



**MAYOR'S OFFICE OF HOUSING AND COMMUNITY DEVELOPMENT  
CITY & COUNTY OF SAN FRANCISCO**

**REQUEST FOR PROPOSALS**

**South of Market Community Stabilization Fund**

**DECEMBER 2016**

**Deadline for Submitting Applications: 5:00 p.m., Monday, January 30, 2017**

One original and three copies of the completed proposal should be submitted to:  
Mayor's Office of Housing and Community Development  
1 South Van Ness Avenue, 5<sup>th</sup> Floor  
Attention: Claudine M. del Rosario

***HAND DELIVERY RECOMMENDED***

**BIDDER'S CONFERENCE**

The Mayor's Office of Housing and Community Development will conduct two (2) technical assistance workshops to assist interested applicants in determining the eligibility of proposed projects, and completing the required elements of the proposal packet. These workshops will be held at 1 South Van Ness Avenue, 5<sup>th</sup> Floor on:

Tuesday, December 20, 2016	10:00 a.m. – 11:00 a.m.
Friday, January 6, 2017	2:00 – 3:00 p.m.

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.

# REQUEST FOR PROPOSAL OVERVIEW

## I. NOTICE OF FUNDING AVAILABILITY

The Mayor's Office of Housing and Community Development (MOHCD) together with the SoMa Community Stabilization Fund (the Fund) Community Advisory Committee (CAC) is seeking to fund community-based organizations to provide various services and activities as described in Attachment A. The grant period will be from July 1, 2017-June 30, 2019. The second year of continued funding (June 1, 2018 – June 30, 2019) will be contingent upon the successful delivery of outcomes for year one. MOHCD reserves the right to withhold Year 2 funding in the case that the funded agency does not meet acceptable performance goals. This is a Request for Proposal (RFP) from MOHCD announcing that SoMa Funds are being made available to provide these services and activities in the amounts described in Attachment A.

## II. ELIGIBLE ACTIVITIES

**Eligible activities under each program area can be found in Attachment A of this packet.** Applicants must submit a separate proposal for each program area. Attachment B provides a background of the Fund as well as the Strategic Plan, which will be used as a guide to determine alignment of proposed programs with the Fund's objectives and strategies. MOHCD reserves the option to award single or multiple agency awards during the review process.

## III. 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 Proposal Areas or Modules may be delayed, suspended, or canceled if the City determines that such action is in the best interest of the City.

## IV. PRIORITIES and ELIGIBILITY

### A. Priority

Priority will be given to those agencies that:

- will serve residents and workers within the overlapping impact areas that include the SoMa Youth and Families District (bounded generally by Natoma Street on the north, Harrison Street on the South, 4<sup>th</sup> Street on the east and 7<sup>th</sup> Street on the west) and the Filipino Social Heritage District (see map in Attachment B);
- demonstrate ability to increase impact through collaborative efforts;
- principally serve low-income residents (see MOHCD income guidelines at [www.mohcd.org](http://www.mohcd.org)) and/or small community-serving businesses (see definition of community serving businesses in Attachment C) in the South of Market.
- serve SoMa youth;

- provide arts and cultural services that benefit SoMa.

#### **B. Eligibility:**

- Beneficiaries must reside or work within the boundaries of SoMa (generally bounded by Market Street to the north, The Embarcadero to the east, King Street to the south, and South Van Ness Avenue and Division Street to the west.) For a map refer to Attachment B.
- Applicants must be San Francisco-based; must be a 501(C)(3) non-profit corporation registered with the Internal Revenue Service; and must be in good standing with the State of California's Registry of Charitable Trusts.
- Applicants may submit as single agencies or as a collaborative; 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 was a single agency.
- Applicants must demonstrate a history and track record of successfully providing the activities and services within the framework described in **Attachment A**.
- Successful applicants must comply with all applicable local government regulations.

#### **V. EVALUATION CRITERIA**

- A. The extent to which the applicant reflects a successful history of effectively serving the targeted populations as specified in the Fund's Strategic Plan (**Attachment B**.) **15%**
- B. The extent to which the proposed program meets the objectives, eligible activities, and program description outlined in the RFP. **15%**
- C. The extent to which the proposal outlines specific, measurable and realistic outcomes for the targeted population and reflects best practices. **15%**
- D. Extent to which applicant demonstrates a robust evaluation methodology. **15%**
- E. Extent to which applicant demonstrates staff experience and expertise required to deliver successful programs. **15%**
- F. Extent to which the budget seems appropriate, reasonable and feasible. **15%**
- G. Extent to which applicants can demonstrate leveraged funding. **10%** (agencies that are returning to the SoMa Fund for 2<sup>nd</sup> time or 3<sup>rd</sup> time funding will be expected to demonstrate diversified funding)

#### **VI. REQUIREMENTS**

##### **Fund Development and Capacity Building Requirement**

If the SoMa Stabilization Fund is providing more than **50%** of an agency's program budget, such agency will be required to participate in fund development/capacity building services that will be procured through this RFP for the SoMa Fund portfolio.

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

- **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.
- **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.
- **Procurement:** projects must comply with federal conflict of interest regulations, and regulatory procedures for obtaining and contracting for goods and services.
- **Ineligible Reimbursements:** funds for activities occurring prior to the commencement date of the grant agreement cannot be reimbursed.
- **Religious Activity:** funds may not be used for religious purposes or for the improvements of property owned by religious entities except where the grant recipient is a secular non-profit organization with a long term lease.
- **Political Activity:** funds may not be used for political activity.

