

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENT

Dept. Code: ECN

Type of Request: Initial Modification of an existing PSC (PSC # 31087 - 21/22)

Type of Approval: Expedited Regular Annual Continuing (Omit Posting)

Type of Service: Consulting - Economic Impact Analysis

Funding Source: Local general funds

PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 05/01/22 - 04/30/23 (52 weeks)

PSC Mod#1 Amount: \$250,000 PSC Mod#1 Duration: 07/01/23-06/30/24 (1 year 8 weeks)

PSC Cumulative Amount Proposed: \$350,000 PSC Cumulative Duration Proposed: 2 years 8 weeks

1. Description of Work

A. Scope of Work/Services to be Contracted Out:

OEWD seeks a qualified consultant (or team of consultants) to support an economic impact analysis, to inform the City's economic recovery efforts with respect to the COVID-19 pandemic. The goals of the analysis include:

- To determine changes to the economic make up of San Francisco's office core as a result of COVID-19 and how changes to employee commuting patterns will impact the viability and the space requirements of downtown offices and office-serving small businesses
- To assess San Francisco office core's competitiveness relative to other comparable markets within the State and nationally
- To identify the policies, programs, resources, and interventions required to maximize new entrants to the San Francisco office market as well as the adaptation and long-term robustness of San Francisco offices operating in the post-COVID economic context, and
- To identify the activities, uses, and incentives that will increase the motivation for employees and other stakeholders to choose to work and/or visit the downtown office core

The scope of this contract (or contracts) will include research tasks (surveys, interviews, stakeholder engagement) as well as impact analysis tasks, described below.

B. Explain why this service is necessary and the consequence of denial:

This service is necessary to ensure that the City's investments in economic recovery activities are coordinated and directly responsive to the needs of the City's workers and businesses. This contract (or contracts) will enable OEWD to gain insights into the future needs of businesses as a result of the COVID-19 pandemic as well as types of uses and amenities that will be compelling to draw a remote workforce into the office going forward.

- C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.
This modification would continue existing services.

D. Will the contract(s) be renewed?

Unknown at this time.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

Not applicable

2. Reason(s) for the Request

A. Display all that apply

Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

Explain the qualifying circumstances:

The skill sets needed for this scope of services are highly specialized, and the project is short-term.

B. Reason for the request for modification:

Request to add \$250,000 and add one year in order to provide additional economic recovery support

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: For Primary Research into the State of San Francisco Business and COVID Economic Impact scope (Research): Applicants must have at least 5 years of experience in performing survey work at a City scale Expertise and demonstrable success in comparable projects that include robust surveying efforts of San Francisco-based businesses For State of San Francisco Business and COVID Economic Impact Analysis scope (Impact Analysis): Applicants must have at least 5 years of experience in performing economic analysis for local government entities of a similar size/scale as San Francisco Expertise and demonstrable success in comparable projects that include analyzing a combination of primary and secondary economic data to assess and make recommendations about responding strategically to a rapidly changing economic context

B. Which, if any, civil service class(es) normally perform(s) this work? 1824, Pr Administrative Analyst;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No, this is not needed.

4. If applicable, what efforts has the department made to obtain these services through available resources within the City?

Not Applicable

5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

A. Explain why civil service classes are not applicable.

This service is short-term and highly specialized.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: Not at this time; this project is anticipated to be short-term.

6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
The selected contractor(s) will coordinate with City staff but training is not necessary at this time.

C. Are there legal mandates requiring the use of contractual services?

No.

D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.

No.

E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.

No.

F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.

Yes - current contractor is expected to continue services.

7. **Union Notification:** On 10/17/22, the Department notified the following employee organizations of this PSC/RFP request:

Professional & Tech Engrs, Local 21; Prof & Tech Eng, Local 21;

I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Jenny Collins Phone: 415-701-4842 Email: Jenny.Collins@sfgov.org

Address: 1 South Van Ness Avenue, 5th FL, San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 31087 - 21/22

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

Receipt of Union Notification(s)

Receipt of Modification Request to PSC # 31087 - 21/22 - MODIFICATIONS

dhr-psccordinator@sfgov.org <dhr-psccordinator@sfgov.org>

on behalf of

Jenny.Collins@sfgov.org <jenny.collins@sfgov.org>

Mon 10/17/2022 11:39 AM

To: Collins, Jenny (ECN) <jenny.collins@sfgov.org>; Laxamana, Junko (DBI) <Junko.Laxamana@sfgov.org>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; WendyWong26@yahoo.com <WendyWong26@yahoo.com>; tmathews@ifpte21.org <tmathews@ifpte21.org>; kschumacher@ifpte21.org <kschumacher@ifpte21.org>; amakayan@ifpte21.org <amakayan@ifpte21.org>; l21pscreview@ifpte21.org <l21pscreview@ifpte21.org>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

PSC RECEIPT of Modification notification sent to Unions and DHR

The ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN has submitted a modification request for a Personal Services Contract (PSC) for \$250,000 for services for the period July 1, 2023 – June 30, 2024. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the initial PSC and the cumulative amount of the request is over \$100,000, there is a 60 day review period for SEIU

After logging into the system please select link below:

<http://apps.sfgov.org/dhrDrupal/node/19320>

Email sent to the following addresses: L21PSCReview@ifpte21.org
amakayan@ifpte21.org kschumacher@ifpte21.org tmathews@ifpte21.org
wendywong26@yahoo.com WendyWong26@yahoo.com junko.laxamana@sfgov.org

Additional Attachment(s)

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN Dept. Code: ECN

Type of Request: Initial Modification of an existing PSC (PSC # _____)

Type of Approval: Expedited Regular Annual Continuing (Omit Posting)

Type of Service: Consulting - Economic Impact Analysis

Funding Source: Local general funds PSC Duration: 52 weeks

PSC Amount: \$100,000

1. Description of Work

A. Scope of Work/Services to be Contracted Out:

OEWD seeks a qualified consultant (or team of consultants) to support an economic impact analysis, to inform the City's economic recovery efforts with respect to the COVID-19 pandemic. The goals of the analysis include:

- To determine changes to the economic make up of San Francisco's office core as a result of COVID-19 and how changes to employee commuting patterns will impact the viability and the space requirements of downtown offices and office-serving small businesses
- To assess San Francisco office core's competitiveness relative to other comparable markets within the State and nationally
- To identify the policies, programs, resources, and interventions required to maximize new entrants to the San Francisco office market as well as the adaptation and long-term robustness of San Francisco offices operating in the post-COVID economic context, and
- To identify the activities, uses, and incentives that will increase the motivation for employees and other stakeholders to choose to work and/or visit the downtown office core

The scope of this contract (or contracts) will include research tasks (surveys, interviews, stakeholder engagement) as well as impact analysis tasks, described below.

B. Explain why this service is necessary and the consequence of denial:

This service is necessary to ensure that the City's investments in economic recovery activities are coordinated and directly responsive to the needs of the City's workers and businesses. This contract (or contracts) will enable OEWD to gain insights into the future needs of businesses as a result of the COVID-19 pandemic as well as types of uses and amenities that will be compelling to draw a remote workforce into the office going forward.

C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.
This service has not been provided in the past.

D. Will the contract(s) be renewed?
Unknown at this time.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why.
not applicable

2. Reason(s) for the Request

A. Indicate all that apply (be specific and attach any relevant supporting documents):

Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

B. Explain the qualifying circumstances:

The skill sets needed for this scope of services are highly specialized, and the project is short-term.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: For Primary Research into the State of San Francisco Business and COVID Economic Impact scope (Research): Applicants must have at least 5 years of experience in performing survey work at a City scale Expertise and demonstrable success in comparable projects that include robust surveying efforts of San Francisco-based businesses For State of San Francisco Business and COVID Economic Impact Analysis scope (Impact Analysis): Applicants must have at least 5 years of experience in performing economic analysis for local government entities of a similar size/scale as San Francisco Expertise and demonstrable success in comparable projects that include analyzing a combination of primary and secondary economic data to assess and make recommendations about responding strategically to a rapidly changing economic context

B. Which, if any, civil service class(es) normally perform(s) this work? 1824, Pr Administrative Analyst;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No, this is not needed.

4. If applicable, what efforts has the department made to obtain these services through available resources within the City?

