

OEWD RFQ 227
Question and Answer Log

Date/Time of Submission	Name	Question	Program Area or Admin	Response
8/11/2023	Ryan Drake-Lee	What format document is best used for submission, i.e., is a microsoft.docx file an acceptable file format?	Admin	The application should be submitted online through the link on our website: https://sf.gov/resource/2023/request-qualifications-rfq-227 . In the online application, there is no specific type of doc requested for the upload attachment fields.
8/11/2023	Ryan Drake-Lee	What is the submission channel, e.g., is there a link to upload the file? (I could not find one thus far).	Admin	There is only one upload/attachment field for the question "Upload resume documenting at least three (3) years of experience providing business consulting and training services to small business clients". Your resume should be uploaded directly through the Choose File button. The entire application should be submitted through the online application.
8/14/2023	Ryan Drake-Lee	What is a typical project scope? e.g., Are you able to share a sample 'problem statement' that might get assigned to a consultant/trainer/coach and the client?	Program	<p>Depending on the client's needs, a consultant gets assigned to provide consulting services in a particular area of need. Typically, a Scope of Work is created for 10 hours of one-on-one consulting with any client. For example, a consultant can work with a business owner on increasing their sales through marketing or social media, obtaining capital through a grant or loan program, setting up their Quickbooks, conducting a financial analysis, and/or purchasing a business or commercial real estate property.</p> <p>Example: A restaurant has been struggling to increase their sales as a result of the COVID-19 pandemic. They want to bring in new customers to try their food that will spend an average of \$30-\$50. Restaurant owner contacts the Small Business Development Center and has a call with the intake team, and the owner identifies that the restaurant needs to increase their social media following. After the call, the owner is paired with a marketing advisor that helps them create a social media campaign to bring customers to the restaurant. The owner is also paired with a financial advisor that looked at their income statement, menu items, and cost of goods sold to determine where cuts can be made to become a more profitable business. After months of running the social media campaign, the restaurant is fully booked and has prospective customers on their waitlist.</p>
8/14/2023	Ryan Drake-Lee	What is the typical project length? e.g, 2-5 coaching training sessions with a single business owner / entrepreneur vs. multi-month engagement including business coaching/counseling directly with the owner/entrepreneur + training ~20+ staff on a specific skill area or subject matter.	Program	There is no typical project length. Every business is different and their challenges can be unique. The expectation is that the consultant creates a 10-hour scope of work with the client to achieve the desired outcome. The scope of work includes homework that the client has to complete before each session. Cases can be one-offs or multi-month engagement depending on the client engagement with their consultant and their specific needs.
8/14/2023	Ryan Drake-Lee	Do multiple clients get assigned to the same coach/consultant/trainer simultaneously?	Program	Yes, consultants would have to manage multiple clients simultaneously, but it all depends on the volume of clients needing advice on a specific subject matter that the consultant is an expert in.
8/14/2023	Ryan Drake-Lee	How is success/impact measured?	Program	Success and impact are measured through client satisfaction surveys, as well as, Small Business Administration (SBA) goals for the Center. For example, the number of businesses started, the number of jobs created or retained, the dollar value of loans/grants accessed as a result of working with the consultant are key performance indicators that are captured at the Center level, and consultants are instrumental in helping the Center report on those numbers.
8/14/2023	Ryan Drake-Lee	How do entrepreneurs/business owners apply for this consulting service from San Francisco, (e.g., how are the clients identified)?	Program	Aspiring entrepreneurs and business owners apply for consulting services through the Center's main website www.sfsbdc.org . Once they sign-up, the client schedules a call with an intake specialist to understand the client's needs. Also, the SF Small Business Development Center works with its host, the City and County of San Francisco, to attract clients to sign-up for services.
8/14/2023	Cian Mitsunaga	I have another meeting scheduled at the same time as tomorrow's technical conference. Will there be a recording of the technical conference available afterwards?	Admin	Yes, a recording of the RFQ 227 Technical Assistance Conference will be posted online at https://sf.gov/resource/2023/request-qualifications-rfq-227 . Written responses to all questions received will be posted by Friday, August 25, end of day.

