

City and County of San Francisco

Sourcing Event ID 0000006259

Formal Request for Proposals for: Salesforce data migration and development maintenance and support

This Solicitation can be viewed on MOHCD's website at:
<https://sfmohcd.org/MOHCD-Vendors-and-Contractors-Solicitations>



Request for Proposals Issuance	Friday, December 3, 2021
Deadline for Written Questions	Thursday, December 9, 2021 at 5:00 p.m. PT Submit questions by email only to michael.solomon@sfgov.org
Responses to Questions Posted	Tuesday, December 14, 2021 by 5:00 p.m. PT
Deadline to Submit Proposals	Tuesday, December 21, 2021 by 5:00 p.m. PT
Notice of Non-Responsive Proposal Determination	Wednesday, December 22, 2021
Period for Protesting Notice of Non-Responsive Proposal Determination	Within three (3) business days of the City's issuance of the Notice of Non-Responsive Proposal Determination.
Notice of Intent to Award	Wednesday, December 29, 2021
Period for Protesting Notice of Intent to Award	Within three (3) business days of the City's issuance of a Notice of Intent to Award.
Contract Administrator:	Michael Solomon Sr IS Business Analyst, MOHCD 1 South Van Ness Ave, 5 th Fl, San Francisco, CA 94103 Phone: (415) 701-5583 Email: michael.solomon@sfgov.org

Attachments

- Attachment 1: City's Proposed Agreement Terms
- Attachment 2: Proposer Questionnaire and References
- Attachment 3: CMD Form 3
- Attachment 4: Optional: LBE Participation and Good Faith Outreach Forms
- Attachment 5: Written Proposal Template
- Attachment 6: Price Proposal Template
- Attachment 7: Reserved (First Source Hiring Form)
- Attachment 8: HCAO and MCO Declaration Forms
- Attachment 9: Reserved (Sweatfree Ordinance Forms)

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I. INTRODUCTION AND SOLICITATION SCHEDULE

A. Introduction

1. General

This Request for Proposals (hereinafter “RFP” or “Solicitation”) is being issued by the Mayor’s Office of Housing and Community Development (hereinafter, “MOHCD” or “City”). MOHCD, on behalf of all City Departments, is seeking qualified suppliers (“Proposers”) to provide proposals for Salesforce data migration and development maintenance and support (Proposal). The City has approximately 65 departments, ranging from small to very large. Some departments maintain facilities located outside of the geographic limits of the City. MOHCD shall order goods and/or services covered by the awarded contract(s) through the issuance of individual Purchase Orders and/or Task Orders which shall be released against the awarded contract(s) during the contract term.

ABOUT MOHCD

MOHCD provides financing for the development, rehabilitation and purchase of affordable housing in San Francisco. The department also guides and coordinates the City's housing policy. More specifically, MOHCD:

- Finances the development of affordable housing by non-profit and for-profit developers
- Provides financial and educational assistance to first-time homebuyers
- Finances housing rehabilitation costs for low-income homeowners
- Monitors and ensures the long-term affordability and physical viability of the City's stock of affordable housing
- Partners with the community to strengthen the social, physical, and economic infrastructure of San Francisco’s low-income neighborhoods and communities in need

In conjunction with the Department of Technology, the Mayor’s Office of Civic Innovation, and the new Department of Digital Services, MOHCD launched the DAHLIA Housing Portal (“DAHLIA” or “Housing Portal”; see housing.sfgov.org), a one-stop resource to search and apply for San Francisco affordable housing that features a custom web app with APIs to a custom Salesforce build.

2. Selection Overview

The City shall award a contract to the Proposer that meets the Minimum Qualifications of this Solicitation whose Proposal receives the highest ranking score. Responsive Proposals will be evaluated by a panel (“Evaluation Panel”) consisting of one or more parties with expertise related to goods and/or services being procured through this Solicitation. The Evaluation Panel may include staff from various City departments. Proposals will be evaluated based on the criteria outlined herein. If applicable, a Contract Monitoring Division (CMD) Contract Compliance Officer will assess Proposal compliance with Local Business Enterprise (LBE) requirements and assign a rating bonus to Proposal scores. The CMD-adjusted scores (if applicable) will then be tabulated, and Proposers will be ranked starting with the Proposer receiving the highest score, then continuing with the Proposer receiving the second highest score, and so on.

