

**City and County of San Francisco**  
**Sourcing Event ID 0000011891**

**Formal Request for Qualifications for:  
Real Estate Appraisal Services**

This RFQ can be viewed on the City's Supplier Portal at: <https://sfcitypartner.sfgov.org/pages/index.aspx>



Request for Qualifications Issuance	June 16, 2026
Deadline for Questions ( <a href="#">via email</a> )	June 22, 2026 at 5:00 pm Pacific Time (PDT)
Deadline to Submit Proposals ( <a href="#">via email</a> )	July 10, 2026 at 5:00 pm Pacific Time (PDT)
Notice of Intent to Establish Prequalified Pool	July 27, 2026
Period for Protesting Notice of Intent to Establish Prequalified Pool	Within three (3) business days of the City's issuance of a Notice of Intent to Award.
Solicitation Manager	Amanda Wentworth Contracts & Procurement Manager Office of the City Administrator Phone: (628) 652-1260 Email: <a href="mailto:Amanda.Wentworth@sfgov.org">Amanda.Wentworth@sfgov.org</a>

**Attachments**

- Attachment 1: Proposer Questionnaire, MQ Attestation and References
- Attachment 2: Written Proposal Template
- Attachment 3: Sample Umbrella Agreement
- Attachment 4: Sample Addendum
- Attachment 5: Sample Request for Bid (Bid Package)
- Attachment 6: Contract Monitoring Division (CMD) Local Business Enterprise (LBE) Initial Certification Application
- Attachment 7: Health Care Accountability Ordinance (HCAO) and Minimum Compensation Ordinance (MCO) Declaration Forms
- Attachment 8: First Source Hiring Form

## MANDATORY MINIMUM QUALIFICATION DOCUMENTATION

Proposers must submit Attachment 1 with Part III – Minimum Qualifications Attestation signed to attest that all Minimum Qualifications are met. A proposal that fails to provide the required signed attestation will not be eligible for further consideration.

MQ #	Description
<b>MQ #1</b>	Completed Attachment 1 - Proposer Questionnaire, MQ Attestation and References.
<b>MQ #2</b>	Offices must be located within a fifty (50) mile radius of San Francisco City Hall, 1 Dr. Carlton B. Goodlett Pl. San Francisco, CA 94602
<b>MQ #3</b>	At the time of submitting a proposal, no less than five (5) years of experience in the appraisal of commercial real estate.
<b>MQ #4</b>	Staff licensed and certified to conduct business in the State of California pursuant to 11300-11302 of the Business and Professions Code (and, if selected, the contractor must maintain that license in good standing for no less than five (5) years).
<b>MQ #5</b>	Member in good standing of the Appraisal Institute (hold MAI designation).
<b>MQ #6</b>	No Less than five (5) years of providing commercial real estate appraisal services in the San Francisco Bay Area
<b>MQ #7</b>	Completed written proposal using Attachment 2 – Written Proposal Template.

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## **I. INTRODUCTION**

### **A. General**

This Request for Qualifications (hereinafter “**RFQ**” or “**Solicitation**”) is being issued by the Office of City Administrator, Real Estate Division (hereinafter, “**RED**” or “**City**”). RED, is seeking qualified suppliers (“**Proposers**”) to provide proposals (“**Proposal**”) for as-needed real estate appraisal services.

RED is responsible for the acquisition, sale, lease and management of hundreds of properties owned or leased by the City and County of San Francisco. RED is issuing this request for qualifications to create a pool of pre-qualified contractors to facilitate conformance with the appraisal requirements codified in Chapter 23 of the City’s Administrative Code.

The City shall evaluate Proposals to create a Prequalified Pool of Proposers (“**Prequalified Pool**”). Proposers prequalified under this RFQ are not guaranteed a contract. The City may use the Prequalified Pool, at its sole and absolute discretion, to enter into an if-and-as-needed contract.