**VII. TECHNICAL ASSISTANCE**

Questions on completing the application can be addressed at the bidder’s conference. The bidder’s conference will assist interested applicants in determining eligibility and completing the required elements of the proposal package. There will be **two workshops** held at **1 South Van Ness Avenue, 5<sup>th</sup> Floor**. The first will be held on **Tuesday, December 20, 2016 from 11:00 a.m. – 12 noon** and the final will be held on **Friday, January 6, 2017, from 2:00 p.m. – 3:00 p.m.**

**VIII. REVIEW PROCESS AND SCHEDULE**

All submitted proposals will be initially screened by a committee composed of MOHCD staff and a SoMa Community Stabilization Fund CAC member to determine completeness and eligibility. Ineligible proposals will be eliminated at this stage. MOHCD staff will make funding recommendations to the full CAC. The CAC will take action on all complete and eligible proposals submitted for programs listed on Attachment A. and make funding recommendations to the Board of Supervisors. The Board of Supervisors and the Director of MOHCD will make the final selection of the agencies/agency to be awarded grant(s) under Attachment A. **The preliminary schedule for review and approval is:**

Bidder’s Conference #1	Tuesday, December 20, 2016 at 10:00 a.m.
Bidder’s Conference #2	Friday, January 6, 2017 at 2:00 p.m.
Proposals due to MOHCD by 5:00pm	Monday, January 30, 2017
Post preliminary recommendations	March 2017
Public Meeting on Preliminary Recommendations	March 2017

Recommendations to BOS/Finance Committee	Early April 2017
Consideration by BOS and Notification of Awards	Late April 2017
Mandatory Orientation for Funded Agencies	Mid May 2017
Execution of Grant Agreements	May and June 2017
Projects Begin	July 2017

## **IX. 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 by 5:00p.m. of the due date. 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:

**Claudine M. del Rosario**  
**Director of SoMa Community Stabilization Fund**  
Mayor's Office of Housing and Community Development  
1 South Van Ness Ave., 5<sup>th</sup> Floor  
San Francisco, CA 94103

**Note:** 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 online programmatic and financial reporting system. Expenses incurred prior to start of the contract are not eligible for reimbursement.

## PROPOSAL INSTRUCTIONS

- ✓ Please be as succinct as possible. The narrative section must be no longer than five pages and double spaced. Reviewers will not consider text beyond the indicated text limitations and/or space provided.
- ✓ No handwritten proposals will be accepted. Proposals must be typed or computer generated and double-spaced. The font must be at least 10.5 point.
- ✓ Pages should be standard 8-1/2" by 11" with 1 inch margins. All copies should be double sided and double spaced.
- ✓ Original signatures must be in blue ink on the original set.
- ✓ Use the application checklist to ensure your package is complete.
- ✓ Submit the original unbound, with three additional stapled copies.
- ✓ Substantially incomplete, faxed, or late applications will not be considered. **Hand delivery is highly recommended. No applications will be accepted after 5:00pm on Monday, January 30, 2017.**
- ✓ One original and three copies of the completed proposal should be submitted to:

**Mayor's Office of Housing and Community Development**  
**1 South Van Ness Avenue, 5<sup>th</sup> Floor**  
**Attention: Claudine M. del Rosario**

## AGENCY CHECKLIST

### Application *(one original signed in blue ink and three copies)*

- Proposal Cover Sheet
- Board Affiliations
- Application Narrative
- Program Budget Worksheet

### Additional required items for applicants not currently receiving MOHCD funding *(one copy attached to the original set)*

- Articles of Incorporation, including all amendments
- Organization by-laws, including all amendments

## PROPOSAL COVER SHEET

Organization Name: \_\_\_\_\_  
Street Address: \_\_\_\_\_ San Francisco, CA 941 \_\_\_\_\_  
Program Location (if different): \_\_\_\_\_ San Francisco, CA 941 \_\_\_\_\_  
Main Phone: \_\_\_\_\_ Fax : \_\_\_\_\_  
Executive Director: \_\_\_\_\_ Telephone: \_\_\_\_\_ x \_\_\_\_\_  
Contact Person: \_\_\_\_\_ Telephone: \_\_\_\_\_ x \_\_\_\_\_  
Fax: \_\_\_\_\_ Email: \_\_\_\_\_

**Please check the box for both the Service Area and the Proposal Title that this proposal is applying for:**

*---For any of the proposals listed below, please reference Attachment A---*

#### **Community Cohesion and Neighborhood Coordination**

- Community Council
- Community Action Grants
- School Site Coordinator
- Neighborhood Arts and Culture Project
- College Preparatory Program
- Fund Development Consultant
- Nonprofit Leadership Development
- Organizational Capacity Building (a)
- Organizational Capacity Building (b)

#### **Housing**

- Access to Housing
- Eviction Defense and Housing Stabilization

**Jobs and Income**

- Financial Literacy
- Neighborhood and Business Coordination
- Event Based Economic Development
- Small Business Acceleration

**Total Proposal Request:** (must not exceed the amount listed on Attachment A \$ \_\_\_\_\_)

**Total FY 2017-2018 Projected Agency Budget:** \$ \_\_\_\_\_

**I certify that the information provided in this application is true:**

\_\_\_\_\_  
Signature of Executive Director

\_\_\_\_\_  
Date



## PROPOSAL NARRATIVE

*(Must not exceed 5 pages)*

1. **Background and Need:** (2-4 paragraphs suggested)

This section should demonstrate a broad understanding of the barriers and challenges faced by the target population as described in Attachment A for the relevant program area.

- What specific barriers and challenges exist for this population within this program area?
- What is your history of providing services in this specific program area and with this specific population?

2. **Proposed Program Design:** (4-5 paragraphs suggested)

This section should provide detail about program design and service delivery strategies.

- What is the proposed program design?
- Who will your organization target for services, how many overall individuals do you propose to serve through this program, and how do you propose to outreach to them?
- Describe how you incorporate best practices into your program design.
- What other organization(s) do you partner with, and how does this partnership impact your reach/activities/services?
- How will you involve the community, or connect with community-based knowledge and experience, to inform program design?

3. **Activities and Outcomes:** (3-4 paragraphs suggested)

This section should list activities, services and outcomes for your proposed program. It is recommended that applicants list performance measure and activity codes per the tables included under each program area.

- Activities and service descriptions should be clear and specific.
- Each activity and service should be linked to a specific outcome(s) and should be supported by evidence-based practice.
- Your proposal should also include expected number of people to be served per activity and number of people who will achieve specific outcomes.

4. **Evaluation:** (1-2 paragraphs suggested)

This section should describe how you will evaluate the impact of the proposed activities for the target population.

- How will you track progress and determine the level of impact for target population?
- How will you evaluate and inform program design?

**5. Organizational Capacity:** (2-3 paragraphs suggested)

This section should provide information about agency capacity to implement the activities prioritized in this RFP for the relevant program area.