B. Anticipated Contract Term

A contract awarded pursuant to this Solicitation shall be non-exclusive with an original term of 5 years. The City at its sole, absolute discretion, shall have the option to extend the term for 3 additional years for a total of 8 years.

C. Anticipated Contract Not to Exceed Amount

A contract awarded pursuant to this Solicitation shall have a not to exceed (“NTE”) amount of \$3,000,000 for the initial term. Should the contract be extended, the NTE may proportionally increase as well.

D. Reserved (Indefinite Quantity, As-Needed Contract)

E. Cooperative Agreement

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

F. Public Disclosure

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

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

G. Limitation on Communications During Solicitation

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

H. Solicitation Schedule

The anticipated schedule for this Solicitation is set forth below. These dates are tentative and subject to change. It is the responsibility of the Proposer to check for any Addenda to this Solicitation or other pertinent information posted on MOHCD's website at:

<https://sfmohcd.org/MOHCD-Vendors-and-Contractors-Solicitations>

Proposal Phase	Tentative Date
Request for Proposals Issued	Friday, December 3, 2021
Deadline for Written Questions	Thursday, December 9, 2021 at 5:00 p.m. PT Submit questions by email only to michael.solomon@sfgov.org
Responses to Questions Posted	Tuesday, December 14, 2021 by 5:00 p.m. PT
Deadline to Submit Proposals	Tuesday, December 21, 2021 by 5:00 p.m. PT
Notice of Intent to Award	Wednesday, December 29, 2021
Period for Protesting Notice of Intent to Award	Within three (3) business days of the City's issuance of the Notice of Non-Responsive Proposal Determination.
Final Award	Wednesday, January 5, 2022

I. How to Register as a City Supplier

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

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

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

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

- **City Business Tax Registration Inquiries:** For questions regarding business tax registration procedures and requirements, contact the Tax Collector's Office at (415) 554-4400 or, if calling from within the City and County of San Francisco, 311.
- **Chapter 12(B) and 12(C) Inquiries:** For questions concerning the City's Chapter 12(B) and 12(C) Equal Benefits and Non-Discrimination in Contracting requirements, go to: www.sfgov.org/cmd.

J. Proposal Questions and Submissions

1. Proposer Questions and Requests for Clarification

Interested parties are directed not to contact any employees, agents or officials of the City other than those specifically designated in this RFP. Proposers shall email any questions regarding this Solicitation to michael.solomon@sfgov.org. Proposers who fail to submit questions concerning this Solicitation and its requirements by the Deadline for Written Questions will waive all further rights to protest based on the specifications and conditions herein. **Questions must be submitted by email to <mailto:michael.solomon@sfgov.org> no later than the deadline for submission of written questions or requests for clarification.** A written Addendum will be executed addressing each question and answer and posted publicly. It is the responsibility of the Proposer to check for any Addenda and other updates that will be posted on MOHCD's website at:

<https://sfmohcd.org/MOHCD-Vendors-and-Contractors-Solicitations>.

2. **Proposal Format**

Proposals must be created using a word processing software (e.g. Microsoft Word or Excel) and typed in a serif font (e.g.-Times New Roman). The document must have page margins of at least .5" on all sides. Information must be provided at a level of detail that enables effective evaluation and comparison between Proposals. Failure to follow formatting, submission, or content requirements, as well as page limit restrictions (if any), may negatively impact the evaluation of your Proposal.

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

Prior to the Proposal submission deadline, Proposers must email their complete Proposals to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation. Late submissions will not be considered. Each original Proposal received will be screened to ensure that all content required by this Solicitation is included. Partial or complete omission of any required content may disqualify Proposals from further consideration. Late Proposal submissions will not be considered and failure to adhere to the above requirements may result in the complete rejection of your Proposal.

