



**REQUEST FOR PROPOSALS FOR
Midtown Park Apartments Resident Engagement Facilitator
Solicitation LAF2023-01
CONTACT: Jeremy Pollock, jeremy.pollock@sfgov.org**

Background

The San Francisco Local Agency Formation Commission (LAFCo) seeks proposals to facilitate a community engagement process for Midtown Park Apartment residents to explore resident ownership and control models. The consultant will facilitate an inclusive conversation among Midtown tenants to develop a collective agreement on what they want for the future of Midtown, addressing issues such as affordability, ownership or resident control, tenure/inheritance, existing/new residents, and a timeline for the rehabilitation, development, and implementation of the ownership or resident-control model.

The selected consultant will also conduct a Property Conditions Assessment (PCA) to assess Midtown’s current condition, and identify current and future physical needs, including capital costs, deferred maintenance, and ongoing maintenance costs.

The final deliverable will be a report documenting the resident engagement process, informed by the PCA, and making recommendations for the future management of the Midtown Park Apartments, including a structure for resident control and/or ownership.

Schedule

RFP Issued	April 7, 2023
Deadline for Questions	April 24, 2023 at 5PM
Deadline for Proposals	May 8, 2023 at 5PM
Notice of Intent to Award Contract Notification	May 19, 2023 (estimated)

Updates

All updates to this RFP will be posted at:
<https://sfgov.org/lafco/rfp-midtown-park-apartments-resident-engagement-facilitator>

Anticipated Contract Term

The anticipated contract term resulting from this RFP may last up to one year. Actual contract terms may vary, depending upon service and project needs at the LAFCo’s sole, absolute discretion. Respondent selected for resulting contract must be available to commence work on or before June 1, 2023.

Anticipated Contract Budget

For the contract resulting from this RFP, the total anticipated not-to-exceed project budget is to be \$45,000. However, the actual contract budget will vary, depending upon service and project needs at the LAFCo’s sole and absolute discretion, and funding availability. The LAFCo has allocated a not-to-exceed amount of \$45,000 for the work.

Important City’s Supplier and Bidder Resources

City Supplier and Bidder Portal:
<https://sfcitypartner.sfgov.org>

Guide to Become a City Supplier:
<https://sfcitypartner.sfgov.org/pages/become-a-supplier.aspx>

Frequently Asked Questions:
<https://sfcitypartner.sfgov.org/pages/faq.aspx>

User Support:
<https://sfcitypartner.sfgov.org/pages/contact.aspx>
User Support tel. (415) 944-2442

Submission of Proposals Requirements

Proposals and all related materials must be received by the Deadline for RFQ Proposals. You must be a registered City Supplier to be awarded a contract through this RFP so it is important to follow the instructions at the above links. Proposals must be emailed to jeremy.pollock@sfgov.org.

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1. Introduction

1.1 General Terms Used in this Request for Proposals (RFP)

Terms and abbreviations used throughout this RFP include:

- **City** – The City and County of San Francisco
- **EUL** – Expected useful life
- **Firm** – Any business entity including, but not limited to, companies, nonprofit organizations, educational institutions, and individuals.
- **LAFCo** – San Francisco Local Agency Formation Commission
- **Midtown** – The Midtown Park Apartments multifamily housing complex located in San Francisco
- **PCA** – Property Conditions Assessment
- **Respondent/Proposer** – Any entity submitting a response to this RFP
- **Response/Proposal** – A Respondent’s proposal submitted in response to this RFP

1.2 Statement of Need and Intent

What Does the LAFCo Seek?

The San Francisco Local Agency Formation Commission (LAFCo) seeks proposals to facilitate a community engagement process for Midtown Park Apartment (“Midtown”) residents to explore resident ownership and control models. The consultant will facilitate an inclusive conversation among Midtown tenants to develop a collective agreement on what they want for the future of Midtown, addressing issues such as affordability, ownership or resident control, tenure/inheritance, existing/new residents, and a timeline for the rehabilitation, development, and implementation of the ownership or resident-control model.