Proposers may be retained by RED in connection with real estate appraisal services on behalf of any City division or other public entity located in the City, including, but not limited to, the Airport Commission, Mayor’s Office of Housing and Community Development, Office of Economic and Workforce Development, Municipal Transportation Agency, Port Commission, Public Utilities Commission, Office of Community Investment and Infrastructure, Department of Public Health, Recreation and Parks Department, and Treasure Island Development Authority. However, nothing contained herein is intended to prevent the City or any other public entity located in the City from issuing subsequent requests for proposals for specific real estate appraisal services.

### **B. Selection Overview**

#### **1. Creation and Duration of the Prequalified Pool**

Proposers meeting the Minimum Qualifications shall be added to the Prequalified Pool and be eligible to enter into an Agreement for Independent Appraisal that will serve as an “Umbrella Agreement” with the City, on an if-and-as-needed basis depending on the proposer’s ranking within the Prequalified Pool, as discussed further below. A Prequalified Pool list is valid for two (2) years but may be extended for up to two (2) additional years if re-opened by City in accordance with Section 21.4 of the San Francisco Administrative Code.

#### **2. Resulting Umbrella Agreements Awarded to Contractors Selected from the Prequalified Pool**

The City may award if-and-as-needed Umbrella Agreements to not more than nine (9) Proposers from the Prequalified Pool. Proposers awarded an Umbrella Agreement will have met the Minimum Qualifications of this Solicitation and obtained the highest-ranking scores. The purpose of the Umbrella Agreements is to provide the City with access to pre-qualified Contractors who have entered into an existing agreement. Having an agreement in place will serve to mitigate future time constraints and reduce City’s

overhead costs. 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. Once awarded a Umbrella Agreement under this Solicitation, the awarded Contractors will be eligible to provide RED with services in accordance with Section 3. Addendum After Umbrella Agreement Award below. Execution of an Umbrella Agreement does not guarantee engagement in the future.

### **3. Addendum After Umbrella Agreement Award**

Because the exact nature and timing of a service need cannot be predetermined, the City shall prepare specific appraisal service project requirements when there is a need for appraisal services. Each project will be executed via an individual addendum (each an “**Addendum**”) issued under and governed by the terms of the Umbrella Agreement.

The Department, at its sole discretion, shall seek price quotations for work from the contractors within the Prequalified Pool that have been awarded an Umbrella Agreement.

Bidding -packages, which will serve to establish a Request for Bid, may be issued for each property or facility to be serviced. Each bidding package shall include specific terms and conditions for the Addendum award. None of the terms and conditions in the bidding package are intended to conflict with the terms and conditions of the Umbrella Agreement for if-and as-needed appraisal services at various facilities; however, if a conflict exists, the terms and conditions of the Umbrella Agreement for if- and as-needed appraisal services shall govern. In the event that a bidding package is not issued for a bid quotation, the terms and conditions in Attachment 3. Sample Umbrella r Agreement, Appendix A. Scope of Work shall be used.

Where applicable, the Department shall apply Chapter 14B LBE Rating Bonuses or Bid Discounts when evaluating quotes and proposals received from contractors with Umbrella Agreements.

The Department shall issue an Addendum to the Contractor submitting the lowest quotation in response to the City’s request for bid. The Department reserves the right to reject any and all quotes for any reason or no reason. The Director may accept other than the lowest quotation if, in his/her discretion, the public interest would best be served.

City shall issue a Notice of Intent to Award an Addendum to all contractors in the Prequalified Pool who have been awarded an Umbrella Agreement five (5) working days prior to selecting a contractor from the Prequalified Pool of vendors with Umbrella Agreements. The City’s award of a resulting Addendum to a contractor from the Prequalified Pool is final and not subject to further review.

The Contractor shall acknowledge and agree that once the Department issues an Addendum under the Umbrella Agreement, the scope of work, time, and price as set forth in the Addendum shall be binding on Contractor as though fully incorporated into the Umbrella Agreement. Officers and employees of the City will not be authorized to request, and the City will not be required to reimburse the Contractor for Services beyond the scope of work listed in each Addendum unless the subject Addendum is modified.

From time to time, the Department may require changes in the scope of work to be performed by Contractor. Such changes, including any increase or decrease in the amount of Contractor's compensation that City and Contractor may mutually agree to, as reflected in a written amendment.