K. Proposal Selection

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

L. Contract Terms and Negotiations

The successful Proposer will be required to enter into an Agreement substantially in the form of the Agreement attached hereto as Attachment 1, City's Proposed Agreement Terms. **If Proposer is unable to accept City's Proposed Agreement Terms substantially in the form presented, Proposer shall include a revised copy of City's Proposed Agreement with its Proposal.** The revised copy of the Proposed Agreement must clearly:

- (1) Mark those sections to which it objects;
- (2) Set forth Proposer's alternative terms with respect to each such section; and
- (3) Explain the basis for each proposed change.

If a satisfactory contract(s) cannot be negotiated in a reasonable time, the City, in its sole discretion, may terminate negotiations. Upon termination of negotiations, City may begin negotiation with the Proposer that meets the Minimum Qualifications of this Solicitation whose Proposal receives the next highest ranking score.

M. Protest Procedures

1. Protest of Non-Responsiveness Determination

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

2. Protest of Non-Responsible Determination

Within three (3) business days of the City's issuance of a Notice of Non-Responsibility, a Proposer may submit a written Notice of Protest of Non-Responsibility. The Notice of Protest must

include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

3. Protest of Contract Award

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

4. Delivery of Protests

A Notice of Protest must be written. Protests made orally (e.g., by telephone) will not be considered. A Notice of Protest must be delivered by mail or email to the Contract Administrator whose name and contact information appears on the cover page to this Solicitation and received by the due dates stated above. A Notice of Protest shall be transmitted by a means that will objectively establish the date the City received the Notice of Protest. If a Notice of Protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein.

II. CITY'S SOCIAL POLICY REQUIREMENTS

The San Francisco Municipal Code establishes a number of requirements for people seeking to do business with the City ("Social Policy Requirements"). These Social Policy Requirements can be found in Attachment 1, City's Proposed Agreement Terms. The Social Policy Requirements set forth below are NOT intended to be a complete list of all Social Policy Requirements applicable to this Solicitation and any contracts awarded from it. Proposers are encouraged to carefully review the Social Policy Requirements applicable to this Solicitation contained in Attachment 1, City's Proposed Agreement Terms.

A. Proposers Unable to do Business with the City

1. Generally

Proposers that do not comply with laws set forth in San Francisco's Municipal Codes may be unable to enter into a contract with the City. Laws applicable to this Solicitation are set forth below and in Attachment 1, City's Proposed Agreement Terms.

2. Reserved (Administrative Code Chapter 12X)

3. Administrative Code Chapter 12B

A Proposer selected pursuant to this Solicitation may not, during the term of the Agreement, in any of its operations in San Francisco, on real property owned by San Francisco, or where work is being performed for the City elsewhere in the United States, discriminate in the provision of bereavement leave, family medical leave, health benefits, membership or membership discounts, moving expenses, pension and retirement benefits or travel benefits, as well as any benefits other than the benefits specified above, between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of such employees, where the domestic partnership has been registered with a governmental entity pursuant to state or local law authorizing such registration, subject to the conditions set forth in §12B.2(b) of the San

Francisco Administrative Code. *Refer to Attachment 1, City's Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

B. Reserved (Prevailing Wage Ordinance)

C. Health Care Accountability Ordinance

A Proposer selected pursuant to this Solicitation shall comply with the requirements of Chapter 12Q. For each Covered Employee, an awarded Proposer shall provide the appropriate health benefit set forth in Section 12Q.3 of the Health Care Accountability Ordinance (HCAO). If a Proposer selected pursuant to this Solicitation chooses to offer the health plan option, such health plan shall meet the minimum standards set forth by the San Francisco Health Commission. Information about and the text of the Chapter 12Q and the Health Commission's minimum standards are available at <http://sfgov.org/olse/hcao>. Any Subcontract entered into by Proposer shall also be required to comply with the requirements of the HCAO and shall contain contractual obligations substantially the same as those set forth in this section. *Refer to Attachment 1, City's Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