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8/14/2023	Karen Lile	Is the RFQ open to workshop-based proposals, or is the preference for individual-based consulting arrangements?	Admin	Where as a Request for Proposal asks for proposed programming, this Request for Qualifications asks applicants to demonstrate expertise in any number of the eleven sub-areas identified in Section II.A. of the RFQ. Respondents meeting the minimum qualifications will be selected as part of a Prequalified Pool of Proposers. Prequalified proposers are not guaranteed a contract. Contractor selection will depend on the match between a proposer's unique qualifications and community need for those services.
8/14/2023	Karen Lile	Would an in-person workshop approach align with the goals of the RFQ, considering the practical benefits of personalized assistance?	Admin	This RFQ requires proposers to demonstrate minimum qualifications in particular sub-areas (rather than an RFP, which asks proposers to propose programming). Per RFQ 227 Section II.A., relevant activities include: *Developing and conducting training programs for small business 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 SBDC Director. *Developing scopes of work for clients. *Tracking and reporting on economic impact achieved while working with the client.
8/14/2023	Karen Lile	Are there any specific budget considerations or guidelines for including rental space and additional assistants in the proposal? I have an office space at 300 Broadway, Suite 8, SF that I rent, but would need to expand and pay extra for workshop space. But, this could be done on a daily rental for the term of the	Admin	Due to Federal and State funding requirements, the consultant rate is \$75 per hour. CPAs, architects, and attorneys may be paid up to \$100 per hour. The hourly rate may change based on Federal and State funding changes. Consultants are reimbursed for their services without any additional budget support for rental space or additional assistants.
8/15/2023	Patricia Caplan	Would you count non-profits as small businesses for the purpose of meeting minimum qualifications?	Program	Yes, we will consider non-profit organizations that provide technical assistance to small businesses owners for this RFQ. We will consider technical assistance given to nonprofit organizations for consideration of minimum qualifications, as long as it relates to the key sub areas we are looking for consulting in.
8/15/2023	Patricia Caplan	In the management and operations area, would you consider non-profit service organizations as examples of brick and mortar or does this refer to other types of businesses only?	Program	We will consider technical assistance given to nonprofit organizations as long as it relates to the key sub areas we are looking for consulting in. Please note that the SBDC does not provide technical assistance to nonprofits at this time, and the skill set will have to be transferable to for-profit businesses.
8/15/2023	Patricia Caplan	Does OEWD consider non-profit, community based service organizations to be small businesses?	Program	Yes, we will consider non-profit organizations that provide technical assistance to small businesses owners for this RFQ. We will consider technical assistance given to nonprofit organizations for consideration of minimum qualifications, as long as it relates to the key sub areas where we are looking for consulting in.
8/15/2023	Dorenda Haynes	Do I need to be a bidder or supplier now?	Admin	You do not need to be a bidder or supplier in order to apply to this funding opportunity, however, we encourage you to start the process right away as it can take weeks (or months!) to complete.
8/15/2023	Patricia Caplan	I'd further ask whether you'd consider internal consulting and training at non-profits toward meeting the qualifications. For example, project managing and training an internal team on grant writing and submission	Program	We will consider technical assistance given to nonprofit organizations for consideration of minimum qualifications, as long as it relates to the key sub areas where we are looking for consulting in. Make sure to identify which sub areas relate to the consulting and training provided.
8/15/2023	Vineeth Venkiteswaran	Have you registered your business with the San Francisco Treasurer & Tax Collector as required prior to execution of any Contract? In Lieu to this, can we provide our CA Seller's Permit and and City of Fremont Business Tax Certificate	Admin	You do not need to be registered with the San Francisco Treasurer and Tax Collector in order to apply to this funding opportunity, however, we encourage you to start the process right away because it is required prior to execution of any contract.
8/15/2023	Wendy Lee	Is there a detailed definition of consumer packaged goods? Is this limited to food & bev or is it broader?	Program	Consumer packaged goods can be a variety of items. Food and beverage are not the only things we are looking for. Cosmetics or cleaning products are also good examples.

