MAYOR'S OFFICE OF HOUSING
COMMUNITY DEVELOPMENT DIVISION

CITY & COUNTY OF SAN FRANCISCO

REQUEST FOR PROPOSAL
HOMEOWNERSHIP AND FINANCIAL LITERARY SERVICES

OCTOBER 2012

Deadline for Submitting Applications:
Monday, October 29, 2012 at 5:00 p.m.
One original and 3 copies of the completed proposal should be submitted to:
Mayors' Office of Housing—Community Development Division
1 South Van Ness Avenue, 5th Floor
Attention: Vanessa Dandridge
HAND DELIVERY RECOMMENDED

Application Forms located at the following link:
http://sf-moh.org/index.aspx?page=626

Technical Assistance Workshop

The Mayor's Office of Housing—Community Development Division will conduct a Technical Assistance Workshop to assist interested applicants in determining the eligibility of proposed projects, and completing the required elements of the proposal packet. This meeting will be held:

Thursday , October 18, 2012
1:00 p.m. – 3:00 p.m.
1 South Van Ness Avenue, 5th Floor

REQUEST FOR PROPOSAL
FOR
NEIGHBORHOOD-BASED COMMUNITY SERVICES

I. Introduction

The Mayor's Office of Housing—Community Development Division (MOH-CD) is seeking to fund community-based organizations to provide neighborhood-based services to assist low- and moderate-income residents of the Bayview. The grant period will be from December 1, 2012 through November 30, 2013.

II. Notice of Funding Availability

This is a Request for Proposal (RFP) from MOH-CD announcing that $60,000 funding will be made available to provide neighborhood-based homeownership counseling and financial literacy services.

Applicants must identify how they will address the diverse cultural needs of San Francisco's Bayview residents. MOH-CD reserves the option to award single or multiple agency awards during the review process.

III. Priorities, Eligibility, Evaluation and Requirements

A. Priority

Priority will be given to those agencies that currently perform similar services and demonstrate ability to increase impact through collaborative efforts. Applicants must provide one or more of the following activities:

1. Provide homeownership counseling services in the Bayview District with targeted outreach to low income racial and ethnic minorities.
2. Provide general financial education and financial literacy services in the Bayview District with targeted outreach to low income racial and ethnic minorities.
3. Provide outreach in coordination with MOH staff to residents of designated HOPE SF public housing sites.

B. Eligibility

<u>All applications must comply with each of the following:</u>

1. Programs must principally benefit low and moderate-income individuals and families.

2. Beneficiaries must reside within the boundaries of the City and County of San Francisco.

3. Applicants must be San Francisco-based; must be a 501(C)(3) non-profit corporation registered with the Internal Revenue Service; and must be in good standing with the State of California's Registry of Charitable Trusts.

4. Applicants may submit as single agencies or as a collaborative; however, collaborative proposals must choose a lead agency to serve as the fiscal agent. The fiscal agent should submit its own organizational documentation as directed below in the same manner as if it was a single agency.

5. Applicants must demonstrate a history and track record of providing culturally competent services within the Bayview community.

6. Successful applicants must comply with all applicable local government regulations.

C. Evaluation Criteria

MOH-CD will evaluate proposals based on the following factors and criteria:

1. Based on track record, the extent to which the applicant demonstrates the capacity to effectively administer this project and produce measurable outcomes. If an applicant submits a collaborative proposal, information about all collaborative members should be described.

2. The extent to which proposed activities meet priorities, eligibility and requirements outlined in the RFP and align with local and national best practices.

3. The extent to which program activities exhibit cultural competencies reaching and working with populations that are lower-income and racial/ethnic minorities.

4. The extent to which the proposal outlines specific, measurable and realistic outcomes for the targeted population.

5. The extent to which funds are leveraged by other resources and add capacity to existing services.

D. Requirements

The use of City funds is subject to numerous local requirements. A few of the requirements are listed below and are briefly summarized.