The selected consultant will also conduct a Property Conditions Assessment (PCA) to assess Midtown’s current condition, and identify current and future physical needs, including capital costs, deferred maintenance, and ongoing maintenance costs.

The final deliverable will be a report documenting the resident engagement process, informed by the PCA, and making recommendations for the future management of the Midtown Park Apartments, including a structure for resident control and/or ownership.

With Whom Will Consultants Work?

Consultants will work with the LAFCo executive officer, LAFCo policy analyst, LAFCo commissioners and their staff, and residents and staff at the Midtown Park Apartments.

1.3 Background of the San Francisco Local Agency Formation Commission

Local Agency Formation Commissions (LAFCos) are independent regulatory bodies, created by the California Legislature in 1963, that oversee changes to the boundaries of cities and special districts and conduct studies of municipal services.

Because the City and County of San Francisco are consolidated, and there is no unincorporated territory in its jurisdiction, the San Francisco LAFCo doesn't oversee annexations or boundary changes like other LAFCos. Our LAFCo wasn't formed until 2000 when there was a voter petition drive to create a municipal utility district (MUD) that would extend to include the City of Brisbane.

San Francisco's LAFCo is an independent public agency separate and apart from the government of the City and County of San Francisco. State law gives LAFCos broad authority to conduct special studies regarding municipal services, and this has been the primary function of the SF LAFCo, including studies on electricity services, refuse, undergrounding of utility wiring, and municipal financial services.

As part of its special studies authority, the LAFCo is studying municipal housing services, starting with this study on the Midtown Park Apartments as the only City-owned property in San Francisco.

1.4 Organization of the Local Agency Formation Commission

SF LAFCo is governed by a five-member Commission. Three members are appointed by the Board of Supervisors of the City and County from its own membership. The Board of Supervisors also appoints a fourth Supervisor who is an alternate member from its own membership. Two Public Members-at-Large are appointed by the other three commissioners. The Commission may also appoint one alternate public member. The public members and the alternate public member shall be residents of the City and County of San Francisco and shall not be officers or employees of the City and County of San Francisco.

Commission meetings are generally held on the third Friday of every month. The LAFCo office is located at City Hall in Room 409. More information is available on the SF LAFCo website at: <https://sfgov.org/lafco/>

1.5 Background of the Midtown Park Apartments

Midtown Park Apartments, located at 1415 Scott Street (Assessor's Parcel Block No. 1099, Lot No. 31), is a City-owned apartment complex in the Western Addition neighborhood that opened in 1968 to provide housing to families displaced by urban renewal policies. From 1968 to 2014, a tenant board was empowered to make decisions regarding Midtown's management and development. On June 12, 2007, the Board of Supervisors unanimously adopted a Resolution approving the principles that will guide the City and Midtown Park Apartments' residents in formulating a long-term ownership structure and development plan for Midtown Park Apartments, a 140-unit residential development owned by the City and County of San Francisco (File No. 070858).

2. Scope and Phases of Work

This scope of work is a general guide to the work the LAFCo expects to be performed and is not a complete listing of all services that may be required or desired.

The work required includes three parts:

1. **Midtown Park Apartments Community Engagement Process** – The selected consultant will facilitate a community process for Midtown Park Apartments residents to explore resident ownership and control models.
2. **Property Conditions Assessment** - The selected consultant will conduct a Property Conditions Assessment (PCA) to assess Midtown's current condition, and identify

current and future physical needs, including capital costs, deferred maintenance, and ongoing maintenance costs.

3. **Final Report** – The selected consultant will produce a report documenting the resident engagement process, informed by the PCA, and making recommendations for the future management of the Midtown Park Apartments, including a structure for resident control and/or ownership.

The LAFCo will negotiate the specific scope of services, budget, deliverables, and timeline with the highest-scoring Proposer(s) selected for contract negotiations.

2.1 Scope of Work

Only proposals that outline an approach to all three requested items will be considered and must include an estimated budget and methodology.

