

ECONOMIC DEVELOPMENT CRITERIA AND QUESTION SET

ECONOMIC DEVELOPMENT CRITERIA

- **Overview and Eligible Applicants**
- **Eligible Projects**
- **Program Objectives**
- **Eligible Beneficiaries**
- **Organizational Capacity**
- **Program Design**

ECONOMIC DEVELOPMENT QUESTION SET

Technical Assistance for Economic Development Proposal Areas:

OEWD will conduct one technical assistance workshop specifically related to the **Economic Development Proposal Areas** of this RFP. This workshop will assist interested applicants in assessing the eligibility and scope of proposed projects, and in completing the required elements of proposals using the online proposal system. Please note, the workshop for Workforce Development Proposal Areas will be a separate and distinct workshop.

ECONOMIC DEVELOPMENT SERVICES ONLY (CDBG and SFRA)

DATE: Wednesday, January 13, 2010

TIME: 10:00 AM – 12:00 PM

LOCATION: ; City Hall, 1 Dr. Carlton B Goodlett Place, room 421, San Francisco, CA 94102

Economic Development Programs (CDBG and SFRA)

Overview and Eligible Applicants

The City and County of San Francisco Office of Economic and Workforce Development (OEWD) and the San Francisco Redevelopment Agency (SFRA) are issuing this Request for Proposals (RFP). Through this RFP, funding will be made available to organizations to provide economic development services to San Francisco residents, entrepreneurs, micro-entrepreneurs, and neighborhood businesses.

There are **five** distinct economic development Proposal Areas in this RFP:

Proposal Area I. CDBG Economic Development - Business Technical Assistance

Proposal Area II. CDBG Economic Development - Commercial Corridor Revitalization

Proposal Area III. CDBG Economic Development - Commercial rehabilitation and improvement

Proposal Area IV. SFRA Economic Development - Bayview Hunters Point Project Area

Proposal Area V. SFRA Economic Development - South of Market Project Area

Eligible **CDBG** applicants include:

- 501(c)(3) registered non-profit corporations or 501(c)(14) community development credit unions with proposed programs based in San Francisco. Applicants should have a Board of Directors with a minimum of 7 members that reflect the diversity of the program(s) and clients being served.
- Governmental entities, including public agencies, commissions, or authorities that are independent of the City and County of San Francisco's government (e.g. S.F. Housing Authority.)
- Institutes of higher education
- Non-profit owned commercial developments

Eligible **SFRA** applicants include:

501(c)(3) registered non-profit corporations. Applicants should have a Board of Directors with a minimum of 7 members that reflect the diversity of the program(s) and clients being served.

Eligible Projects

CDBG Economic Development Priority Proposal Areas I-III

PROPOSAL AREA I: Business Technical Assistance

Funding is available for nonprofit organizations that provide technical assistance to for-profit businesses that are owned by or employ low- to moderate-income persons. There are three sub-categories for business technical assistance.

A. Technical assistance for pre-startups and startups

Training and consultation for pre-startups and startup businesses that have been in business for less than 2 years. Work plan activities may include the following:

- **Access to Resources: Intake, assessment, and referral:** Complete a questionnaire with the client to assess business feasibility and identify current strengths, challenges, and immediate and long-term goals. Refer the client, as necessary, to other CBOs and City agencies that can provide relevant assistance.
- **Basic Training:** Complete a training curriculum that covers basic skills and an understanding of fundamental business concepts that impact business decision-making.
- **Business Plan:** Develop a business plan to help a business launch covering financing, product/service design and description, market analysis, sales projections, real estate, personnel, and other relevant content.
- **Financial Literacy:** Develop financial strength and literacy by assisting the client to understand money management concepts and credit management and repair.
- **Financial Management:** Train client in basic accounting and finance systems and tools.
- **Access to Capital:** Enable the client to secure financing by identifying sources of capital and completing loan application(s).
- **Marketing and Branding:** Assist clients with branding, visual merchandising, building a customer base, market research, using technology for viral marketing, web, and social networking, etc. Proposals should demonstrate how business owners will be trained to implement and maintain a marketing campaign and how to create new strategies on their own.