- Identify the individual/s who will work on this project on behalf of your organization. Include name/s, job title/s, skills and experience.
- Briefly describe the overall agency’s capacity to manage and deliver this program (including fiscal health, leveraged resources, administrative capacity, etc.)

**LIST YOUR BOARD OF DIRECTORS:**

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Name	Neighborhood	Affiliation/Occupation	List Other Board Memberships
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## **ATTACHMENT A: SERVICE AREAS AND PROPOSAL REQUESTS**

**Instructions:** Below is a list of fourteen (14) program funding opportunities. On your proposal cover sheet please check the box that corresponds to the appropriate program. A separate proposal should be submitted for each program. Each proposal should stay within the parameters of its objective, eligible activities and description outlined below. Please read the Fund's Strategic Plan in Attachment B to ensure alignment with the Fund's objectives, strategies and priority populations.

Grant term: Unless otherwise noted, a grant term will be designated for a one-year term with an option for a second year, depending upon the SoMa Fund's budget, overall priorities, and performance by the grantee. MOHCD reserves the right to award a second year of funding to an organization, discontinue funding, and/or issue a separate procurement in the second year based on budget, priorities, and performance. The Maximum Grant Amount listed is the amount for one 12-month period.

Please note that if you are currently receiving a SoMa Fund grant for FY16-17, you must reapply under this RFP for FY17-18 funding. Current funding will not be automatically renewed.

### **COMMUNITY COHESION and NEIGHBORHOOD COMMUNICATION**

This program area is intended to support the following strategic goals:

Strengthen community networks and infrastructure to build neighborhood unity, self-determination and equity in SoMa; Preserve the social heritage of the neighborhood by investing in:

- local nonprofit community infrastructure development
- culture and arts that preserve existing social heritage of the neighborhood
- fostering resident connections across culture and income

#### **1) Community Council**

Maximum Grant Amount: \$50,000

Objective: Provide support and infrastructure for stabilization and community cohesion in SoMa.

Program Description: Administer a neighborhood collaborative to provide support and infrastructure for stabilization and community cohesion in the South of Market. This funding is intended to provide support for regular convening of SoMa stakeholders in developing collaborative strategies to address neighborhood stabilization in SoMa.

Examples of Eligible Activities: recruitment of neighborhood groups, providing governance and recommendations for funding community action grants, coordination and convening of SoMa stakeholders, serving as liaison between the council and MOHCD/SoMa CAC.

**Table of Possible Client Activities and Outcomes for this Program Area**

<b>Activity</b>	<b>Outcome</b>
Residents, workers, and CBOs participating in Civic Engagement Activities	Residents Who Report Increased Opportunities for Neighborhood Involvement and Civic Engagement
Residents Engaged in Community Grantmaking Process	(no outcome required)

**Table of Possible Non-Client Activities for this Program Area**

<b>Unit of measure</b>	<b>Description</b>	<b>Goal # or Completion Date</b>	<b>Start Date</b>	<b>End Date</b>
Plan/Report Produced		Date		
Plan/Report Presented		Date		
Survey Produced		Date		
Survey Completed/Results Shared		Date		
Agencies receiving asset management plans		#		
Agencies attending asset management workshops/trainings		#		
Community-Based Project Completed		Date		
Grants Awarded Through Community Grantmaking Process		#		
Neighborhood-Based Collaboratives Supported		#		
Meeting		#		
Number of Individuals Attending Meeting		#		
Event		#		
Number of Individuals Attending Event		#		
Workshops/Trainings		#		
Number of Individuals Attending Workshop/Training		#		
Outreach Materials Produced		Date		
Outreach Materials Distributed		#		
Outreach Events		#		
Number of Individuals Attending Outreach Events		#		

**2) Community Action Grants Coordinator**

Maximum Grant Amount: \$100,000

Objective: Provide resources for community-initiated projects that support the Fund’s strategic objectives

Program Description: Administer a community-based, small grants program for grants ranging in size from \$1000-\$5000. The small grant program should be in alignment with the South of Market Community Stabilization Fund’s strategic goals and direction. Community action grant recipients may include neighborhood groups, teachers, parents, residents and workers and should represent the Fund’s priority populations.

Examples of Eligible Activities: grant administration, technical assistance, including initial planning, project budgeting, implementation and reporting

**Table of Possible Client Activities and Outcomes for this Program Area**

<b>Activity</b>	<b>Outcome</b>
# Grants Awarded Through Community Grantmaking Process	Community Building and Neighborhood Planning
# Neighborhood-Based Collaboratives Supported	

**Table of Possible Non-Client Activities for this Program Area**

<b>Unit of measure</b>	<b>Description</b>	<b>Goal # or Completion Date</b>	<b>Start Date</b>	<b>End Date</b>
Plan/Report Produced		Date		
Plan/Report Presented		Date		
Survey Produced		Date		
Survey Completed/Results Shared		Date		
Agencies receiving asset management plans		#		
Agencies attending asset management workshops/trainings		#		
Community-Based Project Completed		Date		
Grants Awarded Through Community Grantmaking Process		#		
Neighborhood-Based Collaboratives Supported		#		
Meeting		#		
Number of Individuals Attending Meeting		#		
Event		#		
Number of Individuals Attending Event		#		
Workshops/Trainings		#		
Number of Individuals Attending Workshop/Training		#		
Outreach Materials Produced		Date		

Outreach Materials Distributed		#		
Outreach Events		#		
Number of Individuals Attending Outreach Events		#		

### 3) School Site Coordinator

Maximum Grant Amount: \$50,000

Objective: Strengthen the service infrastructure at Bessie Carmichael to support community cohesion, jobs and income for SoMa youth and families.

Program Description: Support the Bessie Carmichael School in becoming a full service community school and strengthening its community based organization and support services infrastructure to meet the needs of the students and their families. The Coordinator’s support to the school will include an assessment of the needs and assets of the school community, including students, teachers, families and administration.

Examples of Eligible Activities: Assistance in coordinating needs assessments, development of referral system for families, implementing and tracking outcomes, identifying, enlisting and convening community based organizations to support outcomes, convening stakeholder meetings, coordinating joint stakeholder projects and events.