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8/15/2023	Patricia Caplan	Can you say more about the life sciences? Are there emerging startups looking to provide services or technology to health care service provider organizations?	Program	We see there are businesses setting up in San Mateo County, for example, that have started life sciences. We want to see a healthy mix of entrepreneurs in San Francisco, and we would like to expand in life sciences because it is not something we have traditionally done in the past. We want to have advisors that can help our portfolio of clients with this set of expertise. If you know a business is looking for venture, how do you have the expertise to get them to scale and grow here in San Francisco? Do you have the intellectual property expertise so that they can patent what they are doing? We want consultants who are able to provide specific and niche services to the life sciences industry, because ideally we will be increasing our portfolio of clients in that industry.
8/15/2023	Ryan Drake-Lee	Do Consultants need to have capacity to train large groups of trainees? e.g., do we need a large staff?	Program	No, a large staff is not necessary. We use capabilities such as Zoom to provide training to over 100 clients. What we are looking for in our webinars and trainings is: can you provide a broad and overarching training topic? Some of the talks we have held in the past regarded government contracting. So we walked through the various steps to get into a government contract and hiring employees. What are some of the laws in place in San Fran and California, and the Federal guidelines you need to know in order to hire an employee? We are interested in the expertise the consultant wants to give to the entrepreneur on a foundational basis. If the entrepreneur needs more one-on-one advising, they can request for additional services from you, and then create a scope of work that will help them.
8/15/2023	Dorenda Haynes	Do I need a SF Business license to apply?	Admin	You do not need your SF Business License to apply to this funding opportunity. However, if you have an incorporated business (corporation, LLC, etc), you will need to register that business with the Treasurer and Tax Collector's Office in order to become a City Supplier, which is a prerequisite for us to contract with you.
8/15/2023	Marquese Rice	Is the \$75 per hour for each individual / training that we provide and is there a max: amount of hours.		Yes, that is the set rate. Maximum hours are set within the Center, but there are guidelines you would receive if awarded a contract with the SBDC. \$75 is the hourly rate paid to consultants regardless of whether individual or group services. Depending on the client's needs, a consultant gets assigned to provide consulting services in a particular area of need. Typically, a Scope of Work is created for 10 hours of one-on-one consulting with any client. For example, a consultant can work with a business owner on increasing their sales through marketing or social media, obtaining capital through a grant or loan program, setting up their Quickbooks, conducting a financial analysis, and/or purchasing a business or commercial real estate property. The "maximum amount of hours" will be determined through contract negotiations, depending on the qualified relevant sub-areas and community need.
8/15/2023	Anietie Ekanem	This question is about pricing. If we do small working groups with 6 people, can we charge per person?	Program	SBDC contracts pay consultants at a rate of \$75 per hour (regardless of whether services are per individual or group).
8/15/2023	Ryan Drake-Lee	Does this mean that the applicant needs to provide MQ#3 and MQ#4 for each Category and Sub-category they are applying for?	Admin	The RESUME should document at least three years of experience. The CLIENT LIST requires a minimum of 10 small businesses consulted or trained, regardless of how many sub-areas you select for consideration. For example, If you select 11 sub-areas, you are welcome to list 11 (or more) small businesses. Please make sure to identify which sub-areas were part of the support provided to each client. The REFERENCES require contact information for only 3 small businesses served (regardless of how many sub-areas are selected).
8/15/2023	Anietie Ekanem	Do we need 10 small business in each area that we want to do work. Or is it a 10 total over all areas that apply	Admin	The RESUME should document at least three years of experience. The CLIENT LIST requires a minimum of 10 small businesses consulted or trained, regardless of how many sub-areas you select for consideration. For example, If you select 11 sub-areas, you are welcome to list 11 (or more) small businesses. Please make sure to identify which sub-areas were part of the support provided to each client. The REFERENCES require contact information for only 3 small businesses served (regardless of how many sub-areas are selected).