B. Technical assistance for existing businesses

Existing businesses of 2 or more years require advanced technical assistance for expansion and profitability. Work plan activities may include the following:

- **Advanced Training, Consultation, and Technical Assistance Services**
 - Market research and marketing, packaging and promotion,
 - Financial management, including cash flow projections and record-keeping,
 - Advanced business plan development,
 - Loan packaging,
 - Employee hiring and management, and
 - Strategic planning and industry expertise.
- **Commercial Real Estate Support:** Assist the client in pursuing real estate goals in business site location or relocation, and reviewing lease contracts. As necessary, conduct negotiations on behalf of client with landlords, property owners, and brokers.

C. Additional Business Technical Assistance

The following programs and services were highlighted by community members at a series of community planning meetings in 2009, and by OEWD's small business needs assessment. Proposals with strong programs in these areas are also high priority:

- **Commercial Legal Service and/or Lease Negotiation:** Assist clients with business law matters such as entity formation, commercial lease review and negotiations, zoning compliance, ADA compliance, credit repair, and the review of business contracts. Priority legal topics are lease negotiation and credit repair.
- **Credit and Financial Management Services:** Educate clients to avoid incurring debts that cannot be repaid. Provide training to the client to manage working capital, trade credit, and help reverse an adverse credit rating.
- **Marketing and Branding:** Assist clients with branding, visual merchandising, building a customer base, market research, using technology for viral marketing, web, and social networking, etc. Proposals should demonstrate how business owners will be trained to implement and maintain a marketing campaign and how to create new strategies on their own.
- **Business Mentorship:** Provide one-on-one mentoring, consulting, and coaching customized to the needs of the client. Connect individuals interested in startup or business growth to mentors, experienced business consultants and coaches such as accountants, marketing specialists, and suppliers.
- **Business Incubators:** Provide supportive and productive facilities and services, i.e., a physical space which allows emerging businesses to share offices, equipment, and services. Businesses within incubators have the opportunity to build a network of entrepreneurs and draw upon a variety of technical services and peer support. Incubators supporting businesses located in areas of high unemployment, and/or in a Neighborhood Revitalization Strategy Area (NRSA) are preferred. Incubators should target a specific priority business sector including food services, construction, biotech, or clean-tech.

PROPOSAL AREA II: Commercial Corridor Revitalization

Funding is available for nonprofit organizations engaging in activities that strengthen the commercial corridors in low- and moderate-income neighborhoods by providing services to support the retention of locally-owned small businesses and increase corridor potential for providing jobs, services and opportunities for residents. Commercial corridor technical assistance examples include the following:

- **Business Attraction, Retention, Expansions, and Relocations:** Assistance provided to client that includes the identification/negotiation/acquisition of an identified business site or location; or assistance provided in the negotiation of an existing lease to improve terms
- **Access to Resources: Intake, assessment, and referral** to other business support organization or funding opportunities; or permit facilitation
- **Commercial Façade Improvements and Beautification:** Provide assistance to specific business which helps physically improve storefront; visual retail merchandising; graffiti abatement strategy development and implementation

- **Business Safety Consultations:** Connecting business to safety support services and other safety TA providers; connecting a business to the police department for permit facilitation or other police related business support services.
- **Marketing and Branding:** Educating business on how to better market their business city wide; facilitating participation in large marketing campaigns; facilitating development of marketing materials and brand development

PROPOSAL AREA III: Commercial Rehabilitation and Improvements

Funding is available for non-profit organizations that rehabilitate a commercial building or physical infrastructure for economic development activities that contribute to the stabilization and revitalization of a neighborhood. Eligible expenses include funding for construction, rehabilitation, and the following non-construction (soft) costs: architectural, design and engineering services, permit fees construction/project management, environmental review, and legal and special inspection services. Work plan activities may include the following:

- **Commercial Façade Improvements:** Funding is available for special façade improvements that exceed the parameters of the SF Shines Façade Program
- **Commercial Tenant Improvement**
- **Commercial Infrastructure Development**

SFRA Economic Development Proposal Areas IV-V

PROPOSAL AREA IV: Bayview Hunters Point Project Area

Services, projects or programs must support and/or further redevelopment activities within the Bayview Hunters Point project area in accordance with the applicable redevelopment plan goals and objectives for the project area. Redevelopment activities include the planning, development and/or rehabilitation of residential, commercial, industrial, recreational and/or public spaces, facilities, and structures.

PROPOSAL AREA V: SFRA South of Market Project Area

Administration of Sixth Street Revitalization Program which includes six primary components:

1. Managing the façade and tenant improvement loan program, including marketing the program to new participants and working with ongoing clients to ensure projects move through the design phase, bidding, loan execution, construction and reimbursement.
2. Working to attract businesses to Sixth Street and the South of Market Redevelopment Project Area (the “Project Area”) by motivating and assisting property owners to increase the rent-ability of their spaces, listing vacant spaces, taking inquiries and showing vacant spaces to prospective tenants.
3. Providing access to capital for businesses in the Project Area that are unable to obtain capital from traditional sources, assisting small businesses and entrepreneurs in securing loans and developing their businesses, and providing technical assistance to entrepreneurs.

4. Providing post-loan technical assistance for businesses to ensure sustainability
5. Marketing the activities in the Project Area to inform people of the availability and success of the Sixth Street Economic Revitalization Program.
6. Providing support to the South of Market Business Association (SOMBA), including coordinating meetings, preparing and mailing meeting announcements, performing outreach, and working with the SOMBA Board.

Program Objectives

PROPOSAL AREA I - III: CDBG ECONOMIC DEVELOPMENT:

The intent of the Community Development Block Grant (CDBG) program is to develop viable urban communities through the provision of decent housing, suitable living environments, and economic opportunities for persons of low and moderate income.

The CDBG Economic Development Program's objectives are to:

1. Increase the number of job opportunities available for low- and moderate-income San Francisco residents,
2. Increase the number of self-employed low- and moderate-income San Francisco residents, and
3. Support the development of vibrant commercial corridors in low- and moderate-income neighborhoods.

PROPOSAL AREA IV - V: SFRA ECONOMIC DEVELOPMENT:

SFRA South of Market Project Area:

The Sixth Street Economic Revitalization Program seeks to attract new retail businesses to Sixth Street and the South of Market Redevelopment Project Area and improve conditions for existing business with loans and technical assistance. The San Francisco Redevelopment Agency provides funding for the loans and funding for a non-profit corporation to administer the program and provide technical assistance.

Eligible Beneficiaries

PROPOSAL AREA I - III: CDBG ECONOMIC DEVELOPMENT:

The beneficiaries of CDBG economic development activities must be either low- or moderate-income micro-enterprise entrepreneurs or employees of a small business receiving CDBG-funded economic development services. A minimum of 51% of the jobs created and/or retained by the small businesses receiving services must be low-to-moderate income. A micro-enterprise is defined as having 5 or fewer employees, including the owner(s).

CDBG regulations define a low- and moderate-income person as a member of a family that has an income equal to or less than the Section 8 low-income limit established by HUD. Unrelated individuals shall be considered as one-person families for this purpose. [For more information, please review HUD eligibility chart]

PROPOSAL AREA IV: SFRA Bayview Hunters Point Project Area:

Program beneficiaries must be residents, businesses and/or property owners within the Bayview Hunters Point Redevelopment Project Area.

PROPOSAL AREA V: SFRA South of Market Project Area:

Program beneficiaries must be property owners, businesses or nonprofit organizations in the South of Market Redevelopment Project Area.