#### Table of Possible Client Activities and Outcomes for this Program Area

Activity	Outcome
Residents, workers, and CBOs participating in Civic Engagement Activities	Residents Who Report Increased Opportunities for Neighborhood Involvement and Civic Engagement
Residents Engaged in Community Grantmaking Process	(no outcome required)

#### Table of Possible Non-Client Activities for this Program Area

Unit of measure	Description	Goal # or Completion Date	Start Date	End Date
Plan/Report Produced		Date		
Plan/Report Presented		Date		
Survey Produced		Date		
Survey Completed/Results Shared		Date		
Community-Based Project Completed		Date		
Grants Awarded Through Community Grantmaking Process		#		
Neighborhood-Based Collaboratives Supported		#		
Meeting		#		
Number of Individuals Attending Meeting		#		
Event		#		
Number of Individuals Attending Event		#		

Workshops/Trainings		#		
Number of Individuals Attending Workshop/Training		#		
Outreach Materials Produced		Date		
Outreach Materials Distributed		#		
Outreach Events		#		
Number of Individuals Attending Outreach Events		#		

#### 4) Fund Development Consultant

Maximum Grant Amount: \$50,000 (plus up to \$30,000 in agency stipends)

Objective: Build the capacity of grantees funded by the SoMa Fund in order to achieve long-term sustainability beyond the life of the Fund.

Program Description: Assist grantees in the SoMa Community Stabilization Fund portfolio in securing diverse funding sources for its programs to stabilize the SoMa neighborhood. \*Please note that qualified applicants under this program may be asked to interview with MOHCD staff members and/or SoMa CAC members as part of the application process. It is recommended that applications include letters from partner agencies confirming their plan to participate.

Examples of Eligible Activities: Research prospective funders, develop fundraising package to pitch to potential donors, assist funded agencies in developing long-term funding strategies, assistance in creating fund development plans.

#### Table of Possible Client Activities and Outcomes for this Program Area

Activity	Outcome
# of nonprofit staff receiving training and professional development	Org Capacity Building - Staff Trained
# of agencies participating in a collaborative planning process	Org Capacity Building – Development of a Plan
# of agencies receiving technical assistance	Org Capacity Building - Organizations Receiving TA

#### Table of Possible Non-Client Activities for this Program Area

Unit of measure	Description	Goal # or Completion Date	Start Date	End Date
Grant proposals submitted				
Plan/Report Produced		Date		
Plan/Report Presented		Date		
Staff Training		#		
Number of Staff Attending Training		#		

**5) Neighborhood Arts/Culture Project**

Maximum Grant Amount: \$20,000

Objective: Build community cohesion and capacity for civic expression and leadership; Engage community members in artistic collaboration; Preserve, reclaim and revitalize cultural practices as a form of empowerment or resistance to assimilation;

Program Description: project-based support for community-based organizations partnering with an individual artist or an arts organization to engage community members in an art-based project that benefits the South of Market. Artists or partners may be based outside of SoMa if they offer a specific expertise to the project. Applications should include letter from partner organizations confirming participation.

Examples of Eligible Activities: Community art/culture projects, community meetings to engage residents in artistic process.

**Table of Performance Measures and TGS Activity Codes:**

Activity	Outcome
# of residents and workers engaged in a collaborative planning process	Residents Who Report Increased Opportunities for Neighborhood Involvement and Civic Engagement
# of agencies participating in a collaborative planning process	Org Capacity Building – Development of a Plan

**Table of Possible Non-Client Activities for this Program Area**

Unit of measure	Description	Goal # or Completion Date	Start Date	End Date
Plan/Report Produced		Date		
Plan/Report Presented		Date		
Survey Produced		Date		
Survey Completed/Results Shared		Date		
Community-Based Project Completed		Date		
Neighborhood-Based Collaboratives Supported		#		
Meeting		#		
Number of Individuals Attending Meeting		#		
Event		#		
Number of Individuals Attending Event		#		
Workshops/Trainings		#		
Number of Individuals Attending Workshop/Training		#		
Outreach Materials Produced		Date		
Outreach Materials Distributed		#		
Outreach Events		#		
Number of Individuals Attending Outreach Events		#		



**6) College Prep Program**

Maximum Grant Amount: \$50,000

Objective: Increase foundational competencies for youth in SoMa.

Program Description: Support a SoMa-based community-based organization, or a collaborative including such an organization, to connect SoMa youth to quality college preparatory services.

Examples of Eligible Activities: connect a SoMa-based organization (an organization that primarily services SoMa) and its constituents to high-capacity college preparatory service programs/organizations; tutoring sessions, case management, academic workshops, exam preparation.

**Table of Possible Client Activities and Outcomes for this Program Area**

<b>Activity</b>	<b>Outcome</b>
Individuals Receiving Training to Improve Personal Effectiveness/Soft Skills	Individuals Demonstrating Increased Knowledge, Skills and Abilities
Individuals Receiving Training to Improve Academic Competencies	Individuals Receiving High School Diploma, GED, and/or Enrolling in Post-Secondary Education Program
	Individuals Demonstrating Increased Knowledge, Skills and Abilities
Individuals Receiving Training to Improve Workplace Competencies	Individuals Enrolling in a Sector-Specific Job Training Program, or Placed in Unsubsidized Employment
	Individuals Demonstrating Increased Knowledge, Skills and Abilities

**Table of Possible Non-Client Activities for this Program Area**

<b>Unit of measure</b>	<b>Description</b>	<b>Goal # or Completion Date</b>	<b>Start Date</b>	<b>End Date</b>
Meeting		#		
Number of Individuals Attending Meeting		#		
Event		#		
Number of Individuals Attending Event		#		
Workshops/Trainings		#		
Number of Individuals Attending Workshop/Training		#		
Staff Training		#		
Number of Staff Attending Training		#		
Counseling Sessions		#		
Outreach Materials Produced		Date		
Outreach Materials Distributed		#		

Outreach Events		#		
Number of Individuals Attending Outreach Events				
Number of Individuals Attending Outreach Events		#		

**7) Nonprofit Leadership Development**

Maximum Grant Amount: **\$50,000**

Term: 2-3 years

Objective: Increase SoMa’s local nonprofit capacity for collaborative leadership and support the creation of a larger, neighborhood nonprofit strategy to serve the Fund’s priority populations.

Program Description: This program is intended for an intermediary to serve and assist SoMa Fund grantees (both executive leadership and emerging leaders) in authentically aligning their vision, goals and communication for the purpose of stabilizing and serving SoMa’s vulnerable residents and workers. Grant funding may include stipends for participating nonprofits.

