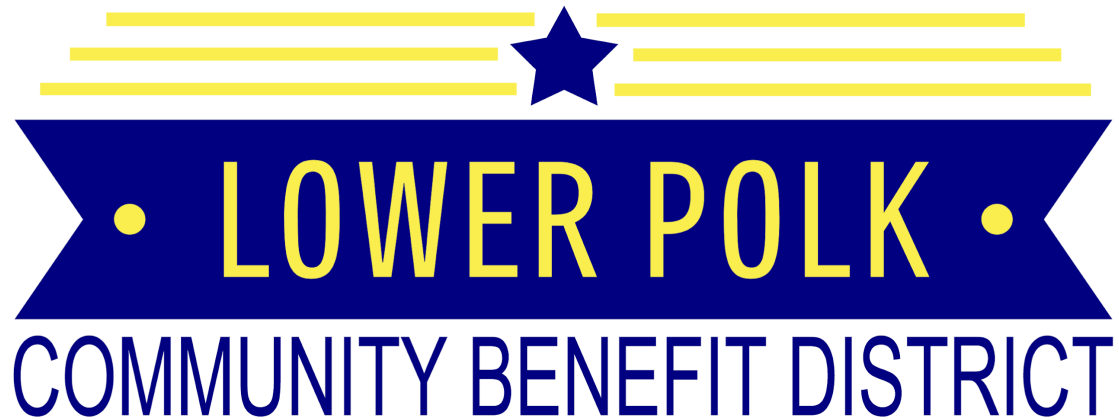


# X Request for Bids X



## Management Consulting Program For The Lower Polk Community Benefit District

Bidding Period Opens: September 1, 2021 (9 AM PST)

Bidding Period Closes: September 15, 2021 (5 PM PST)

**PLEASE READ THIS DOCUMENT CLOSELY AND NOTE THAT A SITE VISIT IS STRONGLY  
ENCOURAGED BEFORE YOU SUBMIT YOUR BID.**

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## Statement of Purpose

By and through this public Request for Bids (hereinafter “RFB”), the Lower Polk Community Benefit District (hereinafter “LPCBD”), a 501(c) not-for-profit corporation, seeks bids for the following Project:

**“Management Consulting Program For The Lower Polk Community Benefit District.”**

## Background Information

Founded in 2015, the LPCBD is a 501(c)3 Community Benefit District (“CBD”) that works to improve the lives of all people in our District.

A CBD is a special assessment district that provides for the levy and collection of assessments on properties within a geographically defined area. Assessment revenue collected from the benefitting properties pays the costs associated with the improvements, services, and activities provided to the CBD area. In San Francisco the legislation that allows for the establishment of a CBD, is the California Streets and Highway Code Sections 36600 et seq. (“1994 Act”) augmented by the Business Improvement District Procedure, Article 15 of the San Francisco Business and Tax Regulations Code. The 1994 Act, as modified by Article 15, allows for the levy of special assessments on both properties and/or businesses. CBD’s are also referred to as Business or Property Improvement Districts (“BIDs”) in some areas of San Francisco.

For more detailed information about the LPCBD, including our District boundaries, we urge you to closely review <https://oewd.org/lower-polk>, along with the official documents that are linked on that page, including our *Management Plan*.

## Project Deliverables

### Objectives

The LPCBD Management Consulting Program will work to ensure that the LPCBD stays up-to-date on the latest technologies, policies, methods, and procedures with respect to employee and facilities management.

### Service Outline

The LPCBD Management Consulting Program shall include, at minimum, consulting and advice on the following tasks:

- Team Culture, Values, and Principles
- Systems, and Operating Procedures

- Hiring and Personnel Management
- Program Budgeting
- Risk Management
- Procurement of Supplies
- Safety Training
- Facilities and Equipment Maintenance
- Cleaning Protocols
- Vehicle Maintenance
- Uniforms Sourcing
- Communications Policies
- Hiring and Personnel
- Recology Coordination
- Program Evaluation and Quality Control

Please note that the above tasks are the minimum tasks that we will require for this contract. In your Proposal, you are strongly encouraged to suggest additional tasks.