Organizational Capacity

PROPOSAL AREA I-III: CDBG ECONOMIC DEVELOPMENT:

There must be a demonstrated program history and track record of ability to efficiently and effectively administer programs and achieve desired outcomes. There should be evidence of the ability to fundraise. The proposal should demonstrate a logical relationship between the organization, its mission, and the proposed program/project.

Agencies that have been suspended or were unable to successfully complete a CDBG/SFRA program/project at any time during the period July 2006 through June 2009 must provide additional supportive information on enhanced ability to manage/implement projects.

Preferences for program funding are given to current grantees with superior performance records and those agencies with ability to leverage CDBG/SFRA funds with other program funds.

PROPOSAL AREA IV: SFRA ECONOMIC DEVELOPMENT:

SFRA Bayview Hunters Point Project Area:

See CDBG description above.

PROPOSAL AREA V: SFRA ECONOMIC DEVELOPMENT:

SFRA South of Market Project Area:

There must be a demonstrated program history and track record of ability to efficiently and effectively administer retail corridor revitalization programs. The proposal should demonstrate a logical relationship between the organization, its mission, and the Sixth Street Economic Revitalization Program.

Program Design

PROPOSAL AREA I-II: CDBG ECONOMIC DEVELOPMENT

Programs must be designed to demonstrate the following:

- Programs should target a neighborhood/community where significant service gaps are identified.

- Programs providing business technical assistance must demonstrate linkages with the City's Small Business Assistance Center (SBAC) and refer requests for navigating the permits and licensing process to SBAC.
- Technical assistance providers and commercial corridor programs working in the same neighborhood should cross-refer each others' programs and services so as to serve the customized needs of the clients.
- There should be an appropriate relationship between program goals and the funding amount requested.
- Programs must have language services or linkages to language/ translation services to effectively serve the neighborhood or sector being served.
- The program work plan should reflect feasible outcomes that can accomplish the program objectives.
- Programs must have a plan for collecting the required eligible beneficiary information.
- A commitment to hiring low-income San Francisco residents.
- A commitment to hiring multi-lingual staff as appropriate.
- Programs must address priorities and strategies set out/supported in one or more of the existing OEWD and SFRA neighborhood or service area plans (available on OEWD and SFRA websites).
- Organizations must have adequate staff to carry out the project and to work with OEWD staff in ensuring that all provisions in the grant agreement are met, including timely reporting using the City's on-line reporting system.
- Satisfaction of prior work plan goals and any special conditions established.
- Program design should incorporate evaluations and stakeholder feedback.

PROPOSAL AREA III: CDBG ECONOMIC DEVELOPMENT

All commercial capital projects require the following supporting documentation. These documents are in addition to the online submission. One original and two copies of the supporting documents must be received by OEWD: Attn: Holly Lung, Office of Economic and Workforce Development, 1 Dr. Carlton B. Goodlett Place, Suite 448, San Francisco, CA 94102 by 5:00 on Thursday February 4, 2010:

- **Site Control:** submit a deed or tax bill as evidence of ownership (if grant is provided, a deed of trust will be required later to secure the grant). If facility is leased, submit copy of lease (if grant is provided, lease would later be modified to provide security of grant terms and appropriate term). **OWNER'S APPROVAL:** if applicant does not own facility, provide owner's written approval for your agency to undertake the renovations.
- **Plans:** provide site plan, floor plans, or sketches showing areas of proposed improvements. If possible, provide in 8.5x11-inch format.
- **Citations, Reports:** submit Fire or Building Department citations, or inspection reports that support the funding request, if available.
- **Matching Funds:** submit documents evidencing source and amount if currently secured.

- Construction Budget: submit cost estimates from design professional and/or contractor indicating the total construction budget.
- Design Budget: submit cost estimates from design professional or engineer.
- 5-Year Capital Plan: submit the 5-year capital improvement plan for the building that will be improved.
- Area Benefit Eligibility: Non-profit commercial developments may determine eligibility using Area Benefit. Identify the primary beneficiaries of the commercial capital project.
- Job Creation/Retention Eligibility: Projects may meet the low- moderate- income (L/M) benefit national objective by employing persons, the majority of whom are L/M income persons. Organization must document which jobs were actually created and retained, whether each such job was held by, taken by, or made available to an L/M income persons, and the full-time equivalency status of each job. Indicate the estimated number of jobs created resulting from approval of commercial improvement/development grant.