8/15/2023	Anietie Ekanem	Is it three in each area or across all of the areas that you apply for	Admin	You can apply to as many areas as you have the expertise for, the sub areas are just examples of what can be considered as financial management or marketing/sales as an example. The RESUME should document at least three years of experience. The CLIENT LIST requires a minimum of 10 small businesses consulted or trained, regardless of how many sub-areas you select for consideration. For example, If you select 11 sub-areas, you are welcome to list 11 (or more) small businesses. Please make sure to identify which sub-areas were part of the support provided to each client. The REFERENCES require contact information for only 3 small businesses served

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8/15/2023	Anietie Ekanem	Can we use subcontractors?	Program	Yes, you can use subcontractors. If looking to collaborate with other organizations that are not applying directly to the RFQ, respond to the RFQ with the organization in mind and make sure to highlight what their expertise is in. At the time of contract, if awarded, you can list them as subcontractors.
8/15/2023	David Mitroff	What is different about this RFQ application PROCESS compared to previous SBDC RFQ's? Only... that this RFQ application is now online vs. before we had to hand deliver the RFQ's. Any other difference in the application process?	Admin	Yes, the major difference between RFQ 227 and earlier SBDC RFQs is that the RFQ 227 application is submitted online, instead of via email or hard copy. The online application link is available in the RFQ 227 website: https://sf.gov/resource/2023/request-qualifications-rfq-227 . For technical questions on how to manage the online application, please contact us at owed.procurement@sfgov.org .
8/15/2023	Tanya Reyes	Will the presentation be shared with us?	Admin	Today's presentation (recording and slides) will be posted on the RFQ website: https://sf.gov/resource/2023/request-qualifications-rfq-227 . In addition, the Question and Answer Log will be posted on the website Friday, August 25, by end of day.
8/15/2023	Anietie Ekanem	Can I list departments within large companies that I have worked with too in my client list? Also if we have helped non-profits can we list that too?	Program	No, departments will not be considered for the client list. The Client List should list solely for-profit businesses and non-profit businesses.
8/15/2023	Dyanna Volek	12B - if you're a solo owner and have no employees, do you need to submit a 12B declaration? It asks for an attachment to show no employees. How do you show that?	Admin	Yes, even sole proprietors and individual business owners with no employees need to complete the 12B declaration and provide proof of no employees. To document no employees, CMD normally requires a tax document, such as the IRS 1040 Schedule C, that will show that you are a sole proprietor with no employees. There are other documents you can use, which CMD can walk you through if you contact them directly at cmd.equalbenefits@sfgov.org .
8/15/2023	Michelle Norman	For the 12B equal benefits it states you need proof of not having employees. What proof do you need and if the declaration was submitted without the proof how do you go back to submit the proof?	Admin	If you have already submitted your 12B declaration form, CMD will accept supporting documentation via email.
8/15/2023	Ogbeide Ikhile	I did not hear much, or I missed it about transformation and sustainability (energy and technology). Do we need consultants in these areas?	Program	The SF SBDC is looking for consultants that can help businesses in the climate/clean tech industry. Business transformation and sustainability would fall under management and operations, ensuring that advisors can help clients be sustainable and to go through the test of time. We are also looking for generalists. Consultants do not have to be so niche in their expertise; they can also have a robust understanding of what it means to run a small business.
8/15/2023	Karen Lile	As a sole proprietor, if I decide to hire independent contractors, especially who speak additional languages, do they need to fill out qualifications or may I add them when doing proposal?	Admin	If you include additional contractors as part of your project team, make sure you speak to their qualifications in your proposal, providing evidence of their expertise as part of the list of the ten clients being served. The subcontractors will not have access to fill in their own qualifications (unless they are submitting their own application as lead applicant). Note that whereas sole proprietors typically receive an individual contract (P-601), addition of subcontractors would require use of the corporation contract (P-600) due to the added responsibility of overseeing subcontractors and ensuring their compliance with City requirements.
8/15/2023	Karen Lile	Where do the business clients come from? Are we as consultants expected to find our own?	Program	No, you are not expected to find your own clients. The SBDC sees over 1,000+ clients in a given year and we would be pairing you with clients looking for support in your specific area of expertise.

