

Economic Development Department  
Business Expansion Attraction and Retention (BEAR) Division

# FY2024 Economic Development Funding RFP Informational Workshop

March 14 & March 29, 2023





## RFP Informational Workshop Agenda

- Welcome and Team Introductions
- Economic Development Funding Programs
  - Alignment of Mission, Program/Project
  - Funding Goal/Outcome
- RFP Process
  - Step by Step Instructions
  - Completing the RFP Application Online
- RFP Evaluation
- Q&A

# Welcome and Team Introductions



## Key Staff:

Elizabeth Studebaker, Asst. Deputy Director

Lisa Lind, Community Development Coordinator

Rosa Elena Enriquez, Business Development Officer

Roosevelt Williams III, Community Development Specialist



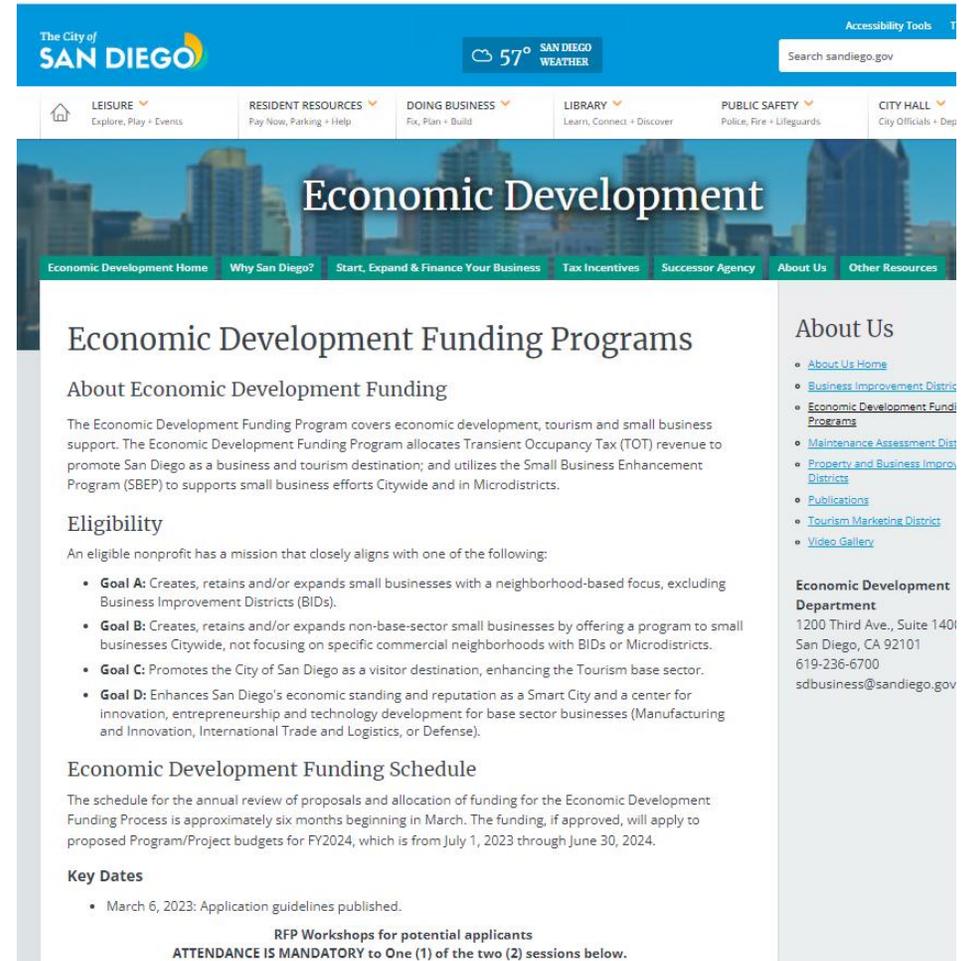
# Mandatory Attendance Records

## Please Sign in

Use the chat function to enter your name, organization, and email address

## Powerpoint

This presentation will be posted on the Economic Development Department webpage as a resource



[www.sandiego.gov/economic-development-funding](http://www.sandiego.gov/economic-development-funding)

# Economic Development Strategy

## Economic Base-Sector Growth

- Advance San Diego's position as an innovation hub and tourist destination
- Launch, Expand, Retain or Attract businesses in the City's four economic base sectors (industry):
  - Manufacturing & Innovation
  - International Trade & Logistics
  - Tourism
  - Defense

## Neighborhood Businesses

- Increase neighborhood-based business activity, with a focus on under-resourced communities



# Economic Development Funding Programs

## Transient Occupancy Tax (TOT)

Allocations to promote San Diego as a business and tourism destination.

