



**Mayor's Office of Housing
& Community Development
(MOHCD)**

Edwin M. Lee
Mayor

Kate Hartley
Acting Director

REQUEST FOR PROPOSALS

PUBLIC SERVICES

**FY 2017-2018
FUNDING CYCLE**

DATE ISSUED:
DEADLINE FOR SUBMISSION:

Tuesday, November 14, 2017
Monday, November 27, 2017 at 5:00 p.m.

NOTICE OF FUNDING AVAILABILITY

The Mayor's Office of Housing & Community Development (MOHCD) is pleased to announce the availability of City General Funds for the following specified projects and services:

Financial Coaching Primarily for LGBT Seniors	\$75,000
TOTAL	\$75,000

The grant period for awards under this notice will be from December 1, 2017 through June 30, 2018.

TECHNICAL ASSISTANCE WORKSHOP

MOHCD will provide a technical assistance workshop to assist interested applicants in determining the eligibility of proposed projects, and in completing the required elements of the proposal packet:

Friday, November 17, 2017

11:00 a.m. – 12:00 p.m.

1 South Van Ness Avenue, 5th Floor

Potential applicants are highly encouraged to attend the workshop before submitting an application. The meeting room is wheel chair accessible. If you need translation services, a sign language interpreter, or any other accommodations, please call (415) 701-5598 at least 72 hours in advance. For speech/hearing impaired callers, please call TYY/TDD (415) 701-5503. For information on MUNI routes, please call (415) 673-6864, or 511.

REQUEST FOR PROPOSALS (RFP) OVERVIEW

DEADLINE FOR SUBMISSION:

by hard-copy original and USB drive copy

November 27, 2017

at 5:00 p.m.

One original and one USB drive copy of the completed proposal must be submitted to:

Attention: Director of Community Development
Mayor's Office of Housing and Community Development (MOHCD)
1 South Van Ness Avenue, 5th Floor
San Francisco, CA 94103

HAND DELIVERY RECOMMENDED

I. ELIGIBLE PROJECTS

Eligible projects and services under each program area can be found in the Eligible Program Areas & Programs section of this RFP (p. 7). Applicants must submit a separate proposal for each program. MOHCD reserves the option to award multiple grants to an agency or group of agencies during the review process.

II. PROCUREMENT

This RFP procurement process, and the proposals received as a result of it, may be used to justify contract funding decisions for other similar services and/or other funding that becomes available through MOHCD or any other City department. MOHCD and/or any other City departments who use this RFP solicitation as a procurement process for other funds, reserve the right, at their own discretion, to fund select activities or partners (and remove or eliminate others) within a proposal submitted by a collaborative or group of agencies. The procurement process for this RFP or any of its component Program Areas & Programs may be delayed, suspended, or canceled if the City determines that such action is in the best interest of the City.

III. PRIORITIES AND ELIGIBILITY

A. Priority

Collaborative proposals are encouraged; however, collaborative proposals must choose a lead agency to serve as the fiscal agent. The fiscal agent should submit its own organizational documentation as directed below in the same manner as if it were a single agency. Priority will be given to those collaborations/agencies that currently perform similar services and demonstrate the ability to increase impact through collaborative efforts. Successful collaborative applicants will need to provide MOUs from each participating agency that outline scopes of work and expectations, both programmatically and fiscally.

B. Eligibility

1. Applicant's programs must principally benefit low- and moderate-income individuals and their families.
2. Participants of applicant's program(s) must reside within the boundaries of the City and County of San Francisco.
3. Applicants must be: (a) based in the City and County of San Francisco; (b) a 501(c)(3) nonprofit corporation registered with the Internal Revenue Service; and (c) in good standing with the State of California's Registry of Charitable Trusts.
4. Successful applicants must comply with all applicable state and local laws and government regulations.

IV. EVALUATION CRITERIA

1. The extent to which the applicant demonstrates an understanding of specific barriers and challenges facing its target population(s) and a successful history of effectively serving it (20%);
2. The extent to which the proposed program meets the objectives, eligible activities, and program description outlined in the RFP, demonstrates a reasonable, measurable theory for how its program activities lead to positive client and community outcomes, and utilizes partnerships to

strengthen and expand program impact (50%);

3. The extent to which the applicant demonstrates a robust evaluation methodology (10%); and
4. The extent to which the applicant demonstrates staff experience and expertise required to deliver a successful program, including a budget that accurately reflects the proposal's intent, activities and outcomes (20%).

See the RFP Proposal Evaluation Form (p. 13) to understand how reviewers will be scoring proposals submitted under this RFP.