D. Minimum Compensation Ordinance

A Proposer selected pursuant to this Solicitation shall comply with Administrative Code Chapter 12P. A Proposer selected pursuant to this Solicitation shall pay covered employees no less than the minimum compensation required by San Francisco Administrative Code Chapter 12P, including a minimum hourly gross compensation, compensated time off, and uncompensated time off. A Proposer selected pursuant to this Solicitation is subject to the enforcement and penalty provisions in Chapter 12P. Information about and the text of the Chapter 12P is available on the web at <http://sfgov.org/olse/mco>. *Refer to Attachment 1, City's Proposed Agreement Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

E. Reserved (First Source Hiring Program)

F. Reserved (Sweatfree Procurement)

G. Other Social Policy Provisions

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

III. LOCAL BUSINESS ENTERPRISE (LBE) PROGRAM REQUIREMENTS

A. Reserved (Application of LBE Bid Discounts and Rating Bonuses)

B. LBE Subcontracting Requirements

1. LBE Subcontracting Participation Requirements

LBE Subcontracting and Good Faith Outreach Forms (Attachment 4) are not required, but strongly encouraged. Proposers responding to this Solicitation may submit response packages that include the LBE Subcontracting Forms included in Attachment 4, *with the exception of CMD Form 2B entitled "Good Faith Outreach Form"*. The applicable forms are:

- (a) **CMD Form 2A:** LBE Subcontracting Form
- (b) **CMD Form 4:** Joint Venture Form (if applicable)
- (c) **CMD Form 5:** Employment Form

2. **CMD Compliance Officer**

The CMD Compliance Officer (CCO) for this Solicitation and any Contract awarded pursuant to this Solicitation is:

Selormey Dzikunu
Contract Monitoring Division
City and County of San Francisco
Tel: 415.581.2310
Email: selormey.dzikunu@sfdpw.org
Website: www.sfgov.org/cmd.

3. **LBE Payment and Utilization Tracking**

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

- (a) Within three (3) business days of City's payment of any invoice to Contractor, pay LBE subcontractors as provided under Chapter 14B.7(H)(9); and
- (b) Within ten (10) business days of City's payment of any invoice to Contractor, confirm its payment to subcontractors using the City's Supplier Portal Payment Module, unless instructed otherwise by CMD.

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

IV. **GOODS AND SERVICES REQUESTED**

A. **Goods and/or Services Requested**

1. **BACKGROUND**

This Solicitation is being issued by MOHCD, which is seeking qualified Proposers to provide Proposals for Salesforce development and data migration support. In conjunction with the Department of Technology, the Mayor's Office of Civic Innovation, and the Department of Digital Services, MOHCD launched the DAHLIA Housing Portal ("DAHLIA" or "Housing Portal"; see housing.sfgov.org), a one-stop resource to search and apply for San Francisco affordable housing.

DAHLIA features a custom web app with APIs to a custom Salesforce build. As MOHCD iteratively grows the service and expands its Salesforce data model to migrate almost all of its data into the same instance, it seeks support from an experienced custom-development Salesforce consultant, with particular strength in data model and custom solution development. MOHCD seeks responses from qualified firms (each Proposer must demonstrate that it meets the Minimum Qualifications described in Section VII to be considered for evaluation) demonstrating successful experience in developing Salesforce custom solutions using Agile processes. As such, the parties will work in short, regular intervals ("sprints"), each typically two weeks long and will deliver a working product at the end of each sprint.

MOHCD has decades' worth of extensive data from multiple functional areas of the department, the bulk of which exists in Microsoft Excel spreadsheets and isolated Microsoft Access databases. Staff members face challenges created by process information across multiple spreadsheets and the absence of single sources of truth for key data. Aligning data across

MOHCD divisions, with the participation of key staff, is the biggest project challenge, but MOHCD also seeks assistance with the following:

- Support for continuing DAHLIA development, as needed
- Data model development and maintenance
- Changes as required to accommodate data from additional areas of the department and future business requirements
- Data migration from varied existing sources to the modified design
- Support for new business processes and practices (including select training and reporting assistance), modified as the result of data migration

We anticipate this work to be ongoing, especially the maintenance (including troubleshooting), for up to five years. We also anticipate the need for more hours per week at the start of the contract with a decrease in hours per week over time as the primary data migration and DAHLIA development work subsides somewhat and the in-house staff takes over more work. The estimated range of hours per week is as much as 120 and as little as 10. The timeframe and number of hours per week will depend on current needs as regularly evaluated by the vendor and the City. Hours will be adjusted based on a regularly reevaluated agreed-upon plan so the City and vendor can plan resourcing accordingly and without any surprises.