OEWD established a new division explicitly focused on economic recovery, and has consulted with multiple departments to determine whether existing staff have the capacity and expertise to conduct this work (including the Controller). Ultimately, it has been determined that an outside expert (or team of experts) would be best positioned to lead this short-term project, in coordination with relevant City stakeholders.

5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

A. Explain why civil service classes are not applicable.
This service is short-term and highly specialized.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain. Not at this time; this project is anticipated to be short-term.

6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.
No. The selected contractor(s) will coordinate with City staff but training is not necessary at this time.

C. Are there legal mandates requiring the use of contractual services?
No.

D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.

E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.

F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. Union Notification: On 03/23/2022, the Department notified the following employee organizations of this PSC/RFP request:

Prof & Tech Eng, Local 21; Professional & Tech Engrs, Local 21

I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Marissa Bloom Phone: 415-701-4887 Email: marissa.bloom@sfgov.org

Address: 1 South Van Ness Avenue, 5th FL San Francisco, CA 94102

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 31087 - 21/22

DHR Analysis/Recommendation:

Commission Approval Not Required

Approved by DHR on 05/05/2022

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENT

Dept. Code: ECN

Type of Request: Initial Modification of an existing PSC (PSC # 36826 - 18/19)

Type of Approval: Expedited Regular Annual Continuing (Omit Posting)

Type of Service: Consulting - Biennial Workforce Development Local Plan & WIOA Technical Assistance

Funding Source: Federal Dept of Labor & General Fund

PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 09/01/18 - 09/30/21 (3 years 4 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 11/01/20-12/31/22 (1 year 13 weeks)

PSC Mod#2 Amount: \$100,000 PSC Mod#2 Duration: 01/01/23-12/31/26 (4 years 1 day)

PSC Cumulative Amount Proposed: \$200,000 PSC Cumulative Duration Proposed: 8 years 17 weeks

1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The Office of Economic and Workforce Development (OEWD) would like to contract with a consultant to provide project management, research, writing, and editing support to produce its mandated Local Workforce Development Plan Update mandated by the California Employment Development Department. Local Workforce Development Areas that administer Department of Labor (DOL) workforce dollars are required by Federal Workforce Innovation and Opportunity Act (WIOA) legislation to submit a Local Plan to the State Workforce Development Board (SWDB) every 4 years. The Plan describes the Local Area's workforce delivery principles and strategies for the subsequent years. The State Workforce Development Board issued directive WSD18-01 on July 27, 2018 requiring Local Workforce Development Boards to submit biennial updates, with the next due in March 2019. While the focus of this contract will be on the Local Plan, additional consulting needs related to WIOA-related DOL and SWDB directives issued within the contract term may be identified and negotiated as part of this contract.

Specifically, OEWD wishes to engage a consultant with expert-level knowledge of WIOA to ensure full compliance with all legal and technical requirements for subsequent revisions and updates to the Local Plan. Currently, it is expected that the work completed through this contract will enable the Department to manage biennial updates to the plan after the March 2021 plan is due, but the Department requests an additional 6 months of authority to transition this work (through September 2021) in the event that the Department of Labor requests clarification or resubmission of any documentation.

B. Explain why this service is necessary and the consequence of denial:

The Local Plan update must be submitted by the March deadline in order for OEWD to be eligible for continued federal WIOA funding. The Office of Economic and Workforce Development is responsible for over \$4 million in federal WIOA funding annually, the majority of which is contracted out to local nonprofit entities who administer essential workforce services to San Francisco residents and businesses. Denial of the needed consulting support risks successful completion of the federally required Local Plan and could put OEWD's federal funding at risk. Additionally, OEWD's Strategic Initiatives unit (the team responsible for preparing the Plan) is currently severely understaffed, operating at less than 50% capacity: out of a team of six, one was hired within the past month, one is a temporary employee whose position permanently ends in August 2018, and three vacant positions are in the early stages of the hiring process with anticipated late 2018/early 2019 start dates. Internal OEWD staff from other units have been engaged to support specific areas of the Local Plan, but OEWD needs this short-term, focused support from an expert in the field to bolster capacity, improve consistency, transmit historical knowledge, and complete the required Local Plan by the mandated deadline.

C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

Yes

D. Will the contract(s) be renewed?

Unknown at this time.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

The State Workforce Development Board issued directive WSDD216 in September 2020 requiring Local Workforce Development Boards to submit biennial updates, with the next due in April 2021. This results in the need for ongoing technical support and expertise in order to comply with the State and Federal Workforce Investments and Opportunities Act (WIOA) requirements. Federal WIOA funding provides over \$6 million annually to OEWD, which is largely contracted out to local nonprofits to administer workforce programming. In addition, OEWD has re-procured the services through RFQ 214.

2. **Reason(s) for the Request**

A. Display all that apply

Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

Explain the qualifying circumstances:

The scope of work is short-term and periodic, based on the biennial reporting updates required by the Department of Labor via the State Workforce Development Board.

B. Reason for the request for modification:

This modification requests an additional 4 years beyond the existing 5.5-year authorization, with \$100,000 in additional funding. Although the understaffing issue has been resolved, the specific expertise provided under this PSC is necessary in order to comply with the Federal Local Plan requirements.

3. **Description of Required Skills/Expertise**

A. Specify required skills and/or expertise: The Plan must be prepared in strict adherence to Workforce Innovation and Opportunities Act (WIOA) guidelines and State directives, requiring a high level of workforce development expertise, familiarity with workforce development legislation, and knowledge of strategic planning methodology. In addition to coordinating the submission of the updated Local plan, the consultant's expertise will be used to assist with responding to any clarifying questions from the State, subsequent to submission.

B. Which, if any, civil service class(es) normally perform(s) this work? 0922, Manager I; 0923, Manager II;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

4. **If applicable, what efforts has the department made to obtain these services through available resources within the City?**

Not Applicable

5. **Why Civil Service Employees Cannot Perform the Services to be Contracted Out**

A. Explain why civil service classes are not applicable.

This project is time-limited and periodic, and requires specific skills.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No; the scope of this project is time-limited and requires specific skills.

6. **Additional Information**

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.

No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.

Contractor will work closely with OEWD's Strategic Initiatives Director (0922) who will oversee the contractor's work. Additionally, the contractor will coordinate and consolidate input from several OEWD units, including Program Operations, Business Services, and CityBuild, and fully engage staff in the process so that they can benefit from a knowledge transfer of relevant content and methodologies. The number of training hours will be contingent on the depth of involvement for each unit, with the majority of training being provided to existing Strategic Initiatives staff. Staff classifications within the above mentioned units may include 9704, 9705, 9706, 9774, 9775, 1824 and 0922.

- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
Extension of contract with Racy Ming Associates LLC

7. Union Notification: On 10/18/22, the Department notified the following employee organizations of this PSC/RFP request:
Municipal Executive Association;

I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Jenny Collins Phone: 415-701-4842 Email: Jenny.Collins@sfgov.org

Address: 1 South Van Ness, 5th Floor, San Francisco, CA, 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 36826 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Required

DHR Approved for 11/21/2022

Receipt of Union Notification(s)

Receipt of Modification Request to PSC # 36826 - 18/19 - MODIFICATIONS

dhr-psccordinator@sfgov.org

on behalf of

Jenny.Collins@sfgov.org

Tue 10/18/2022 1:15 PM

To: Collins, Jenny (ECN) <jenny.collins@sfgov.org>; Laxamana, Junko (DBI) <Junko.Laxamana@sfgov.org>; Criss@sfmea.com <Criss@sfmea.com>; camaguey@sfmea.com (contact) <camaguey@sfmea.com>; christina@sfmea.com <christina@sfmea.com>; staff@sfmea.com <staff@sfmea.com>; DHR-PSCCoordinator, DHR (HRD) <dhr-psccordinator@sfgov.org>

PSC RECEIPT of Modification notification sent to Unions and DHR

The ECONOMIC AND WORKFORCE DEVELOPMENT -- ECN has submitted a modification request for a Personal Services Contract (PSC) for \$100,000 for services for the period January 1, 2023 – December 31, 2026. For all Modification requests, there is a 7-Day noticed to the union(s) prior to DHR Review.