V. REQUIREMENTS

The use of City funds is subject to numerous local requirements. A few of the requirements are listed below and are briefly summarized:

1. **Accessibility:** Programs and services must be accessible to persons with disabilities. Program access can be achieved in many cases without having to alter the existing facility.
2. **Non-Discrimination:** Agencies must comply with federal, state and San Francisco prohibitions against discrimination in fair housing and equal employment opportunity, and in awarding contracts. Agencies must also comply with the Equal Benefits Ordinance for domestic partners.
3. **Procurement:** Projects must comply with federal conflict of interest regulations, and regulatory procedures for obtaining and contracting for goods and services.
4. **Ineligible Reimbursements:** Funds for activities occurring prior to the commencement date of the grant agreement cannot be reimbursed.
5. **Religious Activity:** Funds may not be used for religious purposes.
6. **Political Activity:** Funds may not be used for political activity.
7. **Grant Agreement:** Successful applicants will be required to execute and meet the provisions of a grant agreement. Additional documentation, including an annual work plan and an annual budget, must be completed and approved by MOHCD prior to any funds being committed or spent. Financing is primarily on a monthly cost-reimbursement basis. Successful applicants will be expected to participate in MOHCD's online programmatic and financial reporting system.

VI. REVIEW PROCESS AND SCHEDULE

All submitted proposals will be initially screened by a committee composed of MOHCD staff to determine completeness and eligibility. Ineligible proposals will be eliminated at this stage. MOHCD staff will evaluate all complete and eligible proposals submitted for programs listed in the Eligible Program Areas & Programs section of this RFP (p. 7). MOHCD will make the final selection of agencies/agency to be awarded grant(s) under this RFP.

The preliminary schedule for review and approval is:

Monday, November 27, 2017	Proposals due to MOHCD by 5:00 p.m.
Thursday, November 30, 2017	Agencies notified of award
Thursday, December 7, 2017	Five day appeals period ends
Friday, December 1, 2017	Earliest date grant term can begin

Note: MOHCD reserves the right to adjust the preliminary schedule at its discretion.

VII. PROTEST PROCEDURES

A. Protest of Non-Responsiveness Determination

Within five business days of the City's issuance of a notice of non-responsiveness, any respondent that has submitted a proposal and believes that the City has incorrectly determined that its proposal is non-responsive may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth business day following the City's issuance of the notice 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 protest must be signed by an individual authorized to represent the respondent, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

B. Protest of Grant Award

Within five business days of the City's issuance of a notice of intent to award the grant, any firm that has submitted a responsive proposal and believes that the City has incorrectly selected another proposer for award may submit a written notice of protest. Such notice of protest must be received by the City on or before the fifth business day after the City's issuance of the notice of intent to 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 protest must be signed by an individual authorized to represent the proposer, and must cite the law, rule, local ordinance, procedure or RFP provision on which the protest is based. In addition, the protestor must specify facts and evidence sufficient for the City to determine the validity of the protest.

C. Delivery of Protests

All protests must be received no later than 5:00 p.m. on Thursday, December 7, 2017. If a protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein. Protests should be transmitted by a means that will objectively establish the date the City received the protest. Protests or notice of protests made orally (e.g., by telephone) or via e-mail will not be considered.

If the City determines that a meeting with the party submitting the appeal is necessary, such meeting will be scheduled within ten (10) calendar days of the receipt of a protest to review and attempt to resolve the protest. Protests must be delivered to:

Attention: Director of Community Development
Mayor's Office of Housing and Community Development (MOHCD)
1 South Van Ness Avenue, 5th Floor
San Francisco, CA 94103

PROPOSAL INSTRUCTIONS

1. Please be as succinct as possible. The narrative section must be no longer than seven pages. Reviewers will not consider text beyond the indicated text limitation and/or space provided.
2. No handwritten proposals will be accepted. Proposals must be typed or computer generated. Font must be at least 12 point.
3. Pages should be standard 8-1/2" by 11" with 1 inch margins. The narrative section must be double-sided and single-spaced.
4. Original signatures must be in blue ink on the original set.
5. Use the application checklist to ensure your package is complete.
6. Do not bind proposals, or submit extra materials not requested.
7. Substantially incomplete, faxed, or late applications will not be considered. Hand delivery is highly recommended. No applications will be accepted after 5:00 p.m. on Monday, November 27, 2017.

ELIGIBLE PROGRAM AREAS & PROGRAMS

Instructions: Below is one (1) program area with a specific program listed and described. Each proposal should stay within the parameters of its program objective; eligible program activities are outlined below.

