellow cannot be changed if CDA, otherwise okay to edit]

- a. Briefly explain how your organization is qualified to implement the proposed services. Demonstrate your management/supervisory infrastructure, as well as your administrative/financial capacity to deliver the proposed services.
- b. Describe your experience with/history of successfully providing these services, and serving this population/community. Describe recently completed projects, including quality, requirements, timelines, and/or success. Demonstrate ability to implement new programming and/or services.
- c. Describe the staffing patterns needed to provide the proposed services. Clearly identify whether services will be performed by existing staff or proposed staff. Attach job descriptions and resumes of key program staff. Job descriptions should include the appropriate experience/qualifications/skills for the project, a realistic description of tasks to be performed, and a reasonable workload/work schedule. Describe relevant staff training plans to ensure services are provided in an efficient manner and service and

outcome objectives are being achieved. Provide written assurance that key individuals listed/identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the City's approval.

- d. A description of the organization's plans, strategies, and activities to ensure that it provides equitable access to program participants; a description of how the organization intends to meet the cultural and language needs of the identified Target Population and the envisioned program design; and a description of the agency's language and cultural capacity.

**6. Program Approach – up to 10 pages [these should align with sections IV.B and X; wording for anything in yellow cannot be changed if CDA, otherwise okay to edit]**

Description of your agency's specific program approach to deliver the services proposed in this RFP. In addition, please address the following:

- a. Describe your specific program approach to deliver the service components proposed and how this program approach or service model will appropriately address the needs of the target populations in this RFP (be sure to address all applicable items listed in Target Population, Scope of Work, and Service and Outcome Objectives). Describe the linkages that will connect clients to services.
- b. Identify the proposed site that will be made available for the target population. Explain how the facility/site is appropriate for the services proposed. Describe plan for location and hours of programming and/or services. Include Site Chart.
- c. List and explain the specific service and outcome objectives to be accomplished and how they will be measured. Describe methods for data collection, documentation, and reporting on service and outcome objectives. Identify any subcontractors and describe their responsibilities in the delivery of services. Provide MOU or letter of intent.
- d. Describe the proposed model for clients to offer input regarding program design, service delivery and program operations.

**7. Fiscal Capacity (Budget) – up to 6 pages on form provided (excluding cost allocation plan and audited financial statement)**

Please refer to the instructions outlined in Section XI and use only SFHSA approved budget forms. Provide Cost Allocation Plan and current audited financial statements.

SFHSA intends to award this contract to proposers that it considers will provide the best overall program services at a reasonable pricing structure. SFHSA reserves the right to accept other than the lowest priced offer and to reject any proposals that are not responsive to this request.

Using the budget forms provided, please provide the direct expenses for all proposed costs to be supported through this contract. Proposers must also provide a Budget Justification that clearly explains the basis for each expense listed in the budget.

Discuss any planned leveraging of other resources (i.e., fund raising, in-kind contributions, volunteers, etc.), if any, to support the program approach proposed. Identify external resources committed to this program, including in-kind resources designated solely for this program. Assign a dollar value for all external resources.

**8. Completed Page Number Form (refer to Section X)**

**IV. PROPOSAL EVALUATION CRITERIA**

**A. Minimum Qualifications (Pass/Fail)**

Proposers must provide documentation that clearly demonstrates each Minimum Qualification (MQ) listed below has been met at time of submission. Minimum Qualification documentation should be clearly marked as “MQ1”, MQ2”, etc. to indicate which MQ it supports. Each Proposal will be reviewed for initial determination on whether Proposer meets the MQs referenced in this section. **This screening is a pass or fail determination and a Proposal that fails to meet the Minimum Qualifications will not be eligible for further consideration in the evaluation process.** The City reserves the right to request clarifications from Proposers prior to rejecting a Proposal for failure to meet the Minimum Qualifications.

MQ #	Description
<b>MQ1</b>	Proposer has [enter number] years of experience providing services as described in section II.A. or similar services to the target population as described in the RFP.
<b>MQ2</b>	A nonprofit organization with a 501(c)(3) determination and/or equivalent. [Please consult with supervisor if this is applicable]
<b>MQ3</b>	Completed RFP Cover Page (See section IX)
<b>MQ4</b>	[Enter additional MQs as needed, including certifications and/or other relevant factors]

Proposals should clearly demonstrate that the qualifications are met. Insufficient or incomplete information may result in a proposal being considered non-responsive and may not be eligible for award of the contract.

If planned subs, please check with Program before MQ decision to see if sub should meet MQ's. If so, then add:

All proposed subcontractors MUST also meet MQs.

**Please note:** Agencies submitting proposals that have previously contracted with the City and County of San Francisco and/or Federal agencies to provide goods and/or services must successfully demonstrate compliance with performance/monitoring requirements specified in previous grants/contracts (corrective actions) in order to be considered responsive to this RFP. **Documented failure to correct performance/monitoring deficiencies identified in past City and County grants/contracts may result in disqualification to participate in this RFP.** Provide a statement of any unresolved and/or outstanding findings from any program or

fiscal/compliance monitoring done by the City. If no outstanding issues, provide a statement that your agency is in full compliance with program and fiscal monitoring. (Refer to section III.C.4)

**B. Selection Criteria** [these should align with sections III.C and X; wording for anything in yellow cannot be changed if CDA, otherwise okay to edit]

The proposals will be evaluated by a selection committee comprised of parties with expertise in the service areas identified in this RFP. The City intends to evaluate the proposals generally in accordance with the criteria itemized below.

*Total Possible Points: 100* [points listed are per CDA; non-CDA RFPs can adjust]

**Organizational Capacity** (40 points)

1. Did proposer explain how the organization is qualified to implement the proposed services? Did they demonstrate the management/supervisory infrastructure, as well as the administrative/financial capacity to deliver the proposed services? (10 points)

2. Did proposer describe experience with/history of successfully providing these services, and serving this population/community? Were recently completed projects listed, detailing quality, requirements, timelines, and/or success? Did they demonstrate ability to implement new programming and/or services? (15 points)

3. Based on the staffing patterns described, will the program be sufficiently staffed? Did proposer identify whether services will be performed by existing or proposed staff? Are job descriptions/resumes for all key positions attached? Do job descriptions include the appropriate experience/qualifications/skills for the project, a realistic description of tasks to be performed, and a reasonable workload/work schedule? Were relevant staff training plans clearly described? Did they state that key individuals listed/identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the City's approval? (10 points)

1. Does the agency clearly demonstrate their plans, strategies, and activities will ensure that it provides equitable access to program participants? Do they address the cultural and linguistic competencies related to working with the identified Target Population and the envisioned program design? Do they describe how the organization intends to meet the cultural needs of the target population? (5 points)