**4. Anticipated Term of Resulting Umbrella Agreements**

A Resulting Umbrella Agreement awarded to a party within the Prequalified Pool shall be a non-exclusive agreement having a term of five (5) years.

**5. Anticipated Not to Exceed Amount of Resulting Umbrella Agreements**

Each Umbrella Agreement awarded pursuant to this Solicitation shall have a not to exceed (“NTE”) amount of **Two Hundred Thousand dollars (\$200,000.00)** for the term. This amount is based on City’s estimated spend over the advertised contract term. Should City’s actual spend exceed its estimated spend for the term, City may in its sole discretion increase the contract NTE for the term.

Any other City department, public entity or non-profit made up of multiple public entities, may use the results of this RFQ to select Contractors from the Prequalified Pool under the same terms and conditions of this RFQ.

**C. RFQ Schedule**

The anticipated schedule for this RFQ 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 RFQ or other pertinent information posted in the City’s Supplier Portal.

Proposal Phase	Tentative Date
Request for Qualifications Issued	June 16, 2026
Deadline for Written Questions	June 22, 2026 at 5:00 pm PDT
Deadline to Submit Proposals	July 10, 2026 at 5:00 pm PDT
Notice of Intent to Establish Prequalified Pool	July 27, 2026
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.

**II. SERVICES REQUESTED**

**A. Services Requested**

This RFQ is being issued to create a Prequalified Pool of suppliers to provide real estate appraisal services that may include:

**1. Preparing appraisal reports, studies, surveys, etc.**

All appraisal reports must comply with the requirements set forth in the Contract, including, but not limited to, the standards for a Self-Contained Narrative Report as established by the Appraisal Institute and the Uniform Standards of Professional Appraisal Practice (“**USPAP**”). Appraisal reports must also

satisfy federally-funded and Caltrans-monitored project appraisal guidelines, as described in the Code of Federal Regulations – 49 C.F.R. Part 24 and the State of California Department of Transportation (Caltrans) ROW Manual.

## **2. Reviewing appraisals performed by others**

The Contractors may be asked to review the appraisals of others and reconcile two or more appraisals to develop a single value for a property. Any review appraisal shall be conducted in accordance with the review appraisal guidelines described in the Caltrans ROW Manual Sections 7.01.15.00 through 7.01.16.00; applicable USPAP appraisal.

## **3. Providing expert witness testimony in condemnation trials or other proceedings**

The Contractors should be prepared to prepare appraisals that will be admissible in evidence in eminent domain actions in the California courts, to testify in depositions and trial and in other proceedings, if necessary, and to cooperate with counsel for the City to prepare eminent domain actions for trial.

### **B. Regulatory and Compliance Requirements Specific to the Goods/Services Solicited**

Prior to submitting a Proposal in response to this Solicitation, Proposers must ensure they have fully read and understood Chapter 23 of the San Francisco Administrative Code.

### **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.

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

### **CMD Compliance Officer**

The CMD Compliance Officer (CCO) for this Solicitation and any Contract awarded to a Contractor selected from the resulting Prequalified Pool is:

Michael Cagampan  
Contract Monitoring Division  
City and County of San Francisco  
Tel: 415.554.0660  
Email: Michael.Cagampan@sfgov.org  
Website: [www.sfgov.org/cmd](http://www.sfgov.org/cmd)

### **A. Application of LBE Rating Bonuses and/or Bid Discounts**

LBE Rating Bonuses and/or Bid Discounts shall be applicable at each phase of the RFQ evaluation and selection process, in accordance with the values shown below. LBE Rating Bonuses and/or Bid Discounts shall also be applicable when selecting a Contractor from the resulting Prequalified Pool.