PROPOSAL AREA IV: SFRA ECONOMIC DEVELOPMENT:

SFRA Bayview Hunters Point Project Area:

Programs must be designed to demonstrate the following:

- Programs should have outcomes that are meaningful and measurable
- Programs should target the Bayview Hunters Point Project Area
- There should be an appropriate relationship between program goals and the funding amount requested
- The program work plan should reflect feasible outcomes that can accomplish the program objectives
- A commitment to hiring low-income Bayview Hunters Point Project Area residents
- A commitment to hiring multi-lingual staff as appropriate
- Program must address priorities and strategies set out/supported in the Bayview Hunters Point Project Area redevelopment plan
- Adequate staff to carry out the project and to work with OEWD and Agency staff in ensuring that all provisions in the grant agreement are met, including timely reporting using OEWD's on-line reporting system.
- Satisfaction of prior work plan goals
- Program design should incorporate evaluations and stakeholder feedback

PROPOSAL AREA V: SFRA ECONOMIC DEVELOPMENT:

SFRA South of Market Project Area:

- Programs must be designed to demonstrate the ability to administer the Sixth Street Economic Revitalization Program (see Eligible Projects for a full description of the six components of the program).
- Adequate staff to carry out the project and to work with OEWD and Agency staff in ensuring that all provisions in the grant agreement are met, including timely reporting using OEWD's on-line reporting system.
- Satisfaction of prior work plan goals

Program design should incorporate evaluations and stakeholder feedback

Program Performance Outcomes

PROPOSAL AREA I-III: CDBG ECONOMIC DEVELOPMENT:

Programs are generally evaluated based on their performance using the following:

- Number of jobs created / retained;
- Number of new business startups assisted;
- Number of existing businesses assisted;
- Number of loans packaged and approved;
- Number of clients completing entrepreneurship training;
- Number of vacancies filled in targeted commercial corridors.

During the grant negotiation process, additional measures will be developed to evaluate the impact of the services provided such as change in business revenue, length of time in business, and change in commercial corridor vacancy rate.

PROPOSAL AREA IV: SFRA ECONOMIC DEVELOPMENT:

SFRA Bayview Hunters Point Project Area (in addition to CDBG outcomes above):

- Number of Bayview Hunters Point Project Area residents, businesses, and/or property owners assisted relative to redevelopment activities within the project area. Redevelopment activities include the planning, development and/or rehabilitation of residential, commercial, industrial, recreational and/or public spaces, facilities, and structures.

PROPOSAL AREA V: SFRA ECONOMIC DEVELOPMENT:

SFRA South of Market Project Area:

Applicants to administer the Sixth Street Economic Revitalization Program will be evaluated based on their demonstrated ability to achieve the following:

- Attract 5 new retail clients to the façade and tenant improvement loan program,
- Work with approximately 10 ongoing retail clients,
- Submit 6 façade and/or tenant improvement loan applications to SFRA,
- Attract 3 new businesses to Sixth Street and an additional 3 new businesses to the rest of the Project Area, and

Produce quarterly newsletters and maintain a Project Area website.

Program Dates

PROPOSAL AREA I-II: CDBG ECONOMIC DEVELOPMENT:

Programs are generally funded from July 1, 2010 thru June 30, 2011.

All programs must begin by October 1, 2010.

PROPOSAL AREA III: Commercial Construction and Rehabilitation

Funded projects are expected to begin construction after July 1, 2010 and prior to June 30, 2011. Complex construction projects have a maximum of three years to complete construction and spend all grant funds.