**Program Approach** (35 points)

1. Does the proposer clearly describe the agency's specific program approach to deliver the service components proposed and how this program approach or service model will appropriately address the needs of the target populations in this RFP? Did they address Target Population, Scope of Work, and Service/Outcome Objectives? Does the proposer clearly describe the linkages that will connect clients to services? (15 points)

2. Is the proposed facility/site that will be made available for the target population appropriate for the proposed services? Does proposer have a plan for location and hours of programming and/or services? Did proposer include a Site Chart? (5 points)

3. Does the proposer describe specific service and outcome objectives to be accomplished and how they will be measured? Does the proposer include an explanation of methods for data collection, documentation, and reporting on service and outcome objectives? Are any subcontractors identified? If so, are their responsibilities in the delivery of services clearly defined? Did proposer provide an MOU or letter of intent? (10 points)

4. Does the proposed model include methods for clients to offer input regarding program design, service delivery and program operations? (5 points)

### **Fiscal Capacity** (25 points)

1. Does the budget reflect sound, adequate allocation of resources, matching the program components including staffing costs, operating costs, and capital costs (as appropriate)? Is the budget correct and easy to understand? (10 points)

2. Are specific costs reasonable, justified, and competitive? Does the cost allocation support the services as proposed? (10 points)

3. Does proposer describe their ability to leverage other resources for this program, either from in-kind and/or external resources? Does the proposal reflect the effective use of organizational resources/external resources, including funds leveraged exclusively for this program? (5 points)

4. (optional) Is the specific unit rate reasonable and competitive? (points)

## **V. PRE-PROPOSAL CONFERENCE AND CONTRACT AWARD**

### **A. Pre-Proposal Conference**

Proposers are encouraged to attend a Pre-Proposal Conference on [insert date], at [insert time] to be held via teleconference. [If this RFP requires a subcontracting goal under Chapter 14B, then proposers (primes) must attend the mandatory pre-proposal conference. Change this sentence to “Proposers must attend the mandatory pre-proposal conference...”] All questions will be addressed at this conference, and any available new information will be provided at that time. If you have further questions regarding the RFP, please contact the individual designated in Section VI. A.

### **B. Award**

SFHSA will select a proposer with whom Agency staff shall commence contract negotiations. The selected proposal will be part of the final contract and will be used as a starting point for negotiations. The acceptance and/or selection of any Proposal(s) shall not imply acceptance by the City of all terms of the Proposal(s), which may be subject to further negotiations and approvals before the City may be legally bound thereby. SFHSA may negotiate modifications after the bid/proposal has been selected to assure that all necessary program requirements are covered before the contract is signed. If a satisfactory contract cannot be negotiated in a reasonable time, SFHSA, in its sole discretion, may terminate negotiations with the highest ranked proposer and begin contract negotiations with the next highest ranked proposer.

### C. Written Questions and Requests for Clarification

Proposers are encouraged to submit written questions to [\[Contract Manager's Email\]](#) and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org). All questions will be addressed, and any available new information will be provided in writing via email to proposers. All written questions must be submitted on or prior to [\[insert date and time\]](#).

## VI. TERMS AND CONDITIONS FOR RECEIPT OF PROPOSALS

### A. Inquiries Regarding RFP

All inquiries regarding the RFP or clarification of the RFP, must be directed to: [\[Contract Manager's Email\]](#) and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org)

### B. How to Register as a City Supplier

The following requirements pertain only to Proposers not currently registered with the City as a Supplier.

**Step 1:** Register as a BIDDER at City's Supplier Portal:

<https://sfcitypartner.sfgov.org/pages/index.aspx>

**Step 2:** Follow instructions for converting your BIDDER ID to a SUPPLIER ID. This will require you to register with the City Tax Collector's Office and submit Chapter 12B and 12C forms through the Supplier portal. Once these forms have been completed, submitted, and processed, you will be notified via email with your organization's new Supplier ID. That email will also provide instructions for completing your Supplier registration.

- **City Business Tax Registration Inquiries:** For questions regarding business tax registration procedures and requirements, contact the Tax Collector's Office at (415) 554-4400 or, if calling from within the City and County of San Francisco, 311.
- **San Francisco Labor Code 131 and 132 Inquiries:** For questions concerning the San Francisco Labor Code 131 and 132 Equal Benefits and Non-Discrimination in Contracting requirements, go to: [www.sfgov.org/cmd](http://www.sfgov.org/cmd)

### C. Proposal Questions and Requests for Clarification

Proposers shall address any questions regarding this Solicitation to [\[Contract Manager's Email\]](#) and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org). Proposers who fail to submit questions concerning this Solicitation and its requirements will waive all further rights to protest based on the specifications and conditions herein. **Questions must be submitted by email to [\[Contract Manager's Email\]](#) and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org) no later than Written Questions Due Date.** A written Addendum will be executed addressing each question and answer and posted publicly. It is the responsibility of the Proposer to check for any Addenda and other updates that will be posted on the City's Supplier Portal: <https://sfcitypartner.sfgov.org/pages/Events-BS3/event-search.aspx>.

### D. Proposal Addenda

The City may modify this Solicitation, prior to the Proposal Due Date, by issuing an Addendum to the Solicitation, which will be posted on the San Francisco Supplier Portal. Every Addendum will create a new version of the Sourcing Event and Proposers must monitor

the event for new versions. **The Proposer shall be responsible for ensuring that its Proposal reflects any and all Addenda issued by the City prior to the Proposal Due Date regardless of when the Proposal is submitted.** Therefore, the City recommends that the Proposer consult the website frequently, including shortly before the Proposal Due Date, to determine if the Proposer has downloaded all Solicitation Addenda. It is the responsibility of the Proposer to check for any Addenda, Questions and Answers documents, and updates, which may be posted to the subject Solicitation.

**THE SUBMITTAL OF A RESPONSE TO THIS SOLICITATION SHALL EXPLICITLY STIPULATE ACCEPTANCE BY PROPOSERS OF THE TERMS FOUND IN THIS SOLICITATION, ANY AND ALL ADDENDA ISSUED TO THIS SOLICITATION, AND THE PROPOSED CONTRACT TERMS.**

**E. Public Disclosure**

All documents under this solicitation process are subject to public disclosure per the California Public Records Act (California Government Code Section §6250 et. Seq) and the San Francisco Sunshine Ordinance (San Francisco Administrative Code Chapter 67). Contracts, Proposals, responses, and all other records of communications between the City and Proposers shall be open to inspection immediately after a contract has been awarded. Nothing in this Administrative Code 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 benefit until and unless that person or organization is awarded the contract or benefit.