Examples of Eligible Activities: SoMa nonprofit leadership assessment, trainings, cohort retreats, cohort and individual coaching.

**Table of Performance Measures and TGS Activity Codes:**

<b>Performance Measures</b>	<b>TGS Activity Codes</b>
# of nonprofit staff receiving training and professional development	Org Capacity Building - Staff Trained
# of agencies participating in a collaborative planning process	Org Capacity Building – Development of a Plan
# of agencies receiving technical assistance	Org Capacity Building - Organizations Receiving TA

**Table of Possible Non-Client Activities for this Program Area**

<b>Unit of measure</b>	<b>Description</b>	<b>Goal # or Completion Date</b>	<b>Start Date</b>	<b>End Date</b>
Plan/Report Produced		Date		
Plan/Report Presented		Date		
Staff Trainings		#		
Number of Staff Attending Training		#		

**8) Organizational Capacity Building**

Maximum Grant Amount: First year grant amount ranges are listed below under eligible projects. Second year grant amounts may go up to \$100,000 depending on implementation requirements (e.g. leadership, technology, infrastructure). Approval of implementation budgets for Year Two of each grant will be subject to approval by the CAC.

Objective: Stabilize and strengthen the nonprofit infrastructure that serves priority populations in the South of Market.

Program Description: This funding is intended to support capacity building services to community based organizations serving vulnerable residents of SoMa. Agencies may choose to focus on one of the following areas of capacity building:

Eligible Projects:

- a. Trainings, workshops and other capacity building services provided by technical assistance organizations to other community based organizations for one of the following areas: 1) financial management, including best practices, budget development and monitoring, understanding financial statements, and effective decision making; and 2) real estate planning, including planning space needs, identifying and evaluating potential sites, negotiating purchase and lease agreements. **\$50,000 - \$75,000**
- b. Succession planning projects for individual organizations. Applicants may apply with a consultant already selected or may seek to hire a consultant after grant funding has been approved. **\$20,000 – 50,000**

**Table of Possible Client Activities and Outcomes for this Program Area**

Activity	Outcome
# of nonprofit staff receiving training and professional development	Org Capacity Building - Staff Trained
# of agencies participating in a collaborative planning process	Org Capacity Building – Development of a Plan
# of agencies receiving technical assistance	Org Capacity Building - Organizations Receiving TA

**Table of Possible Non-Client Activities for this Program Area**

Unit of measure	Description	Goal # or Completion Date	Start Date	End Date
Plan/Report Produced		Date		
Plan/Report Presented		Date		
Staff Training		#		
Number of Staff Attending Training		#		

## **HOUSING SERVICES**

This program area is intended to support the following strategic goal:

Increase access to perpetually affordable housing opportunities for existing residents of SoMa by investing in:

- resident engagement and leadership development
- services to provide information and preparation to successfully compete for affordable units
- Invest in acquisition, rehabilitation and/or development of land and property (Leveraging of funds required)

### **9) Access to Housing**

Maximum Grant Amount: \$75,000

Objective: Increase access to perpetually affordable housing opportunities for existing residents of SoMa.

Program Description: Organizations that apply under this program area will provide assistance to existing SoMa residents in identifying suitable rental opportunities, assistance with applications, knowledge of San Francisco's affordable housing systems, assistance with wait lists, credit counseling and financial education, tenant education, and general information and referral regarding appropriate rental opportunities.

Examples of Eligible Activities: outreach, assistance with applications, financial education, placement in rental housing, one-on-one counseling and group workshops, assistance with eligibility guidelines, preparing individuals to competitively apply for affordable and market rate housing, and education about housing opportunities and tenant rights

### **Table of Possible Client Activities and Outcomes for this Program Area**

<b>Activity</b>	<b>Outcome</b>
Applications for Affordable Rental Units	Placed in Rental Housing
Financial Counseling and Education	Individuals Demonstrating Increased Knowledge, Skills and Abilities
Counseling	Better Understanding

### **Table of Possible Non-Client Activities for this Program Area**

<b>Unit of measure</b>	<b>Description</b>	<b>Goal # or Completion Date</b>	<b>Start Date</b>	<b>End Date</b>
Meeting		#		
Number of Individuals Attending Meeting		#		
Event		#		
Number of Individuals Attending Event		#		

Workshops/Trainings		#		
Number of Individuals Attending Workshop/Training		#		
Staff Training		#		
Number of Staff Attending Training		#		
Counseling Sessions		#		
Outreach Materials Produced		Date		
Outreach Materials Distributed		#		
Outreach Events		#		
Number of Individuals Attending Outreach Events				
Number of Individuals Attending Outreach Events		#		

### **10) Eviction Defense and Housing Stabilization**

**Maximum Grant Amount:** \$75,000

**Objective:** Increase access to perpetually affordable housing opportunities for existing residents of SoMa.

**Program Description:** Organizations that apply under this program area will provide assistance to existing SoMa residents and workers regarding housing issues, including tenant rights education and legal support and translation, if needed.

**Examples of Eligible Activities:** Eligible activities include outreach and education on tenant rights; translation support and referral services to pro bono and low cost attorneys; support in accessing the Rent Board regarding habitability issues; and other related tenant support, including community convening to bring together tenants and non-profits that serve the SoMa community.

#### **Table of Possible Client Activities and Outcomes for this Program Area**

<b>Activity</b>	<b>Outcome</b>
Legal Representation	Avoid Eviction
Counseling	Better Understanding
Case Management	Achieve 75% of Goals from Individual Service Plan
	Complete First Individual Service Plan and Progress to Second
Rental Assistance	Stably Housed 3 Months Later
	Stably Housing 9 Months Later
Financial Assistance (moving costs, security deposits, utilities, last month's rent)	Stably Housed 3 Months Later
	Stably Housing 9 Months Later

Information & Referral

Information & Referral, Successfully Connected

**Table of Possible Non-Client Activities for this Program Area**

<b>Unit of measure</b>	<b>Description</b>	<b>Goal # or Completion Date</b>	<b>Start Date</b>	<b>End Date</b>
Meeting		#		
Number of Individuals Attending Meeting		#		
Event		#		
Number of Individuals Attending Event		#		
Workshops/Trainings		#		
Number of Individuals Attending Workshop/Training		#		
Staff Training		#		
Number of Staff Attending Training		#		
Counseling Sessions		#		
Outreach Materials Produced		Date		
Outreach Materials Distributed		#		
Outreach Events		#		
Number of Individuals Attending Outreach Events				
Number of Individuals Attending Outreach Events		#		

**JOBS AND INCOME**

This program area is intended to support the following strategic goal:

Support economic and workforce development for low income residents and community serving businesses by investing in:

- employer cultivation
- job preparation
- income support through micro business
- asset development
- mentoring, leadership development and financial literacy programs for youth and families

**11) Financial Literacy**

Maximum Grant Amount: \$50,000

Objective: Support economic development for low-income SoMa residents and their families.