If SEIU is one of the unions that represents the classes you identified in the initial PSC and the cumulative amount of the request is over \$100,000, there is a 60 day review period for SEIU

After logging into the system please select link below:

<http://apps.sfgov.org/dhrdrupal/node/15657>

Email sent to the following addresses: staff@sfmea.com Christina@sfmea.com Camaguey@sfmea.com Criss@SFMEA.com junko.laxamana@sfgov.org

Additional Attachment(s)

Request for Qualifications #214

City and County of San Francisco

Office of Economic and Workforce Development

for

Consulting Services for Economic and Workforce Development Projects



Request for Qualifications #214

Date of Issue: Wednesday, February 26, 2020

**Deadline for Responses:
Thursday, April 9, 2020 by 5:00 PM**

**1 complete response package may be submitted via email to
oezd.procurement@sfgov.org**

(Preferred Method)

OR

1 copy of the completed response package including all supplementary materials may be hand-delivered by the deadline or received by OEWD by mail by the deadline at the following address:

Office of Economic and Workforce Development
1 South Van Ness Avenue, 5th Floor
San Francisco, CA 94103

Attention: Marissa Bloom, Contracts and Grants Administrator (RFQ 214)

HAND DELIVERY RECOMMENDED IF SUBMITTING HARD COPY

Table of Contents

A. Background	1
B. Project Descriptions	1
C. RFQ Timeline	3
D. Respondents' Questions	4
E. Scope of Work	4
Area 1. Leadership and Professional Development Services	5
Area 2. Real Estate Case Management Services	5
Area 3. Small Business Consulting and Training Services through the SBDC	6
Area 4. Employment Training Panel (ETP) Technical Assistance and Management	8
Area 5. Marketing, Branding, Collateral and Website Development	9
Area 6. Videography Services	10
Area 7. Fiscal Services	11
Area 8. Grant Development Services	12
Area 9. Research and Evaluation of Workforce Development Programs	13
Area 10. Planning and Designing Workforce Services	14
Area 11. Developing and Implementing a Racial Equity, Diversity and Inclusion Plan	15
Area 12. Community Outreach and Education Services	16
Area 13. Community Benefit District/Business Improvement District	17
Area 14. Architectural Services	18
Area 15. Logo/ Branding Design	19
Area 16. Tenant Coordination/Program Management	20
Area 17. Development Agreement Obligation Tracking System	21
F. Minimum Qualifications and Preferred Qualifications	24
G. Content of Response Package	24
H. Supplementary Questions and Requirements	27
I. Final Submission	27
J. Final Selection	28
K. General Information	28
Conditions of Proposal/Response Package.....	28
Cancellation.....	29
Extendibility of Procurement Justification.....	29
Late or Conditional Proposals.....	29
Awarding of the Contract(s) or Grant(s).....	29
Appeals.....	31

A. Background

The City and County of San Francisco's Office of Economic and Workforce Development (OEWD) advances equitable and shared prosperity for San Franciscans by growing sustainable jobs, supporting businesses of all sizes, creating great places to live and work, and helping everyone achieve economic self-sufficiency. OEWD programs are responsible for strengthening San Francisco's many diverse neighborhoods and commercial corridors, creating a business climate where companies can grow and prosper, and ensuring a continually high quality of life for all San Franciscans.

OEWD provides one point of contact for a variety of essential City programs and services, to include:

- Business attraction and retention, with an emphasis on key industry clusters
- Small business assistance and nonprofit support
- Workforce development, including job training for today's jobs and tomorrow's opportunities
- Public and private projects such as affordable housing, job creation, economic development, and open space creation and management
- Neighborhood development, including commercial corridor stabilization and revitalization
- Film and television production
- International trade and commerce, fostering Sister Cities and increasing business opportunities

Through this Request for Qualifications (RFQ), OEWD seeks to develop a list of qualified contractors to provide a variety of consulting services, with a focus on advancing equity and shared prosperity for all residents.

B. Project Descriptions

OEWD is seeking to develop a list of qualified contractors to provide a variety of consulting services as described in Section E of this document. Selections for future projects will be based on the competitive qualifications, experience, and hourly rate quoted in the proposals responding to this RFQ. After the pre-qualified list is established, one or more qualified contractors may be asked to provide further details, portfolios of work and additional price information based on the needs of specific projects. Interested parties may submit one response package for consideration under one or more Areas defined in Section E, Scope of Work, below, or interested parties may submit separate proposals for each Area of interest. **Please use the Proposal Packet Checklist (Appendix A) to clearly identify the Area(s) under which the package should be considered.**

Below is an overview of the types of work being sought in this RFQ. Details on each Area can be found in the subsequent pages of this RFQ under Section E.

Area number	Title	Subsections/Categories
Area 1	Leadership and Professional Development Services	None
Area 2	Real Estate Case Management Services	None
Area 3	Small Business Consulting and Training Services through the SBDC	Yes; subsections a. through g.
Area 4	Employment Training Panel (ETP) Technical Assistance and Management	None
Area 5	Marketing, Branding, Collateral and Website Development	Yes; subsections a. through p.
Area 6	Videography Services	None
Area 7	Fiscal Services	None
Area 8	Grant Development Services	None
Area 9	Research and Evaluation of Workforce Development Programs	Yes; subsections a. through c.
Area 10	Planning and Designing Workforce Services	None

Area 11	Developing and Implementing a Racial Equity, Diversity and Inclusion Plan	Yes; subsections a. through d.
Area 12	Community Outreach and Education Services	None
Area 13	Community Benefit District/Business Improvement District	None
Area 14	Architectural Services	None
Area 15	Logo/Branding Design	None
Area 16	Tenant Coordination/Program Management	None
Area 17	Development Agreement Obligation Tracking System	None

OEWD may fund contracts and/or grants under this RFQ with a variety of federal, state or local funding as appropriate, including, but not limited to: the Workforce Innovation and Opportunity Act (WIOA), Community Development Block Grant (CDBG), American Apprenticeship Grants through the Department of Labor, and City general funds.

C. RFQ Timeline

RFQ Issued	Wednesday, February 26, 2020
Bidders Conference	Tuesday, March 10, 2020 at 3:30 PM (SEE DETAILS BELOW)
Question submission period ends	Thursday, March 12, 2020 at 5:00 PM
Final questions and answers posted	By close of business Friday, March 13, 2020
Proposals Due (no exceptions)	Thursday, April 9, 2020 at 5:00 PM
Notifications to Proposers	Anticipated by close of business Monday, April 20, 2020
Appeal Period Ends (no exceptions)	Five (5) calendar days after notification date

This RFQ will be in effect for two years from the date that notifications are sent to proposers. OEWD may use this RFQ to justify contracts/grants with a term start date within the two year timeframe and for any necessary amendments to those agreements. The term of any agreements (and their amendments) do not need to conclude within the two year timeframe.

Contractors whose minimum qualifications were confirmed for consulting work through OEWD's Request for Qualifications (RFQ) #210 in Fall 2018 do not need to reapply to this RFQ unless they wish to also prequalify themselves for the additional project areas outlined on the following pages or reapply under similar areas to extend their prequalified status. The list of prequalified firms created through RFQ 210 will be active until December 2020.

Schedule may change if necessary.

Any updates to the schedule or changes to the content of the RFQ will be posted to the RFQ 214 specific page linked to <https://oewd.org/bid-opportunities/rfq-214>. It is the proposer's responsibility to review all changes posted and adjust responses as needed.

D. Respondents' Questions

OEWD will hold a Bidders Conference to review program needs and expectations for interested respondents, and to provide clarity on the application and evaluation processes. Though not required, interested parties are encouraged to attend the Bidders Conference. This meeting is scheduled for:

DATE: Tuesday, March 10, 2020
TIME: 3:30 PM – 5:00 PM
LOCATION: Please click here to access the
Webinar: <https://norcalbdc.zoom.us/j/659267496>
Meeting ID: 659 267 496

If you require an accommodation due to a disability, please contact 415-701-4848 or TDD 800-735-2929 (CRS), or email oewd.procurement@sfgov.org at least 3 business days prior to the meeting to ensure availability.

Respondents may additionally request clarification or ask questions about this solicitation by emailing oewd.procurement@sfgov.org through **Thursday, March 12, 2020 at 5:00 PM** (preferred method). Respondents may alternatively drop off written questions to the Office of Economic and Workforce Development, 1 South Van Ness Avenue 5th Floor, San Francisco, CA before the deadline noted above. No phone or fax questions will be answered.

