Attachment A: Proposal Questions - Request for Proposals 232

This Attachment includes the questions that will be asked in the Proposal to OEWD Request for Proposals (RFP) #232. You may draft your responses on this template, but please enter your responses into the online Proposal by the deadline, **Tuesday, June 3, 2025, by 12:00 P.M. PST.**

> **To access the online Proposal, visit the following website and click on the RFP 232 page:**
>
> **https://www.sf.gov/information--bid-opportunities**

Please do not upload this Attachment with your Proposal. Please make sure you upload all required attachments listed on the **Proposal Package Checklist** found at the end of this document. If you have any questions about the content of this appendix, OEWD is here to help! Please join one of our optional technical assistance sessions or submit questions to oewd.procurement@sfgov.org

PART I. APPLICANT PROFILE

In this section, provide all organizational contact information. Note that if you are a **fiscal sponsor or fiscal agent**, you will need to complete an applicant profile for both your organization ("Primary Applicant") and your subgrantee ("Program Lead").

- The **Primary Applicant** is the organization or firm that will hold the contractual obligation with the City.
- If you are applying as the fiscal sponsor or fiscal agent for another entity, your Proposal must also identify a **Program Lead**, which is the primary entity delivering services.

Information requested in the **Applicant Profile** section includes:

- Organization name (legal business name as listed in the California Secretary of State Registry)
- Address, website and main phone number
- Executive Director name, contact information
- Proposal point of contact name, contact information
- Legal business entity type of organization (Nonprofit, for-profit corporation, LLC, individual sole proprietor, etc.)
- Supplier (City vendor) or Bidder Status
- Employer Identification Number (EIN), also known as your agency's tax ID, as registered with the Internal Revenue Service
- Your current Organizational Chart ("Org Chart")
- Information on your Executive Director/CEO's tenure
- Information on your staff (full time equivalent employees, number of volunteers)
- Information about your Board of Directors (see details below)
- Information on additional organizations involved in delivering the program
- Information on your overall organizational budget (data entry field and file upload)
- Target project area in RFP 232 you are applying to

Responsibilities of Fiscal Sponsors and Fiscal Agents

As noted in the RFP, to receive a grant under this Solicitation, Proposer must be in good standing with the California Secretary of State, the Franchise Tax Board and the Internal Revenue Service. If Proposer is a nonprofit organization, it must also be in good standing with the California Attorney General's Registry of Charities and Fundraisers. Proposer cannot be suspended or debarred by the City or any other governmental agency. Proposer must comply with all applicable legal requirements by the time of grant execution and must remain in good standing with these requirements during the term of the agreement. Upon request, Proposer must provide documentation to the City demonstrating its good standing with applicable legal requirements. If Proposer will use any subcontractors/ subgrantees/ subrecipients to perform the agreement, Proposer will be responsible for ensuring they are also in compliance with all applicable legal requirements at the time of grant execution and for the duration of the agreement.

If you are a **fiscal sponsor** to another organization (or group of organizations), you must serve as the lead applicant and meet all criteria described above. While your subcontractors/ subgrantees/ subrecipients do not need to become City Suppliers, they must meet all other applicable compliance requirements.

Should a fiscal sponsorship relationship terminate during the course of the agreement, OEWD will require documentation that proves that the new lead entity (which may be an approved subgrantee or a new fiscal sponsor) can meet all of the initial award criteria, and can accept the terms of the remaining agreement. In the event that a new qualified fiscal sponsor cannot be identified, OEWD reserves the right to cancel the award and terminate the agreement.

Please note: The City reserves the right to decline to enter into a contract due to the failure of an organization to be eligible to do business as a result of its non-compliance with the requirements of a governmental agency having jurisdiction, including, but not limited to, the organization's failure to be in good standing with the California Registry of Charities and Fundraisers.

Staffing and Board information.

Your Proposal requires basic information about your staff and board. These questions should be answered for the Primary Applicant and, if that entity is applying solely as the fiscal agent to another legal entity, we will also need Staffing and Board information for the Program Lead. This information will not be required for fiscally sponsored projects (program leads that are not legal entities).

STAFFING AND BOARD COMPOSITION CHART	
Executive Director Tenure *How many years (or months, if under one year) has your Executive Director/CEO been in this role?*	*Enter your Executive Director/CEO/President's tenure in years/months.*
Total Number of Full Time Equivalent (FTE) Employees	*Provide the FTE number for the whole organization, not just the program being proposed.*
Number of Governing Board Members *Exclude Advisory/Emeritus members.*	

List of Current Board Members
The Board of Directors should include San Francisco residents and/or members with knowledge of the needs of low and moderate income San Franciscans from the target neighborhoods/populations described in the RFP. Fiscal sponsors should only list governing Board members; Program Lead organizations can list Advisory Board members, if applicable.