**PROPOSAL AREA IV -V: SFRA ECONOMIC DEVELOPMENT:
SFRA Bayview Hunters Point Project Area and SFRA South of Market Project Area:**

Programs are generally funded from July 1, 2010 thru June 30, 2011. The Agency may choose to renew funding for a particular program for up to three years.

Awards

PROPOSAL AREA I-III: CDBG ECONOMIC DEVELOPMENT:

Maximum award: \$175,000 per project submitted. Applicants should make efforts to demonstrate leveraging of other non-CDBG funds for overall program budget.

CDBG grants should not comprise more than 50% of an organization's total budget.

PROPOSAL AREA IV: SFRA ECONOMIC DEVELOPMENT:

SFRA Bayview Hunters Point Project Area:

No maximum or minimum.

PROPOSAL AREA V: SFRA ECONOMIC DEVELOPMENT:

SFRA South of Market Project Area:

Maximum budget for July 1, 2010, to June 30, 2011, is TBD.

PROPOSAL AREA I-III: CDBG ECONOMIC DEVELOPMENT:

There is a 12% cap on indirect expenses.

Ineligible uses include stipends, food and beverage, advertising not associated with personnel recruitment, and entertainment expenses.

Travel expenses should be for travel within the City of San Francisco. Other travel expenses will only be approved at the discretion of the OEWD staff.

PROPOSAL AREA IV: SFRA ECONOMIC DEVELOPMENT:

SFRA Bayview Hunters Point Project Area:

Specific fund restrictions will be discussed during the grant negotiation process.

PROPOSAL AREA V: SFRA ECONOMIC DEVELOPMENT:

SFRA South of Market Project Area:

Funds may only be used for services directly related to improving the Sixth Street corridor and the South of Market Redevelopment Project Area.

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ECONOMIC DEVELOPMENT QUESTION SET

1. Project Information

Q1. Contact Person First Name: Contact Person Last Name:

Q2. Contact Person Phone: Contact Person Fax:

Q3. Contact Person Email Address:

Q4. Project Name:

Q5. Project Site Address
(Number, Street, Street Type, Unit, Address Line 2, City, State and Zip)
Please enter the address where program activities take place.

2. Program Specific

Q1. Describe how this program will help San Francisco residents reach self-sufficiency, and how the program will benefit primarily low- and moderate-income residents. Describe how you identified the needs in your community, citing sources such as research reports, census data, community surveys or focus groups. Describe the marketing and outreach plan that will be used to identify clients who will be targeted for program services under this proposal.

Detail your organization's past performance as a provider of economic development services and include a list of all current, on-going, and recently funded economic services (within the past 3 years). Include an overview and analysis comparing your contracted goals against your achieved outcomes and outputs for each of your contracts/grants on this list.

For CDBG applicants, be certain to state how your program will specifically support the goals and objectives as outlined in the 2005-2009 CDBG 5-Year Consolidated Plan, available on the OEWD website.

Q2. Indicate which proposal area you are applying for: **Proposal Area I, II, IV, or V**. You may only select one proposal area per proposal. If you wish to apply for more than one proposal area, you must submit separate proposals for each proposal area. If you are applying for Proposal Area I to provide business technical assistance, please indicate the program sub-category(ies).

Describe the essential elements of your program. Please include the following:

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1. Is the program new or existing? If you are requesting funding for an existing program, please detail any changes to the program and describe the reason for changes.
2. Provide specific detail on the impact the program will have on the entrepreneurs, small businesses, employees, and/or neighborhood commercial corridor benefiting from the services provided. Include a quarterly plan that outlines major activities, deliverables and outcomes.
3. Detail the depth and breadth of services that will be offered.
4. Detail the target population(s) and neighborhood(s) the program will serve, including specifics on population characteristics such as family education levels, English fluency, and socio-economics.
5. Number of people to be served, including estimated percentage of pre-startup business, startup businesses, and existing businesses.
6. Brief description of training curriculum, if any.
7. Provide an example of a client who succeeded and one who failed to complete the program. Describe what may account for each client's experience in the program.
8. Identify any unique challenges facing this program and your strategies for addressing these challenges.
9. Evidence of cultural competencies integrated into the program design, including multi-lingual staff and linkages to other agencies/programs that increase the language capacity of the program
10. Development and incorporation of best practices.
11. Describe existing and/or proposed collaborations and linkages between the proposed activities and other programs and city agencies to ensure clients have access to a full range of necessary services.