- **Economic Development (TOT)**

## Small Business Enhancement Program

(SBEP) General Fund allocations for small business development.

- **SBEP Citywide**
- **SBEP Microdistricts**



## Mission Program/Project and Goal Alignment

- Goal A:** Creates, retains and/or expands small businesses with a neighborhood-based focus, excluding Business Improvement Districts
- Goal B:** Creates, retains and/or expands non-base-sector small businesses by offering a program to small businesses Citywide, not focusing on specific commercial neighborhoods
- Goal C:** Promotes the City of San Diego as a visitor destination, enhancing the Tourism base sector
- Goal D:** Enhances San Diego's economic standing and reputation as a center for innovation, entrepreneurship and technology development for base-sector businesses (Manufacturing & Innovation, International Trade & Logistics, or Defense)



## Funding Goals and Outcomes

### Goal A:

- Increase the number of neighborhood-based businesses OR
- Increase the volume or value of goods and/or services sold by neighborhood-based businesses

### Goal B:

- Increase the number of non-base sector small businesses OR
- Increase the volume or value of goods and/or services sold by non-base sector small businesses

### Goal C:

- Increase the number of City of San Diego hotel room night stays OR
- Increase the sales tax value of goods sold by tourism-related businesses

### Goal D:

- Increase the number of base-sector businesses OR
- Increase the volume or value of goods and/or services sold by base-sector businesses OR
- Increase the number of patents held by local businesses OR
- Increase the volume or value of goods and/or services exported by businesses OR
- Increase the number of exporting (overseas or external to San Diego) businesses OR
- Increase the value of Foreign Direct Investment (FDI ) in San Diego

# Request for Proposals (RFP) Application

## Request for Proposals (RFP) – Program/Project Review

- Organization mission, Funding Goal & Outcome alignment
- Targeted and benefitting businesses
- Feasible and measurable results
- Collaboration, community support and inclusion
- Budget/Spending Plan

### Requested Funding Ranges

**Goal A:** \$ 3,000 - \$15,000

**Goal B:** \$10,000 - \$40,000

**Goal C:** \$20,000 - \$60,000

**Goal D:** \$20,000 - \$60,000



To help protect your privacy, PowerPoint has blocked automatic download of this picture.



# RFP Process

## RFP Application Period – Open now to April 6, 2023



### Economic Development Funding Fiscal Year 2024

#### Step by Step Instructions

The Economic Development Funding online RFP application available through SeamlessDocs **must be completed in one session**. Please plan ahead:

- ✓ Follow the steps below, including preparing a Sample RFP Application and attachments in advance.
- ✓ Please allow at least one (1) hour for completing the online application and uploading the attachments.
- ✓ Whoever completes and submits this form must be authorized to electronically sign and to create a legally binding RFP submission between the applying Organization and the City of San Diego.

**Step 1:** Carefully read these Fiscal Year 2024 Economic Development **Funding Guidelines** on this webpage: [www.sandiego.gov/economic-development-funding](http://www.sandiego.gov/economic-development-funding).

**Step 2:** If you have questions, contact the Economic Development Department by emailing us at [sdbusiness@sandiego.gov](mailto:sdbusiness@sandiego.gov) or by calling us at 619-236-6700. The last day to ask questions is April 3, 2023.

**Step 3:** Attend one (1) RFP Workshop - **ATTENDANCE IS MANDATORY**. RFP Responses may be rejected or potentially disqualify Organizations that do NOT attend a workshop.

Sessions will be held on:

