

# City and County of San Francisco

## Sourcing Event ID 000008580

### Formal Request for Proposals for: Support DAHLIA SF Housing Portal Web Design, Development, and Maintenance

This Solicitation can be viewed on the MOHCD's website at:  
<https://sf.gov/information/request-proposals-dahlia-sf-housing-portal-web-design-dev-maintenance>



Proposal Phase	Tentative Date
Request for Proposals Issued	August 21, 2023
Written Questions and Proposed Changes to City's Contract Terms Due Date	August 31, 2023 by 5:00am PT
Answers to Questions Posted	September 5, 2023
Proposal Due Date (also Due Date for Proposed Changes to Attachment 1, City's Contract Terms)	September 19, 2023 by 12:00 noon PT
Notice of Non-Responsive Proposal Determination	September 21, 2023
Period for Protesting Notice of Non-Responsive Proposal Determination	Within three (3) business days of the City's issuance of the Notice of Non-Responsive Proposal Determination.
Notice of Intent to Award	October 3, 2023
Period for Protesting Notice of Intent to Award	Within three (3) business days of the City's issuance of a Notice of Intent to Award.
Solicitation Administrator:	Michael Solomon Sr IS Business Analyst, Mayor's Office of Housing and Community Development 1 South Van Ness Ave, 5 <sup>th</sup> Floor, San Francisco, CA 94103 Phone: 628-652-5920 Email: michael.solomon@sfgov.org

#### **Attachments**

- Attachment 1: [City's Contract Terms](#)
- Attachment 2: [Proposer Questionnaire and References](#)
- Attachment 3: Omitted (CMD LBE Forms)
- Attachment 4: [Written Proposal Template](#)
- Attachment 5: Omitted (Price Proposal Template)
- Attachment 6: [HCAO and MCO Declaration Forms](#)
- Attachment 7: [First Source Hiring Form](#)

**MANDATORY MINIMUM  
QUALIFICATION  
DOCUMENTATION**

Proposers must submit with their proposal documents in support of each Minimum Qualification (MQ) listed below. A proposal that fails to provide the following documentation or meet each MQ will be considered non-responsive and will not be eligible for further consideration.

MQ #	Description
<b>MQ 1</b>	<p>Proposer’s proposed changes to Attachment 1, City’s Contract Terms, by the Proposal Due Date. If selected, proposed changes will be reviewed and are subject to non-acceptance by the City or negotiation. If not proposing any changes, then note that on <i>Attachment 2: Proposer Questionnaire and References</i> (question 7).</p> <p>Pay special attention to the Insurance Requirements in the City’s Contract Terms <i>Article 5, Insurance, Indemnity, and Warranties</i>. If Proposer does not agree to the required coverage types and amounts, they must note as such as proposed changes to Attachment 1, City’s Contract Terms. If no proposed changes are noted, then insurance will be required as described in the City’s Contract Terms <i>Article 5, Insurance, Indemnity, and Warranties</i>.</p>
<b>MQ 2</b>	Completed Attachments 2, 4, 6, and 7 as applicable. If not applicable, then note so on the attachment.
<b>MQ 3</b>	Responses to questions and information requested in <i>Attachment 4: Written Proposal</i> are complete and entered in <i>Attachment 4: Written Proposal</i> , not on a separate document except where explicitly instructed.
<b>MQ 4</b>	Evidence in the Written Proposal response that Proposer has at least 5 years of experience within the last 7 years in the services requested by this Solicitation.
<b>MQ 5</b>	Evidence in the Written Proposal response that Proposer has successfully delivered at least one product in the services requested by this Solicitation that served over 10,000 end users within the last 7 years.

## Table of Contents

<b>I.</b>	<b>Introduction and Solicitation Schedule.....</b>	<b>1</b>
A.	Introduction.....	1
B.	Anticipated Contract Term .....	1
C.	Anticipated Contract Not to Exceed Amount .....	1
D.	Reserved (Indefinite Quantity, As-Needed Contract).....	1
E.	Cooperative Agreement .....	1
F.	Solicitation Schedule .....	2
G.	Contract Terms and Negotiations.....	2
<b>II.</b>	<b>Goods and Services Requested.....</b>	<b>2</b>
A.	Goods and/or Services Requested.....	2
B.	Reserved (Regulatory and Compliance Requirements Specific to the Goods/Services Solicited).....	3
C.	Green Purchasing Requirements.....	3
D.	Reserved (Alternates and Samples).....	3
E.	Reserved (Freight on Board and Shipping Costs).....	3
<b>III.</b>	<b>Local Business Enterprise (LBE) Program Requirements .....</b>	<b>3</b>
A.	CMD Compliance Officer .....	3
B.	Application of LBE Rating Bonuses .....	3
C.	LBE Subcontracting Participation Requirements.....	4
D.	Reserved (CMD LBE Forms) .....	4
E.	Reserved (LBE Payment and Utilization Tracking).....	4
<b>IV.</b>	<b>Proposal Evaluation Criteria .....</b>	<b>4</b>
<b>V.</b>	<b>Minimum Qualifications Documentation Required with Proposal (Pass/Fail) .....</b>	<b>4</b>
<b>VI.</b>	<b>Written Proposal (90 Points) .....</b>	<b>5</b>
<b>VII.</b>	<b>Price Proposal (10 POINTS) .....</b>	<b>5</b>
A.	Price Proposal Format and Allocation of Points .....	5
B.	Price Proposal Evaluation Period.....	5
C.	Price Discrepancies .....	5
D.	Reserved (Proposing on Separate Items or in Aggregate(s)).....	5
E.	Application of Discounts for Evaluating Lowest Responsive Proposer.....	5
<b>VIII.</b>	<b>Reserved (Oral Interviews) .....</b>	<b>6</b>
<b>IX.</b>	<b>Supporting Documentation Required Prior to Contract Execution .....</b>	<b>6</b>
<b>X.</b>	<b>Failure to Provide Insurance and/or Bonds .....</b>	<b>6</b>
<b>XI.</b>	<b>City’s Social and Economic Policy Requirements .....</b>	<b>6</b>
A.	Proposers Unable to do Business with the City.....	7
B.	Reserved (Prevailing Wage Ordinance).....	7
C.	Health Care Accountability Ordinance .....	7
D.	Minimum Compensation Ordinance .....	8
E.	First Source Hiring Program.....	8
F.	Reserved (Sweatfree Procurement) .....	8
G.	Non-Profit Entities .....	8
H.	Other Social Policy Provisions.....	8
<b>XII.</b>	<b>Terms and Conditions for Receipt of Proposals.....</b>	<b>8</b>
A.	How to Register as a City Supplier .....	8
B.	Proposal Questions and Submissions .....	9
C.	RFP Addenda.....	9