For Proposal Area III only, please include the following:

1. Describe the economic need (description of current state of neighborhood, explanation of how the project is a part of an overall community based economic strategy, and how the neighborhood's low- and moderate-income residents will benefit from the amenities that will be made available and how the potential new business will contribute to neighborhood self-sufficiency).
2. Indicate how the proposal is eligible under HUD's low-income beneficiary requirements (Area Benefit or Job Creation/Retention) If Area Benefit is selected please submit additional documentation that includes a map showing the location of your facility and a description of the service area. The description should indicate street boundaries.
3. Provide a detailed schedule for implementation of the proposed project. Include the following items, with start and ending dates: establishing site control, hiring an architect or other consultant, the completion of preliminary designs and approval of the designs by the Mayor's Office of Disability.
4. Describe any construction training or experience (working as or with architects, building inspectors, contractors, etc.) that your current staff has to implement the request grant. List capital improvement projects that your

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current staff has managed in the recent past (3-5 years), including scope, cost, funding source, and length of time the project took to complete.

5. Owner of Building:

Facility/Size (Sq. Ft):

Number of Stories:

Lease or Own?:

Project applicant should have a guaranteed lease of at least 5 years. If lease, how long is the lease?

Q3 Describe program staffing, including qualifications and/or certifications. Please include the name and title for all staff in the overall program, including staff that is not proposed to be funded through this proposal. For those staff that is proposed to be funded through this proposal, please also include the experience and qualifications of the individuals filling those positions. Discuss fiscal and data management staff experience, specifically working with federal funds. Describe how you will develop the capacity and skills of all staff engaged in these services.

Q4. Agency and Program Budget – Please give us more information about your agency and program budget.

•Total agency budget for current fiscal year: \$_____

•Total CDBG funding in the current fiscal year:

•\$ _____ = _____ % of budget

•Total agency budget for proposed 2010-11 fiscal year: \$_____

•Percentage of total agency budget funded by the proposed CDBG proposal: _____%

•Total Program Budget: \$_____

•Amount requested under this application: \$_____

•Other sources of funding identified for program budget:

•\$ _____ = _____ % of budget

Q5. Provide a detailed breakdown of the projected economic outcomes that your program will have in one or more of the following areas:

- Number of jobs created / retained;
- Number of new business startups assisted;
- Number of existing businesses assisted;
- Number of loans packaged and approved;
- Number of clients completing entrepreneurship training;
- Number of vacancies filled in targeted commercial corridors.

Table Input:

Goal Proposed Goal Amount

3. Work Plan Outline

Q1. Please fill out the work plan detail - including # of people served per activity and

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total UNDUPLICATED clients served program wide.

From the drop-down menu, select the activity(ies) that best describes your program. If you have multiple activities, please enter each activity on a separate line. Please provide a brief one or two-line summary of each activity in the text box next to each activity.

FOR CDBG ECONOMIC DEVELOPMENT GRANTEES: Refer to the [CDBG Economic Development Program Area](#) in the RFP appendix to indicate the appropriate work plan activity to be entered into the "Description/ Unit of Accomplishment" below. For description of the work plan activities, refer to the [Eligible Projects](#) section of the RFP.

Table Input:

Activity	Description/ Unit of Accomplishment
Annual Output	

Q2. Please enter the number of unduplicated clients served by your program.