If the City receives a Public Records Request ("Request") pertaining to this solicitation, City will use its best efforts to notify the affected Proposer(s) of the Request and to provide the Proposer with a description of the material that the City deems responsive and the due date for disclosure ("Response Date"). If the Proposer asserts that some or all of the material requested contains or reveals valuable trade secret or other information belonging to the Proposer that is exempt from disclosure and directs the City in writing to withhold such material from production ("Withholding Directive"), then the City will comply with the Withholding Directive on the condition that the Proposer seeks judicial relief on or before the Response Date. Should Proposer fail to seek judicial relief on or before the Response Date, the City shall proceed with the disclosure of responsive documents.

**F. Limitation on Communications During Solicitation**

From the date this Solicitation is issued until the date the competitive process of this Solicitation is completed (either by cancelation or final Award), Proposers and their subcontractors, vendors, representatives and/or other parties under Proposer's control shall communicate solely with the Contract Administrator whose name appears in this Solicitation. Any attempt to communicate with any party other than the Contract Administrator whose name appears in this Solicitation – including any City official, representative or employee – is strictly prohibited. Failure to comply with this communications protocol may, at the sole discretion of City, result in the disqualification of the Proposer or potential Proposer from the competitive process. This protocol does not apply to communications with the City regarding business not related to this Solicitation.

## **G. Proposal Selection Shall Not Imply Acceptance**

The acceptance and/or selection of any Proposal(s) shall not imply acceptance by the City of all terms of the Proposal(s), which may be subject to further approvals before the City may be legally bound thereby.

## **H. Cybersecurity Risk Assessment**

As part of City's evaluation process, City may engage in Cybersecurity Risk Assessment (CRA). CRA may be performed for each entity manufacturing the product, performing technical functions related to the product's performance, and/or accessing City's networks and systems. Where a prime contractor or reseller plays an active role in each of these activities, CRA may also be required for the prime contractor or reseller.

To conduct a CRA, City may collect as part of this Solicitation process one of the following two reports:

- **SOC-2 Type 2 Report:** Report on Controls at a Service Organization Relevant to Security, Availability, Processing Integrity, Confidentiality or Privacy; or
- **City's Cyber Risk Assessment Questionnaire:** Proposer's responses to a City's Cyber Risk Assessment Questionnaire.

The above reports may be requested at such time City has selected or is considering a potential Proposer. The reports will be evaluated by soliciting Department and the City's Department of Technology to identify existing or potential cyber risks to City. Should such risks be identified, City may afford a potential Proposer an opportunity to cure such risk within a period of time deemed reasonable to City. Such remediation and continuing compliance shall be subject to City's on-going review and audit through industry-standard methodologies, including but not limited to, on-site visits, review of the entities' cybersecurity program, penetration testing, and/or code reviews.

## **I. Solicitation Errors and Omissions**

Proposers are responsible for reviewing all portions of this Solicitation. Proposers are to promptly notify the City, in writing and to the Solicitation contact person if the Proposer discovers any ambiguity, discrepancy, omission, or other error in the Solicitation. Any such notification should be directed to the City promptly after discovery, but in no event later than the deadline for questions. Modifications and clarifications will be made by Addenda as provided below.

## **J. Objections to Solicitation Terms**

Should a Proposer object on any ground to any provision or legal requirement set forth in this Solicitation, the Proposer must, no later than the deadline for questions, provide written notice to the City setting forth with specificity the grounds for the objection. The failure of a Proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

## **K. Notice of Intent to Award-Required Documentation**

After the City issues a Notice of Intent to Award, and before award, if requested by the City, the successful Proposer must possess all qualifications required for the contract. Any failure to demonstrate satisfaction of one or more of following requirements, if requested by the City, will be considered sufficient for the disqualification of the Proposer as non-responsive

and will entitle the City to terminate negotiations and move to the next highest ranked Proposer for award.

1. Proposer is registered in the System of Award Management (SAM) and has no exclusions (<https://usfcr.com/search-sam-cage-duns/>)
2. Proposer is in good standing with the California Secretary of State (<https://bizfileonline.sos.ca.gov/search/business>)
3. Proposer is in good standing with the Franchise Tax Board (<https://webapp.ftb.ca.gov/eletter/?Submit=Check+Status>)
4. Proposer is in good standing with the Internal Revenue Service (<https://apps.irs.gov/app/eos/>)
5. Proposer is in good standing with California Attorney General's Registry of Charitable Trusts (non-profits only) (<https://rct.doj.ca.gov/Verification/Web/Search.aspx?facility=Y>)

To receive a contract under this Solicitation, any nonprofit proposer must be in good standing with the California Attorney General's Registry of Charitable Trusts by the time of contract execution and must remain in good standing during the term of the agreement. If proposer will use any nonprofit subgrantees to perform the agreement, proposer will be responsible for ensuring they are also in compliance with all requirements of the Attorney General's Registry of Charitable Trusts at the time of contract execution and for the duration of the agreement. Upon request, proposer must provide documentation to the City demonstrating its good standing with applicable legal requirements.

**Note: Proposer's failure to remain in good standing with the above after award may entitle the City to immediately terminate the contract for default with no opportunity for the Proposer to cure.**

#### **L. Protest Procedures**

##### **1. Protest of Non-Responsiveness Determination**

Within three (3) business days of the City's issuance of a Notice of Non-Responsiveness, a Proposer may submit a written Notice of Protest of Non-Responsiveness. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

##### **2. Protest of Award**

Within three (3) business days of the City's issuance of a Notice of Intent to Award, a Proposer may submit a written Notice of Protest of Contract Award. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

### **3. Delivery of Protests**

A Notice of Protest must be written. Protests made orally (e.g., by telephone) will not be considered. A Notice of Protest must be delivered by email to [Trent.Rhorer@sfgov.org](mailto:Trent.Rhorer@sfgov.org) or [Kelly.Dearman@sfgov.org](mailto:Kelly.Dearman@sfgov.org) (choose one), [Contract Manager's Email], and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org) and received by the due dates stated above. A Notice of Protest shall be transmitted by a means that will objectively establish the date the City received the Notice of Protest. If a Notice of Protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein.

Executive Director  
Human Services Agency  
P.O. Box 7988  
San Francisco, CA 94120

[Trent.Rhorer@sfgov.org](mailto:Trent.Rhorer@sfgov.org) or [Kelly.Dearman@sfgov.org](mailto:Kelly.Dearman@sfgov.org) (choose one)

#### **M. Proposal Term**

Submission of a Proposal signifies that the proposed products, services and prices are valid for 180 calendar days from the Proposal Due Date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity. At Proposer's election, the Proposal may remain valid beyond the 180-day period in the circumstance of extended negotiations.

#### **N. Revision to Proposal**

A Proposer may revise a Proposal on the Proposer's own initiative at any time before the deadline for submission of Proposals. The Proposer must submit the revised Proposal in the same manner as the original. A revised Proposal must be received on or before, but no later than the Proposal Due Date and time. In no case will a statement of intent to submit a revised Proposal, or commencement of a revision process, extend the Proposal Due Date for any Proposer. At any time during the Proposal evaluation process, the City may require a Proposer to provide oral or written clarification of its Proposal. The City reserves the right to make an award without further clarifications of Proposals received.