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8/15/2023	Rebekah Wu	Fundraising with VCs and Angels require various expertise. Are we able to subcontract to other experts? Or, are we expected to refer the entrepreneurs to consultants on your list only?	Program	Yes, you can use subcontractors. If looking to collaborate with other organizations that are not applying directly to the RFQ, respond to the RFQ with the organization in mind and make sure to highlight what their expertise is in. At the time of contract, if awarded, you can list them as subcontractors.
8/15/2023	Michelle Norman	Do I need to submit the full tax document or just the schedule C page, for the 12B	Admin	The Schedule C page is sufficient. CMD needs documentation that proves you have no employees. CMD does not need or want to see everything else.
8/15/2023	Karen Lile	Can I work with other consultants you provide in collaboration?	Program	Yes, you can collaborate with other consultants within the SBDC. For example, if you are working with a client that wants to access a loan, but your expertise is in marketing, you would notify SBDC staff or Director, who would pair the client with the appropriate advisor. You can let staff know if you would like to collaborate with another advisor again, based on their expertise and client needs. If looking to collaborate with other organizations that are not applying directly to the RFQ, respond to the RFQ with the organization in mind and make sure to highlight what their expertise is in. At the time of contract, if awarded, you can list them as subcontractors.
8/15/2023	Ryan Drake-Lee	What if we are a new business and don't have any full year tax return yet? Does that impact SAM or 12B Declarations?	Admin	Regarding SAM, please contact them to begin your SAM (Federal) registration process. Calling their technical assistance phone number may be helpful. Please start right away, whether you need a new registration, or to renew an expired registration. This process can be painfully long, and we cannot contract with you until you have an active SAM account so that we can verify you have no federal exclusions or disbarments. This is a Federal requirement. https://sam.gov/content/entity-registration Regarding 12B, if you are a new business without tax documents, contact the Equal Benefits Unit of the Contract Monitoring Division at cmd.equalbenefits@sfgov.org and they will work with you to find a way for you to show that you have no employees.
8/15/2023	Benny Gutierrez	If I am a sole proprietor and change to corporation during my contract, does this void my contract as consultant with SBDC?	Admin	Changing from sole proprietor to corporation during the contract period would require reissuance of a new corporation contract. Contract terms change based on sole proprietor vs. corporation status. Different clauses and City administrative code requirements apply differently to corporations, which require a new contract under that entity. You would also need to set up a City Supplier record, due to the new business EIN, which would require a new Supplier record. If you are still operating as a sole proprietor, and adding a separate business corporation, you could still do business with SBDC as a sole proprietor. Because a change in entity type and Supplier ID would also require reverifying compliance (e.g. SAM, Secretary of State, 12B, HCAO, MCO, insurance), we would encourage changing entity types before engaging in a City contract. We have supported Suppliers through this transition, but it is time-consuming, complicated, and may require a break in service provision.
8/15/2023	Michelle Norman	What is the correct email address for the 12B Equal Benefits Unit?	Admin	To contact the Equal Benefits Unit of the Contract Monitoring Division for support with Chapter 12B compliance required of all Suppliers, their contact information is: 415.581.2310 cmd.equalbenefits@sfgov.org www.sfgov.org/cmd

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8/15/2023	Karen Lile	Are we working remote or in person? Are we expected to provide our own location and if so is their a budget?	Program	<p>Consultants can work both remote or in person, but we are looking for consultants that are willing to meet in person, to ensure the client and consultant can build trust and work closely together. Training rooms are also available, whether in-person, virtual, or hybrid, at no cost to you. No, you are not expected to provide your own location. The SF SBDC has potential spaces that can be used. Consultants are reimbursed for their services on an hourly rate without any additional budget support for rental space or additional assistants.</p> <p>If you do have your own location in which services are being provided, you will need to provide general liability insurance to ensure that clients are covered under that policy.</p>
8/15/2023	Kifer Hu	Will all staff who help assist with the consultant need to submit their resumes as well?	Admin	Only the lead applicant needs to provide a resume and meet the minimum qualifications. Support staff or subcontractors cannot provide resumes, but their experience can be identified in the list of ten clients served. If looking to collaborate with other organizations that are not applying directly to the RFQ, respond to the RFQ with the organization in mind and make sure to highlight what their expertise is in.
