



August 15, 2023
12:00 P.M.-2:00 P.M.



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.

San Francisco Office of Economic and Workforce Development

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



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)

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

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.

About The Office of Small Business

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>

About The Small Business Development Center

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. Commerical 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

Program Sub-areas (continued)

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

MQ #	Description
MQ #1	Submitted online application , as referenced in Appendix 1 - Application Questions
MQ #2	Uploaded resume documenting that Proposer has at least three (3) years of experience providing business consulting and training services to small business clients.
MQ #3	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.
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: <ul style="list-style-type: none">*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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<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**.

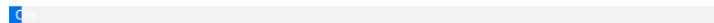
Need help with the online application? Email us at owd.procurement@sfgov.org.

Landing page for RFQ 227 Application

OEWD SBDC RFQ 227 Application

Page: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#)

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



Save my progress and resume later | [Resume a previously saved form](#)

Page 1

Welcome

This is the online application form for OEWD Small Business Development Center (SBDC) Request for Qualifications (RFQ) #227.

All fields marked by an asterisk (*) are mandatory; enter "I" or N/A if not applicable.

The application allows the ability to save progress and resume later.

When ready to submit the final application, press the "Submit" button located on the last page. A message will indicate if any errors need to be corrected before final submission.

Applications will not be accepted after the deadline.

Helpful information is available on the [OEWD RFQ 227 website](#).

For technical support, attend the online **Technical Assistance Conference**, an online **Drop-in Technical Assistance Session**, or email oewd.procurement@sfgov.org.

[Next Page](#)

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.

OEWD SBDC RFQ 227 Application

Page: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#)

Save my progress and resume later | [Resume a previously saved form](#)

Page 2

Part I. Applicant Profile

Primary Point of Contact for this Application

In this section, provide all organizational contact information.

Primary Point of Contact Name *

Primary Point of Contact Title *

Need help with the online application? Email us at oe wd.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.

OEWD SBDC RFQ 227 Application

Page: [1](#) [2](#) [3](#) [4](#) [5](#) [6](#) [7](#)

Save my progress and resume later | [Resume a previously saved form](#)

Resume Later

In order to be able to resume this form later, please enter your email and choose a password.

Your Email:

A Password:

Confirm Password:

Need help with the online application? Email us at owd.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 owd.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 owd.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-Related Requirements

First Source Hiring Program

Insurance

Payment (Labor and Material)
Bond

Performance Bond

Sweatfree Contracting Ordinance

Supplier Instructions – Business Tax



Bidder / Supplier ID



Connect your Business Account Number to Bidder/Supplier ID

<https://newbusiness.sfgov.org/vendor>

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](#)

Supplier Instructions – Business Tax

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

CCSF Supplier - Application Form

In-Lieu of Business Registration

I declare that my business does not need to register with the City and County of San Francisco's Office of the Treasurer & Tax Collector because it does not meet any of the following:

- Maintain a fixed place of business within San Francisco.
- Perform work or render services within San Francisco for all or part of any seven days during one tax year.
- Solicit business within San Francisco for all or part of any seven days during one tax year.
- Exercise corporate or franchise powers within San Francisco.
- Own or lease real or personal property within San Francisco for business purposes.
- Regularly maintain a stock of tangible personal property in San Francisco for sale in the ordinary course of business.
- Employ or loan capital on property within San Francisco.
- Liquidate businesses when the liquidators hold themselves out to the public as conducting such business.
- Use streets in San Francisco for business purposes for any part of seven (7) days during the tax year.
- Have more than \$500,000 in total gross receipts allocated to the City during the tax year.

If the Office of The Treasurer & Tax Collector determines that I am conducting business in San Francisco, the City may either cancel the contract or withhold payment ten days after written notification by the Tax Collector. I declare (or certify) under penalty of perjury under the laws of the State of California that the foregoing is true and correct, and that I am authorized to bind this entity contractually.

Full Name:

Email Address:

Name of Company

Supplier/Bidder ID Number

Mailing Address

City, State, ZIP

Tax ID Number

Telephone Number

Continue

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.



The screenshot shows the website for the San Francisco Treasurer & Tax Collector. The header includes the city logo, the title 'Treasurer & Tax Collector CITY AND COUNTY OF SAN FRANCISCO', a search bar, and navigation links for 'Help Center', 'Find a Form', 'About Us', and 'English'. A blue navigation bar contains dropdown menus for 'Property', 'Business', 'Payments', 'Banking & Investments', and 'In the Community'. Below this, a breadcrumb trail reads 'Home > Business > Register a Business'. A 'Print' button is visible in the top right. The main content area is titled 'Register a Business' and features a list of links: 'Register a Business', 'First Year Free', 'Renew Business Registration', 'Manage Your Business', 'Taxes & Fees', and 'Tax Collector Regulations'. A highlighted box contains the text: 'San Francisco's Business and Tax Regulations generally requires that every person engaging in business within the City must register within 15 days after commencing business and renewed every year by May 31st. Business Registration is generally valid for one fiscal year July 1st through June 30th.' Below this text is a blue button labeled 'New Business Registration Application' and a link to an 'instructional video'.