2. SCOPE OF WORK

This high-level scope of work is a general guide to the work required to satisfy this project, not a complete listing of all services that may be required. It is subject to iterative change based on discovery, user feedback, and solutions the vendor will research and develop in partnership with MOHCD and the City's Digital Services team.

a. Vendor Responsibilities

Partner with MOHCD and the City's Digital Services team to:

- Understand the current MOCHD Salesforce design as well as all Excel spreadsheets and Access databases that contain data to be migrated to Salesforce, keeping field names consistent, the data clean, and maintaining data integrity across all resulting platforms and sources.
- Continue the current data migration work of MOHCD: MOHCD has collected extensive historical data outside of. In partnership with our current providers, the vendor will need to make necessary data model changes to the DAHLIA Salesforce instances (sandbox through production), and load the additional data to the revised build. Note that the department has already done extensive data modeling research to align fields in existing sources (spreadsheets, etc.) and some data migration has been completed.
- Propose streamlined business processes that are enabled by the technology product
- Use results of discovery, and in consideration of specifications provided by designers and developers of public-facing web product, maintain, support, and continue to develop a customized database system (custom objects, fields, reports, dashboards, etc.)
- Continue to maintain, support, and build the existing Salesforce database and Partner Community implementation. This includes the ability of Community Partners to view submitted housing applications, data enter paper applications, screen for duplicate applications, check lottery status, manage lease up, submit marketing and pricing requests, select down payment assistance type and Lender, view submitted down payment assistance applications, manage Certificate of Preference and Displaced

- Tenant Housing Preference, administer homeownership post-purchase programs (i.e., refinance, sell home, loan payoff, etc.), update household contact information, change password, administer financial applications, setup property listings, navigate through approval processes, and administer account and contact setups
- Integrate with the separate but related custom-built public-facing web product with the Salesforce database, using Salesforce APIs (see housing.sfgov.org)
- Collaborate closely in an Agile process with other project developers and City staff, including daily standups, usability testing, and sprint planning and retrospectives
- Support deployment of iterative releases to the existing production database used by City and public users. Train users and administrators to use (and for administrators, edit and update) the system
- Help City to understand and navigate the existing code base, database structure, and all other Salesforce setups related to DAHLIA.

3. DATABASE OVERVIEW

The Salesforce implementation includes a range of objects, fields, and relationships and must continue to provide the flexibility to add/edit/delete objects and fields as needed. Setup is subject to change based on further business analysis and design/development recommendations by the selected vendor(s).

The customized system stores and manages data primarily about, but not limited to:

- Places – Developments, Units and Beds in the MOHCD ecosystem
- Accounts & Contacts – including functionality to support DAHLIA web app account creation and maintenance
- Housing development:
 - Required functionality to support the creation of new units
- Asset management:
 - A range of occupancy and fiscal compliance information, for units that MOHCD develops and manages
- Housing placement programs:
 - Listings – Marketing events for units, along with related objects such as listing units
 - Applications – Submissions by interest households for available units, and/or waitlists, including objects such as application members
 - Application Preferences – Information on housing lottery preferences, which give select applicants additional placement consideration
- Document upload and download functionality that includes ability to select descriptive document properties (i.e., via picklist) that indicate to reviewers document type, etc. and that can be associated to particular user accounts and other relevant records.