- D. Public Disclosure..... 10
- E. Limitation on Communications During Solicitation ..... 10
- F. Proposal Selection Shall not Imply Acceptance ..... 10
- G. Cybersecurity Risk Assessment..... 10
- H. Solicitation Errors and Omissions ..... 11
- I. Objections to Solicitation Terms..... 11
- J. Protest Procedures ..... 11
- K. Proposal Term..... 12
- L. Revision to Proposal ..... 12
- M. Proposal Errors and Omissions..... 12
- N. Financial Responsibility ..... 12
- O. Proposer’s Obligations under the Campaign Reform Ordinance ..... 13
- P. Reservations of Rights by the City ..... 13
- Q. No Waiver ..... 14
- R. Other..... 14

# **I. INTRODUCTION AND SOLICITATION SCHEDULE**

## **A. Introduction**

### **1. General**

This Request for Proposals (hereinafter “RFP” or “Solicitation”) is being issued by the Mayor’s Office of Housing and Community Development (hereinafter, “MOHCD” or “City”). MOHCD, on behalf of all City Departments, is seeking qualified suppliers (“Proposers”) to provide proposals (“Proposal”) for support of the DAHLIA SF Housing Portal web design, development, and maintenance.

The City has approximately 65 departments, ranging from small to very large. Some departments maintain facilities located outside of the geographic limits of the City. MOHCD shall order goods and/or services covered by the awarded contract(s) through the issuance of individual Purchase Orders and/or Task Orders which shall be released against the awarded contract(s) during the contract term.

When applicable and practical, Proposers are encouraged to engage contracting teams that reflect the diversity of the City and include participation of businesses and residents from the City’s most disadvantaged communities including, but not limited to the Bayview/Hunters Point, Chinatown, Mission, South of Market, Tenderloin, Visitacion Valley and Western Addition neighborhoods.

### **2. Selection Overview**

The City shall award a contract to the Proposer that meets the Minimum Qualifications of this Solicitation whose Proposal receives the highest-ranking score. Responsive Proposals will be evaluated by a panel (“Evaluation Panel”) consisting of one or more parties with expertise related to goods and/or services being procured through this Solicitation. The Evaluation Panel may include staff from various City departments. Proposals will be evaluated based on the criteria outlined herein. If applicable, a Contract Monitoring Division (CMD) Contract Compliance Officer will assess Proposal compliance with Local Business Enterprise (LBE) requirements and assign a rating bonus to Proposal scores. The CMD-adjusted scores (if applicable) will then be tabulated, and Proposers will be ranked starting with the Proposer receiving the highest score, then continuing with the Proposer receiving the second highest score, and so on.

## **B. Anticipated Contract Term**

A contract awarded pursuant to this Solicitation shall be non-exclusive with an original term of up to 5 years. The City at its sole, absolute discretion, shall have the option to extend the term for up to 4 additional years for a total of up to 9 years.

## **C. Anticipated Contract Not to Exceed Amount**

The not to exceed (“NTE”) amount for a contract awarded pursuant to this Solicitation cannot be anticipated at the time of this Solicitation but shall be based on the selected Proposal. This amount is based on City’s estimated spend over the advertised contract term. Should City’s actual spend exceed its estimated spend, City may in its sole discretion increase the contract NTE accordingly.

## **D. Reserved (Indefinite Quantity, As-Needed Contract)**

## **E. Cooperative Agreement**

Any other City department, public entity or non-profit made up of multiple public entities, may use the results of this Solicitation to obtain some or all of the commodities or

services to be provided by Proposer under the same terms and conditions of any contract awarded pursuant to this Solicitation.

**F. Solicitation Schedule**

The anticipated schedule for this Solicitation is set forth below. These dates are tentative and subject to change. It is the responsibility of the Proposer to check for any Addenda to this Solicitation or other published pertinent information.

<b>Proposal Phase</b>	<b>Tentative Date</b>
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Written Questions and Proposed Changes to City’s Contract Terms Due Date	August 31, 2023 by 5:00am PT
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Period for Protesting Notice of Intent to Award	Within three (3) business days of the City's issuance of a Notice of Intent to Award.
Solicitation Administrator:	Michael Solomon Sr IS Business Analyst, Mayor’s Office of Housing and Community Development 1 South Van Ness Ave, 5 <sup>th</sup> Floor, San Francisco, CA 94103 Phone: 628-652-5920 Email: michael.solomon@sfgov.org

**G. Contract Terms and Negotiations**

The successful Proposer will be required to enter into a contract substantially in the form attached hereto as Attachment 1, City’s Contract Terms. **If Proposer is unable to accept City’s Contract Terms substantially in the form presented, Proposer shall include a revised copy of City’s Contract Terms with its Proposal.** The revised copy of City’s Contract Terms must clearly:

- (1) Mark those sections to which it objects;
- (2) Set forth Proposer’s alternative terms with respect to each such section; and
- (3) Explain the basis for each proposed change.

If a satisfactory contract(s) cannot be negotiated in a reasonable time, the City, in its sole discretion, may terminate negotiations. Upon termination of negotiations, City may begin negotiation with the Proposer that meets the Minimum Qualifications of this Solicitation whose Proposal receives the next highest-ranking score.

**II. GOODS AND SERVICES REQUESTED**

**A. Goods and/or Services Requested**

This Solicitation is being issued by MOHCD. MOHCD is seeking qualified Proposers to provide Proposals for support of the DAHLIA SF Housing Portal web design, development, and maintenance, in accordance with Appendix A, Scope of Work.

**B. Reserved (Regulatory and Compliance Requirements Specific to the Goods/Services Solicited)**

**C. Green Purchasing Requirements**

In preparation for any Proposal submitted in response to this Solicitation, Proposers are required to review the City [Mandatory Green Purchasing Requirements](#) to ensure all goods and services offered to City in response to this Solicitation comply with the City’s Green Purchasing Requirements. In addition, Proposers are encouraged to refer to Attachment 1, City’s Contract Terms, for additional details related to the Green Purchasing Requirements applicable to any contract awarded pursuant to this Solicitation.

**D. Reserved (Alternates and Samples)**

**E. Reserved (Freight on Board and Shipping Costs)**

**III. LOCAL BUSINESS ENTERPRISE (LBE) PROGRAM REQUIREMENTS**

**A. CMD Compliance Officer**

The CMD Compliance Officer (CCO) for this Solicitation and any Contract awarded pursuant to this Solicitation is:

Selormey Dzikunu  
Contract Monitoring Division  
City and County of San Francisco  
Tel: 415.581.2310  
Email: selormey.dzikunu@sfdpw.org  
Website: [www.sfgov.org/cmd](http://www.sfgov.org/cmd).