A consolidated list of questions and answers will be posted to the RFQ 214 specific page linked to <https://oewd.org/bid-opportunities/rfq-214> no later than end of day **Friday, March 13, 2020**. Periodic posting of questions and answers may occur prior to that deadline. Proposers are responsible to review the website periodically and incorporate guidance as appropriate.

E. Scope of Work

OEWD seeks to develop a list of qualified consultants in the following areas:

1. Leadership and Professional Development Services

OEWD is seeking the expertise of a qualified consultant to support organizational development, individual leadership enhancement and growth of highly functional teams within the department. The selected consultant will provide on call organizational development and executive coaching services, including but not limited to, working with OEWD staff to assess, clarify, and synchronize various viewpoints that align with OEWD's strategic plan and vision, provide executive coaching to individuals and teams, and facilitate team building activities to promote growth and better communication within the agency.

Activities under this section may include:

- On call evaluation, learning and training services in leadership development, team development, systems integration, performance evaluation, feedback and enhancement, communication techniques and strategies for successful project management and team engagement.
- Providing tools, which should be intuitive and simple to use, to members of the OEWD executive team to use to continue organizational development with their staff, and training for OEWD staff in the use of those tools
- Facilitation services and executive coaching to support culture change within OEWD
- Reports, presentations, or other activities for OEWD staff, boards/commissions and stakeholders, as determined by OEWD.

Minimum Qualifications:

- 3 years verifiable experience in providing similar services as those noted in the application area above.

Preferred Qualifications:

- Similar projects or contracts completed within the past 5 years.
- Experience working with government agencies or municipalities
- Experience working with diverse groups of stakeholders and executives with varying management styles

Supplementary Questions and Requirements:

No supplemental information or questions are required.

2. Real Estate Case Management Services

OEWD seeks commercial real estate broker services to support a storefront activation and retention program.

Activities under this section may include:

- Work with OEWD to identify and prioritize storefronts to activate
- Work with landlords to fill vacant storefronts.
- Assist tenant pipeline businesses in representing them, negotiating leases, assessing zoning and permitting, and drafting letters of intent.
- Assist existing businesses in representing them, negotiating leases, and drafting letters of intent.
- Provide OEWD with real estate data such as development pipeline information, tenants in the market, and aggregate demand.

Minimum Qualifications:

- At least 3 years of experience providing real estate or broker services for commercial properties.
- Success providing real estate services to small businesses with varying needs.
- Experience working in San Francisco neighborhood commercial real estate market

Preferred Qualifications:

- California licensed real estate broker

Supplementary Questions and Requirements:

1. Describe recruitment methods for attracting neighborhood serving businesses.
2. Describe how you interpret broker services and business attraction services.
3. Describe accomplishments and successes in supporting small businesses within San Francisco
4. Describe your experience in negotiating leases and drafting letters of intent
5. Describe research and sources of information to be used to ensure that negotiated rents are reasonable
6. Describe your experience partnering with property owners, businesses, nonprofits, leasing agents, residents and the City to implement cultural and/or economic development strategies.
7. Describe your knowledge of challenges and opportunities in leasing spaces for small businesses in San Francisco.

3. Small Business Consulting and Training Services through the SBDC

The San Francisco Small Business Development Center (SBDC), a program within OEWD, is seeking business consultants to provide business counseling and training services.

Specifically, SBDC is seeking consultants with expertise in one or more of the following areas, as they relate to small business operations:

- a. **Financial Management;** including, but not limited to:
 - Loan Packaging
 - Financial Analysis
 - Profitability Tactics
 - Financing/Capital
 - Grant Writing
- b. **Marketing and Sales;** including, but not limited to:
 - Advertising, Sales And Branding

- Customer Creation And Retention
 - Marketing Strategy
 - E-Commerce
 - Web And Graphic Design
 - Visual Merchandizing
 - Social Media Management
- c. **Legal Support**; including, but not limited to:
- Commercial Lease Negotiations
 - Small Business Establishment And Formation
 - Franchising
 - Human Resource Management
- d. **Accounting**; including, but not limited to:
- Accounting And Bookkeeping
 - Business Taxes
- e. **Procurement**; including, but not limited to:
- Certifications
 - Government Contracting
 - Corporate Contracting
- f. **Management/Operations**; including, but not limited to:
- Inventory Management
 - Restaurant Management
 - Grocery Store Management
 - Industry Specific Expertise (I.E. Manufacturing, Retail, Hospitality...Etc.)
- g. **Other**; including, but not limited to:
- Product Development
 - Space Planning And Analysis
 - Technology
 - Importing/Exporting
 - Commercial Real Estate

Activities under this section may include:

- Developing and conducting training programs for small businesses in 1:1 and/or group settings.
- Directing small business clients to appropriate business resources for their needs
- Coordinating and maintaining regular contact with OEWD staff and the SBDC director
- Developing individual service plans and scopes of work for clients
- Tracking and reporting on economic impact of the work being provided

Additional information for this Section:

- Services may be required to be provided in a variety of languages including Spanish, Tagalog (Filipino), Traditional Chinese, and other languages as needed.
- Some services may be required to be provided in the evenings or on weekends to accommodate client needs.
- The SBDC has a standard \$75 hourly rate for consulting (CPAs and Attorneys may be paid up to \$100 per hour)

Minimum Qualifications:

- 3 years verifiable experience providing business consulting and training services to small business clients and a minimum of 5 small business clients consulted and/or trained

Supplementary Questions and Requirements:

Please answer the following questions and provide samples of work, if available, as part of the response package.

1. Explain your ability to develop and conduct training programs.
2. Describe your experience in providing counseling in both one-on-one settings and small group settings. Please provide specifics related to all subareas (A-G) under which you would like this application to be considered.
3. Explain your capabilities in coordinating and maintaining regular contact with OEWD staff and the SBDC director.
4. Indicate the languages you speak and the proficiency with which you speak them:
 - a. Level 1 – Elementary proficiency
 - b. Level 2 – Limited working proficiency
 - c. Level 3 – Professional working proficiency
 - d. Level 4 – Full professional proficiency
 - e. Level 5 – Native or bilingual proficiency
5. Describe your rapport or approach with clients. How do you communicate effectively with entrepreneurs and engage the cooperation of business owners in the implementation process?
6. Describe your success in helping business clients accomplish specified goals.
7. Are you willing to be compensated in accordance with SBDC's standard hourly rate of \$75 per hour?
 - a. Yes
 - b. Yes for some but not all contracts (Please answer question below)
 - c. No (Please answer question below)
 - i. If you are not willing to be compensated in accordance with SBDC's standard hourly rate of \$75 per hour, what is your blended hourly rate?

4. Employment Training Panel (ETP) Technical Assistance and Management

OEWD is seeking consultants to assist the department with the administration of existing and future California State Employment Training Panel (ETP) grants.

Activities under this section may include:

- Collecting and submitting training data to ETP via its online system, on a monthly basis.
- Establishing a system and procedures for ensuring the documentation of training. This may be done by way of electronic or paper training records.
- Establishing a system and procedures for the collection of enrollment information, including required trainee demographic data.
- Acting as a liaison between OEWD and participating employers when necessary.
- Establishing and maintaining the management of an information database to report on the status of ETP training.

- Creating monthly summary reports on the overall progress of the contract.
- Preparing a cash flow plan.
- Enrolling trainees through the ETP on-line system.
- Uploading documentation of training hours to the ETP online system.
- Conducting quality control review of records to ensure they meet ETP standards for completeness and consistency with ETP contract and regulatory requirements.
- Assisting and advising OEWD in documenting employment retention.
- Attending ETP monitoring meetings and to the extent permitted by ETP represent OEWD at said meetings.
- Preparing requests for contract amendments and modification when necessary.
- Preparing invoices for review and approval by OEWD.
- Assisting OEWD with assessing training programs fit for ETP funding, writing applications, and speaking to the panel on the merits of the programs and applications.
- Providing technical assistance workshops and ETP information sessions as needed by OEWD
- Assisting OEWD with outreach and providing technical assistance to local businesses interested in obtaining ETP funding for skill advancement opportunities within their

Minimum Qualifications:

- 5 years verifiable experience in providing similar services as those noted in the application area above.