Part 1: Midtown Apartment Community Engagement Process

The selected consultant will facilitate a community engagement process of Midtown Park Apartments residents. This includes but is not limited to:

- a. Facilitate a community-led process to evaluate potential options for Midtown resident control and/or ownership structure.
- b. Organize, publicize, and facilitate at least six community meetings with attention to accommodating accessibility and scheduling needs of seniors, people with disabilities, parents, and others with special needs.
- c. Conduct individual or small-group interviews.
- d. Coordinate with Tenant Association and with Owner's Property Management as needed.
- e. Coordinate with public funding sources and oversight entities such as Board of Supervisors, MOHCD, HUD, etc.
- f. Develop knowledge and capacity in the Midtown Park Apartment community's ability to
 - a) Ask the right questions and define their own problem statements,
 - b) Develop their own answers and proposals,
 - c) Advocate to change policies, and
 - d) Implement their own solutions.

Part 2: Property Conditions Assessment

The selected consultant will conduct a Property Conditions Assessment, conforming with Fannie Mae Multifamily's guidelines (form 4099) to identify current and future physical needs, including capital costs, deferred maintenance, and ongoing maintenance costs. This includes but is not limited to:

- a. Identify all components of the property that will be part of the assessment.
- b. Perform interviews and review existing property documentation with Midtown staff, such as building plans, building histories, prior assessments and energy audits, maintenance records.
- c. Establish a methodology to sample multiple similar units, buildings and common areas such as lobbies, corridors, and community facilities. Visual inspection only.
- d. Perform building systems evaluation, including coordination with consulting engineers, as necessary, such as Civil, Structural, MEP.
- e. Identify any deficiencies that could have an impact on health and safety and bring them to the attention of Midtown staff immediately by written and verbal notification as a matter of ensuring the safety of residents and staff.
- f. Provide and record an estimate of Expected Useful Life (EUL) for each individual component and provide a source for EUL in general.

- g. Provide and record a replacement unit cost for each individual component and for a total of those components. (E.g., per window and per window times all similar windows.
- h. Assess and prioritize immediate and long term/replacement reserve 20-year budget.
- i. Provide preliminary cost estimates for immediate and long-term replacement costs.

Phase 3: Final Report

The selected consultant will produce a final report outlining key findings. The report will document the resident engagement process and make recommendations, informed by the Property Conditions Assessment, for the future management of the Midtown Park Apartments, including a structure for resident control and/or ownership. The consultant will submit the final report to the LAFCo executive officer.

2.2 Deliverables

Successful completion of the following will be established by a negotiated Agreement between the LAFCo and Contractor to include a complete list of deliverables, timeline and further details shall also be negotiated between LAFCo and Contractor:

1. Midtown Park Apartment Community Engagement Process

Deliverable: Develop and conduct a robust community engagement process with Midtown residents, including 6 or more meetings over 6 months.

2. Property Conditions Assessment

Deliverable: Property Conditions Assessment Report, conforming with Fannie Mae Multifamily guidelines, that provides preliminary cost estimates for immediate and long-term replacement costs.

3. Final report

Deliverable: Final report documenting the resident engagement process, informed by the PCA, and making recommendations for the future management of the Midtown Park Apartments, including a structure for resident control and/or ownership.

3. LAFCo-Respondent Communications

Proposers are specifically directed NOT to contact any employees or officials at LAFCo other than those specifically designated in this RFP and its Attachments. Unauthorized contact may be cause for rejection of proposals at the LAFCo's 's sole and absolute discretion.

3.1 Change Notices

Any change or addition to the requirements contained in this Solicitation resulting from the pre-proposal conference will be executed by a written Addendum to this Solicitation to be posted on the LAFCo website at:

<https://sfgov.org/lafco/rfp-midtown-park-apartments-resident-engagement-facilitator>

Prospective proposers who would like to notified of any changes or addenda to this RFP can be added to a notification list by emailing Jeremy.pollock@sfgov.org.

3.2 Deadline for RFP Questions

Please e-mail any questions to jeremy.pollock@sfgov.org. Oral questions will be accepted prior to April 24, 2023 at 5 PM. Questions, in accordance with the below schedule, must be received before the **Deadline for RFP Questions**. No questions will be accepted after this time with the

exception of those concerning City vendor compliance. All inquiries should include the number and title of the RFP. Substantive replies will be memorialized in written addenda to be made part of this RFP. This RFP will only be governed by information provided through written addenda.