**B. Application of LBE Rating Bonuses**

LBE Rating Bonuses shall be applicable to at each phase of the Solicitation evaluation and selection process, in accordance with the values shown below.

1. **Reserved (Commodities)**
2. **General and Professional Services**

<b>Estimated Contract Value</b>	<b>Small/Micro LBEs Rating Bonus</b>	<b>SBA LBEs Rating Bonus</b>
Greater than \$10,000 but less than or equal to \$400,000.	10%	0%
Greater than \$400,000 but less than or equal to \$10,000,000.	10%	5% <i>So long as it does not adversely affect a Small or Micro-LBE Proposer’s participation or, for Professional Services, an JV Proposer’s participation.</i>
Greater than \$10,000,000 but less than or equal to \$20,000,000.	2%	2%

3. **Reserved (Professional Services by Joint Ventures)**

**C. LBE Subcontracting Participation Requirements**

There shall be no LBE Subcontracting Requirement for any Contract awarded pursuant to this Solicitation because the LBE Subcontracting Requirements were waived by the Contract Monitoring Division.

**D. Reserved (CMD LBE Forms)**

**E. Reserved (LBE Payment and Utilization Tracking)**

**IV. PROPOSAL EVALUATION CRITERIA**

<b>Evaluation Phase</b>	<b>Maximum Points</b>
Written Proposal	100 Points
<b>TOTAL</b>	<b>100 Points</b>

**V. MINIMUM QUALIFICATIONS DOCUMENTATION REQUIRED WITH PROPOSAL (PASS/FAIL)**

Proposers must provide documentation that clearly demonstrates each Minimum Qualification (MQ) listed below has been met. Minimum Qualification documentation should be clearly marked as “MQ1”, MQ2”, etc.... to indicate which MQ it supports. Each Proposal will be reviewed for initial determination on whether Proposer meets the MQs referenced in this section. **This screening is a pass or fail determination and a Proposal that fails to meet the Minimum Qualifications will not be eligible for further consideration in the evaluation process.** The City reserves the right to request clarifications from Proposers prior to rejecting a Proposal for failure to meet the Minimum Qualifications.

<b>MQ #</b>	<b>Description</b>
<b>MQ 1</b>	Proposer’s proposed changes to Attachment 1, City’s Contract Terms, by the Proposal Due Date. If selected, proposed changes will be reviewed and are subject to non-acceptance by the City or negotiation. If not proposing any changes, then note that on <i>Attachment 2: Proposer Questionnaire and References</i> (question 7).  Pay special attention to the Insurance Requirements in the City’s Contract Terms <i>Article 5, Insurance, Indemnity, and Warranties</i> . If Proposer does not agree to the required coverage types and amounts, they must note as such as proposed changes to Attachment 1, City’s Contract Terms. If no proposed changes are noted, then insurance will be required as described in the City’s Contract Terms <i>Article 5, Insurance, Indemnity, and Warranties</i> .
<b>MQ 2</b>	Completed Attachments 2, 4, 6, and 7 as applicable. If not applicable, then note so on the attachment.
<b>MQ 3</b>	Responses to questions and information requested in <i>Attachment 4: Written Proposal</i> are complete and entered in <i>Attachment 4: Written Proposal</i> , not on a separate document except where explicitly instructed.
<b>MQ 4</b>	Evidence in the Written Proposal response that Proposer has at least 5 years of experience within the last 7 years in the services requested by this Solicitation.
<b>MQ 5</b>	Evidence in the Written Proposal response that Proposer has successfully delivered at



	least one product in the services requested by this Solicitation that served over 10,000 end users within the last 7 years.
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**VI. WRITTEN PROPOSAL (90 POINTS)**

In addition to submitting responses and documents supporting each Minimum Qualification as required by this Solicitation, Proposers shall also submit a complete Proposal consisting of each item set forth in **Attachment 4, Written Proposal Template**.

**VII. PRICE PROPOSAL (10 POINTS)**

**A. Price Proposal Format and Allocation of Points**

In addition to submitting responses and documents supporting each Minimum Qualification as required by this Solicitation, Proposers shall also submit a complete Price Proposal consisting of each item set forth in **Attachment 4, Written Proposal**.

Price proposals will be evaluated as follows:

**B. Price Proposal Evaluation Period**

The City will evaluate Price Proposals at the same time as the rest of the written proposals.

**C. Price Discrepancies**

Where applicable, if there is a discrepancy between the Price Proposal and pricing entered by Proposer into the Supplier Portal, the Price Proposal pricing will prevail. In the event of a discrepancy between the unit price and the extended price, the unit price will prevail.

**D. Reserved (Proposing on Separate Items or in Aggregate(s))**

**E. Application of Discounts for Evaluating Lowest Responsive Proposer**

**1. Application of LBE Bid Discount to Price Proposal**

Where price is a factor in City’s evaluation process, Proposer’s price shall be reduced by an amount equal to the applicable LBE Bid Discounts. The discount shall be applied solely for the purpose of determining the lowest responsive Price Proposal and shall be in addition to any other discounts, preferences, or adjustments required by City law.

**2. Application of Prompt Payment Discounts to Price Proposal**

Prompt Payment discount (discount for prompt payment) will not be taken into consideration in determining the Lowest Responsive Proposal.

**3. Reserved (Application of Anticipated Local Tax Revenue Discount to Price Proposal)**

**4. Sample Discount Calculation**

Evaluations are performed on a pre-tax basis except in rare instances, where tax may be a factor (i.e. One vendor bundles the commodities and services in such a way that the entire amount must be taxed, while another vendor clearly separates commodities and services). Below is an example of how bid discounts and/or rating bonuses are applied to a Price Proposal for commodities and services.

Price Proposal Attributes <ul style="list-style-type: none"> <li>Is a Certified Micro LBE</li> </ul>	Offered Price Proposal (Pre-Tax)	14B LBE Bid Discount (10%)	Prompt Payment Terms Discount (2% Max)	21.32 Local Tax Revenue Discount (1.25%)	Evaluated Price when determining Lowest Responsive Proposed Price
Services	\$1,000	(\$100)	N/A	N/A	\$900
<b>Total</b>	<b>\$1,000</b>	<b>(\$100)</b>	<b>N/A</b>	<b>N/A</b>	<b>\$900</b>

### VIII. RESERVED (ORAL INTERVIEWS)

### IX. SUPPORTING DOCUMENTATION REQUIRED PRIOR TO CONTRACT EXECUTION

Awarded Proposer must provide each Required Supporting Documentation (“RSD”) identified below prior to Award. Failure to do so may result in the Proposal being deemed Non-Responsive.