#### **O. Proposal Errors and Omissions**

Failure by the City to object to an error, omission, or deviation in the Proposal will in no way modify the Solicitation or excuse the Proposer from full compliance with the specifications of this Solicitation or any contract awarded pursuant to this Solicitation.

#### **P. Financial Responsibility**

The City accepts no financial responsibility for any costs incurred by a Proposer in responding to this Solicitation. Proposers acknowledge and agree that their submissions in response to this Solicitation will become the property of the City and may be used by the City in any way deemed appropriate.

#### **Q. Proposer's Obligations under the Campaign Reform Ordinance**

If a contract awarded pursuant to this Solicitation has (A) a value of \$100,000 or more in a fiscal year and (B) requires the approval of an elected City official, Proposers are hereby advised:

**1.** Submission of a Proposal in response to this Solicitation may subject the Proposers to restrictions under Campaign and Governmental Conduct Code Section 1.126, which prohibits City contractors, Proposers, and their affiliates from making political contributions to certain City elective officers and candidates; and

**2.** Before submitting a Proposal in response to this Solicitation, Proposers are required to notify their affiliates and subcontractors listed in the awarded contract or Proposal of the political contribution restrictions set forth in Campaign and Governmental Conduct Code section 1.126.

This restriction applies to the party seeking the contract, the party's board of directors, chairperson, chief executive officer, chief financial officer, chief operating officer, any person with an ownership interest greater than ten percent, and any political committees controlled or sponsored by the party, as well as any subcontractors listed in the awarded contract or Proposal. The law both prohibits the donor from giving contributions and prohibits the elected official from soliciting or accepting them.

The people and entities listed in the preceding paragraph may not make a campaign contribution to the elected official at any time from the submission of a Proposal for a contract until either: (1) negotiations are terminated, and no contract is awarded; or (2) twelve months have elapsed since the award of the contract.

A violation of Section 1.126 may result in criminal, civil, or administrative penalties. For further information, Proposers should contact the San Francisco Ethics Commission at **(415) 252-3100** or go to <https://sfethics.org/compliance/city-officers/city-contracts/city-departments/notifying-bidders-and-potential-bidders>.

#### **R. Reservations of Rights by the City**

The issuance of this Solicitation does not constitute a guarantee by the City that a contract will be awarded or executed by the City. The City expressly reserves the right at any time to:

- 1.** Waive or correct any defect or informality in any response, Proposal, or Proposal procedure;
- 2.** Reject any or all Proposals;
- 3.** Reissue the Solicitation;
- 4.** Prior to submission deadline for Proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this Solicitation, or the requirements for contents or format of the Proposals;
- 5.** Procure any materials, equipment or services specified in this Solicitation by any other means; or
- 6.** Determine that the subject goods or services are no longer necessary.

## **S. No Waiver**

No waiver by the City of any provision of this Solicitation shall be implied from the City's failure to recognize or take action on account of a Proposer's failure to comply with this Solicitation.

## **T. Other**

**1.** The City may make such investigation, as it deems necessary, prior to the award of this contract, to determine the conditions under which the goods are to be delivered or the work is to be performed. Factors considered by the City shall include, but not be limited to:

- a.** Any condition set forth in this Solicitation;
- b.** Adequacy of Proposer's plant facilities and/or equipment, location and personnel location to properly perform all services called for under the Purchase Order; and
- c.** Delivery time(s)

**2.** City reserves the right to inspect an awarded Proposer's place of business prior to award of and/or at any time during the contract term (or any extension thereof) to aid City in determining an awarded Proposer's capabilities and qualifications.

**3.** Failure to timely execute a contract, or to furnish any and all insurance certificates and policy endorsements, 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 Proposer and may proceed against the original selectee for damages.

**4.** City reserves the right to reject any Proposal on which the information submitted by Proposer fails to satisfy City and/or if Proposer is unable to supply the information and documentation required by this Solicitation within the period of time requested.

**5.** Any false statements made by a Proposer or any related communication/clarification may result in the disqualification of its Proposal from receiving further evaluation and a contract award.

## **U. Local Business Enterprise Goals and Outreach**

### **Choose one of the following options:**

[Option 1] If LBE Program Requirements do not apply (ie: Federal Funding) to the contracts awarded pursuant to this Solicitation, delete this entire section and enter "Reserved". [Click here](#) to read Chapter 14B Requirements and Applicability to determine if LBE Rating Bonuses apply.

[Option 2] If the RFP is open to both non-profit and for-profit entities, the following section must be included:

### **1. Application of LBE Rating Bonuses**

**If LBE Rating Bonuses will not apply to the contracts awarded pursuant to this Solicitation, delete this section and enter "Reserved."** [Click here to read Chapter 14B Requirements and Applicability to determine if LBE Rating Bonuses apply.](#)

LBE Rating Bonuses shall be applicable at each phase of the Solicitation evaluation and selection process, in accordance with the values shown below.

**a. Commodities**

If this is not a contract for Commodities, delete below and enter “**Reserved.**”

<b>Estimated Contract Value</b>	<b>Small/Micro LBEs Rating Bonus</b>	<b>SBA LBEs Rating Bonus</b>
Greater than \$20,000 but less than or equal to \$400,000.	10%	0%
Greater than \$400,000 but less than or equal to \$10,000,000.	10%	5% <i>So long as it does not adversely affect a Small or Micro-LBE Proposer’s participation.</i>
Greater than \$10,000,000.	0%	0%

**b. General and Professional Services**

If this is not a contract for General/Professional Services, delete below & enter “**Reserved.**”

<b>Estimated Contract Value</b>	<b>Small/Micro LBEs Rating Bonus</b>	<b>SBA LBEs Rating Bonus</b>
Greater than \$20,000 but less than or equal to \$400,000.	10%	0%
Greater than \$400,000 but less than or equal to \$10,000,000.	10%	5% <i>So long as it does not adversely affect a Small or Micro-LBE Proposer’s participation or, for Professional Services, an JV Proposer’s participation.</i>
Greater than \$10,000,000 but less than or equal to \$20,000,000.	2%	2%

**c. Professional Services by Joint Ventures**

If this is not a contract for Professional Services, delete below and enter “**Reserved.**”

<b>Estimated Contract Value</b>	<b>Small/Micro LBE Subcontracting Level</b>	<b>Rating Bonus</b>
Greater than \$20,000 but less than or equal to \$10,000,000.	Equals or exceeds 35%, but less than 40%	5%
	Equals or exceeds 40%, but less than 100%	7.5%
	100%	10%

If applying for an LBE rating discount as a Joint Venture (JV), the Micro and /or Small-LBE must be an active partner in the JV 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 JV. The portion of the Micro and/or Small-LBE JV's work shall be set forth in detail separately from the work to be performed by the non-LBE JV. The Micro and/or Small-LBE JV's portion of the contract must be assigned a commercially useful function.

