Technical Assistance Conference
Request for Qualifications #227
Small Business Consulting and Training Services through the Small Business Development Center (SBDC)

RFQ Issued: August 7, 2023
Proposals Due: August 31, 2023 by 12:00 P.M.
Presentation Overview

• Welcome and Overview
• Program Area Details
• RFQ Timeline and Application Process
• City Supplier and Compliance Requirements
• Q&A
QUESTIONS?

• Please submit your questions in the chat. *List “Administrative” if your question is general in nature.*

• Our team will answer as many questions as possible at this session; all questions will be logged, answered, and posted to the RFQ 227 website.

• You may still submit substantive questions until 12:00 P.M. (Noon) on **Wednesday, August 23, 2023** by email (oewd.procurement@sfgov.org)

About OEWD

OEWD’s Mission is to advance equity and shared prosperity for all 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.
The Office of Small Business is the City’s central point of information for small businesses located in the City and County of San Francisco.

Our mission is to equitably support, preserve and protect small businesses in San Francisco. We provide high quality direct services and programs, drive practical solutions, and serve as a champion for San Francisco’s diverse small business community.

For more information, visit: https://sf.gov/departments/office-economic-and-workforce-development/office-small-business
About RFQ #227

Through this RFQ, we are developing a list of prequalified consultants that can provide business counseling and training services to new and existing entrepreneurs in San Francisco.

The total amount of funding anticipated for initial as-needed contract awards is $1.5 Million. Contracts will start as soon as January 2024, but may continue to be issued, as long as the prequalified list is active, and until available funding is exhausted.

https://sf.gov/resource/2023/request-qualifications-RFQ-227
About RFQ #227 (continued)

Funding for these contracts will include Federal and State funding streams including, but not limited to:

- U.S. Department of Housing and Urban Development Community Development Block Grant Program (CDBG),
- U.S. Economic Development Administration (EDA),
- California Governor’s Office of Business and Economic Development (GO-Biz),
- U.S. Small Business Administration (SBA), and
- Local General Funds.

https://sf.gov/resource/2023/request-qualifications-RFQ-227
San Francisco SBDC is proud to be a part of the greater NorCal SBDC network and work together to support local entrepreneurs and small businesses with the tools and insights to start, grow, and pivot their businesses.

The San Francisco Small Business Development Center’s (SBDC) mission is to empower now and next-generation entrepreneurs with a prepared, growth mindset – through transformative insights, resources, and guidance.

For more information, visit: https://www.sfsbdc.org/
RFQ 227 Program Sub-areas

This RFQ is seeking consultants with expertise in one or more of the following areas, as they relate to small business operations.

1. Financial Management
   a. Loan Packaging
   b. Financial Analysis
   c. Grant Writing
   d. Profitability Tactics
   e. Seed Funding
   f. Venture Capital

2. Marketing & Sales
   a. Advertisement
   b. Marketing Strategy
   c. E-Commerce
   d. Web & Graphic Design
   e. Visual Merchandising
   f. Social Media
Program Sub-areas (continued)

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

3. Legal Support
   a. Commercial Lease Negotiations
   b. Small business establishment and formation
   c. Franchising
   d. Human Resources

4. Accounting
   a. Accounting Bookkeeping
   b. Business Taxes

5. Procurement
   a. Government Contracting
   b. Corporate Contracting
   c. Certifications
Program Sub-areas (continued)

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

6. Management & Operations
   a. Restaurant Management
   b. Retail Management
   c. Brick-and-mortar

7. Manufacturing
   a. Consumer Packaged Goods

8. Childcare
Program Sub-areas (continued)

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

9. Startups/Tech
   a. Technology
   b. Climate/clean tech
   c. Life sciences
   d. Intellectual Property
   e. Product Development/Prototype
   f. Fundraising (Venture Capital, Angel Investors, Seed)

10. Import & Export

11. Architecture
   a. Renderings
Activities under all sub-areas 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 SBDC Director.
- Developing scopes of work for clients.
- Tracking and reporting on economic impact achieved while working with the client.
Language Capacity

We are looking for advisors that can provide services in a variety of languages including, but not limited to:

- Spanish
- Mandarin
- Cantonese
- Tagalog
- Vietnamese
- French
- Portuguese
- Japanese
Rate Cap

For this RFQ, the consultant rate is capped at $75 hourly.