<b>RSD 1</b>	Evidence that <a href="#">Proposer is 12B compliant</a> or likely to become compliant within 30 calendar days of the Proposal Due Date.
<b>RSD 2</b>	<p><b>Completed Proposal Attachments:</b></p> <input type="checkbox"/> Attachment 6: HCAO and MCO Declaration Forms <input type="checkbox"/> Attachment 7: First Source Hiring Form
<b>RSD 3</b>	Insurance in accordance with Article 5 of Attachment 1, City’s Contract Terms.

### X. FAILURE TO PROVIDE INSURANCE AND/OR BONDS

Unless otherwise stated, within ten business days of the receipt of a notice of award of a Contract, the Proposer to whom the contract is awarded shall deliver the specified bond documents and/or insurance certificates and policy endorsements to City. If the Proposer fails or refuses to furnish the required bond and/or insurance within ten days after receiving notice to award a Contract, City may, at its option, determine that the Proposer has abandoned its Proposal. Thereupon the tentative award of said contract to this Proposer shall be canceled and City shall notify the Proposer’s surety and collect on the Proposer’s bond (or the check accompanying its Proposal shall be deposited with the Treasurer of the City and County of San Francisco for collection). The proceeds thereof shall be retained by City as partial liquidated damages for failure of such Proposer to properly file the bonds and insurance herein required. The foregoing in no way limits the damages which are recoverable by City whether or not defined elsewhere in the contract documents.

### XI. CITY’S SOCIAL AND ECONOMIC POLICY REQUIREMENTS

The San Francisco Municipal Code establishes a number of requirements for people seeking to do business with the City (“Social and Economic Policy Requirements”). These Social and Economic Policy Requirements can be found in Attachment 1, City’s Contract Terms, which Proposers are encouraged to carefully review. The Social and Economic Policy Requirements set forth below are not intended to be a complete list of all Social Policy Requirements applicable to this Solicitation and any contracts awarded from it.

**A. Proposers Unable to do Business with the City**

**1. Generally**

Proposers that do not comply with laws set forth in San Francisco’s Municipal Codes may be unable to enter into a contract with the City. Laws applicable to this Solicitation are set forth below and in Attachment 1, City’s Contract Terms.

**2. Contractor Vaccination Policy Attestation Form**

Proposers must agree to comply with the requirements of the 38th Supplement to Mayoral Proclamation Declaring the Existence of a Local Emergency (“Emergency Declaration”), dated February 25, 2020, and the Contractor Vaccination Policy for City Contractors issued by the City Administrator (“Contractor Vaccination Policy”), as those documents may be amended from time to time. A copy of the Contractor Vaccination Policy can be found here: <https://sf.gov/confirm-vaccine-status-your-employees-and-subcontractors>. If Proposer is unable to comply with this Policy, it will be deemed non-responsive unless a City is able to secure a waiver on Proposer’s behalf. *Refer to Attachment 1, City’s Contract Terms for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.*

**3. Reserved (Administrative Code Chapter 12X)**

**4. Administrative Code Chapter 12B**

A Proposer selected pursuant to this Solicitation may not, during the term of the Contract, in any of its operations in San Francisco, on real property owned by San Francisco, or where work is being performed for the City elsewhere in the United States, discriminate in the provision of bereavement leave, family medical leave, health benefits, membership or membership discounts, moving expenses, pension and retirement benefits or travel benefits, as well as any benefits other than the benefits specified above, between employees with domestic partners and employees with spouses, and/or between the domestic partners and spouses of such employees, where the domestic partnership has been registered with a governmental entity pursuant to state or local law authorizing such registration, subject to the conditions set forth in §12B.2(b) of the San Francisco Administrative Code *Refer to Attachment 1, City’s Contract Terms for additional details related to the application of this Ordinance to a contract awarded pursuant to this Solicitation.*

**B. Reserved (Prevailing Wage Ordinance)**

**C. Health Care Accountability Ordinance**

Where applicable, a Proposer selected pursuant to this Solicitation shall comply with the requirements of Chapter 12Q. For each covered employee who is not subject to Prevailing Wage, an awarded Proposer shall provide the appropriate health benefit set forth in Section 12Q.3 of the Health Care Accountability Ordinance (HCAO). If a Proposer selected pursuant to this Solicitation chooses to offer the health plan option, such health plan shall meet the minimum standards set forth by the San Francisco Health Commission. Information about and the text of the Chapter 12Q and the Health Commission’s minimum standards are available at <http://sfgov.org/olse/hcao>. Any Subcontract entered into by Proposer shall also be required to comply with the requirements of the HCAO and shall contain contractual obligations substantially the same as those set forth in this section. *Refer to Attachment 1, City’s Contract*

*Terms for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.*

#### **D. Minimum Compensation Ordinance**

Where applicable, a Proposer selected pursuant to this Solicitation shall comply with Administrative Code Chapter 12P. A Proposer selected pursuant to this Solicitation shall pay covered employees who are not subject to Prevailing Wage no less than the minimum compensation required by San Francisco Administrative Code Chapter 12P, including a minimum hourly gross compensation, compensated time off, and uncompensated time off. A Proposer selected pursuant to this Solicitation is subject to the enforcement and penalty provisions in Chapter 12P. Information about and the text of the Chapter 12P is available on the web at <http://sfgov.org/olse/mco> Refer to Attachment 1, City's Contract Terms for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.

#### **E. First Source Hiring Program**

A Proposer selected pursuant to this Solicitation shall comply with all of the applicable provisions of the First Source Hiring Program, Chapter 83 of the San Francisco Administrative Code. Refer to Attachment 1, City's Contract Terms for additional details related to the application of this Policy to a contract awarded pursuant to this Solicitation.

#### **F. Reserved (Sweatfree Procurement)**

#### **G. Non-Profit Entities**

To receive a contract under this Solicitation, any nonprofit Proposer must be in good standing with the California Attorney General's Registry of Charitable Trusts by the time of contract execution and must remain in good standing during the term of the agreement. Upon request, Proposer must provide documentation to the City demonstrating its good standing with applicable legal requirements. If Proposer will use any nonprofit subcontractors to perform the agreement, Proposer will be responsible for ensuring they are also in compliance with all requirements of the Attorney General's Registry of Charitable Trusts at the time of Contract execution and for the duration of the agreement.

