



**City and County of San Francisco**  
**MAYOR'S OFFICE OF HOUSING AND COMMUNITY DEVELOPMENT**

**REQUEST FOR QUALIFICATIONS (RFQ)**  
**RFQ Name – Five-Year Strategic Planning Process**

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

**Background**

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

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

**Intent of this RFQ**

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

**Schedule\***

RFQ issued	September 23, 2022
Deadline for RFQ questions	October 3, 2022, 5 pm PST
Answers to RFQ questions issued	October 10, 2022
Deadline for RFQ response	October 21, 2022, 5 pm PST
Potential interview and reference checks	November 7 – November 19, 2022
Award notification	Late November/Early December 2022
<b>Contract term begins</b>	January 1, 2023

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

**RFQ Questions & Communications**

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

**Questions in writing must be received before 5pm PST on October 3, 2022.** No questions will be accepted after this time with the exception of City vendor compliance or Contract Monitoring Division (CMD) requirement questions.

A summary of the questions and answers pertaining to this RFQ will be posted on the MOHCD website at <https://sf.gov/departments/mayors-office-housing-and-community-development> on or before October 10, 2022.

# 1. Introduction

---

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

## Statement of Need and Intent

What is the City seeking? MOHCD is seeking a qualified Proposer or Proposers to support MOHCD’s 5-year strategic planning process which includes, data analysis, data collection tool development and community engagement planning services, strategy development, and drafting of plans.

Proposers must have experience working with public and private entities, as well as the general public. Qualifying Proposers will have expertise in survey development and qualitative and quantitative data analysis, communications and outreach strategy development and implementation in one or more of the following areas: U.S. Department of Housing and Urban Development’s Consolidated Planning process, Analysis of Impediments to Fair Housing Choice (AI), and HIV Housing Plan processes, housing issues and policy. Proposers may submit a response for one or more projects.

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

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

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

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

## Racial Equity

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

## Impact of Covid-19

MOHCD understands that COVID-19 disproportionately impacts Black, Indigenous, and People of Color and has deepened its partnership with Contractors that have responded to the emerging needs of vulnerable residents throughout the COVID-19 response and recovery. MOHCD adjusted its funding portfolios to better align with the goals of the City’s Economic Recovery Task Force while remaining grounded in the MOHCD HUD Consolidated plan.

1. **Housing Stabilization** – Addressing immediate housing needs.
2. **Anti-Displacement** - Protecting the stability of communities and families through access to legal services and supporting community-based networks to strengthen and increase service connections.
3. **Economic Self-Sufficiency** – Reaching the most vulnerable residents and providing opportunities for economic advancement.

## 2. Scope of Work

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

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

Is My Firm Expected to Propose for a Specific Project? Yes. Proposers can respond to one or more projects. Respondents must have expertise in survey development and qualitative and quantitative data analysis, communications and outreach strategy development and implementation in one or more of the following areas: U.S. Department of Housing and Urban Development's Consolidated Planning process, Analysis of Impediments to Fair Housing Choice (AI), and HIV Housing Plan processes, housing issues and policy.

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

### Services

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

	Title	Term	Total Funding
1.	Community Engagement Process and Consolidated Plan	30 months	\$250,000
2.	Analysis of Impediments to Fair Housing Choice (AI)	30 months	\$150,000
3.	HIV Housing Plan	30 months	\$50,000

### 2.1 Community Engagement Process and Consolidated Plan

- Develop and execute a communication and outreach strategy, including meeting facilitation to ensure the engagement of a representative, inclusive and diverse set of San Francisco stakeholders. This strategy would embody an equity framework that accounts for disparities in race, gender and other protected categories, as well as for persons with potential barriers to community engagement. The proposed approach would include in-person/hybrid focus groups (estimated up to 20), on-line meetings (estimated 4) and a hybrid on-line engagement process (e.g. in-person and on-line recruitment).
- Gather and assist in the analysis of local data resources and best practices literature;
- Develop survey and other data collection tools and analyze information gathered from public and private Contractors and the general public as part of MOHCD's 5-year strategic planning process;
- Develop a needs analysis report based on findings from the community engagement process, secondary data analysis, and information and data from other City departments related to needs;
- Develop an outreach summary report for the completed community engagement process;
- Develop a plan for and facilitate strategy refinement workshops for Consolidated Plan based on findings from the community engagement process, secondary data analysis as well as information and data from other City departments related to needs;
- Develop San Francisco's 2025-2029 Consolidated Plan, based on findings from the community engagement process, secondary data analysis, and information and data from other City departments; and
- Collaborate and coordinate with the consultant(s) working on the HIV Housing Plan and AI processes to ensure all elements of this scope of work are implemented in conjunction with those concurrent planning processes.