- **Accessibility:** programs and services must be accessible to persons with disabilities. Program access can be achieved in many cases without having to alter the existing facility.
- **Non-Discrimination:** agencies must comply with federal and SF Human Rights Commission prohibitions against discrimination in fair housing and equal employment opportunity, and in awarding contracts. Agencies must also comply with the Equal Benefits Ordinance for domestic partners.
- **Environmental Review:** must be completed before funds can be utilized.
- **Procurement:** projects must comply with federal conflict of interest regulations, and regulatory procedures for obtaining and contracting for goods and services.
- **Ineligible Reimbursements:** funds for activities occurring prior to the commencement date of the grant agreement cannot be reimbursed.
- **Religious Activity:** funds may not be used for religious purposes or for the improvements of property owned by religious entities except where the grant recipient is a secular non-profit organization with a long term lease.
- **Political Activity:** funds may not be used for political activity.

V. Specific Activities Required by this RFP

Description/Mandatory Elements

Financial Education and Literacy
Organizations that apply under this program will provide multi-services within the Bayview community, as well as information and referral to relevant financial services in San Francisco. These services must be aimed at increasing self-sufficiency and economic advancement for Bayview residents.

Required Outcomes –

- Number of individuals receiving credit repair counseling
- Number of individuals whose credit improved; include projections of points increased
- Number of individuals receiving financial literacy education
- Number of people achieving a financial goal such as increased assets or opening a bank account or securing another type of financial product.

Homeownership Counseling Services
Organizations that apply under this program area must provide homeownership counseling services, foreclosure prevention services related educational outreach and related products targeting low and moderated income Bayview residents. Activities will also focus on service provider capacity to improve resident outcomes.

Required Outcomes –

- Number of people who become homeowners
- Number of homeowners avoiding foreclosure
- Number of people who receive homeownership counseling
- Number of homeowners receiving post-purchase default and foreclosure prevention services.

VI. Technical Assistance

1. Technical Assistance

Questions on completing the application can be addressed at the Technical Assistance Conference, or you can contact Vanessa Dandridge (415) 701-5701 or e-mail: vanessa.dandridge@sfgov.org

There will be a **Technical Assistance Conference** to assist interested applicants in determining eligibility and completing the required elements of the proposal package. This workshop is scheduled for:

Thursday, October 18, 2012
1:00 p.m. – 3:00 p.m.
1 South Van Ness Avenue, 5th Floor
Room 5080

2. Review Process and Schedule

All submitted proposals will be initially screened by a committee composed of MOH-CD staff to determine completeness and eligibility. Ineligible proposals will be eliminated at this stage. MOH-CD staff will evaluate all complete and eligible proposals. The MOH-CD Director will make the final selection of the agencies/agency to be awarded a grant(s).

3. The preliminary schedule for review and approval is:

October 29, 2012 Proposals due to MOH-CD by 5:00pm

November 9, 2012	Agencies notified of award
November 12 - November 28, 2012	Contract negotiation and certification
December 1, 2012	Program begins

Note: Successful applicants will be required to execute and meet the provisions of a grant agreement. Additional documentation, including an annual work plan and an annual budget, must be completed and approved by MOH-CD prior to any funds being committed or spent. Financing is primarily on a monthly cost-reimbursement basis. Successful applicants will be expected to participate in MOH-CD online programmatic and financial reporting system. Expenses incurred prior to start of the contract are not eligible for reimbursement.

