

Computer Equipment or Software

- OEWD requires that each organization submit an “Equipment & Information Technology Systems Request Form” for all computer equipment or software purchases, detailing what the items are and how it is programmatically necessary.
 - Additionally, if the cumulative cost will total **between \$1,000 and \$9,999** for any single purchase from a given vendor (any purchases made within a single month from a given vendor), the organization must obtain at least 3 quotes from different sources. The quotes must be for the same exact equipment that is being included on the request form (same make, model, etc.). Once obtained, submit the 3 quotes with the Request Form to the grant administrator. If the organization is unable to obtain 3 quotes, they must provide an explanation that must be accepted by the grant administrator prior to purchase.
 - Once the Request Form has been approved, the organization may submit the Expense Report and accompanying invoices/proofs of purchase.
 - Please provide the serial number, date purchased, cost, make and model of any computer equipment.
- If amount of purchase is **between \$10,000 and \$99,999.99**, informal bidding is required. Follow the same procedure as above as well as the additional procedures below.
 - Record the names, phone numbers and prices quoted from each business that submits a quote.
 - Compare quotes and make a selection. Document your selection process. If you reject the lowest quote or if the lowest quote withdraws from the process, provide an explanation.
 - Make a Good Faith Effort to include minority and women-owned businesses (directions below).
 - If applicable, follow the Drafting a Contractual Agreement Instructions (directions below).
 - Provide documentation of the above to NCCLF for final approval.

Furniture

- OEWD requires that each organization submit an “Equipment & Information Technology Systems Request Form” for all furniture purchases, detailing what the items are and how it is programmatically necessary.
 - Additionally, if the cumulative cost will total **between \$1,000 and \$9,999** for any single purchase from a given vendor (any purchases made within a single month from a given vendor), the organization must obtain at least 3 quotes from different sources for each purchase. The quotes must be for furniture as similar as possible to the furniture included on the Request Form. If the organization is unable to obtain three quotes, they must provide an explanation. Once obtained, submit the 3 quotes with the Request Form to the grant administrator.
 - Once the Request Form has been approved, the organization may submit the Expense Report and accompanying invoices/proofs of purchase.
- If amount of purchase is **between \$10,000 and \$99,999.99**, informal bidding is required. Follow the same procedure as above and follow the additional procedures below.

- Record the names, phone numbers and prices quoted from each business that submits a quote
- Compare quotes and make a selection. Document your selection process. If you reject the lowest quote or if the lowest quote withdraws from the process, provide an explanation.
- Make a Good Faith Effort to include minority and women-owned businesses. (Directions below)
- If applicable, follow the Drafting a Contractual Agreement Instructions (below)
- Provide documentation of the above to NCCLF for final approval

Amount of any purchase is \$100,000 or more – FORMAL BIDDING REQUIRED

- Prior approval of NCCLF is required. Please contact grant coordinator early in the process to ensure that bidding requirements of all departments are coordinated.

GOOD FAITH EFFORT INSTRUCTIONS

Outreach to minority and women-owned businesses Good faith efforts shall be made by Grantee Corporation to utilize women and/or minority-owned business enterprises for sources of supplies and professional services. NCCLF has a good faith effort tracking template. When spending \$29,000.00 or more, provide these businesses with written technical requirements of your needs and request them to submit a quote. Also, eliminate unnecessary requirements or other barriers that prevent these businesses from competing, (for example: don't require unreasonably high liability insurance for small projects.)

DRAFTING A CONTRACTUAL AGREEMENT INSTRUCTIONS

When working with a subcontractor, always use a written contract. At minimum, the agreement must include the following items:

1. General Information: the names of both contracting parties (your agency and the subcontractor), the scope of the service to be provided, the time and place of the service, the method of payment, the monitoring and reporting method to verify their work, signatures of both contracting parties, and compensation. Under “compensation,” be specific: either stipulate the total dollar amount that you will pay for the service, or, if paying hourly, stipulate the maximum dollar amount that the subcontractor cannot exceed.
2. Required Subcontracting Provisions: Attach the Required Subcontracting Provisions to the contract. These provisions include all necessary federal and local regulations and can be found on the program website.
3. Approval Clause: Include this wording in the contract: “This contract is subject to written approval by Oversight Office.” If you have questions, contact your Grant Coordinator



City and County of San Francisco :: Edwin M. Lee, Mayor
Economic and Workforce Development :: Todd Rufo, Director