### 1. Reserved (Commodities)

### 2. General and Professional Services

Estimated Contract Value	Small/Micro LBEs Rating Bonus	SBA LBEs Rating Bonus
Greater than \$20,000 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. Professional Services by Joint Ventures

Estimated Contract Value	Small/Micro LBE Subcontracting Level	Rating Bonus
Greater than \$20,000 but less than or equal to \$10,000,000.	Equals or exceeds 35%, but less than 40%	5%
	Equals or exceeds 40%, but less than 100%	7.5%
	100%	10%
If applying for an LBE rating discount as a Joint Venture (JV), the Micro and /or Small-LBE must be an active partner in the JV and perform work, manage the job and take financial risks in proportion to the required level of participation stated in the Proposal, and must be responsible for a clearly defined portion of the work to be performed and share in the ownership, control, management responsibilities, risks, and profits of the JV. The portion of the Micro and/or Small-LBE JV's work shall be set forth in detail separately from the work to be performed by the non-LBE JV. The Micro and/or Small-LBE JV's portion of the contract must be assigned a commercially useful function.		

### B. LBE Subcontracting Participation Requirements

There shall be no LBE Subcontracting Requirement for any Contract awarded to a Contractor selected from the Prequalified Pool because the LBE Subcontracting Requirements were waived by the Contract Monitoring Division.

## IV. MINIMUM QUALIFICATIONS DOCUMENTATION REQUIRED WITH PROPOSAL (PASS/FAIL)

Proposers must attest that all Minimum Qualifications have been met at the time of Proposal submission but completing and signing Attachment 1 – Proposer Questionnaire, MQ Attestation and

References. Proposers must clearly demonstrate each Minimum Qualification (MQ) listed below has been met in the submitted proposal. 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.

MQ #	Description
<b>MQ #1</b>	Completed Attachment 1 - Proposer Questionnaire, MQ Attestation and References.
<b>MQ #2</b>	Offices must be located within a fifty (50) mile radius of San Francisco City Hall, 1 Dr. Carlton B. Goodlett Pl. San Francisco, CA 94602
<b>MQ #3</b>	At the time of submitting a proposal, no less than five (5) years of experience in the appraisal of commercial real estate.
<b>MQ #4</b>	Staff licensed and certified to conduct business in the State of California pursuant to 11300-11302 of the Business and Professions Code (and, if selected, the contractor must maintain that license in good standing for no less than five (5) years).
<b>MQ #5</b>	Member in good standing of the Appraisal Institute (hold MAI designation).
<b>MQ #6</b>	No Less than five (5) years of providing commercial real estate appraisal services in the San Francisco Bay Area
<b>MQ #7</b>	Completed written proposal using Attachment 2 – Written Proposal Template.

## V. WRITTEN PROPOSAL EVALUATION CRITERIA

In addition to submitting documents supporting each Minimum Qualification as required by this Solicitation, Proposers shall also submit a complete Proposal consisting of each item set forth below. Your proposal shall not exceed twenty-five (25) pages.

Evaluation Phase	Maximum Points
Minimum Qualifications Documentation	Pass/Fail
Proposal	
<b>Overall Qualifications –</b> The qualifications, including experience and references, of the proposer (including any and all staff that may be assigned to City work, and their experience with difficult appraisal issues).	50 Points
<b>Specialized Qualifications –</b> The proposer’s specialized expertise in various and multiple appraisal types and services.	20 Points
<b>Past Experience –</b>	30 Points

Successful past experience performing commercial and residential real estate appraisal services in the San Francisco Bay Area.	
TOTAL POINTS	100 Points

### **A. Introduction and Executive Summary (Up to Two (2) Pages)**

Submit a letter of introduction and executive summary of the proposal. The letter must be signed by a person authorized by your firm to obligate your firm to perform the commitments contained in the proposal. Submission of the letter will constitute a representation by your firm that your firm is willing and able to perform the commitments contained in the proposal.

### **B. Overall Qualification (50 Points)**

The qualifications, including experience and references, of the proposer (including any and all staff that may be assigned to the City work, and their experience with difficult appraisal issues).