8/15/2023	Karen Lile	Do we get paid for transport time to meet a client in person?	Program	No, we do not pay for travel time.
8/15/2023	Alejandro Berea	Are there outreach activities that advisors can participate in?	Program	Yes, because we are part of the City and County of San Francisco, there are many opportunities for consultants to get in front of clients. For example, the Contract Monitoring Division has events where consultants have presented on SBDC services. Small Business Week is also a big week in San Francisco, where consultants can be there, showcase SBDC, and be a pipeline to gather more clients. We participate and partner with other nonprofit organizations, like City College, San Francisco State, UC, and UCSF. The opportunities are myriad, and only a matter of does it align with SBDC's mission and what does it look like for the consultant that would be representing SBDC in that moment.
8/15/2023	Wendy Michi Ou	In Application Appendix Part 2 says"6. How do you adopt the principles of diversity and inclusion in your work? "Can you give more clarity about" which principles"?	Program	Regarding principles of diversity and inclusion, SBDC wants to ensure that marginalized communities are participating, and receiving equitable and fair access to our services. For example, if we have a monolingual client, and they own a store in the Mission, and they request that you meet with them in person because they cannot close up shop to get your advising services, how do you adapt your framework for that specific client, and create equitable ways to provide your services? We would hate to turn a client away because of issues with systemic and institutional racism or principles of oppression. How do you meet businesses where they are at? Not only literally, but metaphorically and figuratively. For example, if a client does not have the literacy level to read through certain documents, how do you ensure that they can access the content? To respond "We really can't work with you" is not the type of answer we would want from consultants. Really, this is about how you approach your work in a way that is really inclusive to the diverse community that we want to serve in San Francisco.
8/15/2023	Karen Lile	Will there be a copy of the Technical Assistance Conference slide deck and recording?	Admin	Today's presentation (recording and slides) will be posted on the RFQ website: https://sf.gov/resource/2023/request-qualifications-rfq-227 . In addition, the Question and Answer Log will be posted on the website Friday, August 25, by end of day.
8/15/2023	Gabriela Gonzalez	Is there any minimum/maximum of hours we have to provide our services per month?	Program	No there is no set minimum or maximum number of hours. Hours will depend on your contract amount, client stream, and available funding.

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8/15/2023	Karen Lile	I submitted an application previously, but should I resubmit with more precise statistics about what was accomplished in past projects and do you have specific types of statistics you want to see?	Program	<p>Please make sure your proposal is complete and final before submitting online. However, if you have already submitted your online application and need to make meaningful edits, you have two options:</p> <p>1) You can submit a completely new online proposal before the deadline. If you did not receive a copy of your earlier submission and want to use it as a starting point, contact us at owd.procurement@sfgov.org and we can forward your submission to you. If you submit multiple proposals, make sure to notify us which one is your official submission; or,</p> <p>2) We can reopen your proposal so that you can adjust and resubmit. Email us at owd.procurement@sfgov.org to request this. Please note that once reopened, the proposal is no longer in "submitted" status and will have to be resubmitted online before the deadline. It is not recommended to select this option within 48 hours of the proposal deadline, when the technical assistance volume increases, our response time slows, and your risk of not resubmitting in time grows. Reopened proposals not resubmitted by the deadline will not be evaluated for the RFQ.</p> <p>In terms of statistics, the focus is on impact, which can be measured in so many different ways. Helping a first generation minority women-owned business obtain a \$5,000 loan is just as impactful as supporting someone with the historical business savviness to obtain a multi-million dollar loan or to purchase a commercial property. What is important is to demonstrate the impact you have had on the lives of entrepreneurs, and how you are being impactful in a way that is specifically geared towards the client.</p>