## Bidder Qualifications

Qualified organizations placing bids will share the following characteristics:

- 1) The company or organization will be organized as a not-for-profit Corporation, a C-Corporation, a Public Benefit Corporation (“B-Corp”), an S-Corporation, or a Limited Liability Corporation.
- 2) The company or organization will be demonstrably culturally sensitive to the unique challenges that confront our unhoused populations.
- 3) The company or organization will be able to demonstrate a sincere commitment to equity.
- 4) The company or organization will have a history and policy of working to provide meaningful employment opportunities to people who have been systematically denied employment.
- 5) The company or organization will comply with all local, state, and federal ordinances.
- 6) The company or organization will comply with Article 33 of the San Francisco Police Code, which prohibits discrimination based on race, color, ancestry, national origin, place of birth, sex, age, religion, creed, disability, sexual orientation, gender identity, weight, or height.
- 7) The company or organization will be able to demonstrate a successful history of operating similar projects.
- 8) The company or organization will be able to demonstrate a commitment to the use of technology in order to increase productivity and program effectiveness.
- 9) The company or organization will be able to demonstrate the fiscal and operational capacity to successfully and sustainably fulfill this contract.
- 10) Evidence of General Liability Insurance, Automobile Insurance, Worker’s Compensation Insurance, and Professional Liability Coverage. These policies should have a policy value of at least \$1,000,000 each. In lieu of Evidence of Insurance, we reserve the right to accept a temporary indemnification agreement. However, no work will be performed, and no payment

will be rendered, until we are in possession of the above-mentioned Insurance certificates. Note that the winning bidder will be required to add “Lower Polk Community Benefit District” as a named insured to the above policies.

## Term of Contract and Payment

The contract term will be the 9 months from October 1, 2021 through June 30, 2022 (303 days, inclusive of start and end dates).

Payment for services rendered shall generally be on a monthly basis.

## Requirements for Bid Preparation and Submittal

Bidders will be required to submit, and their bids will contain:

1. Signed Bid Cover Sheet (**APPENDIX A**)
2. Board of Directors List, only if applicable (**APPENDIX B**)
3. Resumes of all managers who will be working on this project.
4. Project Narrative. **The Project Narrative should be informed by, and should contain information relevant to, the section above entitled “Bidder Qualifications.”**
  - a. *Suggested* content for Project Narrative:
    - i. **INTRODUCTION**
      1. Please give us a broad overview of your company, and a summary of how it will deliver the above services.
    - ii. **YOUR ORGANIZATIONAL HISTORY**
      1. Please outline your corporate history.
    - iii. **ORGANIZATIONAL QUALIFICATIONS**
      1. Please outline the qualities that make your organization the best choice for this project.
    - iv. **CASE STUDIES OF SIMILAR PROJECTS THAT YOUR COMPANY HAS PERFORMED, OR INFORMATION REGARDING RELATED EXPERIENCE**
    - v. **STAFFING PLAN FOR THIS PROJECT**
    - vi. **ADDITIONAL NOTES**
      1. Please add any additional notes that you think will help us evaluate your bid.
5. Your Articles of Incorporation, including all amendments.
6. Your Corporate By-Laws, including all amendments.
7. If applicable, evidence of your Federal Tax Exempt 501(c)(3) status.
8. Evidence of Professional Liability coverage, General Liability Insurance, Automobile Insurance, and Worker’s Compensation Insurance. These policies should have a policy value of at least \$1,000,000 each. In lieu of Evidence of Insurance, we reserve the right to accept a **temporary** indemnification agreement. However, no work will be performed, and no payment will be rendered, until we are in possession of the above-mentioned Evidence of Insurance.
  - a. Note that the winning bidder will be required to add “Lower Polk Community Benefit District” as a named insured to the above policies.

Bidders are required to submit the above items to us, on or before September 15, 2021 (5 PM PST). Please note that we reserve the right to extend this date past August 31, 2021.

**Bids shall be emailed, or otherwise electronically transmitted to Chris Schulman at [cschulman@lowerpolkcbd.org](mailto:cschulman@lowerpolkcbd.org) as a single merged PDF document. Paper submissions will not be accepted.**

This public RFP is online at <https://lowerpolkcbd.org/RFB2> and [https://docs.google.com/document/d/1pVEIAVtKU3QeSk7vaVljkUyO9aEygYsm7VnLU5Rml\\_8/edit?usp=sharing](https://docs.google.com/document/d/1pVEIAVtKU3QeSk7vaVljkUyO9aEygYsm7VnLU5Rml_8/edit?usp=sharing) and bidders are encouraged to download this electronic version and use it to create an outline for their responsive bid.

## Pre-Bid Site Visit

Due to the unique nature of our District, and the specific requirements as set forth herein, we strongly recommend that your company conduct a pre-bid site visit. During the visit, we will tour our facilities, show you our existing hardware and supply inventory, walk the District, and discuss personnel issues. You may ask clarifying questions about this RFB during this site visit. If your company has printed brochures or other sales materials that you wish us to have, you may leave them with us at that time.