#### **H. Other Social Policy Provisions**

Attachment 1, City's Contract Terms, identifies the City's applicable social policy provisions related to a contract awarded pursuant to this Solicitation. Proposers are encouraged to carefully review these terms and ensure they are able to comply with them.

## **XII. TERMS AND CONDITIONS FOR RECEIPT OF PROPOSALS**

### **A. How to Register as a City Supplier**

The following requirements pertain only to Proposers not currently registered with the City as a Supplier.

**Step 1:** Register as a BIDDER at City's Supplier Portal:

<https://sfcitypartner.sfgov.org/pages/index.aspx>

**Step 2:** Follow instructions for converting your BIDDER ID to a SUPPLIER ID. This will require you to register with the City Tax Collector's Office and submit Chapter 12B and 12C forms through the Supplier portal. Once these forms have been completed, submitted, and processed, you will be notified via email with your organization's new Supplier ID. That email will also provide instructions for completing your Supplier registration.

- **City Business Tax Registration Inquiries:** For questions regarding business tax registration procedures and requirements, contact the Tax Collector’s Office at (415) 554-4400 or, if calling from within the City and County of San Francisco, 311.
- **Chapter 12(B) and 12(C) Inquiries:** For questions concerning the City’s Chapter 12(B) and 12(C) Equal Benefits and Non-Discrimination in Contracting requirements, go to: [www.sfgov.org/cmd](http://www.sfgov.org/cmd).

**B. Proposal Questions and Submissions**

**1. Proposer Questions and Requests for Clarification**

Proposers shall address any questions regarding this Solicitation to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation. Proposers who fail to submit questions concerning this Solicitation and its requirements will waive all further rights to protest based on the specifications and conditions herein. **Questions must be submitted by email to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation no later than Written Questions Due Date.** A written Addendum will be executed addressing each question and answer and posted publicly. It is the responsibility of the Proposer to check for any Addenda and other updates that will be posted on the Solicitation details page at: <https://sf.gov/information/request-proposals-dahlia-sf-housing-portal-web-design-dev-maintenance>

**2. Proposal Format**

Proposals must be created using a word processing software (e.g. Microsoft Word or Excel) and typed in a serif font (e.g.-Times New Roman). The document must have page margins of at least .5” on all sides. Information must be provided at a level of detail that enables effective evaluation and comparison between Proposals. Failure to follow formatting, submission, or content requirements, as well as page limit restrictions (if any), may negatively impact the evaluation of your Proposal.

**3. Time and Place for Submission of Proposals**

Prior to the Proposal submission deadline, Proposers must email their complete Proposals to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation. Late submissions will not be considered. Each original Proposal received will be screened to ensure that all content required by this Solicitation is included. Partial or complete omission of any required content may disqualify Proposals from further consideration. Late Proposal submissions will not be considered and failure to adhere to all requirements may result in the complete rejection of your Proposal.

Proposer must include in its email: Solicitation #0000008580, Proposer firm name, Proposer contact information.

**C. RFP Addenda**

The City may modify this Solicitation, prior to the Proposal Due Date, by issuing an Addendum to the Solicitation, which will be posted on the [Solicitation details page](#). Proposers must monitor the [Solicitation details page](#) for new versions. **The Proposer shall be responsible for ensuring that its Proposal reflects any and all Addenda issued by the City prior to the Proposal Due Date regardless of when the Proposal is submitted.** Therefore, the City recommends that the Proposer consult the website frequently, including shortly before the Proposal Due Date, to determine if the Proposer has downloaded all Solicitation Addenda. It is

the responsibility of the Proposer to check for any Addenda, Questions and Answers documents, and updates, which may be posted to the subject Solicitation.

**THE SUBMITTAL OF A RESPONSE TO THIS SOLICITATION SHALL EXPLICITLY STIPULATE ACCEPTANCE BY PROPOSERS OF THE TERMS FOUND IN THIS SOLICITATION, ANY AND ALL ADDENDA ISSUED TO THIS SOLICITATION, AND THE PROPOSED CONTRACT TERMS.**

**D. Public Disclosure**

All documents under this solicitation process are subject to public disclosure per the California Public Records Act (California Government Code Section §6250 et. Seq) and the San Francisco Sunshine Ordinance (San Francisco Administrative Code Chapter 67). Contracts, Proposals, responses, and all other records of communications between the City and Proposers shall be open to inspection immediately after a contract has been awarded. Nothing in this Administrative Code provision requires the disclosure of a private person’s or organization’s net worth or other proprietary financial data submitted for qualification for a contract or other benefit until and unless that person or organization is awarded the contract or benefit.

If the City receives a Public Records Request (“Request”) pertaining to this solicitation, City will use its best efforts to notify the affected Proposer(s) of the Request and to provide the Proposer with a description of the material that the City deems responsive and the due date for disclosure (“Response Date”). If the Proposer asserts that some or all of the material requested contains or reveals valuable trade secret or other information belonging to the Proposer that is exempt from disclosure and directs the City in writing to withhold such material from production (“Withholding Directive”), then the City will comply with the Withholding Directive on the condition that the Proposer seeks judicial relief on or before the Response Date. Should Proposer fail to seek judicial relief on or before the Response Date, the City shall proceed with the disclosure of responsive documents.

**E. Limitation on Communications During Solicitation**

From the date this Solicitation is issued until the date the competitive process of this Solicitation is completed (either by cancelation or final Award), Proposers and their subcontractors, vendors, representatives and/or other parties under Proposer’s control, shall communicate solely with the Contract Administrator whose name appears in this Solicitation. Any attempt to communicate with any party other than the Contract Administrator whose name appears in this Solicitation – including any City official, representative or employee – is strictly prohibited. Failure to comply with this communications protocol may, at the sole discretion of City, result in the disqualification of the Proposer or potential Proposer from the competitive process. This protocol does not apply to communications with the City regarding business not related to this Solicitation.

**F. Proposal Selection Shall not Imply Acceptance**

The acceptance and/or selection of any Proposal(s) shall not imply acceptance by the City of all terms of the Proposal(s), which may be subject to further approvals before the City may be legally bound thereby.

**G. Cybersecurity Risk Assessment**

As part of City’s evaluation process, City may engage in Cybersecurity Risk Assessment (CRA). CRA may be performed for each entity manufacturing the product, performing technical functions related to the product’s performance, and/or accessing City’s networks and systems.

Where a prime contractor or reseller plays an active role in each of these activities, CRA may also be required for the prime contractor or reseller.