## 2. LBE Subcontracting Participation Requirements

[Click here to read Chapter 14B Requirements and Applicability to determine if LBE Subcontracting Requirements apply.](#)

**[Option 1 – LBE Subcontracting Requirements Do Not Apply/Waived]** There shall be no LBE Subcontracting Requirement for any Contract awarded pursuant to this Solicitation because **[give reason:]** this is a contract primarily for Commodities **OR** the LBE Subcontracting Requirements were waived by the Contract Monitoring Division **OR** the anticipated Contract NTE amount will be less than one half of the Minimum Competitive Amount **OR** the funding for this contract prohibits application of local preferences when evaluating an Award.

**[Option 2]:** The LBE Subcontracting Requirements for the services of any Contract awarded pursuant to this Solicitation shall be **[Enter %]** which shall be met with any combination of Micro and/or Small LBEs.

**[Option 3]:** The LBE Subcontracting Requirements for the services of any Contract awarded pursuant to this Solicitation shall be **[Enter %]** which shall be met with any combination of Micro, Small, and/or SBA LBEs.

**[Option 4]:** The LBE Subcontracting Requirements for the services of any Contract awarded pursuant to this Solicitation shall be: (A) **[Enter %]** which shall be met with any combination of Micro and Small LBEs; and (B) **[Enter %]** which shall be met with SBA LBEs.

**[Option 5]:** The LBE Subcontracting Requirements for the services of any Contract awarded pursuant to this Solicitation shall be: (A) **[Enter %]** which shall be met with Micro-LBEs; (B) **[Enter %]** which shall be met with Small-LBEs; and **[Enter %]** which shall be met with SBA-LBEs.

## 3. CMD LBE Forms

**If there are no LBE Subcontracting Requirements, delete this section and enter “Reserved.” Otherwise, choose from the options below and delete those not used. Contact CMD to determine which option to select.**

**[Option 1: LBE Subcontracting Requirements Apply]** Because LBE Subcontracting Participation Requirements apply to Contracts awarded pursuant to this Solicitation, Bidders must submit response packages that include the following CMD LBE Forms, which can be found in Attachment 5 (or whatever next # is at bottom of Table of Contents) of this Solicitation. The applicable forms are:

**[Option A]: CMD Packet 2 – Requirements for Architecture, Engineering & Professional Services Contracts consisting of:**

- a. CMD Form 2A: LBE Participation Form
- b. CMD Form 2B: Good Faith Efforts Form. If a contractor’s proposed LBE subcontracting participation exceeds the sum of all LBE Subcontracting Participation Requirements for a Contract by at least 35%, the Bidder is excused from conducting or documenting its good faith efforts.
- c. CMD Form 3: Compliance Affidavit
- d. CMD Form 4: Joint Venture Form (if applicable)
- e. CMD Form 5: Employment Form

**[Option B]: CMD Packet 3 – Requirements for General Services Contracts consisting of:**

- a. CMD Form 2A: LBE Participation Form
- b. CMD Form 2B: Good Faith Efforts Form. If a contractor’s proposed LBE subcontracting participation exceeds the sum of all LBE Subcontracting Participation Requirements for a Contract by at least 35%, the Bidder is excused from conducting or documenting its good faith efforts.
- c. CMD Form 3: Compliance Affidavit
- d. CMD Form 5: Employment Form

**[Option C]: CMD Packet 5 – Requirements for Micro-LBE Set-Aside Architecture, Engineering, Professional Services Contracts & Requirements for Micro Set-Aside General Services Contracts consisting of:**

- a. CMD Form 2A: LBE Participation Form
- b. CMD Form 3: Compliance Affidavit
- c. CMD Form 5: Employment Form

**[Option D]: CMD Packet 5A – Requirements for SFPUC Regional Micro-LBE Set-Aside Architecture, Engineering, Professional Services Contracts & Requirements for Micro Set-Aside General Services Contracts consisting of:**

- a. CMD Form 2A: LBE Participation Form
- b. CMD Form 3: Compliance Affidavit
- c. CMD Form 5: Employment Form

**[Option E]: CMD Packet 6A – Requirements for SFPUC Regional Architecture, Engineering & Professional Services Contracts consisting of:**

- a. CMD Form 2A: LBE Participation Form
- b. CMD Form 2B: Good Faith Efforts Form. If a contractor’s proposed LBE subcontracting participation exceeds the sum of all LBE Subcontracting Participation Requirements for a Contract by at least 35%, the Bidder is excused from conducting or documenting its good faith efforts.
- c. CMD Form 3: Compliance Affidavit

- d. CMD Form 4: Joint Venture Form (if applicable)
- e. CMD Form 5: Employment Form

Failure to complete, sign and submit each of the required CMD LBE Forms with Bidder's Bids may result in the response package being deemed non-responsive and rejected.

**[Option 2: LBE Subcontracting Requirements Do Not Apply but the Department Requires CMD LBE Forms for Data Tracking Purposes]** Although LBE Subcontracting Participation Requirements do not apply to Contracts awarded pursuant to this Solicitation, Bidders responding to this Solicitation must submit response packages that include the CMD LBE Forms included in Attachment 5 (or whatever next # is at bottom of Table of Contents), *with the exception of CMD Form 2B entitled "Good Faith Efforts Form"*. The applicable forms are:

**[Option A]: CMD Packet 2 – Requirements for Architecture, Engineering & Professional Services Contracts consisting of:**

- a. CMD Form 2A: LBE Participation Form
- b. CMD Form 3: Compliance Affidavit
- c. CMD Form 4: Joint Venture Form (if applicable)
- d. CMD Form 5: Employment Form

**[Option B]: CMD Packet 3 – Requirements for General Services Contracts consisting of:**

- a. CMD Form 2A: LBE Participation Form
- b. CMD Form 3: Compliance Affidavit
- c. CMD Form 5: Employment Form

**[Option C]: CMD Packet 5 – Requirements for Micro-LBE Set-Aside Architecture, Engineering, Professional Services Contracts & Requirements for Micro Set-Aside General Services Contracts consisting of:**

- a. CMD Form 2A: LBE Participation Form
- b. CMD Form 3: Compliance Affidavit
- c. CMD Form 5: Employment Form

**[Option D]: CMD Packet 5A – Requirements for SFPUC Regional Micro-LBE Set-Aside Architecture, Engineering, Professional Services Contracts & Requirements for Micro Set-Aside General Services Contracts consisting of:**

- a. CMD Form 2A: LBE Participation Form
- b. CMD Form 3: Compliance Affidavit
- c. CMD Form 5: Employment Form

**[Option E]: CMD Packet 6A – Requirements for SFPUC Regional Architecture, Engineering & Professional Services Contracts consisting of:**

- a. CMD Form 2A: LBE Participation Form
- b. CMD Form 3: Compliance Affidavit
- c. CMD Form 4: Joint Venture Form (if applicable)
- d. CMD Form 5: Employment Form

Failure to complete, sign and submit each of the required CMD LBE Forms with Bidder's Bids may result in the response package being deemed non-responsive and rejected.