Firms or individuals with professional certifications (CPAs, architects, and attorneys) may be paid up to $100 per hour.

The hourly rate may change based on Federal and State funding changes.
## Mandatory Minimum Qualifications

<table>
<thead>
<tr>
<th>MQ #</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MQ #1</td>
<td>Submitted online application, as referenced in Appendix 1 - Application Questions</td>
</tr>
<tr>
<td>MQ #2</td>
<td>Uploaded resume documenting that Proposer has at least three (3) years of experience providing business consulting and training services to small business clients.</td>
</tr>
<tr>
<td>MQ #3</td>
<td>Entered client list of a minimum of ten (10) small businesses which Proposer has consulted or trained. Identify which sub-areas were part of the support provided to each client.</td>
</tr>
</tbody>
</table>
| MQ #4 | Entered reference contact information for three (3) small businesses Proposer has consulted or trained. Upon request, successful proposers may also be required to submit a letter of reference from each reference listed within five (5) days of notification. Failure to do so may result in rejection of proposal. Information requested includes:  
   * Name of Company  
   * Business address and website (if applicable)  
   * Reference point of contact name, email, phone number  
   * Number of service Proposer provided to this company  
   * Type of service Proposer provided to this company  
Proposer will be asked to sign a separate Release of Liability for References in the online application. |
QUESTIONS?

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  *list “Administrative” if your question is general in nature.*

• Our team will answer as many questions as possible at this session; all questions will be logged, answered, and posted to the RFQ 227 website.

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https://sf.gov/resource/2023/request-qualifications-RFQ-227
Timeline

- August 7, 2023: RFQ 227 published on OEWD website
- August 15, 2023: Technical Assistance Conference
- August 23, 2023: Deadline to submit written questions (12:00 PM)
- August 25, 2023: Final Q & A Posted to RFQ website by end of day
- August 31, 2023: Proposals due by 12:00 PM Deadline

https://sf.gov/resource/2023/request-qualifications-RFQ-227
HOW TO APPLY

Applications are submitted online only, using the online application located here: https://sf.gov/resource/2023/request-qualifications-RFQ-227

Apply

Go to the online application

View the questions that are in the application in Appendix A linked below. All elements of the proposal package must be submitted online by the application deadline on Thursday, August 31, 2023 at Noon.

Need help with the online application? Email us at oewd.procurement@sfgov.org.
Landing page for RFQ 227 Application

From the RFQ 227 application link you should land on page 1 of 7 to begin the application.

Need help with the online application? Email us at oewd.procurement@sfgov.org.
Completing RFQ 227 Application

As you navigate through each screen, you can monitor your progress (see numbers in top right).

There are 7 screens to complete in total.

All questions asked in this RFQ can be found in Appendix A.

Need help with the online application? Email us at oewd.procurement@sfgov.org.
Resuming and saving your RFQ 227 Application

When you check the box marked "Save my progress and resume later", the system will ask you for an email and password.

Please carefully enter your email to make sure you receive the link to access your proposal.

Each time you resume and save, you will receive an email with a link to the most recent version of your proposal.

Need help with the online application? Email us at oewd.procurement@sfgov.org.
Completed RFQ 227 Application

Once all 7 screens of the Application are completed, you will see a submission confirmation screen.

Please be sure to verify that you land on this page for confirmation of submission -->

Thank you for your submission to the Office of Economic and Workforce Development's Small Business Development Center Request for Qualifications (RFQ) 227. This message confirms the timely submission of your proposal. The Primary Point of Contact email address will also receive an email confirmation message.

The Minimum Qualification review process will begin shortly, and our office will be in touch with you when the prequalified pool has been established. Please look out for determination letters via email from oewd.procurement@sfgov.org.

Any updates to the RFQ schedule will be posted at the OEWD RFQ 227 website at https://sf.gov/information/bid-opportunities.

If you need to make any adjustments to this proposal before the deadline, please submit a complete replacement proposal no later than the submission deadline.

