

**work2future**  
**Request for Proposals**

**Small Business Education and Incubator Assistance**

<b><u>Date for Submittal</u></b>	<b>June 15, 2007, 3:00 PM</b> <b>Faxed or e-mailed proposals will not be accepted. Postmarked will not be accepted as proof of timely delivery. Proposals received after the deadline will not be accepted and will be returned unopened.</b>
<b><u>Proposal Packet Submittal</u></b>	<b>Work2future</b> <b>Attn: B.J. Sims</b> <b>Business Services Manager</b> <b>1290 Parkmoor Ave.</b> <b>San Jose, Ca 95126</b>
<b><u>Technical Assistance/clarifications:</u></b> <b><u>Deadline is May 30, 2007</u></b>	<b>Work2future</b>  <b>E-Mail: <a href="mailto:Bj.sims@sanjoseca.gov">Bj.sims@sanjoseca.gov</a></b>  <b>Written inquires only, please. All relevant questions and answers will be made available to interested parties and posted on the website at <a href="http://www.work2future.biz">www.work2future.biz</a> under the heading “Funding Opportunities”.</b>

**\*All dates subject to change; changes will be posted on [www.work2future.biz](http://www.work2future.biz)**

## **Small Business Education and Incubator Services Request for Proposal (RFP)**

### **1. Background**

The City of San Jose Office of Economic Development is the recipient of Community Development Block Grant to deliver short-term business and financial education – along with long-term business incubation, asset development, and social responsibility training to low-income, minority, first generation immigrant entrepreneurs in San Jose.

The City of San Jose Office of Economic Development and work2future are interested in receiving proposals to implement a program to provide business education and support to low-income, minority entrepreneurs in the City of San Jose.

### **2. Deliverables**

A grant not to exceed \$262,000 will be made to the successful proposer to provide the following deliverables within the twelve-month grant period:

- 30 jobs created for low-income individuals;
- 560 entrepreneurs receive short-term business and asset-building education;
- 40 entrepreneurs receive intensive business and asset-building incubation assistance;
- 10 new business licenses created by participants; and
- 30 clients will increase their business knowledge/skill by completing a full-fledged business plan that can be used to access capital.
- Obtain Dunn and Bradstreet D-U-N-S number for all existing businesses entering the program and for all businesses established while in the program.
- Maintain detailed documentation and provide reports on client demographics, program outputs and outcomes.
- Collect and provide detailed information on businesses served.

**Original and four (4) copies of proposals are due by 3:00 pm June 15, 2007 at 1290 Parkmoor Ave., San Jose, CA 95126, Attention: Ms. B.J. Sims, work2future Business Services Manager. Proposals must be 12 pt. font single-spaced, with one inch margins and shall not exceed 10 pages in length, including resumes. Only hard copies of proposals will be accepted. Proposals that are emailed or faxed will not be accepted. Any proposal received after the 3:00 p.m. deadline will be rejected and returned to the submitting party.**

All materials submitted in accordance with this become property of the City and will not be returned.

Should you have any questions regarding this , please contact Ms. B.J. Sims, work2future Business Service Manager via email at [bj.sims@sanjoseca.gov](mailto:bj.sims@sanjoseca.gov).

The City shall not be responsible for nor be bound by any oral instructions, interpretations or explanations issued by the City or its representatives. Should discrepancies or omissions be found in this or should there be a need to clarify the , you may request clarification via email to [bj.sims@sanjoseca.gov](mailto:bj.sims@sanjoseca.gov).

Any City response to a request for clarification will be made in the form of an addendum to this and will be sent to all parties to whom this has been issued prior to the proposal due date and will be posted on our website at [www.work2future.biz](http://www.work2future.biz). All addenda shall become part of this . The last day requests for clarifications will be accepted will be May 30, 2007.

### **3. Objectives and Scope of Services**

The objectives of the project focus on meeting the needs of underserved, low and moderate income, minority, first generation immigrant entrepreneurs in the City of San Jose by providing short-term business and financial education and long-term business and training programs.

Services are to be provided at the San Jose One Stop located at 1290 Parkmoor Ave., San Jose, CA 95126. The facilities will be provided to the contractor on cost reimbursable basis (including rent, janitorial, utilities and other common area maintenance).

The first outcome measure will be job creation for low or moderate income, first generation immigrant entrepreneurs through micro enterprise development. To ensure compliance with CDBG standards, proposer staff will:

- (1) Verify that a client is low moderate-income with appropriate documentation (e.g. proof of income and/or public assistance, low-income service rate on utility bills, etc.) at the time of enrollment.
- (2) Confirm if existing business has 5 or fewer employees including the owner(s).
- (3) Verify that the participants are San Jose residents.

During periodic reviews of client progress, proposer will record any new business licenses, “dba” filings, self-employment, and /or additional employees hired by clients of the proposed program, and whether new employees are hired for full-time or part-time positions. Measuring tools will include documentation (such as copies of State of California Quarterly Wage Withholding DE6 or Report of New Employees DE34, etc), client surveys, and interviews by program staff. The program will create 30 jobs and document such creation.

The second outcome measure will be development of business knowledge and skills. Upon completion of the business planning course(s), participants will have acquired and/or increased their business knowledge and acumen as evidenced by completion of a business plan. Proposer will verify completion of a business plan for a start-up or expansion of clients’ businesses. Each client will have produced a business plan

document, a copy of which will be filed in the archives of the client's business and available for review and audit. At least 30 clients will have completed a full-fledged business plan that can be utilized as an operating manual for business or to access capital.