3.3 Summary of Information Requested and Presented

A summary of all addenda, questions and answers pertaining to this RFP will be posted on the LAFCo website at:

<https://sfgov.org/lafco/rfp-midtown-park-apartments-resident-engagement-facilitator>

It is the Proposers' responsibility to check this Website for any updates. The LAFCo recommends that Proposers check the Website for updates on a daily basis at a minimum.

For help with the City's Supplier and Bidder Portal, please see:

Frequently Asked Questions:

<https://sfcitypartner.sfgov.org/pages/faq.aspx>

User Support:

<https://sfcitypartner.sfgov.org/pages/contact.aspx>

User Support tel. (415) 944-2442

3.4 LAFCo Communication Following Receipt of Proposals

The LAFCo may contact the Proposers for clarification or correction of minor errors or deficiencies in their Proposals prior to deeming a Proposal as non-responsive. Clarifications are "limited exchanges" between the LAFCo and a Proposer for the purpose of clarifying certain aspects of the Proposals, and do not give a Proposer the opportunity to revise or modify its Proposal. Minor errors or deficiencies are defined as those that do not materially impact the LAFCo's evaluation of the Proposal; for example, failing to label the "original" Proposal as an "original". For information regarding the LAFCo's Evaluation Process, see RFP Section 4 - Evaluation Criteria.

4. Evaluation Criteria

This section describes the guidelines used for analyzing and evaluating the proposals. It is the LAFCo's intent to select Proposers for contract negotiations that will provide the best overall service package to the LAFCo inclusive of fee considerations. Proposers selected for contract negotiations are not guaranteed a contract. This RFP does not in any way limit the LAFCo's right to reject all proposals or solicit contracts for similar or identical services if, in the LAFCo's sole and absolute discretion, it determines proposals are inadequate to satisfy its needs. As in all professional service contracts, the LAFCo reserves the right to accept other than the lowest price offer and reject all proposals that are not responsive to this request.

LAFCo representatives will serve as the Evaluation Team responsible for evaluating Respondents. Specifically, the team will be responsible for the evaluation and rating of the responses for prequalification, and for interviews, if desired by the LAFCo.

4.1 Initial Screening

The LAFCo will review each proposal for initial determination on responsiveness and acceptability in an Initial Screening process.

4.2 Minimum Qualifications

Any response that does not demonstrate that the Proposer meets these minimum qualifications by the response deadline will be considered non-responsive and will not be evaluated or eligible for award of a contract.

MQ1 Community Engagement Experience

Submit two Prior Community Engagement Project Descriptions as part of the RFP Attachment 1 response, which meet the following criteria:

- A. The services/experiences described must be comparable to the community engagement services the LAFCo is requesting, described in RFP Section 2, Scope of Work.
- B. Both Prior Project Descriptions must demonstrate successful completion within five years from the issuance date of this RFP (successful completion means project deliverables have been completed as required).

MQ2 Property Conditions Assessment Experience

Submit two Prior Property Conditions Assessment Descriptions as part of the RFP Attachment 1 response, which meet the following criteria:

- A. The services/experiences described must be comparable to the PCA services the LAFCo is requesting, described in RFP Section 2, Scope of Work.
- B. Both Prior Property Conditions Assessment Descriptions must demonstrate successful completion within five years from the issuance date of this RFP (successful completion means project deliverables have been completed as required).

MQ3 Staffing Confirmation

MQ3.1: The lead staff proposed to be assigned to the Midtown project must individually have had a similar lead role in both Prior Project Descriptions submitted for Minimum Qualification MQ1.

MQ3.2: The lead staff proposed to conduct the Property Conditions Assessment must have had a similar lead role in both PCAs submitted for Minimum Qualification MQ2.

MQ4 Professional Property Assessment Certification

Evidence that the lead staff proposed to conduct the Property Conditions Assessment has a current architect, general contractor, appropriate engineering license or evidence of multiple years' experience preparing PNA's.