To conduct a CRA, City may collect as part of this Solicitation process one of the following two reports:

- **SOC-2 Type 2 Report:** Report on Controls at a Service Organization Relevant to Security, Availability, Processing Integrity, Confidentiality or Privacy; or
- **City's Cyber Risk Assessment Questionnaire:** Proposer's responses to a City's Cyber Risk Assessment Questionnaire.

The above reports may be requested at such time City has selected or is considering a potential Proposer. The reports will be evaluated by the soliciting Department and the City's Department of Technology to identify existing or potential cyber risks to City. Should such risks be identified, City may shall afford a potential Proposer an opportunity to cure such risk within a period of time deemed reasonable to City. Such remediation and continuing compliance shall be subject to City's on-going review and audit through industry-standard methodologies, including but not limited to: on-site visits, review of the entities' cybersecurity program, penetration testing, and/or code reviews.

## **H. Solicitation Errors and Omissions**

Proposers are responsible for reviewing all portions of this Solicitation. Proposers are to promptly notify the City, in writing and to the Solicitation contact person if the Proposer discovers any ambiguity, discrepancy, omission, or other error in the Solicitation. Any such notification should be directed to the City promptly after discovery, but in no event later than the deadline for questions. Modifications and clarifications will be made by Addenda as provided below.

## **I. Objections to Solicitation Terms**

Should a Proposer object on any ground to any provision or legal requirement set forth in this Solicitation, the Proposer must, no later than the deadline for questions, provide written notice to the City setting forth with specificity the grounds for the objection. The failure of a Proposer to object in the manner set forth in this paragraph shall constitute a complete and irrevocable waiver of any such objection.

## **J. Protest Procedures**

### **1. Protest of Non-Responsiveness Determination**

Within three (3) business days of the City's issuance of a Notice of Non-Responsiveness, a Proposer may submit a written Notice of Protest of Non-Responsiveness. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

### **2. Protest of Non-Responsible Determination**

Within three (3) business days of the City's issuance of a Notice of Non-Responsibility, a Proposer may submit a written Notice of Protest of Non-Responsibility. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on

which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

### **3. Protest of Contract Award**

Within three (3) business days of the City's issuance of a Notice of Intent to Award, a Proposer may submit a written Notice of Protest of Contract Award. The Notice of Protest must include a written statement specifying in detail each and every one of the grounds asserted for the protest. The Notice of Protest must be signed by an individual authorized to represent the Proposer, and must cite the law, rule, local ordinance, procedure or Solicitation provision on which the protest is based. In addition, the Notice of Protest must specify facts and evidence sufficient for the City to determine the validity of the protest.

### **4. Delivery of Protests**

A Notice of Protest must be written. Protests made orally (e.g., by telephone) will not be considered. A Notice of Protest must be delivered by mail or email to the Contract Administrator whose name and contact information appears on the cover page to this Solicitation and received by the due dates stated above. A Notice of Protest shall be transmitted by a means that will objectively establish the date the City received the Notice of Protest. If a Notice of Protest is mailed, the protestor bears the risk of non-delivery within the deadlines specified herein.

#### **K. Proposal Term**

Submission of a Proposal signifies that the proposed products, services and prices are valid for 180 calendar days from the Proposal Due Date and that the quoted prices are genuine and not the result of collusion or any other anti-competitive activity. At Proposer's election, the Proposal may remain valid beyond the 180-day period in the circumstance of extended negotiations.

#### **L. Revision to Proposal**

A Proposer may revise a Proposal on the Proposer's own initiative at any time before the deadline for submission of Proposals. The Proposer must submit the revised Proposal in the same manner as the original. A revised Proposal must be received on or before, but no later than the Proposal Due Date and time. In no case will a statement of intent to submit a revised Proposal, or commencement of a revision process, extend the Proposal Due Date for any Proposer. At any time during the Proposal evaluation process, the City may require a Proposer to provide oral or written clarification of its Proposal. The City reserves the right to make an award without further clarifications of Proposals received.

#### **M. Proposal Errors and Omissions**

Failure by the City to object to an error, omission, or deviation in the Proposal will in no way modify the Solicitation or excuse the Proposer from full compliance with the specifications of this Solicitation or any contract awarded pursuant to this Solicitation.

#### **N. Financial Responsibility**

The City accepts no financial responsibility for any costs incurred by a Proposer in responding to this Solicitation. Proposers acknowledge and agree that their submissions in response to this Solicitation will become the property of the City and may be used by the City in any way deemed appropriate.



## **O. Proposer's Obligations under the Campaign Reform Ordinance**

If a contract awarded pursuant to this Solicitation has (A) a value of \$100,000 or more in a fiscal year and (B) requires the approval of an elected City official, Proposers are hereby advised:

1. Submission of a Proposal in response to this Solicitation may subject the Proposers to restrictions under Campaign and Governmental Conduct Code Section 1.126, which prohibits City contractors, Proposers, and their affiliates from making political contributions to certain City elective officers and candidates; and
2. Before submitting a Proposal in response to this Solicitation, Proposers are required to notify their affiliates and subcontractors listed in the awarded contract or Proposal of the political contribution restrictions set forth in Campaign and Governmental Conduct Code section 1.126.

This restriction applies to the party seeking the contract, the party's board of directors, chairperson, chief executive officer, chief financial officer, chief operating officer, any person with an ownership interest greater than ten percent, and any political committees controlled or sponsored by the party, as well as any subcontractors listed in the awarded contract or Proposal. The law both prohibits the donor from giving contributions and prohibits the elected official from soliciting or accepting them.

The people and entities listed in the preceding paragraph may not make a campaign contribution to the elected official at any time from the submission of a Proposal for a contract until either: (1) negotiations are terminated and no contract is awarded; or (2) twelve months have elapsed since the award of the contract.

A violation of Section 1.126 may result in criminal, civil, or administrative penalties. For further information, Proposers should contact the San Francisco Ethics Commission at [\(415\) 252-3100](tel:415-252-3100) or go to <https://sfethics.org/compliance/city-officers/city-contracts/city-departments/notifying-bidders-and-potential-bidders>.

## **P. Reservations of Rights by the City**

The issuance of this Solicitation does not constitute a guarantee by the City that a contract will be awarded or executed by the City. The City expressly reserves the right at any time to:

1. Waive or correct any defect or informality in any response, Proposal, or Proposal procedure;
2. Reject any or all Proposals;
3. Reissue the Solicitation;
4. Prior to submission deadline for Proposals, modify all or any portion of the selection procedures, including deadlines for accepting responses, the specifications or requirements for any materials, equipment or services to be provided under this Solicitation, or the requirements for contents or format of the Proposals;
5. Procure any materials, equipment or services specified in this Solicitation by any other means; or

6. Determine that the subject goods or services are no longer necessary.

**Q. No Waiver**

No waiver by the City of any provision of this Solicitation shall be implied from the City's failure to recognize or take action on account of a Proposer's failure to comply with this Solicitation.