Preferred Qualifications:

- Specific workforce development related experience is highly desirable.

Supplementary Questions and Requirements:

No supplemental information or questions are required.

5. Marketing, Branding, Collateral and Website Development

OEWD is seeking consultants to assist with establishing consistent and effective messaging among OEWD's programs and initiatives.

Activities under this section may include:

- a. Analyzing stakeholders and how they affect messaging across all channels (website, print collateral, social media, etc.).
- b. Analyzing and providing recommendations about how, through messaging and information design, OEWD can create better access to OEWD services for San Francisco residents, including underserved populations. This may include strategy for creating print and web materials that are user/customer focused. Provide OEWD with manual of best practices on how to create user/customer centered content.
- c. Designing research and analysis to better understand our customers/clients, including current challenges and barriers, socioeconomic context, etc.
- d. Data visualization

- e. Creating, presenting, implementing, and analyzing the effectiveness of a media outreach plan including recommendations on translation and interpretation service needs.
- f. Analyzing current web, digital, and/or paper collateral and recommendations for additional pieces to effectively market services to the public, other City departments, and community stakeholders.
- g. Branding strategy to better integrate OEWD messaging and design across all channels (print, digital, social media, etc.) This may include design of logos, collateral, style guidelines, and other support materials to market services to the public, other City departments, and community stakeholders.
- h. Photographing events, programs, clients, and service providers for print and online marketing
- i. Analyzing of stakeholders and how they affect messaging in all available media (website, print collateral, etc.).
- j. Creating, presenting, implementing, and analyzing effectiveness of a media outreach plan including recommendations on translation and interpretation service needs.
- k. Creating, implementing, and potentially consolidating appropriate website(s) to market services to the public, other City departments, and community stakeholders.
- l. Designing and producing logos, collateral, and other support materials to market services to the public, other City departments, employers and community stakeholders.
- m. Developing a content strategy and developing print and web materials that are engaging and user/customer focused. Provide OEWD with manual of best practices for creating user/customer centered content.
- n. Creating a unified OEWD Workforce Development brand and graphic system for collateral across print, digital and social media channels.
- o. Conducting door-to-door outreach to disseminate information about OEWD
- p. Developing a Marketing and Branding Strategy Plan that includes:
 - A Style & Marketing Guide (these could be two separate activities)
 - Marketing Toolkit
 - Strategy for outreach to employers, providers, job seekers and other stakeholders through print, digital and social media channels

Minimum Qualifications:

- 3 years verifiable experience providing similar services as those noted in the application area.

Supplementary Questions and Requirements:

No supplemental information or questions are required.

6. Videography Services

OEWD is seeking videography services for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. OEWD offers programs that provide technical assistance for existing and aspiring entrepreneurs, in addition to grants and design assistance to improve visual identity, commercial façades, and business interiors to help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

Activities under this section may include:

- Conduct and facilitate planning and conceptualization meeting with OEWD staff.
- Review program information, goals, past projects, and communications needs.
- Develop detailed production work plan including shoot times and travel needs.
- Capture video that highlight the work of programs and services to small businesses and commercial corridors.
- Obtain necessary releases from people and property owners included in the shoots.
- Present proof videos for selection by OEWD.
- Edit video to attain the standard and quality required by OEWD.
- Deliver digital files of final video and raw footage by method approved by OEWD.

Minimum Qualifications:

- 5 years verifiable experience providing videography for events, real estate, non-profit, and/or commercial purposes.

Preferred Qualifications:

- Experience working with small business owners.
- Experience working in San Francisco neighborhoods and commercial corridors.

Supplementary Questions and Requirements:

No supplemental information or questions are required.

7. Fiscal Services

OEWD seeks consultants to assist OEWD directly, individual grantees, or other system service providers which the department deems in need of assistance with fiscal operations.

Activities under this section may include:

- Training and coaching staff and leadership to improve fiscal operations of the designated organization.
- Reviewing, analyzing and documenting current practices; updating policy and procedures as necessary.
- Reviewing monthly invoices from grantees against Federal, State, local or other applicable regulations to confirm funding is being spent according to appropriate requirements.
- Developing or revising fiscal policies and procedures for administration of federal workforce funds, local city grant dollars, or a combination of both.
- Developing or revising cost allocation plans and functional budgets in partnership with one or more nonprofit agencies receiving a variety of Federal, State and local funding.
- Technical development of administrative procedures and policies related to financial management, cost allocation and monitoring.
- Creation of financial reports and documents.
- Providing training to service providers on financial compliance with the Workforce Innovation and Opportunity Act (WIOA), H1B retraining funding or other regulated funds.
- Conducting financial compliance reviews of WIOA service providers.

- Summarizing methods of implementing proposed recommendations, ways to measure progress, and provide updates including specifying persons responsible, timeframes, and measurable objectives.

Minimum Qualifications:

- 3 years verifiable experience in providing similar services as those noted in the application area above.

Supplementary Questions and Requirements:

No supplemental information or questions are required.

8. Grant Development Services

OEWD seeks consultants to assist with grant development and program sustainability planning with a focus on prospect research, program development, and proposal writing.

Activities under this section may include:

- Sector programming sustainability including strategy development, service and training system analysis, and program design analysis.
- Sector assessment including developing criteria for selecting sectors, researching labor markets, and identifying demand for workers.
- Sustainability planning for current and/or future OEWD programs.
- Working with OEWD to identify grants and funding resources to support OEWD current and/or future programs and services.
- Writing grant proposals and coordinating with OEWD partners.

Minimum Qualifications:

- At least 5 years verifiable experience in providing similar services as those noted in the application area above, with at least 3 projects completed within the past 10 years.
- At least 3 years verifiable experience in providing the services noted in the application area above in one or more of OEWD's areas of focus, including neighborhood commercial corridors, small business assistance, industry focused business recruitment and retention, international business development, joint development projects, and workforce development.
- A proven track record of success in winning or assisting others to win competitive procurements or grants.

Preferred Qualifications:

- Similar projects or contracts completed within the past 5 years.
- At least 3 years of experience working with state and federal grant solicitations.

Supplementary Questions and Requirements:

Your Appendix B submission, (e) "Statement of Contracts", must include a description of at least three (3) projects that the organization has worked on within the past 10 years, providing the services noted in the application area above. For each project or contract, provide the following information:

- 1) Name of the client, if applicable,
- 2) The project scope and deliverables,
- 3) The budget and length of time of the project and if the project was completed on schedule and within budget, and
- 4) The methods and strategies your firm employed to complete the projects.

9. Research and Evaluation of Workforce Development Programs

OEWD seeks consultant(s) to provide research and evaluation services for City of San Francisco staff members, property and business owners, Community Based Organizations, and other organizations on an as-needed basis. OEWD tracks the effectiveness of programming and tests, implements, and recommends new and emerging workforce development programs, tools, and policies for the San Francisco Workforce Development System. In pursuit of this mission, OEWD seeks skilled researchers and evaluators to explore topics related to workforce innovation and performance.

Activities under this section may include:

- a. Research services, including
 - Design and review of research proposals;
 - Qualitative research;
 - Quantitative research;
 - Participatory research;
 - Technical assistance on research and methodology;
 - Submission and dissemination of research findings and analysis through reports, publications, or other presentations; and
 - Peer review of research conducted by OEWD staff.
- b. Evaluation and program design services, including
 - Design and review of evaluation frameworks and plans, including program logic models and key performance indicators;
 - Technical assistance on programs, tools, and policies;
 - Formative evaluation;
 - Summative evaluation;
 - Cost-benefit analysis;
 - Meta-analysis;
 - Design randomized control trials to measure policy and program impact;
 - Submission and dissemination of research findings and analysis through reports, publications, or other presentations; and
 - Peer review of evaluation protocols conducted by staff.
- c. Professional development services related to research and evaluation, including
 - Developing training resources and/or delivering training on research design, research methodology, evaluation design, and evaluation methodology, and

- Developing training resources and/or delivering training on survey design and data collection, data processing, data analysis, data mining, statistical analysis, data linkages and data management with emphasis on longitudinal and/or departmental data sets.

Minimum Qualifications:

- Minimum of (5) years verifiable experience providing similar services as those noted in the application area.
- Project Lead has a Master's or Ph.D. in research and evaluation, public policy, public administration, economics, education, social welfare, or other applicable focus area.