The system must also allow for expansion to include other MOHCD functional areas, particularly those which touch the same developer and leasing agent stakeholders, and those which are required for larger comprehensive reporting, such as granting functions through our Community Development division

The system must preserve all standard Salesforce features, including but not limited to the following:

a. Security Requirements

- All data, including login information, transmitted and inside databases must be encrypted and secure.
- Automatic timeout (auto-logout) that can be controlled by a System Administrator
- Scheduled data backups at an agreed-upon frequency
- Provide ability for MOHCD to download all data in an open non-proprietary format (i.e. XLS, SQL backup, CSV, etc.); data must be usable by MOHCD without dependency on Contractor or other outside proprietary tools or services
- Finally, an updated data definition table must be included, specifying the name, size and type/class of each field, as well as any specific relationship to other fields.

b. Reporting Requirements

- MOHCD must be able to define and generate ad-hoc queries and reports across multiple data tables by exporting System data into Microsoft Office (Word, Excel), CVS and HTML formats
- MOHCD must be able to create, save, print, export, etc. reports based on any data in the system, as well as the ability to publish/share particular queries

B. Reserved (Regulatory and Compliance Requirements Specific to the Goods/Services Solicited)

C. Reserved (Articles Furnished)

D. Reserved (Alternates)

E. Reserved (Samples)

F. Reserved (Freight on Board and Shipping Costs)

G. Green Purchasing Requirements

In preparation for any Proposal submitted in response to this Solicitation, Proposers are required to review the City [Mandatory Green Purchasing Requirements](#) to ensure all goods and services offered to City in response to this Solicitation comply with the City's Green Purchasing Requirements. In addition, Proposers are encouraged to refer to Attachment 1, City's Proposed Agreement Terms, for additional details related to the Green Purchasing Requirements applicable to any contract awarded pursuant to this Solicitation.

V. PROPOSAL EVALUATION CRITERIA

Evaluation Phase	Maximum Points
Minimum Qualifications Documentation	Pass/Fail
Price Proposal	Pass/Fail
Written Proposal	100 Points
TOTAL POINTS	100

VI. REQUIRED SUPPORTING DOCUMENTATION

Proposers must provide each Required Supporting Documentation ("RSD") identified below with their Proposal. Failure to do so may result in the Proposal being deemed Non Responsive.

RSD1	Evidence that Proposer is 12B compliant or likely to become compliant within 30 days.
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RSD2	Completed Proposal Attachments: <input type="checkbox"/> Attachment 1: Proposer's Changes to City's Proposed Agreement Terms <input type="checkbox"/> Attachment 2: Proposer Questionnaire and References <input type="checkbox"/> Attachment 3: CMD Form 3 <input type="checkbox"/> Attachment 4: (Optional) LBE Participation and Good Faith Outreach Forms <input type="checkbox"/> Attachment 5: Written Proposal Template <input type="checkbox"/> Attachment 6: Price Proposal Template <input type="checkbox"/> Attachment 8: HCAO and MCO Declaration Forms
RSD3	Signed copies of all Solicitation Addenda, if any.

VII. MINIMUM QUALIFICATIONS DOCUMENTATION (PASS/FAIL)

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

MQ #	Description
MQ1	Complete all requirements and submit all forms and attachments as described in this RFP.
MQ2	<p>Evidence that Proposer has 5 years of experience within the last 7 years in the custom development of goods and/or services requested by this Solicitation. Submit two Prior Project Descriptions in accordance with section IX.E. of this RFP and demonstrate in those descriptions that Proposer has met each and all of the following experience requirements:</p> <p><u>Experience with scope of Project described in this RFP with comparable agencies:</u></p> <ul style="list-style-type: none"> Proposer must have experience developing and maintaining end-to-end (from development through successful launch and acceptance by government or nonprofit agency client) customized, Salesforce-based systems utilizing the same software or platform proposed under this RFP for at least two (2) government or nonprofit agencies with over 50 users in the United States, other than MOHCD. The customized systems developed must be outside the sales, marketing, leads focus of the standard Salesforce build Proposer must have experience with Agile project management <p><u>Experience is current:</u></p> <ul style="list-style-type: none"> Both Prior Project experiences occurred within seven (7) years of the date of this RFP <p><u>Experience of Key Personnel:</u></p>