#### **4. LBE Payment and Utilization Tracking**

**If this contact is for commodities and there are no services, or if LBE participation requirements have been waived, reserve this section and enter "Reserved". Otherwise, include the following language.**

Because LBE Subcontracting Participation Requirements apply to a Contract awarded pursuant to this Solicitation, the Awarded Contractor shall agree to:

- a. Within thirty (30) business days of receiving an invoice from an LBE subcontractor, submit to City a request for payment along with a copy of the LBE subcontractor's invoice;
- b. Within three (3) business days of City's payment of any invoice to Contractor, pay LBE subcontractors as provided under Chapter 14B.7(H)(9); and
- c. Within ten (10) business days of City's payment of any invoice to Contractor, confirm its payment to subcontractors using the City's Supplier Portal Payment Module, unless instructed otherwise by CMD.

Failure to submit all required payment information to the City's Supplier Portal Payment Module with each payment request may result in the withholding of 20% of subsequent payments due. Self-Service Training is located at this link:

<https://sfcitypartner.sfgov.org/pages/training.aspx>.

### **VII. CITY'S SOCIAL AND ECONOMIC POLICY REQUIREMENTS**

The San Francisco Municipal Code establishes a number of requirements for people seeking to do business with the City ("Social and Economic Policy Requirements"). These Social and Economic Policy Requirements are set forth below, which Proposers are encouraged to carefully review. The Social and Economic Policy Requirements set forth below are not intended to be a complete list of all Social Policy Requirements applicable to this Solicitation and any contracts awarded from it.

#### **A. Proposers Unable to do Business with the City**

##### **1. Generally**

Proposers that do not comply with laws set forth in San Francisco's Municipal Codes may be unable to enter into a contract with the City. Laws applicable to this Solicitation are set forth below.

#### **B. San Francisco Labor and Employment Code Article 131.2**

A Proposer selected pursuant to this Solicitation may not, during the term of the Contract, in any of its operations in San Francisco, on real property owned by San Francisco, or where work is being performed for the City elsewhere in the United States, discriminate in the provision of bereavement leave, family medical leave, health benefits, membership or membership discounts, moving expenses, pension and retirement benefits or travel benefits,

as well as any benefits other than the benefits specified above, between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of such employees, where the domestic partnership has been registered with a governmental entity pursuant to state or local law authorizing such registration, subject to the conditions set forth in Article 131.2(b) of the San Francisco Labor and Employment Code.

**SF Labor and Employment Code Article 121, Health Care Accountability Ordinance**, applies if the Grantee is a **for-profit** organization with **more than twenty (21+)** employees worldwide, **OR** a **non-profit** organization with **more than fifty (51+)** employees worldwide with at least one employee working in San Francisco.

#### **C. Health Care Accountability Ordinance (HCAO)**

Any proposer selected pursuant to this Solicitation shall comply with Labor and Employment Code Article 121. For each Covered Employee, the awarded Contractor shall provide the appropriate health benefit set forth in Article 121.3. If the awarded Contractor chooses to offer the health plan option, such health plan shall meet the minimum standards set forth by the San Francisco Health Commission. Information about and the text of Article 121, as well as the Health Commission's minimum standards, is available on the web at <http://sfgov.org/olse/hcao>. An awarded Contractor is subject to the enforcement and penalty provisions in Article 121. Any Subcontract entered into by the awarded Contractor shall require any Subcontractor with 20 or more employees to comply with the requirements of the HCAO and shall contain contractual obligations substantially the same as those set forth in this Section.

#### **D. Minimum Compensation Ordinance (MCO)**

A Proposer selected pursuant to this Solicitation shall comply with Labor and Employment Code Article 111. A Proposer selected pursuant to this Solicitation shall pay covered employees no less than the minimum compensation required by San Francisco Labor and Employment Code Article 111, including a minimum hourly gross compensation, compensated time off, and uncompensated time off. A Proposer selected pursuant to this Solicitation is subject to the enforcement and penalty provisions in Article 111. Information about and the text of the Article 111 is available on the web at <https://www.sf.gov/information/minimum-compensation-ordinance>.

#### **E. First Source Hiring Program**

A proposer selected pursuant to this solicitation shall comply with all of the provisions of the First Source Hiring Program, Chapter 83 of the San Francisco Administrative Code that apply to this agreement and an awarded proposer is subject to the enforcement and penalty provisions in Chapter 83.

#### **F. Other Social Policy Provisions**

Attachment 1, City's Contract Terms, identifies the City's applicable social policy provisions related to a contract awarded pursuant to this Solicitation. Proposers are encouraged to carefully review these terms and ensure they are able to comply with them.

## VIII. CONTRACT REQUIREMENTS

### A. Contract Terms and Negotiations

The successful Proposer will be required to enter into the Agreement in the form attached hereto as Attachment 1, City's Proposed Agreement Terms. **City's Proposed Agreement Terms are attached in Attachment 1: Contract Agreement (form P-600)**. However, Proposers may identify those contract terms to which they object as part of the questions they submit by the Questions Due Date. City shall evaluate all objections and determine what, if any changes, will be incorporated into City's Contract Terms prior to the Proposal Due Date. Any such changes will be made known to all Proposers through an Addendum to this Solicitation. Failure to timely execute the Proposed Agreement, or to furnish any and all insurance certificates and policy endorsements, surety bonds or other materials required in the Proposed Agreement, shall be deemed an abandonment of the Proposal and City, in its sole discretion, may select another Proposer and proceed against the original selectee for damages.

### B. Insurance Requirements

**1. Types and Amounts of Coverage.** Without limiting Contractor's liability, Contractor shall maintain in force, during the full term of the contract, insurance in the following amounts and coverages. Limits of insurance may be revised according to the Scope of Work, risk, and amount of contract:

- a.** Workers' Compensation, in statutory amounts, with Employers' Liability Limits not less than one million dollars (\$1,000,000) each accident, injury, or illness.
- b.** Commercial General Liability Insurance with limits not less than \$1,000,000 each occurrence and \$2,000,000 general aggregate for Bodily Injury and Property Damage, including Contractual Liability, Personal Injury, Products and Completed Operations. **If Contractor(s) might provide services for vulnerable clients such as minors and/or the elderly, include: Policy must include Abuse and Molestation coverage.**
- c.** Commercial Automobile Liability Insurance with limits not less than one million dollars (\$1,000,000) each occurrence Combined Single Limit for Bodily Injury and Property Damage, including Owned, Non-Owned and Hired auto coverage, as applicable.