#### **1. Firm Qualifications**

Provide information on your firm's background and qualifications which addresses the following:

- a. Name, address, and telephone number of a contact person; and
- b. A brief description of your firm, as well as how any joint venture or association would be structured; and
- c. A list of clients for whom the firm has performed appraisals (including type of appraisal) within the last five years. If joint consultants or sub-consultants are proposed, provide the above information for each. Complete Attachment 1 - Part IV "Proposer References" to include the name, address and telephone number of at least 3 (three) but no more than 5 (five) recent clients (preferably other public agencies). By including these references, proposers are representing that the references are familiar with proposer's work and experience, and references will be truthful in any representations.

#### **2. Team Qualifications**

- a. Provide a list identifying: (1) each qualifying appraiser who will or may provide appraisals in response to request for bids for appraisals and/or review appraisals, and (2) a written assurance that the key individuals listed and identified will be performing the work and will not be substituted with other personnel or reassigned to another project without the City's prior approval.
- b. Provide a description of the experience and qualifications of the appraisers, including current copies of each of their curriculum vitae.

### C. Specialized Qualifications (20 Points)

The proposer's specialized expertise in various areas of concern and appraisal types and services will be considered. The following are additional qualifications RED will consider in selecting qualified firms and/or sole practitioners.

**1.** Please place an X in the boxes that relate to the proposer's area of expertise:

- |  |  |
|--|--|
| <input type="checkbox"/> Affordable Housing  | <input type="checkbox"/> Air Rights  |
| <input type="checkbox"/> Airport   | <input type="checkbox"/> Arbitration & Mediation                           |
| <input type="checkbox"/> Contaminated Properties   | <input type="checkbox"/> Critical/Sensitive Areas                          |
| <input type="checkbox"/> Eminent Domain – Whole and Partial Takings  | <input type="checkbox"/> Farm Land   |
| <input type="checkbox"/> Financial & Investment Analysis   | <input type="checkbox"/> Funding Feasibility Studies                       |
| <input type="checkbox"/> General Appraisal – commercial, industrial, single/multifamily residential, condominiums, vacant land | <input type="checkbox"/> High Rise Office Buildings                        |
| <input type="checkbox"/> Highest & Best Use and Feasibility Studies  | <input type="checkbox"/> Land Use Consultation                             |
| <input type="checkbox"/> Market Surveys & Studies  | <input type="checkbox"/> Mineral and Timber Resources                      |
| <input type="checkbox"/> Nursing Homes, Medical Offices & Hospitals  | <input type="checkbox"/> Personal Property                                 |
| <input type="checkbox"/> Rails to Trails Corridors; Trails and Parks   | <input type="checkbox"/> Residential Properties                            |
| <input type="checkbox"/> Service Stations  | <input type="checkbox"/> Severance Damages                                 |
| <input type="checkbox"/> Specialized Purchases and/or Sales of San Francisco County Property                                   | <input type="checkbox"/> Specialized Rent/Leasing Studies and Negotiations |
| <input type="checkbox"/> Street Vacation Analysis  | <input type="checkbox"/> Submerged Lands or Tidelands                      |
| <input type="checkbox"/> Subdivision Analysis  | <input type="checkbox"/> Transferable Development Rights                   |
| <input type="checkbox"/> Water Rights  | <input type="checkbox"/> Other (describe)                                  |

In addition to the above, City will take into consideration whether the Proposer has met the following criteria:

- 2.** ☐ Successful completion of a course in appraisal of partial acquisitions of public agencies.
- 3.** ☐ Successful completion of a course in the Uniform Relocation and Real Property Acquisition Policies Act taught by a recognized organization.
- 4.** ☐ Successful completion of a course in the California Eminent Domain Law taught by a recognized organization.

5. ☐ Appraisal work during the last three (3) years for government or quasi-governmental agencies in the San Francisco Bay area.

6. ☐ Experience testifying as an expert witness in a California Superior Court as to valuation of real property interests.

7. ☐ Recent experience in the City and County of San Francisco appraising a) commercial properties; b) high- and mid-rise office, residential, or mixed-use buildings; d) special use properties; e) residential properties.

8. ☐ Experience as a review appraiser of senior review appraiser.

9. ☐ Experience as either a party or neutral appraiser on a three-appraiser arbitration panel.