Equipment & Information Technology Systems Request Form

1. Date:	2. Organization:		
3. Organization Address:	4. Contact Name:		
5. Contact Email Address:	6. Contact Phone:		
7. Condition: <input type="checkbox"/> Replace existing hardware <input type="checkbox"/> Upgrade existing hardware <input type="checkbox"/> New <input type="checkbox"/> Lease			
8. Category – Check all that apply: <input type="checkbox"/> Desktop Computer <input type="checkbox"/> Laptop <input type="checkbox"/> Copier <input type="checkbox"/> Copier <input type="checkbox"/> Scanner <input type="checkbox"/> Fax <input type="checkbox"/> Phone <input type="checkbox"/> Tablet <input type="checkbox"/> Television <input type="checkbox"/> Projector <input type="checkbox"/> Infrastructure (server, wiring, etc.) <input type="checkbox"/> Software <input type="checkbox"/> Capital Improvement <input type="checkbox"/> Furniture (items \leq \$1,000 per unit) <input type="checkbox"/> Licenses <input type="checkbox"/> Other _____			
9. Description of Equipment: (item, make, model, and quantity)			
10. Total Projected Cost: (breakdown cost to item, per unit cost, total cost, funding source, % of funding source)			
11. Description of how equipment will be used:			

For Approval by OEWD

Date	Name	Signature
------	------	-----------



Professional Services

- If the cumulative cost of professional services will total **between \$1,000 and \$9,999** for any single contract with a given contractor, NCCLF requires the following:
 - Each organization must submit an explanation of their selection process. This includes (1) a record of the businesses (name, phone number, and price quoted) they contacted in their search for a contractor to perform the needed services and (2) a written description of why the final contractor was selected, if you reject the lowest quote or if the lowest quote withdraws from the process, provide an explanation.
 - This documentation must be approved by the grant administrator prior to contract signing.
 - Once the documentation has been approved and the contract has been signed, provide NCCLF with a copy of the contract
- If the cumulative cost of professional services will total **between \$10,000 and \$99,999.99**, informal bidding is required. Follow the same procedure as above as well as the additional procedures below.
 - Make a Good Faith Effort to include minority and women-owned businesses (directions below).
 - Follow the Drafting a Contractual Agreement Instructions (directions below).
 - Provide documentation of the above to NCCLF for final approval.
 - Once the documentation has been approved and the contract has been signed, provide NCCLF with a copy of the contract

Amount of any purchase is \$100,000 or more – FORMAL BIDDING REQUIRED

- Prior approval of NCCLF is required. Please contact grant coordinator early in the process to ensure that bidding requirements of all departments are coordinated.

GOOD FAITH EFFORT INSTRUCTIONS

Outreach to minority and women-owned businesses Good faith efforts shall be made by Grantee Corporation to utilize women and/or minority-owned business enterprises for sources of supplies and professional services. NCCLF has a good faith effort tracking template. When spending \$29,000.00 or more, provide these businesses with written technical requirements of your needs and request them to submit a quote. Also, eliminate unnecessary requirements or other barriers that prevent these businesses from competing, (for example: don't require unreasonably high liability insurance for small projects.)

DRAFTING A CONTRACTUAL AGREEMENT INSTRUCTIONS

When working with a subcontractor, always use a written contract. At minimum, the agreement must include the following items:

1. General Information: the names of both contracting parties (your agency and the subcontractor), the scope of the service to be provided, the time and place of the service, the method of payment, the monitoring and reporting method to verify their work, signatures of both contracting parties, and compensation. Under “compensation,” be specific: either stipulate the total dollar amount that you will pay for the service, or,

if paying hourly, stipulate the maximum dollar amount that the subcontractor cannot exceed.

2. Required Subcontracting Provisions: Attach the Required Subcontracting Provisions to the contract. These provisions include all necessary federal and local regulations and can be found on the program website.
3. Approval Clause: Include this wording in the contract: "This contract is subject to written approval by Oversight Office." If you have questions, contact your Grant Coordinator

Prevailing Wage How To Instructions
SF NSSP Program
8/29/2018

For projects with budgets between \$2,000 and \$99,999.

Step 1: Develop Plans and Specifications

Step 2: Prepare Bid Manual for public bidding of the project and review with NSSP Team.

Timing: Prior to selection of General Contractor. If you have a general contractor assisting you in early predevelopment on the design, they cannot bid on the project. Better to have a construction management consultant.