4.3 Desired Qualifications

Proposals will be evaluated based on how they demonstrate the ability to meet the following criteria:

- A. Experience in values-based community planning processes, providing underserved communities with the tools to become effective actors in shaping the future development of their own neighborhoods.

- B. Experience developing local capacity and improving working relationships between stakeholders and local, regional, state and federal agencies.
- C. Experience with community engagement and facilitation, visualization tools, popular education curriculum for planning and development literacy, and leadership development with community members:
- D. Demonstrated ability to ‘translate’ building facility management/construction issues and vocabulary (jargon) into everyday language for clear understanding by residents, critical for decision making process and prioritization of development/rehab issues.
- E. Demonstrated ability to problem solve for physical resident and participation issues and convert to potential physical improvements and solutions for integration in Property Conditions Assessment (PCA).
- F. Experience and sensitivity with diverse cultures, experiences and languages, including developing linguistically and culturally accessible workshops.
- G. Demonstrated ability to develop a collective statement of guiding values and broad goals.
- H. Familiarity with multi-unit affordable housing, including income certification, resident services, property management and asset management, and familiarity with housing development strategies, including LIHTC affordable housing, LEHC cooperatives, community land trusts, etc.
- I. Familiarity with San Francisco Planning Code, development and land-use issues, and general building typology cost considerations.
- J. Familiarity with Midtown’s immediate neighborhood context, history and issues.
- K. Experience working with tenant organizations and resident councils.
- L. Experience in architecture/construction, building systems, construction and building operations, including Property Conditions Assessments.
- M. Experience working with working with the Board of Supervisors, public funding sources, and oversight entities such as MOHCD and HUD.
- N. Team is locally based with experience working with San Francisco’s low- and moderate-income communities, with demonstrated local relationships and established community partnerships relevant to the project, including history working with the Fillmore and Divisadero community.

4.4 Response Evaluation Criteria (100 points)

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.

4.4.1 Prior Experience – 30 points

- 1) Prior community engagement experience submitted for MQ1.
- 2) Prior Property Conditions Assessment experience submitted for MQ2, and certification(s) submitted for MQ3.

4.4.2 Firm and Staff Qualifications – 30 points

- 1) Qualifications, educational backgrounds, and relevant experience of lead staff.

- 2) Experience demonstrating the ability to meet the Desired Qualifications listed in Section 4.3.
- 3) Client relationships terminated for reasons other than convenience, if any.

4.4.3 Approach and Cost – 40 points

- 1) Work plan demonstrates understanding of the project and the tasks to be performed; and demonstrates ability to complete project in a timely manner.
- 2) Expectations of client involvement or level of effort are appropriate; the proposed approach and questions demonstrate experience with providing services to comparable clients.
- 3) Cost response is sufficiently detailed, reasonable and appropriate.

4.5 Reference Checks

Respondents must submit at least three references of prior clients. At least one reference must be for community engagement services and at least one reference must be for property conditions assessment services. The LAFCo will not inform Respondents when references will be contacted. The Respondent should ensure that client contact information listed in the response is up-to-date and should notify references that the LAFCo may be contacting them.

4.6 Oral Interviews

If the LAFCo chooses to conduct interviews, then following the Proposal Evaluation process, the LAFCo may invite Proposers to oral interviews with the Evaluation Team. Oral interviews will consist of standard questions asked of selected Proposers, and specific follow-up questions regarding individual responses. If interviews are conducted, they will be worth 100 points based on a set of criteria established following review of written responses. The 100 points possible awarded for interviews will be added to the 100 possible points awarded during the Proposal Evaluation process for a total of 200 points. The LAFCo has sole and absolute discretion over whether interviews will be conducted or not to select Proposers for prequalification.

4.7 Contract Terms and Negotiations

The successful Proposer will be required to enter into an Agreement substantially in the form of Attachment 2, LAFCo Proposed Agreement Terms. If Proposer is unable to accept City's Proposed Agreement Terms substantially in the form presented, Proposer shall include a revised copy of City's Proposed Agreement with its Proposal. The revised copy of the Proposed Agreement must clearly:

- 1) Mark those sections to which it objects;
- 2) Set forth Proposer's alternative terms with respect to each such section; and
- 3) Explain the basis for each proposed change.