Program Description: Provide financial education services to assist individuals, youth and families in achieving self-sufficiency and improved financial security. Funded organizations will be expected to adopt the Financial Education Standards approved by the Smart Money Network San Francisco and be able to describe how it adheres to the Standards through its work.

Examples of Eligible Activities: Financial coaching, counseling, basic banking services, predatory lending alternatives, budgeting and saving, and college planning.

**Table of Possible Client Activities and Outcomes for this Program Area**

Activity	Outcome
Financial Counseling and Education	Individuals Demonstrating Increased Knowledge, Skills and Abilities
	Clients Who Receive Loans
	Increase savings by at least 2% of net income
	Decrease debt by at least 10%
	Clients Who Open Savings/Checking Accounts
Credit Repair Counseling	Increase credit score by at least 35 points
Household Budget Created	

**Table of Possible Non-Client Activities for this Program Area**

<b>Unit of measure</b>	<b>Description</b>	<b>Goal # or Completion Date</b>	<b>Start Date</b>	<b>End Date</b>
Meeting		#		
Number of Individuals Attending Meeting		#		
Event		#		
Number of Individuals Attending Event		#		
Workshops/Trainings		#		
Number of Individuals Attending Workshop/Training		#		
Staff Training		#		
Number of Staff Attending Training		#		
Counseling Sessions		#		
Outreach Materials Produced		Date		
Outreach Materials Distributed		#		
Outreach Events		#		
Number of Individuals Attending Outreach Events				

**12) Neighborhood and Business Coordination**

Maximum Grant Amount: \$75,000

Objective: Create employment opportunities for SoMa residents, support SoMa small businesses, and generate connections between residents and the business community to achieve neighborhood cohesion.

Program Description: Create institutional and interpersonal linkages between residents (including youth), community-based organizations and the business community in the South of Market to build a culture of doing business that is inclusive of the local community.

Examples of Eligible Activities: outreach, coordination and convening of businesses, CBOs and SoMa residents, research on business needs around employment and desired skills, workshops for residents and businesses.



**Table of Possible Client Activities and Outcomes for this Program Area**

<b>Activity</b>	<b>Outcome</b>
Intake and referral	Better understanding of business basics or financial management basics
Case management	Individuals or businesses assisted with referral and follow up
	Individuals placed in jobs
	Graduates report increase in profitability, efficiency or stability
	Individuals or pre-startups assisted with referral and follow up
	Microenterprises launched
	Microenterprises expanded
Legal Assistance	Leases revised or extended
	Eviction prevented

**Table of Possible Non-Client Activities for this Program Area**

<b>Unit of measure</b>	<b>Description</b>	<b>Goal # or Completion Date</b>	<b>Start Date</b>	<b>End Date</b>
Meeting		#		
Number of Individuals Attending Meeting		#		
Event		#		
Number of Individuals Attending Event		#		
Workshops/Trainings		#		
Number of Individuals Attending Workshop/Training		#		
Staff Training		#		
Number of Staff Attending Training		#		
Counseling Sessions		#		
Outreach Materials Produced		Date		
Outreach Materials Distributed		#		
Outreach Events		#		
Number of Individuals Attending Outreach Events				
Number of Individuals Attending Outreach Events		#		

### 13) Event Based Economic Development

Maximum Grant Amount: \$75,000

Objective: Attract culturally relevant businesses to SoMa, which include businesses that serve all populations in the neighborhood, especially the LGBTQ, Filipino, youth and families residents, reflecting the existing cultural and special use districts in the neighborhood. Develop new and innovative approaches to jumpstart small-business growth in SoMa. Build community with arts groups and youth service providers.

Program Description:

Produce a series of pop-up events/markets/fairs in SoMa that will promote small business owner development featuring businesses that include, but are not limited to food and beverage, retail, and the arts. Strengthen prospective entrepreneurs interested in locating in SoMaby producing a weekly vendor series that will allow participating companies to build traction with consumers and bring in new economic activity. Must have experience with SoMa businesses and creating pop-up events.

Example of Eligible Activities:

Outreach to retailers, vendors, chefs, restaurant groups, and other relevant businesses. Curate a product / retail mix for maximum community engagement. Coordinate marketing activities to promote the series of events. Manage and develop relationships between venues, vendors, artists, youth, and restaurant groups.

#### Table of Performance Measures and TGS Activity Codes:

Activity	Outcome
# of businesses receiving assistance	Businesses that report an increase in efficiency, profitability, or stability
# of businesses and CBOs participating collaborative planning process	
# of agencies receiving technical assistance	

#### Table of Possible Non-Client Activities for this Program Area

Unit of measure	Description	Goal # or Completion Date	Start Date	End Date
Meeting		#		
Number of Individuals Attending Meeting		#		
Event		#		
Number of Individuals Attending Event		#		
Workshops/Trainings		#		
Number of Individuals Attending Workshop/Training		#		
Staff Training		#		
Number of Staff Attending Training		#		

Counseling Sessions		#		
Outreach Materials Produced		Date		
Outreach Materials Distributed		#		
Outreach Events		#		
Number of Individuals Attending Outreach Events				

**14) Small Business Acceleration**

Maximum Grant Amount: \$75,000

Objective: Develop new programs to enhance small business competitiveness in SOMA.

Program Description: Strengthen new and existing businesses in SOMA by providing workshops and support in business accounting, branding, marketing, crowdfunding, and mentorship services are needed to make them more competitive. Must have experience with marketing, crowdfunding, and business development.