### 2.2 Analysis of Impediments to Fair Housing Choice (AI)

- Develop survey and other data collection tools and analyze information gathered from public and private Contractors and the general public as part of the AI process;
- Engage and coordinate with other city departments including Human Rights Commission and Planning Department;
- Develop a plan for, and facilitate strategy refinement workshops for AI based on findings from the community engagement process, secondary data analysis as well as information and data from other City departments related to needs;

- Draft San Francisco’s Analysis of Impediments to Fair Housing Choice, based on findings from the community engagement process, secondary data analysis, and information and data from other City departments; and
- Collaborate and coordinate with the consultant(s) working on the HIV Housing Plan and Consolidated Plan processes to ensure all elements of this scope of work are implemented in conjunction with those concurrent planning processes.

### 2.3 HIV Housing Plan

- Develop survey and other data collection tools and analyze information gathered from public and private Contractors and the general public as part of the HIV Housing Plan process;
- Engage and coordinate with other city departments including Department of Public Health, Department of Disability and Aging Services, and Department of Homelessness and Supportive Housing;
- Develop a plan for and facilitate strategy refinement workshops for HIV Housing Plan based on findings from the community engagement process, secondary data analysis as well as information and data from other City departments related to needs;
- Draft San Francisco’s HIV Housing Plan based on findings from the community engagement process, secondary data analysis, and information and data from other City departments; and
- Collaborate and coordinate with the consultant(s) working on the AI and Consolidated Plan processes to ensure all elements of this scope of work are implemented in conjunction with those concurrent planning processes.

### RFQ Timeline

RFQ issued	September 23, 2022
Deadline for RFQ questions	October 3, 2022, 5 pm PST
Proposals due	October 21, 2022, 5 pm PST
Internal review period	October - November 2022
Potential interview and reference checks	November 7 – November 19, 2022
Award notification	Late November/Early December 2022
Contract term begins	January 1, 2023

### 3. Response Requirements

---

#### Time and Place for Submission of Responses

Responses and all related materials must be received by **5:00 pm on Friday, October 21, 2022**. Responses must be submitted to [CommDevRFP@sfgov.org](mailto:CommDevRFP@sfgov.org) in **a single email**. Late submissions will not be considered. An email will be sent to confirm successful submission within three business days after the submission.

#### Submission Elements

The following items must be included in your response and clearly labeled. When submitting package via email, subject line should be labeled **“Five-Year Strategic Plan Process RFQ, 2022 Proposal”**.

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

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

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

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

Respondents are advised to review all links found in the Contract Requirements (Section 4) before beginning to work on Qualifications Statement or Project Approach, to ensure that City’s requirements can be met.

## 4. Contract Requirements

---

### 4.1 Vendor Status

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

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

### 4.2 Standard Contract Provisions

The successful Respondent will be required to enter into a contract substantially in the form of the Agreement for Professional Services. Failure to timely execute the contract, or to furnish any and all insurance certificates and policy endorsement, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another firm and may proceed against the original selectee for damages. Here is a sample of [the City and County of San Francisco Standard Professional Services Agreement \(P-600\)](#).

Respondent are urged to pay special attention to the requirements of Administrative Code Chapters 12B and 12C, Nondiscrimination in Contracts and Benefits, (§10.5 in the Agreement); the Minimum Compensation Ordinance (§10.7 in the Agreement); the Health Care Accountability Ordinance (§10.8 in the Agreement); the First Source Hiring Program (§10.9 in the Agreement); and applicable conflict of interest laws (§10.2 in the Agreement), as set forth in labeled paragraphs below.

### 4.3 Nondiscrimination in Contracts and Benefits

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

### 4.4 Minimum Compensation Ordinance (MCO)

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

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

### 4.5 Health Care Accountability Ordinance (HCAO)

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

### 4.6 First Source Hiring Program (FSHP)

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

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

## 4.7 Small Business Enterprise Goals and Rating Bonuses

### SBE Goals– Small Business Enterprise Subconsulting Requirements

The requirements of the Small Business Program, the “SBE Program” (SBE) shall apply to this RFQ.

### SBE Subconsultant Participation Goals

The Small Business Enterprise (SBE) subconsultant participation goal for this project is 0%.