**R. Other**

1. The City may make such investigation, as it deems necessary, prior to the award of this contract to determine the conditions under which the goods are to be delivered or the work is to be performed. Factors considered by the City shall include, but not be limited to:

- a. Any condition set forth in this Solicitation;
- b. Adequacy of Proposer's plant facilities and/or equipment, location and personnel location to properly perform all services called for under the Purchase Order; and
- c. Delivery time(s).

2. City reserves the right to inspect an awarded Proposer's place of business prior to award of and/or at any time during the contract term (or any extension thereof) to aid City in determining an awarded Proposer's capabilities and qualifications.

3. Failure to timely execute a contract, or to furnish any and all insurance certificates and policy endorsements, surety bonds or other materials required in the contract, shall be deemed an abandonment of a contract offer. The City, in its sole discretion, may select another Proposer and may proceed against the original selectee for damages.

4. City reserves the right to reject any Proposal on which the information submitted by Proposer fails to satisfy City and/or if Proposer is unable to supply the information and documentation required by this Solicitation within the period of time requested.

5. Any false statements made by a Proposer or any related communication/clarification may result in the disqualification of its Proposal from receiving further evaluation and a contract award.

## **Appendix A Scope of Work**

### **Support DAHLIA SF Housing Portal Web Design, Development, and Maintenance**

#### **1. Department Overview**

The Mayor's Office of Housing and Community Development provides financing for the development, rehabilitation and purchase of affordable housing in San Francisco. MOHCD also guides and coordinates the City's housing policy. MOHCD:

- Finances the development of affordable housing by non-profit and for-profit developers.
- Provides financial and educational assistance to first-time homebuyers.
- Finances housing rehabilitation costs for low-income homeowners.
- Monitors and ensures the long-term affordability and physical viability of the City's stock of affordable housing.
- Partners with the community to strengthen the social, physical, and economic infrastructure of San Francisco's low-income neighborhoods and communities in need

#### **2. Project Summary**

Over the past few years, we have created the DAHLIA San Francisco Housing Portal for those seeking affordable rental and ownership housing to find resources, view available listings, and apply online via a custom web app that works with Salesforce as the backend database. In addition, we have created and are providing web app tools for our MOHCD partners, such as Leasing Agents, Sales Agents, Lenders, and Developers to interact with the system according to their specific needs regarding administering their programs.

The number of applicants for a single listing can reach over 9,000. We work with just over 400 partners who have accounts in the system.

The City and County of San Francisco's ("City") Mayor's Office of Housing and Community Development ("MOHCD") is soliciting for qualified firms to use Agile processes to partner with the City's Digital Services team to support continued design, build, and maintenance of the current web-based services (see [housing.sfgov.org](http://housing.sfgov.org)) to include even more MOHCD programs, services, and tools. These services need to continue to make it easy to navigate complicated eligibility rules and a wide variety of programs and resources with clear instructional language, easy-to-follow steps, and appropriate follow-up information such as status, next steps, and what to expect via multiple channels (on-screen, email, SMS, etc.).

The system must continue to provide mobile-focused, responsive web-based interfaces and processes that make it simple for users at all levels of computer and web skills to search and apply for all available affordable San Francisco rental and ownership properties, as well as housing assistance programs offered by nonprofits. In addition, the system must continue to provide limited access web-based administrative tools for MOHCD's partners, including Leasing Agents, Sales Agents, Developers, and Lenders.

Currently, the public site (housing.sfgov.org) includes and is anticipated to include features like:

- presenting a welcoming user-friendly branded interface that provides information about MOHCD and San Francisco housing programs in general
- conveying program details and eligibility information,
- helping users assess property and program eligibility,
- allowing users to optionally create secure accounts to maintain personal and household information, self-service account administration (i.e., password reset),
- filtering search results by desired attributes and eligibility,
- providing information relevant to a user regarding other housing-related programs for which they may be eligible, and
- communicating status and other instructions via multiple channels (on-screen, email, text message, etc.)

In addition, the limited access site includes and is anticipated to include features like:

- application review by listing
- entry of paper application records
- review of duplicate applications which may result in removal from lottery
- lease-up tracking and sales-up tracking

We will follow a frequent, iterative release cycle in accordance with Agile best practices. The vendor will work collaboratively with the City and other vendors, following an Agile methodology. The parties will work in short, regular intervals (“sprints”), each typically two weeks long and will deliver a working product at the end of each sprint. The City and the vendor will use the results of these sprints to decide together the goals of subsequent sprints.

### **3. Business Requirements**

MOHCD is seeking a vendor to continue our current work using Agile development processes to partner with City Digital Services staff, which include a product manager, web app engineers, web app ui/ux designer, and Salesforce developer to support the continued design, build, and maintenance of our cloud-hosted web products which enable users to search and apply for all MOHCD affordable housing programs online and addresses all the desired attributes described in the Department Overview and Project Summary sections of this Appendix A. The vendor, in partnership with the City Digital Services team will support continued development, maintenance, and troubleshooting of web applications, with appropriate serving infrastructure, that make use of a Salesforce database accessible via APIs. In addition, the vendor will support the City’s work reimplementing the DAHLIA Affordable Housing site from AngularJS to React with UI/UX modernization improvements along the way.

We are seeking to work with engineers with the following skills and characteristics:

#### **Desired skills and characteristics**

- Experience with Javascript (React, AngularJS), HTML, CSS
- Experience building server-side applications using frameworks such as Ruby on Rails or Django, and experience creating or extending REST APIs.

- Experience with end to end test automation with Javascript: (Cypress, Selenium, Cucumber)
- Commitment to modern software development practices such as source control, continuous integration/continuous deployment, automated testing, and agile development
- Familiarity with usability, accessibility, and internationalization.
- Ability to quickly learn the code base of a system to work with it and collaborate with partners to help them understand it as well and support their development work. The code for this project is open source, so for reference, you may view it at:
  - <https://github.com/SFDigitalServices/sf-dahlia-web>
  - <https://github.com/SFDigitalServices/sf-dahlia-lap>
- Designing and developing mobile-centric, responsive web applications.