Preferred Qualifications:

- Verifiable ability to manage research projects within time and financial constraints.
- Project Lead has a peer-reviewed publication demonstrating research and evaluation skills.

Supplementary Questions and Requirements:

No supplemental information or questions are required.

10. Planning and Designing Workforce Services

OEWD seeks consultants to provide support in planning and designing workforce services, including advising on:

- Customer-centered approaches to defining user segments, including participants, industry advisors, and employers; customer and employer engagement. Infrastructure for collection and analysis of real-time data from industry, educational partners, service providers, and the broader labor market.
- Planning and design of system infrastructure that encourages stakeholder collaboration, experimentation, user feedback, and user/customer-centered design.
- Identifying and prioritizing opportunities to improve the public workforce system.
- Designing, developing, deploying, and evaluating workforce tools.
- Developing workforce partnerships and collaborations.
- Design thinking strategies, including empathic discovery, creative problem solving, prototyping and customer-centered research processes.
- Accelerated learning and skills development.
- General workforce focused and sector contextualized curriculum development.
- Career and education assessment and planning.
- Project based and on-site learning models.
- Linking learning and work.
- Workforce Innovation and Opportunity Act regulation technical assistance
- Workforce policy analysis and technical assistance

Activities under this section may consist of:

- Identification of stakeholders; collecting input and providing analysis on preliminary goals from stakeholders.
- Collecting data on strategies, strengths, weaknesses, and opportunities.
- Identifying and working toward decision points/priorities, outcomes, timeline, and project deliverables.
- Summarizing methods of implementing proposed recommendations, ways to measure progress, and providing updates including specifying persons responsible, timeframes, and measurable objectives.
- Leading rapid prototyping sessions and design processes.
- Leading and conducting customer-centered research projects.
- Creating experience maps.

Minimum Qualifications:

- 5 years verifiable experience providing similar services as those noted in the application area

Preferred Qualifications:

- Specific workforce development related experience is highly desirable

Supplementary Questions and Requirements:

No supplemental information or questions are required.

11. Developing and Implementing a Racial Equity, Diversity and Inclusion Plan

OEWD is seeking qualified consulting nonprofit and/or for profit firm(s) to: 1) conduct an assessment of department practices regarding racial equity, diversity and inclusion; 2) develop a framework that is built on the central pillars of racial equity, diversity and inclusion; 3) provide training and meeting facilitation on racial equity, diversity and inclusion, and create a plan for subsequent trainings; and 4) develop a Racial Equity Plan based on the framework and assist with implementing the plan across the department's units, programs, policies, and practices.

Activities under this section may include:

a. Assessment and Evaluation

- Survey and interview all OEWD staff or a diverse subset of staff to assess beliefs, attitudes and practices regarding racial equity;
- Provide a summary of data that protects the identity of individuals who participate;
- Assist in the assessment of components which should be included in a department-wide Racial Equity Plan that will be developed by OEWD's Government Alliance on Racial Equity (GARE) cohort; and
- Assist in the evaluation of OEWD's programs, policies and practices to optimize consistency with the Racial Equity Plan and its principles.

b. Plan Development

- Develop a framework built around racial equity, diversity and inclusion
- Develop a Racial Equity Plan based on the framework ○ Plan and program design will have an emphasis on staff development.

c. Training and Facilitation

- Develop and provide meeting facilitation and training to Racial Equity Working Group members;
- Utilize best practices in establishing a framework which ensures that racial equity, diversity, and inclusion are key values of the department, including developing a shared understanding of key terms and concepts;
- Provide racial equity training and facilitation at all-staff meetings;
- Facilitate the development of a shared vision for a more inclusive and equitable organizational culture; and
- Build staff and organizational capacity, skills and competencies and provide recommendations for developing programs, policies and practices that support and advance racial equity over time.

d. Implementation

- Provide and develop tools and assist in the operationalization of the tools in the Racial Equity Plan to increase inclusion and racial equity across OEWD's programs, policies, and practices.

Minimum Qualifications:

- Expertise with racial equity, diversity and inclusion focused program design and facilitation, organizational development, human resource management, and research and evaluation services.
- Familiarity with Economic and Workforce development principles and concepts.

Preferred Qualifications:

- Familiarity with the social, physical and economic infrastructure of San Francisco's low-income neighborhoods and communities of color.

Supplementary Questions and Requirements:

1. Provide a description of at least 2 similar or relevant projects completed in the last 5 years; include challenges, successes, and impacts of the projects.
2. Provide links to websites and/or attach relevant supplemental materials such as a final report on the effectiveness or impact of prior work experience that is relevant to this area.

12. Community Outreach and Education Services

OEWD seeks consultants to assist with community outreach and education services to inform and gather input from residents regarding OEWD programs, services, and events.

Activities under this section may include:

- Promoting OEWD programs, services, and events door-to-door, publicly, in meetings, online, through social media, in print, and through other methods of outreach.

- Organizing community meetings and listening sessions to discuss OEWD programs and services.
- Participating in community meetings to educate groups and individuals about OEWD programs and services
- Assisting with OEWD-hosted public events by supporting guest registration, providing helpful information, troubleshooting, providing programming, helping with logistics, and any other task required for successful events.
- Educating community members about OEWD programs and services, as well as OEWD partnerships such as Opportunities for All.
- Developing and helping develop marketing collateral that can be used to increase awareness of OEWD programs, services, and events.

Minimum Qualifications:

- At least 3 years verifiable experience in providing similar services as those noted in the application area above.
- At least 2 years verifiable experience in providing the services noted in the application area above in one or more of OEWD’s areas of focus, including neighborhood commercial corridors, small business assistance, industry focused business recruitment and retention, international business development, joint development projects, and workforce development.
- At least 1 year verifiable experience in providing similar services as those noted in the application area above in the City and County of San Francisco.

Preferred Qualifications:

- At least 2 years verifiable experience providing the services noted in the application area above to San Francisco’s disadvantaged and underrepresented communities and community members.
- At least 1 year verifiable experience providing the services noted in the application area above in multiple languages.

Supplementary Questions and Requirements:

Your Appendix B submission, (e) “Statement of Contracts”, must include a description of at least 3 projects or contracts that the organization has worked on in the past in providing the services noted in the application area above. For each project or contract, provide the following information:

- 1) Name of the client, if applicable,
- 2) The project scope and deliverables,
- 3) The budget and length of time of the project and if the project was completed on schedule and within budget, and
- 4) The methods and strategies the organization employed to complete the projects.

13. Community Benefit District/Business Improvement District

OEWD is seeking Community Benefit District/Business Improvement District (CBD/BID) program support services for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. CBDs/BIDs strive to improve the overall quality of life in targeted commercial districts and mixed-use neighborhoods through a partnership between the City and local communities. OEWD offers programs that help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

Activities under this section may include:

- Development of legal documents for forming or renewing districts; including, but not limited to the Management District Plan and Engineer's Report
- Overall management of CBD/BID from renewal through a successful election
- Working with OEWD to determine the effectiveness of the CBD/BID program or individual CBDs/BIDs
- Strategic planning for the CBD/BID program or individuals CBDs/BIDs

Minimum Qualifications:

- A strong track record of forming and/or managing CBDs/BIDs in San Francisco and/or the State of California
- Previous experience in strategic planning
- Previous experience in reporting the impact and effectiveness of CBDs/BIDs or citywide related programs

Preferred Qualifications:

- Previous work in strategic planning for CBDs/BIDs
- Previous work in reporting the effectiveness of individual CBDs/BIDs and/or citywide related programs
- Registered Supplier with the City and County of San Francisco

Supplementary Questions and Requirements:

1. Provide a list of all CBDs/BIDs your organization formed in the City and County of San Francisco and/or the State of California
2. Provide links to websites or attach an example of a final strategic plan your organization completed on behalf of a CBD/BID
3. Provide links to websites or attach an example of a final report on the effectiveness or impact of individual CBDs/BIDs or on a citywide program.