### SBE Participation

The City strongly encourages proposals from qualified SBEs. Pursuant to Chapter 14B, the following rating bonus will be in effect for the award of this project for any firms who are certified by CMD as an LBE, State of California GSA as an SBE and Caltrans and the California Unified Certification Program, CUCP, as a DBE, or joint ventures have the specific levels of participation as identified below. Certification applications may be obtained by calling CMD at (415) 581-2310. The rating bonus applies at each phase of the selection process. The application of the rating bonus is as follows:

- (1) A 10% rating bonus to an SBE; or a joint venture between or among SBEs; or
- (2) A 5% rating bonus to a joint venture with SBE participation that equals or exceeds 35%, but is under 40%; or
- (3) A 7.5% rating bonus to a joint venture with SBE participation that equals or exceeds 40%; or
- (4) A 10% rating bonus to a certified non-profit entity.
- (5) A 5% rating bonus to firms certified as SBA-SBEs not unless the application of the SBA-SBE rating bonus adversely affects the inclusion of small and micro SBEs on the lists.

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

### SBE Form Submittals

All response packages submitted must include SBE Forms: 1, 2, 3 and Schedule B (if applicable). SBE Forms are attached as Appendix C. Proposers are strongly advised to contact CMD staff before submitting their proposals to insure SBE forms are accurate and/or requirements are achieved.

NOTE: Website links for finding Certified DBEs/SBEs/LBEs:

- Certified Disadvantaged Businesses Enterprises (“Federal DBE Program”) <https://dot.ca.gov/programs/civil-rights/dbe-search>
- Certified Small Businesses Enterprises (“State Program”) <https://caleprocure.ca.gov/pages/PublicSearch/supplier-search.aspx>
- For Certified SF CMD Certified Local Business Enterprises (“City Program”) <http://sfgov.org/cmd/directory-certified-lbes>

If you have any questions concerning the SBE Forms, you may call Selormey Dzikunu, CMD Contract Compliance Officer, at (628) 271-2094 or by email at [selormey.dzikunu@sfdpw.org](mailto:selormey.dzikunu@sfdpw.org),

### Chapters 12B and 12C Requirements (Equal Benefits)

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



## 5. Evaluation Criteria

---

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

### 5.1 Evaluation Team

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

### 5.2 Qualifications

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

Qualifying Proposers will have expertise in survey development and qualitative and quantitative data analysis, communications and outreach strategy development and implementation in one or more of the following areas: U.S. Department of Housing and Urban Development's Consolidated Planning process, Analysis of Impediments to Fair Housing Choice (AI), and HIV Housing Plan processes, housing issues and policy.

Proposers receiving a contract from this RFQ must be approved City suppliers or have started the process of becoming a City Supplier at time of proposal submission. See Section 4.

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

### 5.3 Evaluation Criteria

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

#### Written Response Evaluation (100 points)

- 1) Qualification Statement (20 points)
  - a) Demonstrated experience of performing complex assignments
  - b) Describe and summarize Respondent's background qualifications as outlined in Section 3, commitment, strength, and technical capabilities to fulfill all services specified and required, and successfully accomplish the work.
  - c) Proven ability to successfully meet the proposed scope of work outlined in this RFQ for the project which the Proposer is applying under.
  - d) Describe not more than three (3) projects completed in the last five (5) years similar in size and scope prepared by your firm including client, reference and telephone numbers, staff members who worked on each project, budget, schedule, and project summary.
- 2) Project Approach and Scope of Work (30 points)
  - a) Describe which services described in Section 2 your firm proposes to provide and how each will be provided. It is not necessary to address every item, however, Respondent must identify items that will and will not be provided and include any proposed enhancements.
  - b) For each of the services and activities that your firm proposes to provide to the City. Include the following information:
    - i) Overall approach for meeting the goals and objectives of the City's scope of service;
    - ii) Approach for coordinating/managing all work activities to meet project milestones and deliverable due dates;
    - iii) Processes/measures for controlling cost and schedule, tracking delivery/performance and maximizing QA/QC;

- iv) Approach for monitoring expended labor hours and tracking various factors affecting overall cost; and
  - v) Any special expertise to be provided for the project(s).
- 3) Project Team Expertise/Skills of Assigned Staff (30 points)
- a) Proposed team structure – include background, expertise, and authority of the staff person(s) who would prepare deliverables, depending on the scope of work, and key person on each proposed project team (e.g., who would be the key contact on the team to provide services). Include clarity, appropriateness, and value of each person’s role, authority to represent the firm, and demonstrated ability to solve problems.
  - b) Written assurance that the key individuals listed and identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the City’s prior approval.
  - c) Disclose whether any proposed staff have ever been removed or asked to resign from an engagement.
  - d) Provide resumes in Exhibit B to contain sufficient information for the Selection Panel to evaluate the ability and experience of each key/lead team member to successfully fulfill their roles and complete the scope of services.
- 4) Fee Proposal (10 points)
- a) Appropriateness and reasonableness of fees.
- 5) Overall Quality of Submission (10 points)
- a) Response conforms with RFQ requirements and concisely but comprehensively addresses RFQ requirements;
  - b) Response is professionally presented, organized, cohesive and complete.