	<ul style="list-style-type: none"> • The proposed Project Manager/Lead Developer (or other title for the role directly responsible for serving as the MOHCD point of contact managing project resources, budget, timeline, deliverables and completion), as verified in the Proposer's Project Staffing Structure and/or Project Staff Qualifications, is the same Project Manager/Lead Developer or agency point of contact on at least one of the Proposer's two submitted Prior Project Descriptions. • The Lead Developer named in the Project Staffing Structure AND Project Staff Qualifications must submit proof of current, active certification in the software or platform proposed under this RFP. <p>If proposing a partnership, each of the partners must be listed in both Prior Project Descriptions.</p>
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VIII. PRICE PROPOSAL (Pass/Fail)

A. Price Proposal Format and Allocation of Points

Proposers shall submit a Pricing Narrative in response to this Solicitation. The pricing narrative should, at a minimum, address the following points:

- (a) Unit pricing by service or product line, manufacturer, etc. including how the pricing will be determined and adjusted over the contract term (e.g. fixed price adjusted annually, X% off of list, X% mark up, etc).
- (b) Indicate if any further discounts are offered, i.e. volume, quantity, prompt payment etc.
- (c) Discuss why the Proposer believes pricing is fair and reasonable and how it relates to most favored customer pricing.

Proposer's pricing narrative, including any proposed price list discounts or markups, must remain firm during the term of the contract unless stated otherwise. Submission of the Pricing Narrative will be evaluated on a Pass/Fail basis.

B. Price Proposal Evaluation Period

The City will attempt to evaluate Proposals within thirty (30) days after receipt of Proposals. If City requires additional evaluation time, all Proposers will be notified in writing of the new expected award date.

C. Reserved (Price Discrepancies)

D. Reserved (Price Lists)

E. Reserved (Proposing on Separate Items or in Aggregate(s))

F. Application of Discounts for Evaluating Lowest Responsive Proposer

1. Reserved (LBE Bid Discount/Rating Bonus)

IX. WRITTEN PROPOSAL (100 POINTS)

In addition to submitting documents supporting each Minimum Qualification as required by this Solicitation, Proposers shall also submit a complete Proposal consisting of each item set forth below.

The content of all Proposals must consist of all the information specified below, in the order outlined below, in order to be deemed responsive.

A. Description of Goods/Services being Provided (25 Points)

Proposer shall provide a Proposal consisting of the full line of goods and/or services being offered in response to this Solicitation, including manufacturer names and product descriptions, if applicable. Proposer must also provide detailed descriptions of how the Proposer will execute the work associated with each task outlined in this Solicitation. The description provided for each task should include, as appropriate, the following information:

- Task-specific approach and associated work elements;
- Dependencies on/among other tasks (including activities of others and required key information);
- Responsible party within the Proposer; and
- Output/deliverables from the task.

B. Business Profile (5 Points)

Provide a brief description of the Proposer's size and organization structure, including:

1. Proposer's financial stability, capacity and resources supported by two (2) most recent annual financial statements by which City can analyze Proposer's financial resources. If financial statements are unavailable due to confidentiality reasons, submit recent Dun & Bradstreet reports. Include all lines of credits the City should consider in its analysis.

2. A listing and description of any lawsuit resulting from (a) any public project undertaken by the Proposer or by its subcontractors where litigation is still pending or has occurred within the last five years or (b) any type of project where claims or settlements were paid by the Proposer or its insurers within the last five years.

C. Project Team (15 Points)

1. **Team Members** (8 Points). Provide the role, responsibilities, qualifications, and company affiliation of every individual on the Proposer team who will perform the services outlined in this Solicitation. Discuss each team member's background and experience in order to demonstrate a strong ability to successfully perform the work.

2. **Key/Lead Team Members** (5 Points). Identify and provide resumes for all staff who will serve as the Key/Lead Team Members so that the Evaluation Panel can evaluate the ability of each team member to successfully fulfill their project roles and complete the scope of services.

3. **Team Organization Chart** (2 Points). Attach an Organizational Chart that illustrates the team structure (include the integration/interaction with City project team staff). Note the Proposer name and title/role for each team member.