### **Nice to have skills**

- Experience maintaining a production application using Heroku, Papertrail, Sentry, New Relic or similar tools
- Experience working with Agile development processes, including daily scrums and iterative development/feedback cycles.
- Ability to communicate technical concepts to technical and non-technical audiences.

### **Role and responsibilities**

- Partner with City Digital Services staff on the current code rewrite taking place.
- Take pride of ownership in all projects you touch and leave code better than you found it. Contribute to documentation, tests, style fixes, accessibility, performance, security, etc.
- Deliver well-tested code that is easy to deploy, update, and monitor by ensuring the tooling for this is present early in the project development cycle.
- Participate in code reviews and QA testing of work from other engineers.
- Participate in prototyping, feature prioritization, scrum meetings, and architecture discussions.
- Support integration with a Salesforce database using APIs.
- Help the team troubleshoot bugs in production.
- Support deployment of code to our production site.

## **4. SCOPE OF WORK**

### **Task 1: Web Product Requirements Assessment Support**

#### **Task 1 Deliverables:**

1. Understand research done to date and support additional discovery and business analysis in collaboration with the City.
2. Partner with City to propose streamlined business processes that are enabled by the new technology product.

3. Partner with City to research and draft user stories to define the requirements of the software to be built.

## **Task 2: Web Product Design Support**

### **Task 2 Deliverables:**

1. Collaborate closely in an Agile methodology with developers and City staff, including, to a limited extent, requirements development, daily standups, usability testing, and sprint planning and retrospectives.
2. Support continued design of a modern, user-friendly branded front-end that takes into account: required processes and features, accessibility, mobile-centric responsive design, ease of use and navigation for those with low tech experience, and multilingual needs. For reference, the current public facing system can be viewed at [housing.sfgov.org](https://housing.sfgov.org)

## **Task 3: Web Product Development Support**

### **Task 3 Deliverables:**

1. Partner with City Digital Services staff to coordinate understanding and navigation of the existing code base.
2. Based on user stories identified iteratively throughout development, use an Agile process to support continuous building, maintenance, and troubleshooting of existing web applications that meet product requirements and agreed-upon user needs.
3. Support integration with a Salesforce database using APIs in partnership with a City staff Salesforce Engineer and/or Salesforce development vendor.
4. Support handoff of new functionality to the City for long-term technical maintenance.
5. Support set up and management of automated testing throughout the development and deployment process.
6. Support set up, transfer, or provision of cloud infrastructure as a service during development, and collaborate in deploying the production system to the City's internal data center if used.
7. Support continued development of a web application and serving infrastructure that calls out to a separate database through Salesforce APIs.
8. Support deploy of updates to the existing software to the public Iteratively.

9. Support reimplementation of the DAHLIA Affordable Housing site from AngularJS to React with minor UI/UX modernization improvements along the way

## 5. Project Success Criteria

The product shall continue to streamline and simplify the process of searching and applying for affordable housing in the City, making it easier to rent, buy, and stay in San Francisco. It will create a great experience for residents who need housing and housing assistance by providing “one-stop shopping” for all affordable housing resources in the City. It will also continue to provide robust tools to MOHCD partners for administration of Listings, Applications, Lotteries, Lease Ups, etc.

The following criteria shall be met for project success:

### **Functionality for affordable housing seekers:**

- View listings of all affordable housing programs and properties funded by the City and County of San Francisco, and view detailed information for each.
- Apply directly for MOHCD-funded properties and programs online, in a streamlined experience that minimizes or eliminates the need to enter duplicate information.
- Assess their own eligibility, and be matched with appropriate units/housing programs and next steps for each (taking into account complex and widely-varying eligibility rules).
- Receive the right information at the right time by providing clear, up-to-date messaging throughout the processes, including after users apply for housing; may include email or SMS based on discovery of user needs.

### **Functionality for MOHCD partners (Leasing Agents, Developers, Lenders, etc.):**

- View and process applications for affordable housing lotteries for current listings
- Create and view pricing plans, marketing plans, and listings of all affordable housing properties to be made available to the public
- Administer lease-up of units, including applicant selection and communication based on MOHCD policies and procedures in relation to preference programs, reserved and priority qualifying information, and needed ADA accessibility features
- Provide detailed status updates by application during the lease-up process with the ability to view status history

### **Salesforce Integration:**

- The product must continue to be integrated using Salesforce APIs with the City’s associated affordable housing Salesforce database.
- A non-technical user should be able to add, edit and delete the affordable housing resources (programs and properties) listed, as well as their eligibility requirements, using the associated Salesforce platform.

## **Design Principles:**

- Use the existing design pattern library to implement a modern, world-class, and timeless look and feel that is not based on current and quickly-outmoded trends. Provides an experience comparable to best-in-class consumer web products, with a beautiful interface and seamless functions.
- Is easy-to-use for people who may have low literacy and tech familiarity. Makes a complicated and confusing process easy to complete.
- Uses friendly, clear language in descriptions, instructions, field names, etc. that can be understood by people reading at a third-grade level, avoiding government and technical lingo.
- Is responsive (mobile-centric), providing a great experience on both desktop and mobile devices, and functional on older versions of common browsers.
- Is accessible: Must meet Gov Sec 508 and WCAG 2.0 guidelines; Incorporates Mayor's Office on Disability and Mayor's Disability Council recommendations.
- Is multilingual: Must take into account all pages and forms will be machine or human translated into San Francisco's official languages: English, Spanish, Chinese, Filipino (human translations will be performed by a separate City vendor; implementation will be part of this project).

## **Other functionality:**

- This product includes and may include in the future: search and apply for Below Market Rate ownership and rental housing, view started and submitted housing applications, check lottery status, down payment assistance requests and Lender selection, view started and submitted down payment assistance applications, Certificate of Preference search request, Displaced Tenant Housing Preference application, Neighborhood Housing Preference confirmation, view preference certificate status, homeownership post-purchase programs (i.e., refinance, sell home, loan payoff, etc.), update household contact information, change password and other account administration.
- Include authenticated sign-on for users who wish to return to their saved personal data and past applications.
- Meet HIPAA requirements. All data, including login information, transmitted and inside databases must be secure.
- Include automatic timeout (auto-logout) that can be controlled by a System Administrator.
- Include data architecture that guarantees redundancy and high data availability.
- Provide ability for MOHCD to download all data in an open non-proprietary format (i.e. XLS, SQL backup, CSV, etc.). Data must be usable by MOHCD without dependency on Contractor or other outside proprietary tools or services. For any custom developed databases, a data definition table must be included, specifying the name, size and type/class of each field, as well as any specific relationship to other fields.