Example of Eligible Activities:

Identify needs of businesses and develop new turn-key programs. Source consultants to provide services. Build screening and assessment criteria for businesses to qualify for these new services.

**Table of Possible Client Activities and Outcomes for this Program Area**

Activity	Outcome
Intake and referral	Better understanding of resources and business basics
Case management	Microenterprises launched
	Assisted with IDP development
	Startup training/curriculum completed
	Graduate or existing business assisted and an economic impact achieved
	Leases drafted, negotiated or renewed
	Microenterprises expanded
Legal Assistance	Leases revised or extended
	Eviction prevented

**Table of Possible Non-Client Activities for this Program Area**

<b>Unit of measure</b>	<b>Description</b>	<b>Goal # or Completion Date</b>	<b>Start Date</b>	<b>End Date</b>
Meeting		#		
Number of Individuals Attending Meeting		#		
Event		#		
Number of Individuals Attending Event		#		
Workshops/Trainings		#		
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Staff Training		#		
Number of Staff Attending Training		#		
Counseling Sessions		#		
Outreach Materials Produced		Date		
Outreach Materials Distributed		#		
Outreach Events		#		
Number of Individuals Attending Outreach Events				
Number of Individuals Attending Outreach Events		#		

## ATTACHMENT B: BACKGROUND & STRATEGIC PLAN

### **The SoMa Community Stabilization Fund**

In August 2005 the Rincon Hill Area Plan was approved, effectively rezoning the area (generally bounded by Folsom Street to the north, the Embarcadero to the east, Bryant Street and the north side of the Bay Bridge to the south, and Essex Street to the west) for residential development. The San Francisco Board of Supervisors approved an amendment to the Planning Code (Ordinance 217-05), establishing the SoMa Community Stabilization Fund (the Fund). This legislation imposes a SoMa community stabilization impact fee of \$14 per square foot on residential development in the Rincon Hill Area Plan to provide community stabilization benefits in SOMA including affordable housing, economic development and community cohesion. In addition, approximately \$6 million of the Rincon Hill Community Improvements Fund (\$11 per square foot), will be transferred to the Fund.

In concert with Ordinance 217-05, monies deposited in the Fund shall be used to address the impacts of destabilization on residents and businesses in SoMa including assistance for: affordable housing and community asset building, small business rental assistance, development of new affordable homes for rental units for low income households, rental subsidies for low income households, down payment assistance for home ownership for low income households, eviction prevention, employment development and capacity building for SoMa residents, job growth and job placement, small business assistance, leadership development, community cohesion, civic participation, and community based programs and economic development.

### **Mayor's Office of Housing and the Community Advisory Committee**

The Board of Supervisors approved Resolution 162-06, requiring the Mayor's Office of Housing and Community Development (MOHCD) to administer the Fund. The Ordinance also stipulates that there should be a SoMa Community Stabilization Fund Community Advisory Committee (the Committee), composed of seven members of the SoMa community, to advise MOHCD and the Board of Supervisors on the administration and expenditure of the Fund.

### **Mission and Vision**

The mission of the SOMA Community Stabilization Fund Community Advisory Committee is to stabilize the community and promote equity through funding recommendations and priorities that mitigate the impact of development.

Our vision is that populations most vulnerable to displacement in SOMA (individuals, families, businesses that serve and employ them, nonprofit organizations, community arts, and educational institutions) are able to live, work and prosper in a neighborhood that is safe and culturally and economically diverse.

- All South of Market Neighborhood Residents have access to information and can be involved in the decisions that affect their lives in the South of Market Community and beyond.
- All its residents, low-wage workers and small community-serving businesses can contribute to and benefit from the South of Market Community.
- Mutual respect and support is practiced by all in the South of Market Communities

## Conditions and Causes

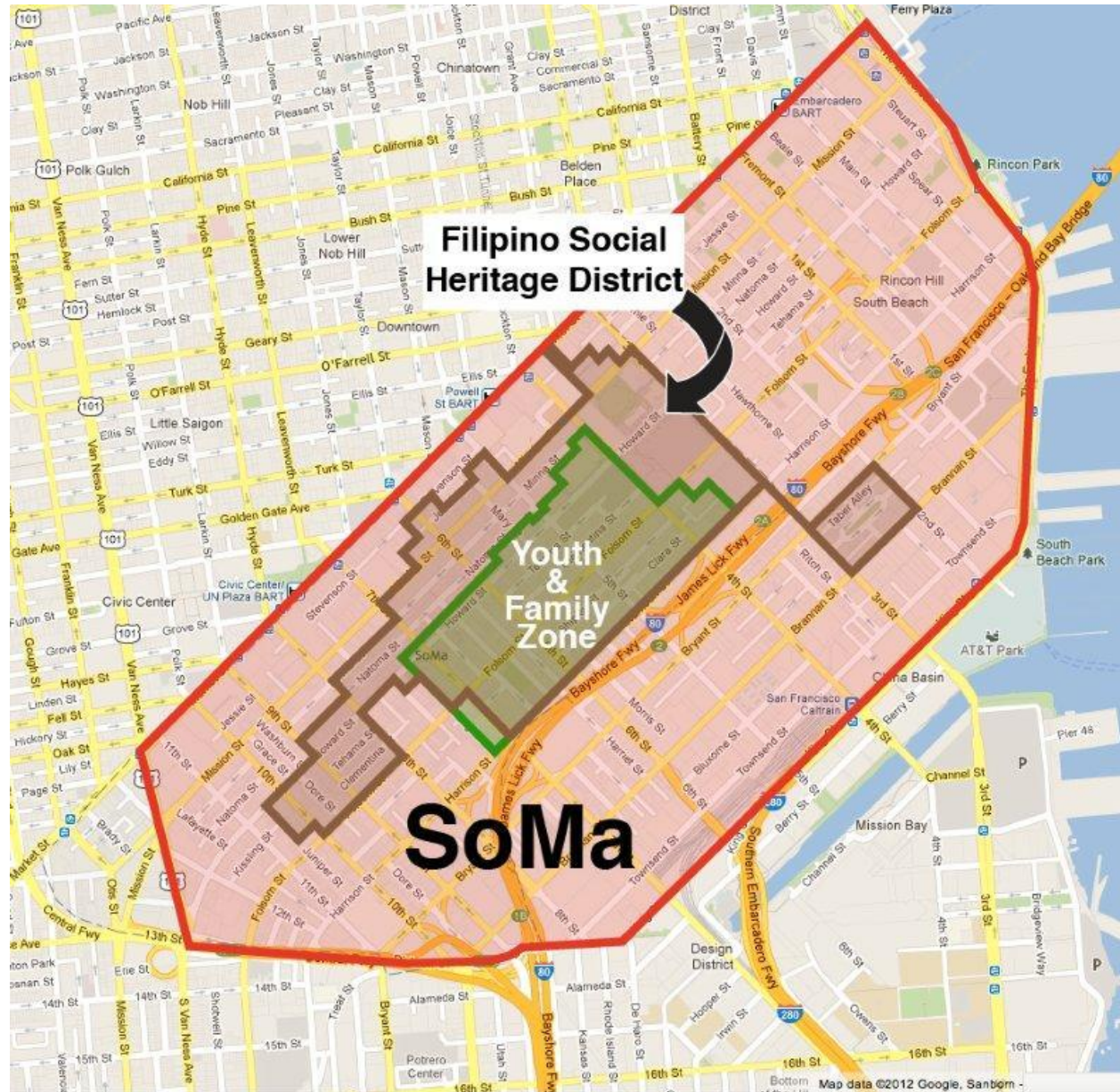
- The impact and aftermath of skyrocketing housing costs in the South of Market Community, exposed longstanding inequities and continues to destabilize vulnerable families and workers. Over the last decade the SOMA community has had and is expected to continue to have highest rate of real estate development in the City of San Francisco during the current decade.
- The South of Market Stabilization Fund is an important tool designed to focus on and support economic stability and choice for vulnerable community members.
- At core, the fund's long-term investments will address systemic inequity by helping vulnerable people have voice and input into policy decision-making and practice. These community voices will impact legislative and administrative policy with a particular focus on housing and income generation.
- The South of Market Community is a gateway in San Francisco for newcomers to the City of San Francisco as well as the United States. It is steeped in a strong cultural history and thriving culture expression. Significant community strength and connectedness can grow from culture.