**If professionals are used as part of the contract, professional liability will be required:**

- d.** Professional liability insurance for negligent acts, errors or omission with respect to professional or technical services, if any, required in the performance of this Agreement with limits not less than one million dollars (\$1,000,000) each claim.

**If the contract will provide technology-type services or have city system access, they must provide Technology Errors and Omissions Liability insurance. The limits of insurance may be**

increased based on the Scope of Work, risk, and the amount of the contract. Remove if not applicable.

- e. Technology Errors and Omissions Liability coverage, with limits of \$1,000,000 each occurrence and each loss, and \$2,000,000 general aggregate. The policy shall at a minimum cover professional misconduct or lack of the requisite skill required for the performance of services defined in the contract and shall also provide coverage for the following risks:
  - i. Liability arising from theft, dissemination, and/or use of confidential information, including but not limited to, bank and credit card account information or personal information, such as name, address, social security numbers, confidential social service information, protected health information or other personally identifying information, stored or transmitted in electronic form;
  - ii. Network security liability arising from the unauthorized access to, use of, or tampering with computers or computer systems, including hacker attacks; and
  - iii. Liability arising from the introduction of any form of malicious software including computer viruses into, or otherwise causing damage to the City's or third person's computer, computer system, network, or similar computer related property and the data, software, and programs thereon.

Contractor will need to provide Cyber and Privacy Liability Insurance if it is determined to have data sharing requirements. The insurance limit will be determined by the cyber insurance rubric after the contract is awarded and before negotiations. If the Contractor does not provide such services, then delete the body text of subsection (f) and replace with **Reserved.**

- f. Cyber and Privacy Liability Insurance with limits of not less than \$5,000,000 - \$20,000,000 per claim. Such insurance shall include coverage for liability arising from theft, dissemination, and/or use of confidential information, including but not limited to, bank and credit card account information or personal information, such as name, address, social security numbers, protected health information or other personally identifying information, stored or transmitted in electronic form.

**2.** Additional Requirements for General and Automobile Coverage. Commercial General Liability and Commercial Automobile Liability insurance policies shall:

- a. Name as additional insured City and its officers, agents and employees.
- b. Provide that such policies are primary insurance to any other insurance available to the Additional Insureds, with respect to any

claims arising out of this Agreement, and that insurance applies separately to each insured against whom claim is made or suit is brought, except with respect to limits of liability.

**3. Additional Requirements for All Policies.** All policies shall be endorsed to provide at least thirty (30) days' advance written notice to City of cancellation of policy for any reason, nonrenewal or reduction in coverage and specific notice mailed to City's address for notices pursuant to Article 15.

**4. Required Post-Expiration Coverage.** Should any of the insurance required hereunder be provided under a claims-made form, Contractor shall maintain such coverage continuously throughout the term of this Agreement and, without lapse, for a period of three (3) years beyond the expiration or termination of this Agreement, to the effect that, should occurrences during the term hereof give rise to claims made after expiration or termination of the Agreement, such claims shall be covered by such claims-made policies.

**5. General Annual Aggregate Limit/Inclusion of Claims Investigation or Legal Defense Costs.** Should any of the insurance required hereunder be provided under a form of coverage that includes a general annual aggregate limit or provides that claims investigation or legal defense costs be included in such general annual aggregate limit, such general annual aggregate limit shall be double the occurrence or claims limits specified above.

**6. Evidence of Insurance.** Before commencing any operations under this Agreement, Contractor shall furnish to City certificates of insurance, and additional insured policy endorsements, in form and with insurers satisfactory to City, evidencing all coverages set forth above, and shall furnish complete copies of policies promptly upon City's request. Before commencing any operations under this Agreement, Contractor shall furnish to City certificates of insurance and additional insured policy endorsements with insurers with ratings comparable to A-, VIII or higher, that are authorized to do business in the State of California, and that are satisfactory to City, in form evidencing all coverages set forth above. Failure to maintain insurance shall constitute a material breach of this Agreement.

**7. Effect of Approval.** Approval of any insurance by City shall not relieve or decrease the liability of Grantee hereunder.

**8. Insurance for Subcontractors and Evidence of this Insurance.** If a subcontractor will be used to complete any portion of this agreement, the contractor shall ensure that the subcontractor shall provide all necessary insurance and shall name the City and County of San Francisco, its officers, agents, and employees and the contractor listed as additional insureds.

**9. Regarding Workers' Compensation,** Contractor hereby agrees to waive subrogation which any insurer of Contractor may acquire from Contractor by virtue of the payment of any loss. Contractor agrees to obtain any endorsement that may be necessary to effect this waiver of subrogation. The Workers' Compensation policy shall be endorsed with a

waiver of subrogation in favor of the City for all work performed by the Contractor, its employees, agents and subcontractors.

**10.** Should any required insurance lapse during the term of this Agreement, requests for payments originating after such lapse shall not be processed until the City receives satisfactory evidence of reinstated coverage as required by this Agreement, effective as of the lapse date. If insurance is not reinstated, the City may, at its sole option, terminate this Agreement effective on the date of such lapse of insurance.

**C. Failure to Provide Insurance and/or Bonds**

Unless otherwise stated, within ten business days of the receipt of a notice of award of a Contract, the Proposer to whom the RFP is awarded shall deliver the specified bond documents and/or insurance certificates and policy endorsements to City. If the Proposer fails or refuses to furnish the required bond and/or insurance within ten days after receiving notice to award a Contract, City may, at its option, determine that the Proposer has abandoned its Proposal. **If Performance Bond or Fidelity Bond are required, include: Thereupon the tentative award of said contract to this Proposer shall be canceled and City shall notify the Proposer's surety and collect on the Proposer's bond (or the check accompanying its Proposal shall be deposited with the Treasurer of the City and County of San Francisco for collection). The proceeds thereof shall be retained by City as partial liquidated damages for failure of such Proposer to properly file the bonds and insurance herein required.** The foregoing in no way limits the damages which are recoverable by City, whether or not defined elsewhere in the contract documents.

**D. Compliance with Other Laws**

Proposers shall keep themselves fully informed of City's Charter, codes, ordinances and regulations and all state, and federal laws, rules and regulations affecting the performance of the Contract Agreement and shall at all times comply with such Charter codes, ordinances, and regulations rules and laws.