Note: The Maximum Grant Amount is listed next to the program title below. The Maximum Grant Amount is for a 7-month period, from December 1, 2017 through June 30, 2018.

FINANCIAL EDUCATION

MOHCD has allocated City General Funds for the following purpose:

1. **Financial Coaching Primarily for LGBT Seniors (\$75,000).** The San Francisco Office of Financial Empowerment (SF OFE), in partnership with the Human Services Agency, Department of Aging and Adult Services, and the Mayor's Office of Housing and Community Development (MOHCD), is requesting proposals from community partners to implement financial coaching for LGBT seniors/older adults at sites that serve this population.

This RFP is directed towards organizations that can effectively implement quality, one-on-one financial counseling services to low-income San Franciscans through targeted referral systems developed in partnership with the SF OFE and our partner city agencies. Financial coaching is defined as the provision of personalized financial information provided by a certified counselor and resulting in measurable improvements in an individual's or family's financial situation.

The San Francisco LGBT Aging Policy Task Force recommended in *LGBT Aging at the Golden Gate: San Francisco Policy Issues and Recommendations (March 2014)* to develop and implement financial literacy training services that target LGBT older adults. This program is funded by the voter-approved Dignity Fund.

AGENCY CHECKLIST

Application Packet

(One original signed in blue ink and one USB drive copy)

- Proposal Cover Sheet (p.9)
- Board of Directors (p.10)
- Proposal Narrative (see p.11 for instructions)
- Program Budget Worksheet (p.12 and posted in Excel)

Additional required items for applicants not currently receiving funding from MOHCD:

- Articles of Incorporation, including all amendments
- Organization By-Laws, including all amendments
- Evidence of Federal Tax Exempt 501(c)(3) status

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San Francisco, CA 94103

HAND DELIVERY RECOMMENDED

RFP QUESTIONS?

Pierre Stroud
(415) 701-5588
pierre.stroud@sfgov.org

ALTERNATIVE FORMATS FOR PERSONS WITH DISABILITIES

Eugene Flannery
(415) 701-5598
eugene.flannery@sfgov.org

PROPOSAL COVER SHEET

(You may neatly hand write this portion of the proposal)

Organization Name:

Street Address:

City:

State:

Zip Code:

Main Phone:

Fax:

Program Name:

Program Street Address (if different):

City:

State:

Zip Code:

Executive Director:

Phone:

Email:

Primary Contact Person (if different):

Phone:

Email:

Total Proposal Request (may not exceed Maximum Grant Amount on page 7): \$

Total FY 2017-18 Projected Agency Budget: \$

I certify that the information provided in this application is true.

Signature

Date

BOARD OF DIRECTORS

(You may neatly hand write this portion of the proposal)

Name	Years on Board	Neighborhood of Residence (using map on p.14 of this RFP)	Affiliation/Occupation

PROPOSAL NARRATIVE

(Must not exceed 7 pages)

1. **Background and Need** (3-5 paragraphs suggested)

This section should demonstrate a clear understanding of the barriers and challenges faced by the target population(s) indicated in the selected program description.

- What specific barriers and challenges exist for the target population(s) broadly? How do these needs align or differ among the clients that you plan to serve through this proposal?
- What is the current landscape of funding and services to address these challenges, both at your organization and within the community?
- What is your organization's history of providing similar services to the target population(s)?

2. **Proposed Program Design** (7-9 paragraphs suggested)

This section should describe the implementation of activities prioritized by the selected program, and provide detail about program design and service delivery strategies. This section should also list activities and outcomes for your proposed program.

- What is the proposed program design? Describe how it incorporates best practices and will achieve intended goals and outcomes.
- What makes your program design unique compared to other services in the city?
- Who will your program target for services, how many individuals will it serve, and how does it propose to reach them?
- From a client's perspective, how will their life improve as a result of your program?
- Describe the activities and outcomes that your program plans to track, and how it will track them. In most cases, each client activity should be linked to specific outcome(s) and should be supported by evidence-based practice. You may elect to include a calendar, a logic model, or another graphic that illustrates how your program's activities lead to positive client and community outcomes.
- Your proposal should also include the expected number of people to be served per activity, and the number of people expected to achieve the corresponding outcome(s).
- What other organization(s), including City government entities, does your program partner with, and how does this partnership impact its reach/activities/services? Please describe the level of partnership (e.g., shared services or decision making versus referrals or service connection).
- How will your program involve the community, or connect with community-based knowledge and experience, to inform program design?

3. **Evaluation** (2-3 paragraphs suggested)

This section should describe how your organization will evaluate the impact of the proposed activities on the target population(s).