Thank you for your interest.

Need help with the online application? Email us at oewd.procurement@sfgov.org.
Supplier Instructions

For general questions regarding the Supplier registration process, contact the User Support Desk 415-944-2442 or email sfcitypartnersupport@sfgov.org
Supplier Instructions

• Supplier Registration
• Business Tax Compliance (TTX)
• Equal Benefits (12B) Compliance (CMD)
• Minimum Compensation Ordinance, Health Care Accountability Ordinance and Health Care Security Ordinance (OLSE)
Supplier Instructions
https://sfcitypartner.sfgov.org/pages/become-a-supplier.aspx

Become a Supplier
A guide to becoming a Fully Compliant Supplier.

First become a Registered Bidder...
The first step to begin working with the City is to complete a short registration process to become a “Registered Bidder”. This will allow you to view and bid on Sourcing Events.

...then Become a Fully Compliant Supplier
After becoming a Registered Bidder, you can then advance your status to become a Fully Compliant Supplier, which allows you to be fully awarded City contracts. The steps to do this are as follows:

1. Complete a San Francisco Business Tax Registration
2. Complete a 12B Equal Benefits Declaration

In addition to the hyperlinked directions above, you can click here to view step-by-step directions on How to Become a Fully Compliant Supplier.

Additional Programs and Forms that may apply to you as you work with the City include the following:

- OPTIONAL 14B LBE Certification for Small Local Businesses
- Requirements Based on Your Annual Business with the City
- Contract-Based Requirements
- First Source Hiring Program
- Insurance
- Payment (Labor and Material) Bond
- Performance Bond
- Sweater Contracting Ordinance
Supplier Instructions – Business Tax

- **Bidder / Supplier ID**

- Connect your Business Account Number to Bidder/Supplier ID

  [https://newbusiness.sfgov.org/vendor](https://newbusiness.sfgov.org/vendor)

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Are you already registered?

Are you a registered business with a Business Account Number (or Business Registration Certificate)? If so, use the link provided to link your Bidder/Supplier ID Number to your Business Account Number: [Click here to enter your BAN and Bidder/Supplier ID Number](https://newbusiness.sfgov.org/vendor)
If you do not have a Business Account Number, complete the questionnaire.

If you are not registered as a business:
Please answer "Yes" or "No" to the questions below to determine if you are required to register as a business with the Office of the Treasurer & Tax Collector.

Does this business:
- Yes No Receive a grant, stipend or honoraria from the SF Arts Commission, as an individual artist or panelist and otherwise does not do business in San Francisco?
- Yes No Maintain a fixed place of business within San Francisco?
- Yes No Perform work or render services within San Francisco for all or part of any seven days during one tax year?
- Yes No Solicit business within San Francisco for all or part of any seven days during one tax year?
- Yes No Exercise corporate or franchise powers within San Francisco?
- Yes No Own or lease real or personal property within San Francisco for business purposes?
- Yes No Regularly maintain a stock of tangible personal property in San Francisco for sale in the ordinary course of business?
- Yes No Employ or loan capital on property within San Francisco?
- Yes No Liquidate businesses when the liquidators hold themselves out to the public as conducting such business?
- Yes No Use streets in San Francisco for business purposes for any part of seven (7) days during the tax year?
- Yes No Have more than $500,000 in total gross receipts allocated to the City during the tax year?
Supplier Instructions – Business Tax

If you are not required to have a Business Account Number, you will see this form.

For assistance:
TTX.VendorAccounts@sfgov.org
Supplier Instructions – Business Tax

• Registration is required within 15 days after commencing business and renewed annually by May 31st.

• To register your business, visit https://sftreasurer.org/business/register-business

• For additional support, visit the Help Center at the above link.
Supplier Instructions – Business Tax

Selecting "yes" enables our office to ask the Supplier Management Team to link your bidder/supplier ID# with your business account#.

For Assistance:
Email to: TTX.VendorAccounts@sfgov.org
Chapter 12B Equal Benefits Ordinance

Most businesses that contract with the City are required to include domestic partners in employee benefits.