I. APPLICATION INSTRUCTIONS

- Please be as succinct as possible. Reviewers will not consider text beyond the indicated text limitations and/or space provided.
- No handwritten proposals will be accepted. Proposals must be typed or computer generated. The font must be at least 10 point.
- Pages should be standard 8-1/2" by 11". All copies should be double-sided.
- Original signatures must be in blue ink on the original set.
- Use the application checklist to ensure your package is complete.
- Do not bind proposals, or submit extra materials not requested.
- Substantially incomplete, faxed, or late applications will not be considered. **Hand delivery is recommended by 5:00pm**

A. Application Deadline:

The deadline for submitting applications is:
5:00 p.m.
Monday, October 29, 2012
One original and 3 copies of the completed proposal should be submitted to:
Mayor's Office of Housing--Community Development Division
1 South Van Ness Avenue, 5th Floor
San Francisco, CA 94103
Attn: Vanessa Dandridge
Hand Delivery Recommended

II. The following checklist identifies all RFP forms and other items to be required for submission. Use this checklist to put together the proposal packet for submission. One original and three copies of the RFP must be submitted. One copy of these must have original signatures in blue ink**.**

Application *(one original and three copies)*

[ ] Application Forms (**located at: http://sf-moh.org/index.aspx?page=626**)
[ ] Budget Attachment Worksheet
[ ] Budget Details

Additional required items for applicants <u>not currently receiving CDBG funding</u> *(one copy attached to the original set):*

[ ] Articles of Incorporation, including all amendments
[ ] Organization by-laws, including all amendments
[ ] Evidence of Federal Tax Exempt 501(c) (3) status

APPLICANT BACKGROUND INFORMATION

(Please type all responses no smaller than 10 font)

Organization Name: _____

Street Address:_____ San Francisco, CA 941_____

Project Location (if different):_____ San Francisco, CA 941 _____

Main Phone: _____ Fax : _____

Executive Director: _____ Telephone: _____ x _____

Board President: _____ Telephone: _____ x _____

Contact Person: _____ Telephone: _____ x _____

Fax:_____ Email: _____

Amount requested under this Application:

Total Program Activity/Project Budget: $_____

Total FY '12-'13 Agency Budget: $_____

I certify that the information provided in this application is true:

_____ _____

Signature of Executive Director Date

I certify that the Board of Directors has approved the submittal of this application:

_____ _____

Signature of Board President Date

Proposal Format *(the narrative should not exceed five pages)*

Agency Name: _____

Proposal for (check one): ☐ Homeownership Counseling Services in the Bayview
☐ Financial Literacy and Education in the Bayview

Background and Need: (2-4 paragraphs) This section should provide a description of the specific history of services that your organization has provided to low and moderate income residents of the Bayview. This section should present a clear picture of challenges faced by this population, as well as successful strategies implemented by your organization (or collaborations of agencies) to address these.

- What data or information supports the need for this work?
- What gaps in services and support to the target population does the proposal attempt to fill?

Proposed Activities: (4-5 paragraphs) This section should describe the work that your agency proposing to accomplish and address the eligible funded activities of this RFP. This section should provide detail about program design and service delivery strategies

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- How will you involve the community, or connect with community-based knowledge and experience to inform program design?
- What other organization(s) do you partner with, and how does this partnership impact your reach/activities/services?
- What if any fees or other costs to clients would be associated with service delivery and what is the justification for these fees or costs?
- This section should describe the work that your agency is proposing to accomplish, and address the eligible funded activities of this RFP.

Objectives and Outcomes: (3-4 paragraphs) This section should list objectives for your proposal and include specific activities and outcomes for each objective

- Objectives describe the activities your organization will perform, the total number of people to be served and other program deliverables anticipated for this project. Objectives should be described in a way that gives a specific timeline for their completion.
- Your proposal should also include expected number of people to be served per activity as well as total unduplicated number of clients proposed to be served. Example: *number of homeowners avoiding foreclosure*

Evaluation: (1-2 paragraphs) This section should describe how you will evaluate the impact of the proposed activities for the target population.

- How will you track progress and determine the level of impact for target population?
- How will you evaluate and inform program design?

Organization Capacity: (2-3 paragraphs)

Discuss your organization's ability to implement the proposed work. Also describe your agency staff and board of directors skills and diversity; how the proposal fits with your mission and history.

List your Board of Directors:

Name	Neighborhood	Affiliation/Occupation