Third outcome will be the direct filing of 10 new business licenses by clients completing the training.

#### **4. Budget and Timetable**

It is expected that the budget for this project will not exceed \$262,000. A budget worksheet will be included in the proposal outlining personnel costs (salary & fringe benefits), general non-personnel costs, specific non-personal costs and indirect costs.

The proposal should include a detail of costs eligible for reimbursement for the funding year.

Contract commenced date is projected to be July 1, 2007. Monthly narratives, invoices, and MIS reports will be submitted to work2future by the 10<sup>th</sup> of each month, commencing August 2007. Quarterly monitoring of the program will be conducted. All programmatic reporting will be completed by July 6, 2008.

#### **5. Selection Criteria**

The Proposer should demonstrate that its organization and staff proposed to work on this project have the appropriate analytical and professional background and access to resources to fulfill the stated scope of services.

Proposers should describe their work plan for developing the deliverables. This should include a timetable, proposed budget (not to exceed \$262,000), methodology, tools (e.g. applications, evaluation forms) and available data sources to be utilized, a staffing plan and reporting relationships, and any other relevant information germane to work2future's assessment of whether the Proposers have a work plan that is well organized and achievable within the desired scope, time, and budget guidelines.

As part of the work plan please provide your strategy for securing access to the required information and building awareness and consensus with those parties that would provide (i) the required information and (ii) the most benefit from the information and findings of this research.

Given the nature of this proposal, collaborations between various organizations are encouraged.

Proposers will be reviewed and evaluated based on the following criteria:

- Up to 30% rating will be allotted for demonstration of organizational/staff professional background and access to resources to fulfill the stated scope of services.
- Up to 25% rating will be allotted for a work plan, timelines, budget and price, which develops the deliverables.
- Up to 40% rating will be allotted for prior experience in performing similar services to a comparable customer base.
- Up to 5% rating will be allotted for documented partnerships with organizations within the City of San Jose to provide services to minority-owned small businesses.
- 5 points for vendors who qualify as a Local Business Enterprise.
- 5 points for vendors who qualify as a Small Business Enterprise (having 35 or fewer employees).

#### **CITY OF SAN JOSE INSURANCE REQUIREMENTS**

If awarded the contract, the successful Proposer shall warrant and certify that it will comply with the City of San Jose's insurance requirements as stated below:

- Commercial General Liability - \$1,000,000 Combined Single Limit
- City of San Jose must be named as additional insured
- Automobile Liability - \$1,000,000 Combined Single Limit
- Workers' Compensation – Statutory
- Professional Liability - \$1,000,000
- Employer's liability- limit of \$1,000,000 per accident

#### **PUBLIC NATURE OF PROPOSAL MATERIAL**

Responses to this RFP become the exclusive property of the City. At such time as the SVWIN Board recommends a Proposer to the City Manager or City Council, as applicable, all proposals received in response to this RFP become a matter of public record and shall be regarded as public records, with the exception of those elements in each proposal which are defined by the Proposer as business or trade secrets and plainly marked as "Confidential," "Trade Secret," or "Proprietary" or if disclosure is required under the Public Records Act. Any proposal which contains language purporting to render all or significant portions of the proposal "Confidential," "Trade Secret," or "Proprietary" shall be regarded as non-responsive.

Although the California Public Records Act recognizes that certain confidential trade secret information may be protected from disclosure, the City of San Jose may not be in a position to establish that the information that a Proposer submits is a trade secret. If a request is made for information marked "Confidential," "Trade Secret," or "Proprietary," the City will provide the Proposer who submitted the information with reasonable notice

to allow the Proposer to seek protection from disclosure by a court of competent jurisdiction.

#### **NON-DISCRIMINATION/NON-PREFERENTIAL TREATMENT**

The successful Proposer shall not discriminate, in any way, against any person on the basis of race, sex, color, age, religion, sexual orientation, actual or perceived gender identity, disability, ethnicity, or national origin, in connection with or related to the performance of City of San Jose contracts.

#### **ADDITIONAL TERMS AND CONDITIONS**

This RFP does not commit the City to pay any costs incurred in the submission of the proposal or in making any necessary studies or analysis in preparation of submission of the proposal.

The City reserves the right without limitation to:

- Execute an agreement with one or more Proposers based solely on the proposal and any approved additions;
- Enter into an agreement with another Proposer in the event that the originally selected Proposer defaults or fails to execute an agreement with the City; and
- Enter into negotiations with one or more Proposers.

The City reserves the right to verify any information provided during the RFP process, and may contact references listed or any other persons known to have contracted with the Proposer.

An agreement shall not be binding or valid with the City unless and until it is executed by authorized representatives of the City and of the Proposer.

#### **ACCEPTANCE OR REJECTION OF PROPOSAL**

The City reserves the right to accept or reject any item or group(s) of items of a response. The City also reserves the right to waive any informality or irregularity in any proposal. Additionally, the City may, for any reason, decide not to award an agreement as a result of this RFP or cancel the RFP. The City shall not be obligated to respond to any proposal submitted, not be legally bound in any manner by submission of the proposal. The SVWIN Board will make a recommendation to the City Manager or City Council, as applicable, regarding the selection of a Proposer(s) based upon the evaluation of the proposals. The City reserves the right to negotiate project deliverable and associated costs.