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

MOHCD will release intent to award letter by early December 2022.

## 5.4 Contractor Selection Processes

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

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

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

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

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

## **6. Protest Procedures**

---

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

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

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

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

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

### **6.3 Delivery of Protests**

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

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

# Attachment I: MOHCD 5-year Strategic Planning Process Coversheet Template

## Part I - Proposer Information

Name of Firm:	<input type="text"/>
Headquarter Address:	<input type="text"/>
Phone No.:	<input type="text"/>
Toll Free Phone No.:	<input type="text"/>
Contact Name & Title:	<input type="text"/>
E-mail:	<input type="text"/>
SF Supplier ID:	<input type="text"/>
Federal Tax ID:	<input type="text"/>
Payment Terms:	<input type="text"/>
Person Preparing Bid:	<input type="text"/>
Local Representative Name and Number:	<input type="text"/>

## Main Point of Contact:

Telephone:	<input type="text"/>
Fax:	<input type="text"/>
Email:	<input type="text"/>

## Part II - Proposer Questionnaire

Question	Yes	No
<p><b>1. Have you registered as a Bidder or Supplier, through the Supplier Portal (<a href="https://sfcitypartner.sfgov.org/">https://sfcitypartner.sfgov.org/</a>)?</b>            If yes, what is your Bidder ID or Supplier ID? _____</p>		
<p><b>2. Has your company enrolled with Paymode-X to receive electronic payments from the City?</b>  <a href="https://www.paymode.com/city_countyofsanfrancisco">https://www.paymode.com/city_countyofsanfrancisco</a></p>		
<p><b>3. Have you registered your business with the San Francisco Treasurer &amp; Tax Collector as required prior to submission of any Proposal?</b>             Enter your Business Tax Registration ID here: _____</p>		
<p><b>4. Are you claiming SBE preference on this solicitation per Chapter 14B?</b>            Note: To claim SBE preference for this solicitation, you must be certified in the following SBE certification categories by the Proposal Due Date:            SBE /LBE San Francisco CMD LBE Certification Program            † SBE State of California, General Services SBE Program            DBE California Unified Certification Program (CUCP) DBE Program</p>		
<p><b>5. Have you submitted with your Proposal all the <u>Minimum Qualification Statement</u> outlined in the accompanying solicitation document?</b>            If you reply NO to any document, please explain.</p>		
<p><b>6. Have you submitted with your Proposal a <u>Fee Proposal</u> that complies with the requirements of the accompanying solicitation document?</b>            If you reply NO to any document, please explain.</p>		
<p><b>7. Have you submitted with your Proposal, the <u>Proposal Approach and Scope of Work</u> that complies with the requirements of the accompanying solicitation document?</b>            If you reply NO to any document, please explain.</p>		
<p><b>8. Have you submitted with your Proposal all the <u>Required Supporting Documentation</u> outlined in the accompanying solicitation document?</b>            If you reply NO to any document, please explain.</p>		

### Part III

#### Proposer References

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

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

**Part IV**

**Proposer Release of Liability for References**

The undersigned hereby fully and forever release, exonerate, discharge and covenant not to sue the City, its commissions and boards, officers and employees, and all individuals, entities and firms providing information, comments, or conclusions ("Reference Information") in response to inquiries that the City may make regarding the qualifications or experience of a Prime proposer, proposed joint venture partner, proposed subconsultant or proposed key/lead team member in connection with the selection process for **MOHCD 5-year Strategic Planning Process** from and for any and all claims, causes of action, demands, damages, and any and all liabilities of any kind or description, in law, equity, or otherwise arising out of the provision of said Reference Information. This Release and Waiver is freely given and will be applicable whether or not the responses by said individuals, entities or firms are accurate or not, or made willfully or negligently.

Company Name

Signature of Authorized Representative of Company

Date

Print Name and Title

**Part V.**

**Proposer Certification of Truth, Accuracy, and Completeness**

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

Company Name

Signature of Authorized Representative of Company

Date

Print Name and Title