Name	Years (or months) on Board	Home Neighborhood*	Job or Relevant Experience**

*If the Board Member lives outside of San Francisco please list the city and state.
**Job or relevant experience can include lived experience, neighborhood knowledge, as well as professional experience. Any demographic information of Proposer's staff, leadership, or Board Members included in the Proposal will not be used to make any awarding decisions.

If you are in the process of recruiting new Board members, please describe your efforts to ensure a diverse and equitable board that aligns with the community being served.

(Limit: 1,000 characters)

Total Number of Volunteers *Please exclude Board members that have been counted above.*	[Volunteers]

PART II. PROJECT DESCRIPTION

In preparing your Proposal, please address all questions in response to the scope of work. Pay particular attention to and address the minimum qualifications in full. Proposals are evaluated based on clarity, substance and measurable results. **Note: Character limits include spaces.**

Introduction	Character Limit	Point value
Project Title	100 characters	N/A
Brief 1-2 sentence summary of the proposed project	350 characters	N/A
Executive Summary: Brief overview of Applicant, qualifications, and proposed approach.	1,000 characters	N/A

Please provide a Project Title, a brief (1-2 sentence) summary of the Project, and an Executive Summary with a brief overview of Applicant's company, qualifications, and proposed approach.

Section 1	Character Limit	Point Value
Applicant Qualifications and Staff Assignments	**6,000 characters**	**20 points**

This section should briefly address the principal objectives of the proposed project and establish the applicant's professional qualifications and the experience of proposed partners, sub-contractors and staff. The applicant should detail past experience and track record implementing projects similar to the proposed activities. Details may include how staff will be accessible and available to individuals and/or organizations receiving services, the relevant experience of staff members, and the distribution of workload within the project team. This section should further note how the project team demonstrates a thorough understanding of the economic, social, financial, institutional or other issues that require a solution as well as indicators of community support.

Specific questions in this area:

1. **Briefly describe your firm qualifications and proposed project staffing. Include information about your company's history, organizational structure, experience with Active Server Pages Network Enabled Technologies (ASP.NET) and Structured query language (SQL) Server-based systems, experience with workforce development and small business support programs, proposed team structure, and key personnel qualifications. describe your organization's mission, values, and history providing services to residents and businesses in San Francisco. (Limit: 2,000 characters)**

   Include key personnel resumes as attachments.

Section 2	Character Limit	Point Value
Approach, Activities and Outcomes • **2.1 System Maintenance and Development (30 points)** • **2.2 Hosting and Technical Infrastructure (15 points)**	**6,000 characters each question**	**45 points**

This section should outline a plan of action that describes in sufficient detail the specific scope of services applicant(s) propose and how the proposed work will be accomplished. The plan should address all functions and activities for which applicants seek funds. Cite factors that might accelerate or

decelerate work, explain rationales for strategies selected, and describe any unique or unusual features of the proposed project, such as design or technological innovations, cost or time saving strategies, or methods to increase engagement of targeted stakeholders in services. Include and make clear the organizations, cooperating entities, consultants or key individuals who will work on the proposed activities, with a brief description of their contributions and qualifications.

1. **System Maintenance and Development: Describe your approach to system maintenance and development. Include information about your methodology for maintaining and enhancing the existing systems, managing Application Programming Interface (API) integration, user account administration, Eligible Training Provider List (ETPL) maintenance, reporting capabilities, document management, and error handling. (Limit: 6,000 characters)**

2. **Hosting and Technical Infrastructure: Describe your proposed hosting and technical infrastructure. Include information about system architecture, scalability, data security, backup and disaster recovery, performance monitoring, and security compliance. (Limit: 6,000 characters)**

Section 3	Character Limit	Point Value
Project Management Approach	**6,000 characters**	**15 points**

1. **Describe your project management approach. Include information about your methodology, communication plan, resource allocation strategy, risk management, change management process, and approach to timeline management and milestone tracking. (Limit: 6,000 characters)**

Section 4	Character Limit	Point Value
Support and Implementation Approach	**6,000 characters**	**10 points**

1. **Describe your support and implementation approach. Include information about your customer service model, transition plan for the July 1, 2025 start date, documentation approach, training methodology, and quality assurance procedures. (Limit: 6,000 characters)**

Section 5	Character Limit	Point Value
Financial Management and Budget	**6,000 characters**	**10 points**

Please provide a brief narrative – limited to 6,000 characters – detailing the financial management of the Primary Applicant organization. In this section, you should respond to the following, as applicable:

- Provide your project budget information. Include a detailed cost breakdown (initial setup, hosting, maintenance, development, training, documentation), proposed payment schedule, and any assumptions or exclusions.