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#.

Business Identification

Are you establishing this business to be a vendor (City Bidder/Supplier) or participate in procurement processes with the City and County of San Francisco? * Yes No

Supplier ID Bidder ID

[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

Contact for Help – 12B Equal Benefits

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



Office of Labor Standards Enforcement

The labor performed may be covered under the following:

Citywide Labor Laws

- Health Care Security

Contracting Labor Laws

- Minimum Compensation
- Health Care Accountability

Minimum Compensation Ordinance (MCO)

MCO: Covered Employer

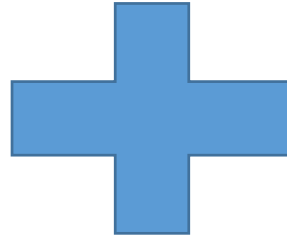
- For-profit and nonprofit – 5+ workers (permanent, temporary, etc.) anywhere in the world with a San Francisco City contract or grant
- Includes subcontractors and subtenants

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

MCO Wage Requirements

Effective July 1, 2023:

- *\$20.22 per hour – For-profit Rate**
- *\$18.93 per hour – Non-profit Rate***

*For-Profit Annual increases every July 1 based on the increase in the Consumer Price Index.

*Non-Profit increases are 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

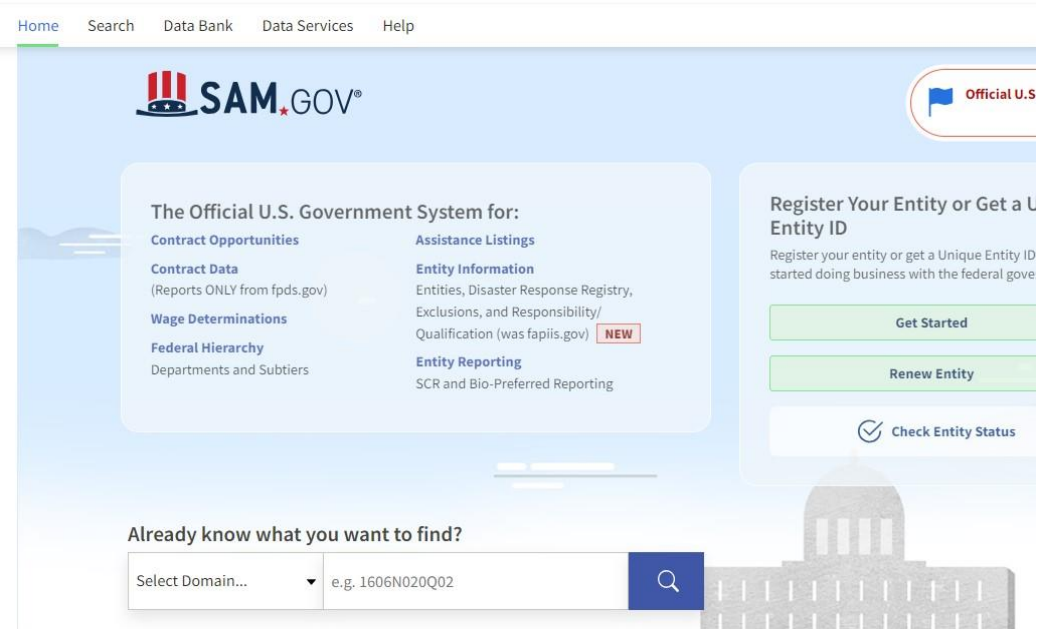
<https://sf.gov/departments/office-labor-standards-enforcement>

MCO & HCAO: (415) 554-7903 - mco@sfgov.org, hcao@sfgov.org

HCSO: (415) 554-7892 - hcsos@sfgov.org

System of Award Management (aka "SAM")

- Registration is Current
- You have no exclusions



The screenshot shows the SAM.GOV website homepage. At the top, there is a navigation bar with links for Home, Search, Data Bank, Data Services, and Help. The main header features the SAM.GOV logo and a badge indicating it is the Official U.S. Government System. Below the header, there are two main columns of content. The left column lists various services: Contract Opportunities, Contract Data (Reports ONLY from fpds.gov), Wage Determinations, and Federal Hierarchy (Departments and Subtiers). The right column lists: Assistance Listings, Entity Information (Entities, Disaster Response Registry, Exclusions, and Responsibility/Qualification (was fapiis.gov) with a NEW tag), and Entity Reporting (SCR and Bio-Preferred Reporting). On the far right, there is a section for 'Register Your Entity or Get a Unique Entity ID' with buttons for 'Get Started', 'Renew Entity', and 'Check Entity Status'. At the bottom, there is a search bar with the text 'Already know what you want to find?' and a search input field containing 'e.g. 1606N020Q02'.

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 owd.procurement@sfgov.org.

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SAN FRANCISCO

OFFICE OF ECONOMIC &
WORKFORCE DEVELOPMENT

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

Email our team: owd.procurement@sfgov.org

Subscribe for updates at: owd.org/email