**E. HSA/DAS Policy Manuals and Memoranda**

<https://www.sfhsa.org/partner/policies-and-procedures>

**F. Other CDA Rules/Federal Regulations (if applicable)**

- State (CDA Regulations): [https://www.aging.ca.gov/programsproviders/aaa/Laws\\_Regulations\\_Policies/](https://www.aging.ca.gov/programsproviders/aaa/Laws_Regulations_Policies/)
- Federal OMB Uniform Guidance: <https://www.grants.gov/learn-grants/grant-policies/omb-uniform-guidance-2014.html>
- Code of Federal Regulations: <https://www.govinfo.gov/help/cfr>



[Insert MQs and evaluation criteria here. These should exactly match Section IV]

**X. PAGE NUMBER FORM**

This form is to assist the review panel in finding the information in the Proposal that corresponds to the evaluation criteria. For each item listed below, please list the page number(s) where the reviewer may find the answer(s) to the criteria.

	<b>Evaluation and Selection Criteria</b> [wording for yellow cannot be changed if CDA, otherwise okay to edit]	
	<b>Minimum Qualifications</b>	Page Number(s)
<b>MQ1</b>	Proposer has [enter number] years of experience providing services as described in section II.A. or similar services to the target population as described in the RFP.	
<b>MQ2</b>	A nonprofit organization with a 501(c)(3) determination and/or equivalent.	
<b>MQ3</b>	Completed RFP Cover Page (See section IX)	
<b>MQ4</b>	[Enter additional MQs as needed, including certifications and/or other relevant factors]	
	<b>Organizational Capacity (40 points)</b>	
1.	Does proposer explain how the organization is qualified to implement the proposed services? Did they demonstrate the management/supervisory infrastructure, as well as the administrative/financial capacity to deliver the proposed services? (10 points)	
2.	Did proposer describe experience with/history of successfully providing these services, and serving this population/community? Were recently completed projects listed, detailing quality, requirements, timelines, and/or success? Did they demonstrate ability to implement new programming and/or services? (15 points)	
3.	Based on the staffing patterns described, will the program be sufficiently staffed? Did proposer identify whether services will be performed by existing or proposed staff? Are job descriptions/resumes for all key positions attached? Do job descriptions include the appropriate experience/qualifications/skills for the project, a realistic description of tasks to be performed, and a reasonable workload/work schedule? Were relevant staff training plans clearly described? Did they state that key individuals listed/identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the City's approval? (10 points)	
4.	Does the agency clearly demonstrate how their plans, strategies, and activities will ensure that it provides equitable access to program participants? Do they address the cultural and linguistic competencies related to working with the identified Target Population and the envisioned program design? Do they describe how the organization intends to meet the cultural needs of the target population? (5 points)	

	<b>Program Approach (35 points)</b>	
1.	Does the proposer clearly describe the agency’s specific program approach to deliver the service components proposed and how this program approach or service model will appropriately address the needs of the target populations in this RFP? Did they address Target Population, Scope of Work, and Service/Outcome Objectives? Does the proposer clearly describe linkages that will connect clients to services? (15 points)	
2.	Is the proposed facility/site that will be made available for the target population appropriate for the services proposed? Does proposer have a plan for location and hours of programming and/or services? Did proposer include a Site Chart? (5 points)	
3.	Does the proposer describe specific service and outcome objectives to be accomplished and how they will be measured? Does the proposer include an explanation of methods for data collection, documentation, and reporting on service and outcome objectives? Are any subcontractors identified? If so, are their responsibilities in the delivery of services clearly defined? Did proposer provide an MOU or letter of intent? (10 points)	
4.	Does proposed model include methods for clients to offer input regarding program design, service delivery and program operations? (5 points)	
	<b>Fiscal Capacity (25 points)</b>	
1.	Does the budget reflect sound, adequate allocation of resources, matching the program components including staffing costs, operating costs, and capital costs (as appropriate)? Is the budget correct and easy to understand? (10 points)	
2.	Are specific costs reasonable, justified, and competitive? Does the cost allocation support the services as proposed? (10 points)	
3.	Does proposer describe their ability to leverage other resources for this program, either from in-kind, and/or external resources? Does proposal reflect the effective use of organizational resources/external resources, including funds leveraged exclusively for this program? (5 points)	
4.	(optional) Is the specific unit rate reasonable and competitive? (XX points)	

## XI. BUDGET FORMS AND INSTRUCTIONS

### **IF YOU ARE USING A BUDGET TEMPLATE OTHER THAN THE STANDARD EXCEL BUDGET DOCUMENT, PLEASE REVISE THE SECTION BELOW TO MATCH THE BUDGET FORM**

Budgets should be submitted in the standard SFHSA format. Forms are available at: <https://sfcitypartner.sfgov.org/pages/Events-BS3/event-search.aspx>

Click on “Human Services Agency” in the Department drop-down menu and then click the link for this RFP.

The attached spreadsheets are in Excel. There are six (6) tabs: Budget Summary, Salaries and Benefits, Operating-Direct, Subcontractors-Pass Thru, Capital Expenses, and Justification.

Please note these must all be clearly and easily attributable to the specific program being funded.

### **[IF YOU ARE USING A DIFFERENT BUDGET TEMPLATE, MAKE SURE TO INCLUDE A SECTION FOR BUDGET JUSTIFICATION]**

The Budget Justification should be a narrative, providing detailed information and calculations supporting the amount allocated for each budget line item. Please detail all mathematical computations for each line item. Show how the total dollar amount was derived, e.g., the number of square feet of office space to be utilized multiplied by the rate per square foot, the cost per month for insurance multiplied by the number of months in the contract term, etc. For the Salaries and Benefits section, list the position, a brief sentence of the position's responsibilities, the basis for the percentage of FTE allocated to the activity, and the mathematical computation used to arrive at the total dollar amount. Also list everything being included under Fringe Benefits.

The Cost Allocation Plan is required. Proposers must follow the City’s cost allocation guidelines for nonprofit contractors, which largely follow those described by Generally Accepted Accounting Principles (GAAP) and in Federal OMB Circular A-122. The plan should include how indirect costs were calculated.

For any proposed Subcontracts over \$50,000, attach a separate detailed Subcontracting budget using the standard SFHSA format. Provide a brief explanation of the subcontracting arrangement, as well as a budget breakdown. Please note, the total subcontractor budget amount should appear on the Subcontractors-Pass Thru sheet.

Indirect rates are not allowable on Subcontractor indirect expenditures, Subcontracts over \$50,000, Capital Expenses, or Direct Client Pass-Through payments: aid payments, direct voucher payments, or any stipend, subsidy or expense paid on behalf of a client (i.e., security deposit, rental payment assistance, transportation vouchers, etc.). These examples are not intended to be a comprehensive list.

**These guidelines provide general information.** If further clarification or technical assistance is required, email [\[Contract Manager’s Email\]](#) and [HSARFP@sfgov.org](mailto:HSARFP@sfgov.org) on or prior to [\[insert date and time\]](#).