8/15/2023	Alejandro Berea	Is SF SBDC values and principles training provided to consultants?	Program	<p>Yes, training is provided at a regional and local level. Advisors are required to participate in new advisor onboarding training for any SBDC they decide to contract with. Individual service center training may also be provided. Because we are hosted by the City and County of San Francisco, you may receive additional training on programs unique to San Francisco. Advisors will need to attend regional trainings both to understand what it means to be a SBDC advisor, and to learn technical skills such as our Customer Relationship Management technology and other measures you need to be compliant with.</p> <p>Visit the SF SBDC website at https://www.sfsbdc.org/ for more context. This public-facing site communicates to potential clients what kind of services are available, and how to navigate the services to get served. The website provides background on SBDC's diversity and inclusion goals, and presents the business case for diversity and the goals we are working towards. This is a helpful resource for consultants who are accepted into the RFQ 227 prequalified pool.</p>
8/15/2023	Karen Lile	Can I have a translator help me with a client when I have the expertise, but they need it in different language?	Program	<p>Yes, OEWD has translation and interpretation services we can use depending on the language. We have Spanish, Mandarin, and Cantonese staff in-house. We also have two regional language programs for SBDC as a whole. SBDC is one of 18 centers within the larger Northern California SBDC network. If you have the expertise and we do not have in-house translation services, we can find someone within the network to help us. On an ad hoc basis, we would have a conversation with the advisor and client in order to determine the need and how to meet it. SBDC partners with nonprofit organizations and the Office of Small Business as part of a larger family meant to help entrepreneurs. Advisors are not alone in the endeavor of helping a business by yourself.</p>

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8/15/2023	Karen Lile	What sub-area would strategic partnership building and system design be closest to (i.e. system design for any small business)?	Program	<p>SBDC gets a lot of micro-enterprises and solo entrepreneurs looking for one-on-one advising and trainings versus businesses with a specific problem, limited time, and a focus on solutions to reach desired outcomes. SBDC is interested in economic development and vibrant commercial corridors. As SBDC diversifies our client portfolio, there may be a need for partnership building and system design. A case could be made for strategic partnership and system design to fall under sub-area 6. Management & Operations (a. Restaurant Management , b. Retail Management , c. Brick-and-mortar). Strategic partnership has a lot of intersectionality, so the focus is on how it aligns with what the entrepreneur is looking for.</p> <p>Because this is nuanced, make sure to present your expertise in your application, and whether there is a specialization under one of the sub-areas which relates. For example, systems design could relate to corporate contracting, physical space design, hiring systems, etc. Clarify your particular experience and how it relates to the sub-areas you select.</p>
8/15/2023	Desi Danganan	Are we able to access a recording of the conference held earlier today? Unfortunately, we had a scheduling conflict.	Admin	Today's presentation (recording and slides) will be posted on the RFQ website: https://sf.gov/resource/2023/request-qualifications-rfq-227 . In addition, the Question and Answer Log will be posted on the website Friday, August 25, by end of day.
8/15/2023	Desi Danganan	When referencing types of services offered on page #7, under the Management & Operations sub-area what is meant by "Brick-and-Mortar"?	Program	Brick-and-mortar is referring to businesses that have a physical location in San Francisco. Under the management and operations section, when thinking about brick-and-mortar, the RFQ wants consultants that can help entrepreneurs with maintaining a physical presence in SF by understanding their strategy to bring foot traffic to their business, understanding their costs to operate a physical location, assisting them with navigating licenses and permits, and potentially accessing capital for tenant improvements.
8/15/2023	Desi Danganan	As a nonprofit agency, can we work with collaborators as needed? If so, how should we reference this relationship in our qualifications?	Program	Yes, you can collaborate with other consultants within the SBDC. If looking to collaborate with other organizations that are not applying directly to the RFQ, respond to the RFQ with the organization in mind and make sure to highlight what their expertise is in. At the time of contract, if awarded, you can list them as subcontractors.