Forms:

1. Cover Letter to Bidders (Put on organization's letterhead; fill in blanks including organization name and contact person for questions; standard non-refundable deposit is \$15-25 (This fee is optional. If Architect puts plans on an FTP site for bidders to print themselves, there will be no printing cost to you))
2. Instructions to Bidders (Fill in blanks). Note: Item 13, the walkthrough may be made voluntary or mandatory, at your discretion. It is advisable to ensure that bidders do visit the site, and this is a way to manage these visits.
3. OEWD Capital Grants Bid Form (Fill out top four lines only, name, project address, bid opening address, bid opening time and date; rest to be filled out by the bidding contractor)
4. List of Subcontractors (Fill in address in second line only, rest of form filled out by contractor)
5. Draft Owner/Contractor Agreement: AIA A107-2007 (small projects) or A101/A201-2007 (large projects); DRAFT blank contract is fine, with attachment of various forms identified below.
 - a. Include Sample AIA contract in MOH - 10, including OEWD/MOCI requirements, unless you have a draft construction contract in house (if using a different form, make sure that all City provisions are incorporated)
 - b. See MOHCD - 11: Instructions for Preparing Owner-Contractor Agreement. Make sure to add all of these provisions in the appropriate place in the GC Contract. May insert by line or as an Exhibit/Appendix if listed as Exhibit A (or B, etc.) in Article 6.1.6.3

Exhibits & Appendices to list in Article 6.1.2 or 6.1.6 and attach to contract:

Exhibit A: Budget (attached in final version of contract)

Exhibit B: Project Schedule (draft here ok, final version to be attached in the contract)

Exhibit C: Scope of Work, List of Drawings (may be in 6.1.3-6.1.5)

Appendix A: Additional Provisions, Instructions for Preparing Owner-Contractor Agreement
Appendix B: Supplementary General Conditions – State, and Local Requirements for Construction Contracts
Appendix C: SB 854 Notice (**Requires Contractor to Register with State, prior to bidding**)
Appendix D: CA State Labor Standards Provisions
Appendix E: Prevailing Wage Determination [**Contractor to obtain from OLSE website, include full determination in final Contract**]
Appendix F: Contractor's Requirements for Licensing, Bonding, Insurance & Eligibility

Step 3: Hold Open House(s) if desired for potential bidders at the date/time/location identified on the Instructions to Bidders Form.

Step 4: Open bids on date/time identified

Tool provided: Bid Tabulation Sheet to fill out for comparison of bidders

Step 5: Notify selected bidder, advisable to use Notification of Apparent Low Bidder Form or incorporate that information. No need to attach the Bid Tabulation Sheet, Bid Form, or Subcontractor list of other bidders.

Step 6: Selected Contractor and Owner meet regarding Contract Compliance and Prevailing Wage Reporting. Bring Project Manager to this meeting!

Step 7: Draft GC Contract, based on Step 2 materials above and final negotiations

Prior to starting work, submit the entire executed contract to the NSSP Team, and Forms MOH - 7 (Bid Form) and MOH – 8 (List of Subcontractors), prepared and submitted by GC with their bid package.

Step 8: Owner/Grantee issues Notice to Proceed to General Contractor, once they have Building Permit(s) (or GC goes to pick up permits)

Step 9: Grantee must register the project on the CA Dept of Industrial Relations website within 5 days of executing the contract: <https://www.dir.ca.gov/pwc100ext/>

Sample registration form: http://www.dir.ca.gov/das/dir_pwc_100Form.pdf

Step 10: For progress payments: submit General Contractor's Application for Payment (AIA G702/703), Contractor's Certified Payroll(s) for current and prior applications for payment, Contractor's conditional and unconditional lien Releases, and NSSP Expense Report to NCCLF. NCCLF will hold on to the Contractor's documentation, and will provide it to the City in the event of a complaint. Contractor should also maintain copies of all documents provided.

For sole proprietor contractors, an invoice that breaks out Labor and Materials and identifies the number of hours worked will be an acceptable form of certified payroll. For contractors with more than one employee, provide timesheets/certified payrolls for all workers on the project.

Notify NCCLF of anticipated contractor funding one month ahead in order to facilitate timely payment of contractor invoices

Step 11: Close out project per NSSP Financial Assistance Final Report Requirements, including the Notice of Completion, Final Unconditional Lien Releases (from Contractor and all subs), Final Contractor Application for Payment and Retention Release from Contractor (AIA G702/703), and Certified Payrolls from the general contractor for the entire term of the project (less certified payrolls provided earlier).