D. Qualifications Summary (5 Points)

Proposer must demonstrate corporate qualifications, commitment, strength, and technical capabilities to fulfill all services specified and required to successfully accomplish the work. If Proposer is a JV, include a description of the organization, relationships, and defined responsibilities of all Partners in the JV. Describe any previous project-specific associations of the JV Partners. The Lead JV Partner shall demonstrate proven experience in managing and leading.

E. Past Projects (20 Points)

Proposer must describe 2 most recent projects previously managed by the Proposer or, if applicable, JV Partners within the last 7 years.

1. **Similar Size and Scope:** Each project must be of the type and scope of services specified in this Solicitation. (5 Points)

2. **Project Details:** The descriptions shall include each item listed below. (15 Points)

- a. Project name;
- b. Project scope summary;
- c. Dates when the project was performed;
- d. Project costs;
- e. Proposer's role and responsibilities in the project;
- f. Proposer's performance on delivering the project on schedule and on budget;
- g. Proposer staff members who worked on the project; and
- h. Client name, reference, and contact info.

F. Work Approach (30 Points)

Proposer must describe their overall work approach to successfully deliver the goods and/or services requested in this Solicitation by addressing each item listed below:

1. Approach for coordinating/managing all work activities, including coordination and communication with City staff, to meet project milestones and deliverable due dates. (5 Points)

2. Processes/measures for controlling cost and schedule, tracking delivery/performance, and maximizing quality (QA/QC). (5 Points)

3. Approach for monitoring expended labor hours and tracking various factors affecting task costs. Include description (frequency, days after timesheet submittal) of project manager's access to reports on staff labors hours and other cost items. (5 Points)

4. Processes for internal and external notification and resolution of technical conflicts and cost/schedule variances. (5 Points)

5. Understanding of potential project/task issues and constraints, and approach to managing project-specific challenges to complete tasks on schedule and within budget. (5 Points)

6. Approach and procedures for contending with work partners in adversarial or difficult situations. (5 Points)

X. RESERVED (ORAL INTERVIEWS)

XI. INSURANCE AND BONDS

A. Insurance

Prior to award, the successful Proposer(s) will be required to furnish evidence of insurance as outlined in Attachment 1, City's Proposed Agreement Terms.

- B. Reserved (Performance Bond)**
- C. Reserved (Fidelity Bond)**
- D. Failure to Provide Insurance and/or Bonds**

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

XII. TERMS AND CONDITIONS FOR RECEIPT OF PROPOSALS

A. Cybersecurity Risk Assessment

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

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

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

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

B. Solicitation Errors and Omissions

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

C. Objections to Solicitation Terms

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

D. Solicitation Addenda

The City may modify this Solicitation, prior to the Proposal due date, by issuing an Addendum to the Solicitation, which will be posted on MOHCD's website. **The Proposer shall be responsible for ensuring that its Proposal reflects any and all Solicitation Addenda issued by the City prior to the Proposal due date regardless of when the Proposal is submitted.** Therefore, the City recommends that the Proposer consult the website frequently, including shortly before the Proposal due date, to determine if the Proposer has downloaded all Solicitation Addenda. It is the responsibility of the Proposer to check for any Addenda, Questions and Answers documents, and updates, which may be posted to the subject Solicitation.

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

E. Proposal Term

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

F. Revision to Proposal

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

G. Proposal Errors and Omissions

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

H. Financial Responsibility

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

I. Proposer's Obligations under the Campaign Reform Ordinance

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

1. Submission of a Proposal in response to this Solicitation may subject the Proposers to restrictions under Campaign and Governmental Conduct Code Section 1.126, which prohibits City contractors, Proposers, and their affiliates from making political contributions to certain City elective officers and candidates; and
2. Before submitting a Proposal in response to this Solicitation, Proposers are required to notify their affiliates and subcontractors listed in the awarded contract or Proposal of the political contribution restrictions set forth in Campaign and Governmental Conduct Code section 1.126.

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

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

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

J. Reservations of Rights by the City

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

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

K. No Waiver

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

L. Other

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

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

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

3. Failure to timely execute a contract, or to furnish any and all insurance certificates and policy endorsements, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another Proposer and may proceed against the original selectee for damages.

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

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