Domestic Partners

- same-sex and different-sex couples registered with any state or local government agency
- same proof of relationship/waiting period requirements for domestic partnerships and marriages
- domestic partner registry certificates = marriage certificates
Compliance - Chapter 12B Equal Benefits

3 documents

1. Online 12B Declaration

2. Proof of employee count (example: IRS Form 941)

3. Memorandum to employees that summarizes domestic partner policies
Supplier Instructions – 12B Equal Benefits

• Log in to the SF City Partner portal https://sfcitypartner.sfgov.org/

• On the Certification menu, click 12B Declaration

• Click Add A New Value (necessary boxes self-populate)

• Click ADD

• Fill in the 12B Declaration

• Click Save

• Click Submit
Equal Benefits compliance information and assistance in completing the online 12B Declaration:

Equal Benefits Unit
415-581-2310
cmd.equalbenefits@sfgov.org
www.sfgov.org/cmd
Minimum Compensation Ordinance (MCO)
Health Care Accountability Ordinance (HCAO)
Health Care Security Ordinance (HCSO)

Presented on 8/15/23 For OEWD
Jade San Diego, Compliance Officer
The labor performed may be covered under the following:

<table>
<thead>
<tr>
<th>Citywide Labor Laws</th>
<th>Contracting Labor Laws</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Health Care Security</td>
<td>• Minimum Compensation</td>
</tr>
<tr>
<td></td>
<td>• Health Care Accountability</td>
</tr>
</tbody>
</table>

Office of Labor Standards Enforcement
Minimum Compensation Ordinance (MCO)

MCO: Covered Employer

• For-profit and nonprofit – 5+ workers (permanent, temporary, etc.) anywhere in the world with a San Francisco City contract or grant
• Includes subcontractors and subtenants

MCO: Covered Employee/Worker

• Anyone working for a covered employer on a City contract
• Worker/Employee is anyone – doesn’t matter if full-time, part-time, contract, casual, etc.
MCO
Required Wages and Paid Time Off (PTO)

- MCO wages are higher than the SF Minimum Wage Rate
- PTO must meet MCO Requirements

Office of Labor Standards Enforcement
MCO Wage Requirements

Effective July 1, 2023:

• $20.22 per hour – For-profit Rate*

• $18.93 per hour – Non-profit Rate**

*For-Profits receive annual increases every July 1 based on the increase in the Consumer Price Index.

*Non-Profits receive increases based on City Budget (July-August)

Check the MCO webpage for the current MCO rates.

Office of Labor Standards Enforcement
Health Care Accountability Ordinance (HCAO)

HCAO: Covered Employer
• For-profit with 20 or more employees (anywhere)
• with a City contract
• Includes subcontractors

HCAO: Covered Employee/Worker
• Anyone working for a covered employer on a City contract at least 20 hours a week
Health Care Security Ordinance (HCSO)

Basic City Wide Labor Law

**For-Profits**
If the employee/worker does not work 20 hours or more a week AND performs work in the City and County of San Francisco, then the company may need to comply with the Health Care Security Ordinance (HCSO).
MCO & HCAO Declaration Forms

- Required for contracts $25,000 or more

- Send completed forms to sfcitypartnersupport@sfgov.org

- There is no waiver or exemption for the Declaration requirement

- MCO & HCAO Units can explain compliance requirements
Office of Labor Standards Enforcement (OLSE)

For additional information about these policies, contact:

Office of Labor Standards Enforcement
San Francisco City Hall
1 Dr. Carlton B. Goodlett Place, Room 430
San Francisco, CA 94102
https://sf.gov/departments/office-labor-standards-enforcement

MCO & HCAO: (415) 554-7903 - mco@sfgov.org, hcao@sfgov.org
HCSO: (415) 554-7892 - hcso@sfgov.org
System of Award Management (aka "SAM")

- Registration is Current
- You have no exclusions
Other Compliance Items

• Insurance: General Liability, Auto Liability and Workers Compensation (as applicable to your business)

• First Source Hiring Ordinance – Submission of First Source Projection Form

If you are a non-profit corporation:

• Office of Attorney General – Current Status

• IRS Registered

• Secretary of State – Active Status

Need help with compliance? Email us at oewd.procurement@sfgov.org.
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