8/17/2023	Gil Cardon	<p>I am currently a Business Advisor with the UC Merced SBDC and the Valley Sierra SBDC offices in Central California. I attended the Technical Assistance Conference yesterday where it was mentioned that references from 10 clients are requested in the application process.</p> <p>Since I am already an SBDC advisor, is it necessary for me to submit information about my SBDC clients?</p>	Program	<p>Applicants are required to submit the following, among other items: the RESUME should document at least three years of experience. The CLIENT LIST requires a minimum of 10 small businesses consulted or trained, regardless of how many sub-areas you select for consideration. For example, If you select 11 sub-areas, you are welcome to list 11 (or more) small businesses. Please make sure to identify which sub-areas were part of the support provided to each client. The REFERENCES require contact information for only 3 small businesses served (regardless of how many sub-areas are selected).</p> <p>Current SBDC advisors are under a confidentiality agreement which precludes disclosure of SBDC client identity. Current and prior SBDC experience should be identified in the resume. The Client List and References can include SBDC clients served by using the client's NeoSerra CLIENT ID ONLY, in order to maintain confidentiality.</p>

OEWD RFQ 227
Question and Answer Log

8/18/2023	John DeGaetano	After submitting the RFQ application, does OEWD have everything they need at this point? Some of the other documentation such as business insurance proof, license, and SAM.gov is requested later. Is that correct?	Admin	<p>Page i of RFQ 227 lists the mandatory minimum qualification documentation due with each online submission: the online application, resume, client list, and references.</p> <p>Part III, Proposer Checklist, page 3 of the Appendix A Application Questions, provides certain key compliance items required prior to contract execution.</p> <p>Depending on entity type, contractors will be required to have reached compliant City Supplier status, and to provide current SAM registration, insurance, First Source Hiring form, among other items. OEWD staff will provide specific requirements during the contract drafting process, but reaching compliant status in advance is recommended to expedite contract processing. In particular, the SAM registration/renewal process can be very lengthy.</p> <p>Compliance with the San Francisco Treasurer and Tax Collector's Office, as well as the 12B Equal Benefits program, were covered at our Technical Assistance Conference. The slide deck and a video recording of the Conference have been posted to the website, https://sf.gov/resource/2023/request-qualifications-rfq-227.</p>
8/18/2023	Cian Mitsunaga	We are considering applying for RFQ 227. Would it be possible for me to see a list of those business consultants who were selected in past RFPs issued by OEWD and SBDC to service new and existing entrepreneurs? This would be really helpful for us to get a better idea on what types of services we could offer. Also, would it be possible to see their proposals?	Admin	<p>Yes, we can provide a list of current or previous SBDC consultants. However, since the program has been running since 2014, it would be time-consuming for us to pull a complete list. Alternatively, images and bios for the current SBDC advisors are located on the SBDC website: https://www.sfsbdc.org/about/team/?tm_category%5B%5D=20. We do not have a proposal for Port Labs; they are listed on the website as a SBDC regional affiliate, and not as an applicant to our previous procurements.</p> <p>Yes, we can provide proposals from the advisors who got into contract with SBDC. Again, this would be a very large number if we went back all the way to 2014, so can you please specify how many you would like to review, or within what timeframe? Perhaps upon reviewing the current advisors, you may identify a specific selection (although certain information would be redacted).</p> <p>Also, please remember that whereas a Request for Proposals (RFP) requests service proposals, a Request for Qualifications (RFQ) such as RFQ 227 asks for demonstration of experience providing the set of services outlined in the procurement. Rather than offering services, RFQ respondents will identify which sub-areas to be considered for, and will present relevant experience in those categories.</p> <p>One tip for a faster response: please separate your questions for different procurement into separate emails. We have different team members responding to different procurements, so our RFQ 227 team can respond more quickly if the subject identifies 227.</p> <p>Please remember that today Tuesday 8/23 at Noon is the deadline for substantive questions. After that we will be limited to technical questions (e.g. about the online application). Since presumably the proposals will be sent to you after the deadline, we will not be able to answer any questions about them.</p> <p>Make sure to allow enough time to submit the online application by the deadline. As volume increases close to the deadline, the server can slow down, and any unexpected delays can occur. Failure to submit by the deadline eliminates the application from consideration.</p>