The selection of any Proposer for contract negotiations shall not imply acceptance by the LAFCo of all terms of the response, which may be subject to further negotiation and approvals before the LAFCo may be legally bound thereby.

The LAFCo will select the most qualified and responsive Proposer with whom LAFCo staff will commence contract negotiations. If a satisfactory contract cannot be negotiated in a reasonable time with the selected Proposer, then the LAFCo, in its sole discretion, may terminate negotiations and begin contract negotiations with the next highest scoring Proposer or to reject all proposals. The LAFCo, in its sole discretion, has the right to approve or disapprove any staff person assigned to its projects by the Contractor before and throughout the contract term. The

LAFCo reserves the right at any time to approve, disapprove or modify proposed project plans, timelines and deliverables, provided that all modifications are within the scope of services sought by this RFP.

5. Proposal Submission Requirements

5.1 Time and Method for Submission of Proposals

Proposals and all related materials must be received by the **Deadline for RFP Proposals on page 1 of this RFP**. Proposals must be delivered by email to jeremy.pollock@sfgov.org.

5.2 Proposal Contents

Proposals must be sent via email with “Midtown Park Apartments Facilitator RFP” included in the subject line.

Response item Checklist:

- **RFP Attachment 1** – Proposal Template
- **RFP Attachment 2** – LAFCo Proposed Agreement Terms (include if respondent requests edits to LAFCo’s proposed agreement terms, as described in Section 4.7, Contract Terms and Negotiations.

Each Attachment must include all documents submitted for that Attachment in one, separate, complete file, submitted in PDF or Word format. Each of these separate files must be titled with Proposer’s name and Attachment number, in specific order.

Complete, but concise responses, are recommended for ease of review by the Evaluation Team. Proposals should provide a straightforward, concise description of the Proposer’s capabilities to satisfy the requirements of the RFP. All parts, pages, figures, and tables should be numbered and clearly labeled.

5.3 Redact Confidential or Proprietary Information

All documents under this solicitation process are subject to public disclosure per section 67.24 of the San Francisco Administrative Code, “The San Francisco Sunshine Ordinance of 1999.”

Proposals to RFPs, contracts, and all other records of communications between the LAFCo and Proposers shall be open to inspection immediately after a contract has been awarded. Nothing in this 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*.

Proposers may redact any confidential or proprietary information, as appropriate, prior to submitting a response to this RFP.

Proposers should clearly indicate proprietary data included in their proposal that the LAFCo should redact in case the RFP response is publicly disclosed prior to a contract being awarded to the Proposer. Please note that this information can only be withheld during the RFP process and would become publicly disclosable should a contract be awarded to the Proposer.

6. Registering as a City Bidder and Supplier

Proposer Team must fulfill the City’s administrative requirements for doing business with the City and become a compliant vendor prior to contract award. The first step to begin working

with the City is to [complete a short registration process](#) to become a "Registered Bidder." This will allow you to view and bid on Sourcing Events.

After becoming a Registered Bidder, you can then advance your status to become a Fully Compliant Supplier, which allows you to be fully awarded City contracts. The steps to do this are as follows:

1. Complete a [San Francisco Business Tax Registration](#)
2. Complete a [12B Equal Benefits Declaration](#)

In addition to the hyperlinked directions above, you can click here to view step-by-step directions on [How to Become a Fully Compliant Supplier](#).

Proposers are urged to begin the supplier registration process as soon as possible. The City provides the following support for this process:

- Create a support ticket: <https://sfcitypartner.sfgov.org/pages/contact.aspx>
- Email user support: sfcitypartnersupport@sfgov.org
- Telephone support: Monday – Friday, 8:30 AM – 5:00 PM: [415-944-2442](tel:415-944-2442)
- One-on-one video conference support: Mondays (Except Holidays) 8:30 AM – 5:00 PM
Please make a reservation by emailing sfcitypartnersupport@sfgov.org