4. Evaluation

Q1. In addition to the activities and outcomes that will be monitored as part of your work plan, please describe how your organization will assess the quality and effectiveness of the proposed program/project. How does your agency know your program is successful? Include, if applicable, examples such as focus groups, surveys, stakeholder input, and other methods of evaluation. Describe how evaluation results are reviewed and used to improve programming. Also, please describe your evaluation method for assessing the impact your services have made on your clients. How does your agency know your program helped improve the quality of life of your clients and neighborhood? If your organization does not have an evaluation method for assessing impact, please explain how you will develop one in the future.

5. Program and Agency Budget

Q1. Please enter detailed budgetary information. If you are not requesting funding for a specific line item please enter "0". Your budget will be incomplete if there are blanks in the Amount box for any line item.

Salary Detail:

If you are requesting funds to pay for administrative salaries please indicate the title(s) and % of admin time in the justification box. If you are requesting coverage for indirect costs you may NOT request administrative salaries as part of your direct costs.

Table Input:

Last Name	First Name	Title	Rate	Hrs	Total
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Fringe Benefits Detail:

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Table Input:

Description	Payroll Total	Rate %	Amount
FICA			
SUI			
Workers Compensation			
Medical Insurance			
Retirement			
Other			

Contractual Services Detail:

Subcontracting must follow federal procurement guidelines as outlined in the City's Operating Procedures Manual and specifically in [Form H](#).

Table Input:

Service Type	Contractor Name	Explanation	Amount
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Equipment Detail:

Equipment purchases exceeding \$1,000 must follow the guidelines set forth in [Form H](#). Equipment leases should be included under "Other" Detail.

Table Input:

Equipment Name	Explanation	Amount
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Insurance Detail:

General Liability	Amount:
Auto	Amount:
Fidelity	Amount:
Property	Amount:
Other	Amount:

Travel/Conference Detail:

The Operating Procedures Manual requires agencies to consult their grant coordinator for out of town travel expenses.

Table Input:

Travel Event	Travel Location	Explanation	Amount
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Other Detail:

CDBG funds CANNOT be used for stipends, food and beverage, and entertainment expenses. Political activities and advertising not related to recruitment are also disallowed budget items.

Other Name	Explanation	Amount
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Budget Details:

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Item	Amount	Justification
Salaries		
Fringe Benefits		
Contractual Services		
Equipment		
Insurance		
Space Rental		
Supplies		
Telecommunications		
Travel/Conferences		
Utilities		
Other		

Indirect Cost (Applicants may include indirect costs in the proposed budget.)
 Total Budget

Q2. Program Funding from other City Department(s).
 Using the table below, please list funding received for FY 2010-2011 from other City Departments that supports the same program for which you are requesting funds. If you do not receive any funding from other City Departments for the proposed program leave the table blank.

Name of Funding Source	Comment (Optional)	Amount
Total Funding from other City department(s) \$		

Q3. Program Funding from non-City sources.
 Using the table below, please list funding received for FY 2010-2011 from non-City sources that support the same program for which you are requesting funds. If you do not receive any non-City sources for the proposed program leave the table blank.

Name of Funding Source	Comment (Optional)	Amount
Total Funding from other Funding Source(s): \$		
Total Proposed Funding from this Grant: \$		
Total Program Budget: \$		

6. Neighborhood

Q1. The specific programs that would benefit from the funding you are requesting should be based in and primarily benefit low-income residents of San Francisco neighborhoods. Identify the neighborhoods to be served and the % of your total clients from each neighborhood. The total percentage must equal 100%. Please see the map of defined San Francisco neighborhoods.

If your program serves at least six neighborhoods AND no one neighborhood comprises at least 20% of the total individuals served, you may select "Citywide"

This Question Set is for information only! Proposals must be submitted through the City's online RFP system (available beginning Tuesday, January 5, 2010 at [www.oewd.org/business-assistance - funding.aspx](http://www.oewd.org/business-assistance-funding.aspx)). The deadline for proposal submission is 5:00 p.m. on Thursday, February 4, 2010.

as the neighborhood. If you serve individuals residing outside of San Francisco, choose "Other" as the neighborhood.

Table Input:

Neighborhood	% Input
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