14. Architectural Services

OEWD is seeking services from architects to provide design services and technical assistance for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. OEWD offers programs that provide grants and design assistance to improve visual identity, commercial façades, and business interiors to help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

Activities under this section may include:

- Attend meetings with small business owners and OEWD staff to discuss the proposed scope of work and establish the goals and parameters of the project.
- Review historic information, reports, previous building permits and planning requirements for each project. Conduct field measurements and photographing existing conditions.
- Work with OEWD staff and applicant to develop a minimum of two conceptual designs for the improvements.
- Create design development and construction documents drawings. Coordinate revisions with OEWD staff, applicant and Department of Building Inspection (DBI).
- Obtain all required building permit approvals.

- Develop a scope of work for bidding; attend contractors' walk-through; provide assistance during the bidding phase including responding to questions from contractors.
- Review bids and assisting OEWD staff to provide recommendations on choosing lowest price qualified contractor.
- Provide construction administration as needed including site visits, field reports and review and approval of contractor invoices. Answer questions from contractors and OEWD staff.
- Conduct final walk-through with OEWD staff, contractor and applicant upon project completion. Inspect the work for compliance with applicable City guidelines and signing the Certificate of Completion.

Minimum Qualifications:

- 5 years verifiable experience providing architectural services to small business and/or building owners similar to the services noted in the application section(s) above
- Licensed architect with the State of California_
- Three commercial façade and/or tenant improvement projects completed in the past 5 years.
- Note: The following Minimum Qualification is only a requirement under limited circumstances and may not be required depending on the type of project and Scope of Work that is negotiated after applicant has been notified that their proposal was successful:
 - If this Minimum Qualification is applicable based on the post-award, final, negotiated Scope of Work, any contractors that the awardee of this RFP uses must be registered in the State Department of Industrial Relations Public Works Contractor database. Contractors responsible for covered construction or maintenance projects must comply with all relevant local, state and federal prevailing wage laws at the point of bidding to be eligible for a contract award. Please visit <http://sfgov.org/olse/prevailing-wage> and <https://www.dir.ca.gov/PublicWorks/Contractor-Registration.html> for more information.

Preferred Qualifications:

- Experience working with small business owners unfamiliar with the design process

Supplementary Questions and Requirements:

No supplemental information or questions are required.

15. Logo/Branding Design

OEWD is seeking services from branding designers to provide design services and technical assistance for City of San Francisco staff members, property and business owners, and other organizations on an as-needed basis. OEWD offers programs that provide grants and design assistance to improve visual identity, commercial façades, and business interiors to help small businesses thrive, increase quality of life, improve physical conditions, and build community capacity.

Activities under this section may include:

- Attend meetings with the business/applicant and OEWD staff to discuss the proposed scope of work and establish the goals and parameters of the project.

- Research and evaluate the business concept, customer perception, and other brands in the field.
- Work with OEWD staff and the business/applicant to develop a minimum of 3 conceptual designs for a visual identity that could include logos, color schemes, signage, and environmental graphics.
- Submit digital files of all designs and a visual identity guideline document for the business.
- Communicate with contractors to specify design and material.
- Providing before and after high quality photographs of the project.

Minimum Qualifications:

- 5 years of verifiable experience and three commercial space branding projects completed within the past five years.
- Experience designing signage.

Supplementary Questions and Requirements:

No supplemental information or questions are required.

16. Tenant Coordination/Program Management

OEWD is seeking a project manager to provide direct real estate services and manage a program that coordinates and supports storefront activation services.

Activities under this section may include:

- Partner and work closely with City team and neighborhood stakeholders to identify neighborhood business retention and attraction efforts and priorities.
- Coordinate with OEWD to prioritize corridors and storefronts for activation and retention based on assessment reports
- Facilitate coordination with Community based organization partners, vacancy assessments, and real estate brokers.
- Conduct direct, proactive, iterative business outreach to businesses that may be considering expanding to San Francisco, have opened in San Francisco or who may be interested in investing in San Francisco
- Provide real estate services and direct case management for up to 25 storefronts
 - Assist businesses in representing them, negotiating leases, and drafting letters of intent.
- Coordinate Tenant Pipeline
- Maintain and manage a pipeline of vacant commercial storefronts. Various sources exist to collect vacancy information, but maintaining and becoming familiar with key and important vacancies will be important to filling them.
- Coordinate within OEWD, other City agencies, and grantee organizations to share vacancies with their clients who are seeking new spaces
- Consider creating a new clearinghouse for temporary or “pop up” users of commercial space
- Assess prospective tenants in leveraging existing service providers
- Assist with Existing Business Retention efforts
- Manage a list of priority businesses for retention services.

- Leverage existing programs to remove leasing barriers and incentivize business owners and property owners to agree to lease terms.

Minimum Qualifications:

- Experience working with real estate, construction-related parties, including but not limited to architects, designers, landlords, brokers, contractors, small business tenants, and City permitting agencies, to fill a vacant storefront.
- Minimum 3 years in real estate experience working with small businesses.

Preferred Qualifications:

Building Assessments

- Certified commercial property inspector with experience in California.

Real Estate Services

- California licensed real estate broker
- 5 or more years in real estate matching experience working with small businesses

Supplementary Questions and Requirements:

Please answer the following questions and provide samples of work, if available, as part of the response package

1. Describe a program or project you have managed that involves multiple stakeholders and involves real estate matters.
2. Describe how you interpret broker services and business attraction services.
3. Describe accomplishments and successes in supporting small businesses within San Francisco
4. Describe your experience partnering with property owners, businesses, nonprofits, leasing agents, residents and the City to implement cultural and/or economic development strategies.
5. Describe your knowledge of challenges and opportunities in leasing spaces for small businesses in San Francisco.

17. Development Agreement Obligation Tracking System

OEWD seeks consultants to create a modern, user-friendly, automated, and elegant digital solution to track project development and developer obligations as stated in Development Agreements (DAs). DAs are legal agreements between the City and private entities approved by the Board of Supervisors that lay out numerous obligations on the part of the developer and the City. The technological solution should have the following characteristics at minimum:

1. Be easy to use for the front-end users and for back end data maintenance;
2. Be easy and low cost to learn and maintain over time;
3. Be developed on the City's SharePoint platform or be a better stand-alone solution, or compatibly integrated with SharePoint where user needs dictate;
4. Start with an existing DA Monitoring staff spreadsheets and workflows of summarized obligations in excel spreadsheets;
5. Include a set of automatic reports designed and developed for specific reporting requirements, using both web-based access with digital visualization and PDFs for easy distribution;
6. Be accessed automatically over the Web with APIs as well as import/export data to other commonly-used data management programs (e.g., Excel) and to include geospatial identifiers (e.g., parcel numbers, digitized project boundary, and land use plan);
7. If practical, capacity to leverage the investment in this digital monitoring tool by being easily used or integrated through data services with other city users, data on land use, total units approved and built, by type, location and timing.

To this end, OEWD seeks to partner with the SF Planning Department to develop a database linked with services that can report out via a website on the status of obligations associated with approved agreements, for enhanced tracking and enforcing of DA obligations. In order to be effective as a tool for monitoring and enforcing DAs, the system should include a database management system that has several characteristics. Specifically, the database should:

- Be easily and conveniently accessible to users in multiple departments;
- Be flexible and robust enough to accommodate the wide variety and complexity that exists among DA obligations and requirements;
- Have advanced features such as custom reporting and automation of certain tasks (e.g., email advance notification of deadlines and milestones); and
- Have security and access controls adequate to preserve the integrity of the data.

Activities under this section may include:

- Scoping meetings: Conduct one-on-one technical sessions with staff from OEWD and SF Planning Department and six to eight participating agencies to develop custom applications and functions/procedures for the purpose of interfacing with a centralized database for tracking and enforcing the conditions, requirements, mitigations, and obligations.
- Building the tracking system: Working directly with an OEWD project manager and the SF Planning Development Performance Coordinator, create the system and make adjustments, as necessary. Assist with integration directly with FAMIS/FSP, Accela PPTS, mapping software, City Outlook Directory, and other applicable systems, as necessary, or indirectly through data exporting/importing. Create and adhere to a project schedule for building and launching this system.
- Roll-out: Launch the new DA Obligations Tracking System. Provide on-going support and development through beta-testing. Designing maintenance protocols: Draft protocols for OEWD and other stakeholders to utilize after roll-out stage. Develop department-specific work

flows for custom reporting and automation of tasks. Create security and access controls to allow for the adequate preservation of integrity of inputted data. Build document management capabilities to upload and retrieve relevant files. Additional information for this Section: Applicants should demonstrate in their response the following specifics:

- A successful track record in organizing and facilitating multi-stakeholder projects
- Technical expertise needed for all aspects of building the DA Obligations Tracking System

Minimum Qualifications:

- Demonstrated experience in providing similar services as those noted in the application area.
- Demonstrated experience in developing at least two similar obligation-tracking systems/databases, especially with Microsoft SharePoint and/or Access, that are elegant, easy to learn and use, and low cost for the tool's on-going maintenance.