- How will your organization track progress and measure program impact on the target population(s)? Please include specific client success stories or examples of positive outcomes achieved, and how this impact was tracked.
- How will your organization evaluate and inform program design? Give clear examples of how information collected will be analyzed, interpreted and used in program decision making.

4. **Organizational Capacity and Budget** (2-3 paragraphs suggested)

Describe the skills and experience of key agency staff, and communicate a budget that will accomplish your proposed program design.

- Identify the individual(s) who will work on this project on behalf of your organization. Include name, job title, skills and experience for each individual.
- Provide a brief narrative for your proposal and full program budget; highlight any unique and/or substantial budget items (including other revenue sources) reviewers should understand, especially in the context of the full program budget.

PROGRAM BUDGET WORKSHEET

AGENCY NAME:	
PROGRAM NAME:	

Please fill in the yellow highlighted fields that apply to your Proposal and Full Program Budget. Include your program's two largest secured revenue sources in the columns labeled "Secured Amount from [Insert Source]," and sum the remaining revenue sources in the column labeled "Secured Amount from Other Sources." List the names of other revenue sources in that column header.

Line Item	Budget Item			Requested Amount from MOHCD	Secured Amount from [Insert Source]	Secured Amount from [Insert Source]	Secured Amount from Other Sources:	Total Program Budget
	Name & Title	Rate/Hr.	# of Hrs.					
Salaries & Wages								\$ -
								\$ -
								\$ -
								\$ -
								\$ -
								\$ -
	Total Salaries & Wages			\$ -	\$ -	\$ -	\$ -	\$ -
Fringe Benefits	Item							
	FICA							\$ -
	SUI							\$ -
	Workers Compensation							\$ -
	Medical Insurance							\$ -
	Retirement							\$ -
	Other							\$ -
	Total Fringe Benefits			\$ -	\$ -	\$ -	\$ -	\$ -
Contractual Services	Item							
								\$ -
								\$ -
								\$ -
	Total Contractual Services			\$ -	\$ -	\$ -	\$ -	\$ -
Equipment	Item							
								\$ -
								\$ -
	Total Equipment			\$ -	\$ -	\$ -	\$ -	\$ -
Insurance	Item							
								\$ -
								\$ -
	Total Insurance			\$ -	\$ -	\$ -	\$ -	\$ -
Other	Item							
	Travel & Conferences							\$ -
	Office and/or Program Space Rental							\$ -
	Office and/or Program Supplies							\$ -
	Telecommunications							\$ -
	Utilities							\$ -
								\$ -
	Total Other			\$ -	\$ -	\$ -	\$ -	\$ -
Indirect	Total Indirect (no more than 15%)							\$ -
	TOTAL			\$ -	\$ -	\$ -	\$ -	\$ -

RFP PROPOSAL EVALUATION FORM

1. Background and Need:

- Applicant clearly describes specific barriers and challenges that exist for its target population(s) and how these align or differ among the clients it will serve?
- Applicant illustrates an understanding of the current landscape of funding and services to address these challenges?
- Applicant describes a successful history of effectively serving the target population(s)?

Score: _____/20

2. Proposed Program Design:

- Applicant clearly describes its program design and articulates how the proposed design is best suited to address the needs of the target population(s) and the objectives of the RFP?
- Applicant incorporates best practices into its program design?
- Applicant fills a community service gap or provides unique value through its program design?
- Applicant clearly describes a reasonable, measurable theory for how its program activities lead to positive client and community outcomes?
- Applicant articulates the expected number of people to be served per activity, and the number of people expected to achieve the corresponding outcome(s)?
- Applicant clearly describes partnerships that strengthen and expand program impact?

Score: _____/50

3. Evaluation:

- Applicant clearly describes how the proposed program will track progress and measure impact?
- Applicant clearly describes how its evaluation framework will inform program design?

Score: _____/10

4. Organizational Capacity and Budget:

- Applicant clearly identifies program staff who are commensurate with the scope and objectives of the proposed program?
- Applicant clearly describes a proposal and full program budget that can accomplish the proposed program design, and includes reasonable explanations for unique and/or substantial budget items?
- Applicant's Board of Directors reflect the constituency of the target population(s) and demonstrate the appropriate expertise in the services to be provided and/or to be a high-functioning Board (e.g. fundraising, fiscal management, and similar skills)?

Score: _____/20

Total Score: _____/100

Recommend for Funding: YES NO

MAP OF MOHCD-DEFINED SAN FRANCISCO NEIGHBORHOODS