## Strategies

- Grant making to organizations with a track record of success and/or a credible intent to promote equity, cultivate stability and support resident-led housing choice as well as strengthen the pathways to income growth
- Positioning the Fund and its Community Advisory Committee as an influential leader among local entities that provide resources and shapes public policy (local funders, business leaders, community college system, etc.)
- Promote infrastructure/forum and coordination among nonprofit organizational leaders.

## **Priority Population and Geography**

The Fund prioritizes low wage residents and workers, including youth and immigrants, and small community serving businesses (see Attachment C for definition). While projects serving the entire SoMa area are eligible, the Fund prioritizes projects serving the overlapping impacted areas that include the Children and Families Zone as well as the Pilipino Social Heritage District.



## **Investment Objectives**

The Fund's investments are directed toward the following four areas:

- Housing – Increase access to perpetually affordable housing opportunities for existing residents of SoMa by investing in:
  - resident engagement and leadership development
  - services to provide information and preparation to successfully compete for affordable units
  - Invest in acquisition, rehabilitation and/or development of land and property (Leveraging of funds required)
- Jobs and Income – Support economic and workforce development for low income residents and community serving businesses by investing in:
  - employer cultivation
  - job preparation
  - income support through micro business
  - asset development
  - mentoring, leadership development and financial literacy programs for youth and families
- Community Cohesion and Neighborhood Communication – Strengthen community networks and infrastructure to build neighborhood unity, self-determination and equity in SoMa; Preserve the social heritage of the neighborhood by investing in:
  - local nonprofit community infrastructure development
  - neighborhood culture and arts that preserve existing neighborhood social heritage of the neighborhood
  - fostering resident connections across culture and income
- Physical Infrastructure - Improve the infrastructure and physical environment of the neighborhood by invest in:
  - Rehabilitation, acquisition and/or development of community facilities
  - improve public spaces and outdoor facilities to promote cohesion among diverse groups in the neighborhood

## **Performance Measures**

- Jobs and community economic development strategy and CAC monitoring system in place
- # of housing units leveraged (developed as well as accessed by priority community members)
- # of small business expansions and stabilizations
- # of public policy engagements that produce positive results consistent with the plan
- Community-led grantee infrastructure to promote collective policy work
- \$ the Fund is able to grant directly and/or influence other grantors to contribute



### **Indicators of Success**

- South of Market priority stakeholders, vulnerable residents, low-wage workers and small businesses are able to access information to improve their long-term financial condition.
- Organizations that seek community stabilization and economic well being for community members will have connected, (organization to organization) and developed an infrastructure with the information sharing and resident leadership that is recognized as a driver of positive change by local government and key decision-makers.
- Current residents are prepared to take advantage of housing opportunities within the South of Market Community, if desired.
- Policy impacts of constituents seeking community stabilization and economic well-being consider development policy as well as local family and community policy
- Regional and local funders will support organizations promoting community stabilization as the indicators described above

## ATTACHMENT C: DEFINITION OF COMMUNITY SERVING BUSINESS

A SoMa community-serving business is defined as a business that:

**Either**

Hires part-time, temporary, contractors, or full-time employees that reside in SoMa;

**Or**

Commits to at least two of the following:

- Provides affordable food, products or services to residents
- Provides healthy or organic foods
- Provides food, products or services that reflect the cultural needs or diversity of the neighborhood
- Provides food, products or services that bring business diversity to the area
- Provides food, products or services that are requested by the community
- Provides special pricing or discounts for SoMa customers
- Provides free or affordable event space for SoMa serving non-profit organizations
- Provides affordable event menus for SoMa serving non-profit organizations
- Provides safe, dry places for individuals or community members to gather
- Provides a family-friendly environment
- Provides space for SoMa artists to exhibit or perform
- Participates in community watch or community safety
- Demonstrates a concerted effort to hire from the SoMa neighborhood
- Operates a “green” or environmentally sustainable business

For guidelines on the definition of small business, please refer to SBA’s website at <http://www.sba.gov/category/navigation-structure/contracting/contracting-officials/eligibility-size-standards>. Please note that priority will be given to organizations that work with businesses employing 20 or fewer employees.