- Describe the key features of your organization's financial tracking system and confirm it is capable of generating all financial information needed for required reports, including data needed to monitor, evaluate and if necessary, modify program performance.
- Describe in detail any cost allocation plan utilized when costs are chargeable to more than one cost category, or to more than one program and/or funding source.
- If proposing a management fee/fiscal fee, identify the amount as well as how the requested percentage was identified.
- Provide a narrative justification for items in the budget. Note, if the program area you are applying to includes the possibility of a multi-year grant award, please share any major budget changes (above 10% for any individual line item) that you expect to incur in future program years.
- Provide details on any matching or leveraged funds including anticipated source, amount, and restrictions. Although not required, matching funds are encouraged.

Note: in addition to your written budget narrative (limited to 6,000 characters), make sure to upload a proposed budget for the project using the budget template available on the RFP 232 website ("Attachment B").

SUBMISSION REQUIREMENT CHECKLIST	Proposers must submit the following items with their online Proposal. A Proposal that fails to provide the following Submission Requirements (SR) will not be eligible for further consideration.
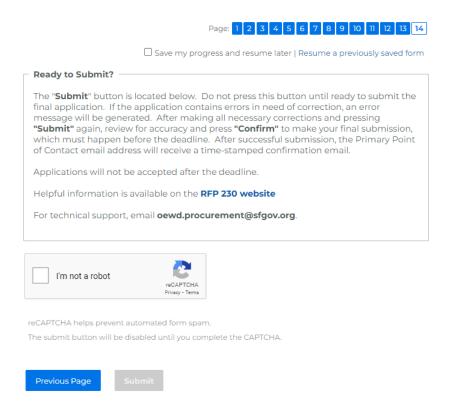
The following items must be completed and included in the online Proposal submission, uploading submission requirements where prompted before submitting the Proposal.

SR #	Description
SR 1	Completed proposal submitted via online system by the deadline.
SR 2	Completed Attachment B, Proposed Budget template in Excel file format.
SR 3	Organizational Budget for the current or last completed fiscal year for the Primary Applicant, the entity that will hold the contractual obligation if awarded (no template provided).
SR 4	Organizational Chart for the Primary Applicant, the entity that will hold the contractual obligation if awarded (no template provided).

Submitting your Proposal

When you have completed your Proposal, please make sure to click "Submit" on the final screen. You will need to check the reCAPTCHA box first.

OEWD Request for Proposals (RFP) 230 Application

Page: 1 2 3 4 5 6 7 8 9 10 11 12 13 **14**

☐ Save my progress and resume later | Resume a previously saved form

Ready to Submit?

The "**Submit**" button is located below. Do not press this button until ready to submit the final application. If the application contains errors in need of correction, an error message will be generated. After making all necessary corrections and pressing **"Submit"** again, review for accuracy and press **"Confirm"** to make your final submission, which must happen before the deadline. After successful submission, the Primary Point of Contact email address will receive a time-stamped confirmation email.

Applications will not be accepted after the deadline.

Helpful information is available on the **RFP 230 website**

For technical support, email **oewd.procurement@sfgov.org**.

☐ I'm not a robot   reCAPTCHA
                     Privacy - Terms

reCAPTCHA helps prevent automated form spam.
The submit button will be disabled until you complete the CAPTCHA.

Previous Page   Submit

You will receive an **error notification pop-up message** if any corrections need to be made before your Proposal is accepted. If an error exists, the system will flag the page(s) in the Proposal with errors, and provide a description of the issue(s). Please pay attention to the page numbers in the top-right side of your screen; if there are additional errors on any pages in your Proposal, those pages will be highlighted in **red**:

Page: 1 **2** 3 4 5 6 7 8 **9** 10 11 **12** 13 14

☐ Save my progress and resume later | Resume a previously saved form

After making all necessary corrections and pressing "Submit" again, you will be able to review your Proposal and confirm that it is accurate and complete. You can also print your submission for your records.

After reviewing your submission, press "Confirm" in the bottom-left corner of the screen to make your final submission, which must occur before the deadline. The system locks out at the deadline,

when confirmation and submission will no longer be possible. After you click "Confirm", the Proposal will be locked. After successful submission, you will see a confirmation screen, and the Primary Point of Contact Email Address that you listed in your Proposal will receive a time-stamped confirmation email within about five minutes.

You may follow up with OEWD at oewd.procurement@sfgov.org if you have any questions or need technical assistance with your submission. If you have submitted a Proposal in error and need to re-file your Proposal, please contact oewd.procurement@sfgov.org and let us know which Proposal should be considered.