Supplementary Questions and Requirements:

No supplemental information or questions are required.

PERSONAL SERVICES CONTRACT SUMMARY ("PSC FORM 1")

Department: ECONOMIC AND WORKFORCE DEVELOPMENT

Dept. Code: ECN

Type of Request: Initial Modification of an existing PSC (PSC # 36826 - 18/19)

Type of Approval: Expedited Regular Annual Continuing (Omit Posting)

Type of Service: Consulting - Biennial Workforce Development Local Plan & WIOA Technical Assistance

Funding Source: Federal Dept of Labor & General Fund

PSC Original Approved Amount: \$100,000 PSC Original Approved Duration: 09/01/18 - 09/30/21 (3 years 4 weeks)

PSC Mod#1 Amount: no amount added PSC Mod#1 Duration: 11/01/20-12/31/22 (1 year 13 weeks)

PSC Cumulative Amount Proposed: \$100,000 PSC Cumulative Duration Proposed: 4 years 17 weeks

1. Description of Work

A. Scope of Work/Services to be Contracted Out:

The Office of Economic and Workforce Development (OEWD) would like to contract with a consultant to provide project management, research, writing, and editing support to produce its mandated Local Workforce Development Plan Update mandated by the California Employment Development Department. Local Workforce Development Areas that administer Department of Labor (DOL) workforce dollars are required by Federal Workforce Innovation and Opportunity Act (WIOA) legislation to submit a Local Plan to the State Workforce Development Board (SWDB) every 4 years. The Plan describes the Local Area's workforce delivery principles and strategies for the subsequent years. The State Workforce Development Board issued directive WSD18-01 on July 27, 2018 requiring Local Workforce Development Boards to submit biennial updates, with the next due in March 2019. While the focus of this contract will be on the Local Plan, additional consulting needs related to WIOA-related DOL and SWDB directives issued within the contract term may be identified and negotiated as part of this contract.

Specifically, OEWD wishes to engage a consultant with expert-level knowledge of WIOA to ensure full compliance with all legal and technical requirements for subsequent revisions and updates to the Local Plan. Currently, it is expected that the work completed through this contract will enable the Department to manage biennial updates to the plan after the March 2021 plan is due, but the Department requests an additional 6 months of authority to transition this work (through September 2021) in the event that the Department of Labor requests clarification or resubmission of any documentation.

B. Explain why this service is necessary and the consequence of denial:

The Local Plan update must be submitted by the March deadline in order for OEWD to be eligible for continued federal WIOA funding. The Office of Economic and Workforce Development is responsible for over \$4 million in federal WIOA funding annually, the majority of which is contracted out to local nonprofit entities who administer essential workforce services to San Francisco residents and businesses. Denial of the needed consulting support risks successful completion of the federally required Local Plan and could put OEWD's federal funding at risk. Additionally, OEWD's Strategic Initiatives unit (the team responsible for preparing the Plan) is currently severely understaffed, operating at less than 50% capacity: out of a team of six, one was hired within the past month, one is a temporary employee whose position permanently ends in August 2018, and three vacant positions are in the early stages of the hiring process with anticipated late 2018/early 2019 start dates. Internal OEWD staff from other units have been engaged to support specific areas of the Local Plan, but OEWD needs this short-term, focused support from an expert in the field to bolster capacity, improve consistency, transmit historical knowledge, and complete the required Local Plan by the mandated deadline.

C. Has this service been provided in the past? If so, how? If the service was provided under a previous PSC, attach copy of the most recently approved PSC.

Yes

D. Will the contract(s) be renewed?
Unknown at this time.

E. If this is a request for a new PSC in excess of five years, or if your request is to extend (modify) an existing PSC by another five years, please explain why:

The State Workforce Development Board issued directive WSDD216 in September 2020 requiring Local Workforce Development Boards to submit biennial updates, with the next due in April 2021. This results in the need for ongoing technical support and expertise in order to comply with the State and Federal Workforce Investments and Opportunities Act (WIOA) requirements. Federal WIOA funding provides over \$6 million annually to OEWD, which is largely contracted out to local nonprofits to administer workforce programming. In addition, OEWD has re-procured the services through RFQ 214.

2. Reason(s) for the Request

A. Display all that apply

Short-term or capital projects requiring diverse skills, expertise and/or knowledge.

Services required on an as-needed, intermittent, or periodic basis (e.g., peaks in workload).

Explain the qualifying circumstances:

The scope of work is short-term and periodic, based on the biennial reporting updates required by the Department of Labor via the State Workforce Development Board.

B. Reason for the request for modification:

This modification requests an additional 2.25 years beyond the existing 3-year authorization, with no additional funding. Although the understaffing issue has been resolved, the specific expertise provided under this PSC is necessary in order to comply with the Federal Local Plan requirements.

3. Description of Required Skills/Expertise

A. Specify required skills and/or expertise: The Plan must be prepared in strict adherence to Workforce Innovation and Opportunities Act (WIOA) guidelines and State directives, requiring a high level of workforce development expertise, familiarity with workforce development legislation, and knowledge of strategic planning methodology. In addition to coordinating the submission of the updated Local plan, the consultant's expertise will be used to assist with responding to any clarifying questions from the State, subsequent to submission.

B. Which, if any, civil service class(es) normally perform(s) this work? 0922, Manager I; 0923, Manager II;

C. Will contractor provide facilities and/or equipment not currently possessed by the City? If so, explain: No.

4. If applicable, what efforts has the department made to obtain these services through available resources within the City?

Not Applicable

5. Why Civil Service Employees Cannot Perform the Services to be Contracted Out

A. Explain why civil service classes are not applicable.

This project is time-limited and periodic, and requires specific skills.

B. If there is no civil service class that could perform the work, would it be practical and/or feasible to adopt a new civil service class to perform this work? Explain: No; the scope of this project is time-limited and requires specific skills.

6. Additional Information

A. Will the contractor directly supervise City and County employee? If so, please include an explanation.
No.

B. Will the contractor train City and County employees and/or is there a transfer of knowledge component that will be included in the contract? If so, please explain what that will entail; if not, explain why not.

Contractor will work closely with OEWD's Strategic Initiatives Director (0922) who will oversee the contractor's work. Additionally, the contractor will coordinate and consolidate input from several OEWD units, including Program Operations, Business Services, and CityBuild, and fully engage staff in the process so that they can benefit from a knowledge transfer of relevant content and methodologies. The number of training hours will be contingent on the depth of involvement for each unit, with the majority of training being provided to existing Strategic Initiatives staff. Staff classifications within the above mentioned units may include 9704, 9705, 9706, 9774, 9775, 1824 and 0922.

- C. Are there legal mandates requiring the use of contractual services?
No.
- D. Are there federal or state grant requirements regarding the use of contractual services? If so, please explain and include an excerpt or copy of any such applicable requirement.
No.
- E. Has a board or commission determined that contracting is the most effective way to provide this service? If so, please explain and include a copy of the board or commission action.
No.
- F. Will the proposed work be completed by a contractor that has a current PSC contract with your department? If so, please explain.
No.

7. Union Notification: On 10/21/20, the Department notified the following employee organizations of this PSC/RFP request:
Municipal Executive Association;

I CERTIFY ON BEHALF OF THE DEPARTMENT THAT THE INFORMATION CONTAINED IN AND ATTACHED TO THIS FORM IS COMPLETE AND ACCURATE:

Name: Jenny Collins Phone: 415-701-4842 Email: Jenny.Collins@sfgov.org

Address: 1 South Van Ness, 5th Floor, San Francisco, CA, 94103

FOR DEPARTMENT OF HUMAN RESOURCES USE

PSC# 36826 - 18/19

DHR Analysis/Recommendation:

Civil Service Commission Action:

Commission Approval Not Required

Approved by DHR on 10/28/2020