#### **D. Past Experience (30 Points)**

1. Describe successful past experiences with the City and County of San Francisco and other public agencies, if any.

2. A description of the proposer's experience with the Uniform Appraisal Standards for Federal Land Acquisition and Federal Regulations (49 CFR, Part 24) – Uniform Relocation and Assistance and Real Property Acquisition for Federally Assisted Programs.

3. A description of proposer's experience with Federal Highway Administration (FHWA) and Federal Transit Administration (FTA) rules, regulations and procedures including the FHWA Federal Aid Policy Guide and the FTA Best Practices Procurement Manual (BPPM).

4. A description of proposer's experience testifying in court. Include the names, location, and court jurisdiction of several cases, if possible, within the last 10 years.

5. A description of proposer's previous experience with the City and County of San Francisco (i.e., a list of City projects on which proposer has worked).

6. Provide a statement listing similar contracts (both public and private) relevant to services solicited that have been completed during the last three (3) years. The statement must also list any failure or refusal to complete a contract, including details and dates.

7. Describe any arrangements, formal or informal, that the firm has with any party that might conflict with or interfere with the firm's ability to provide independent and unbiased services under this RFQ.

8. Describe any litigation, administrative proceeding, or investigation (actual or pending) in which the firm is involved or to which it is subject that might have an adverse effect on its ability to fulfill any engagements resulting from this RFQ, or of which the City should be aware in evaluating the firm's capacity to undertake future engagements.

#### **VI. RESERVED (PRICE PROPOSAL)**

## **VII. RESERVED (ORAL INTERVIEWS)**

## **VIII. RESERVED (SUPPORTING DOCUMENTATION REQUIRED PRIOR TO SELECTION FOR THE PREQUALIFIED POOL)**

## **IX. 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**"). 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. Reserved (Prevailing Wage Ordinance)**

### **B. Reserved (Nondiscrimination Requirements)**

### **C. Health Care Accountability Ordinance**

If awarded an Umbrella Agreement when selected from the Prequalified Pool, Proposer may be required to comply with the requirements of San Francisco Labor and Employment Code Articles 121. For more information, visit: <http://sfgov.org/olse/hcao>.

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

If awarded an Umbrella Agreement when selected from the Prequalified Pool, Proposer may be required to comply with San Francisco Labor and Employment Code Articles 111. For more information, visit: <http://sfgov.org/olse/mco>.

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

If awarded an Umbrella Agreement when selected from the Prequalified Pool, Proposer may be required to comply with all of the applicable provisions of the First Source Hiring Program, Chapter 83 of the San Francisco Administrative Code. For more information, visit <https://oewd.org/first-source>.

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

### **G. Reserved (Non-Profit Entities)**

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

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

The following requirements pertain only to the selected Proposers not currently registered with the City as a Supplier. This will be required prior to entering contract.

**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. Once completed, 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.

### **B. Proposal Questions and Submissions**

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

Proposers shall address any questions regarding this Solicitation to the Pool 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 Solicitation Manager whose name and contact information appears on the cover page of this Solicitation and received by the Solicitation Manager no later than the Written Questions Deadline.** 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 City's Supplier Portal: <https://sfcitypartner.sfgov.org/pages/Events-BS3/event-search.aspx>.

#### **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. **Proposers are encouraged to use the Written Proposal Template included as Attachment 2 to this RFQ.** 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, **Proposer must email its Proposal to the Contract Administrator whose name and contact information appears on the cover page of this Solicitation.** Complete Proposals must be emailed no later than the Proposal deadline. 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, supplemental documents or revisions will not be considered after the deadline and failure to adhere to the above requirements may result in the complete rejection of your Proposal.

### **C. RFQ 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 San Francisco Supplier Portal. Every Addendum will create a new version of the Sourcing Event and Proposers must monitor the event 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 Pool Administrator whose name appears in this Solicitation. Any attempt to communicate with any party other than the Pool 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 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 Prequalified Pool Creation**

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 Pool 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 an Umbrella Agreement awarded to a Contractor from the Prequalified Pool 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 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.