## Evaluation and Award Process

**Bids shall be emailed, or otherwise electronically transmitted to Chris Schulman at [cschulman@lowerpolkcbd.org](mailto:cschulman@lowerpolkcbd.org) as a single merged PDF document. Paper submissions will not be accepted.**

Submitted bids will be evaluated based on the following weighted criteria:

1. Cost effectiveness and bid transparency (20 percent).
2. Organizational sustainability, capacity, history, and familiarity with San Francisco and our District (30 percent).
3. Whether the organization or its managers have successfully operated related projects in San Francisco or similar cities (30 percent).
4. Project Narrative and the existence, completeness, and suitability of all Required Documents (20 percent).

In addition to the above special attention will be paid to bidders who are able to demonstrate a commitment to the use of technology in order to increase productivity and program effectiveness.

The LPCBD will evaluate bids on a rolling basis, and we hereby reserve the following rights:

1. We reserve the right to award a bid before the closing bid date.

2. We reserve the right to change this public RFB at any time, and without notice. The most current version will be located here: <https://lowerpolkcbd.org/RFB2> and here: [https://docs.google.com/document/d/1pVEIAVtKU3QeSk7vaVljkUyO9aEygYsm7VnLU5Rml\\_8/edit?usp=sharing](https://docs.google.com/document/d/1pVEIAVtKU3QeSk7vaVljkUyO9aEygYsm7VnLU5Rml_8/edit?usp=sharing). We reserve the right to waive any of the above or below bid qualifications and/or bidding procedures.
3. We reserve the right to add new and/or change existing bid qualifications and/or bidding procedures.
4. We reserve all other rights to the fullest extent of the law.

Please note that you are strongly encouraged to ask clarifying questions:

1. Via email before the site visit
2. Orally during the site visit
3. Via email after the site visit

Answers to these questions will be posted at **Appendix C: Answers to RFB Questions**.

Organizations that do not win this particular bid will be placed in a pool to be considered for future opportunities to perform contract work with the LPCBD.

## Contacts

Questions about this RFB may be submitted to Chris Schulman at [cschulman@lowerpolkcbd.org](mailto:cschulman@lowerpolkcbd.org).

**Bids shall be emailed, or otherwise electronically transmitted to Chris Schulman at [cschulman@lowerpolkcbd.org](mailto:cschulman@lowerpolkcbd.org) as a single merged PDF document. Paper submissions will not be accepted.**

## BID CHECKLIST

- Signed Bid Cover Sheet (**APPENDIX A**)
- Board of Directors List (**APPENDIX B**) (if applicable)
- Resumes of all managers.
- Project Narrative, not to exceed fifteen pages.
- Your Articles of Incorporation, including all amendments.
- Your Organizational By-Laws, including all amendments.
- Evidence of your Federal Tax Exempt 501(c)(3) status (if applicable).

**Bids shall be emailed, or otherwise electronically transmitted to Chris Schulman at [cschulman@lowerpolkcbd.org](mailto:cschulman@lowerpolkcbd.org) as a single merged PDF document. Paper submissions will not be accepted.**



## APPENDIX A: BID COVER SHEET

**Company Name:** \_\_\_\_\_

Street Address: \_\_\_\_\_ City: \_\_\_\_\_

State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Company Phone: \_\_\_\_\_ Company Email: \_\_\_\_\_

**Principal / CEO:** \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Primary Contact Person (if different): \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

I hereby warrant, agree, and affirm that I have included all items listed in the **BID CHECKLIST**.

I warrant, agree, and affirm that the information provided in this application is true.

I hereby warrant, agree, and affirm that I am authorized to sign this bid.

I hereby warrant, agree, and affirm that I understand that merely being awarded this Project does not bind the Lower Polk CBD unless and until both parties sign a duly-negotiated Project Contract.

I hereby warrant, agree, and affirm that, should my organization be awarded this project, that this Request for Bid, and my responsive bid, may be incorporated by reference into any contracts that are negotiated among the parties.

I hereby warrant, agree, and affirm that the LPCBD Management Plan, located at [https://d26kkimnzwvcse.cloudfront.net/wp-content/uploads/2019/07/702-Lower-Polk-CBD\\_Management-Plan.pdf](https://d26kkimnzwvcse.cloudfront.net/wp-content/uploads/2019/07/702-Lower-Polk-CBD_Management-Plan.pdf) may be incorporated by reference into any contracts that are negotiated among the parties.

**Name / Title:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## APPENDIX B: BOARD OF DIRECTORS (IF APPLICABLE)

Name	Years on Board	Job or Relevant Experience

## APPENDIX C: ANSWERS TO RFB QUESTIONS