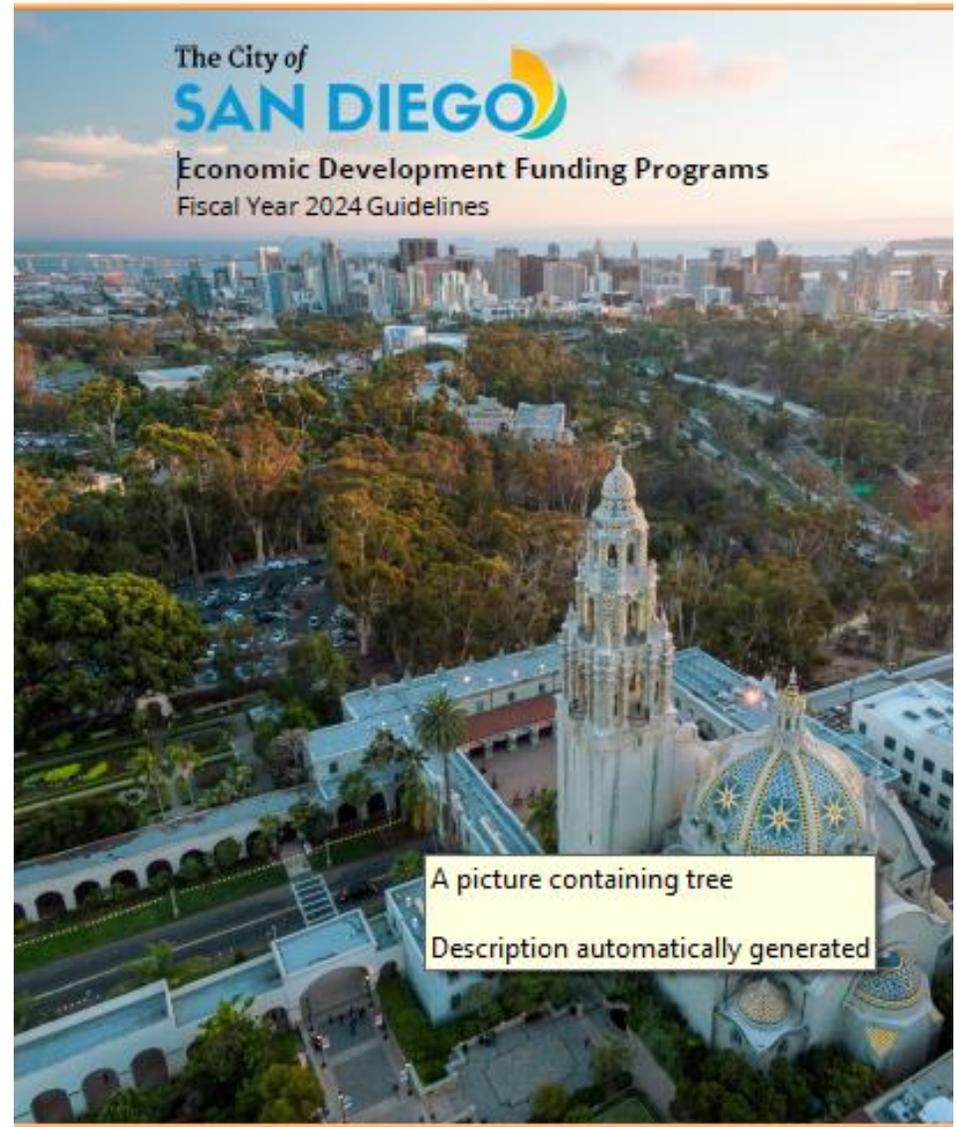
- March 14, 2023 from 10:00-11:30 a.m.
- March 29, 2023 from 1:30-3:00 p.m.

Both Sessions will be held virtually and will be recorded. However, attendance during the scheduled time for one (1) workshop **is mandatory**. The link for each session will be posted in advance of the workshop on this webpage:

[www.sandiego.gov/economic-development-funding](http://www.sandiego.gov/economic-development-funding)

At least one organization representative must attend **one** of the mandatory scheduled RFP workshop sessions.

**Step 4:** Review the Proposal (request for funding) with the Economic Development Program



Issued: March 6, 2023 • **Application deadline: April 6, 2023**

## RFP Process

### **RFP Application Period – Open now to April 6, 2023**

- Follow the instructions, including preparing a Sample RFP Application and attachments in advance.
- Please allow at least one (1) hour for completing the online application and uploading the attachments.
- Whoever completes and submits this form must be authorized to electronically sign and to create a legally binding RFP submission between the applying Organization and the City of San Diego.

## Step by Step Instructions

**Step 1:** Carefully read the *Economic Development Funding FY2024 Guidelines*

**Step 2:** If you have questions, contact the Economic Development Department by emailing us at [sdbusiness@san Diego.gov](mailto:sdbusiness@san Diego.gov) or calling 619-236-6700.

**Step 3:** Attend one RFP Workshop. Attendance is mandatory.

## Step by Step Instructions (continued)

- Step 4:** Review the Economic Development Program Funding Goals (A-D) and funding range for Fiscal Year 2024.
- Step 5:** Download the *Sample RFP* (Microsoft Word or PDF) from the Economic Development Department webpage: [www.sandiego.gov/economic-development-funding](http://www.sandiego.gov/economic-development-funding)
- Step 6:** Download the Budget and Financial Statements templates (.xls)

## Step by Step Instructions (continued)

To prepare your Program Budget and Financial Statements:

- Open the Excel files for the Program Budget
- Enter your Organization name, dates and financial information
- Save or print each of the worksheets individually as a PDF.
- Repeat for the Financial Statements

Note that there are a total of seven worksheets between the two template Excel files that will be attached in Section 5 of the electronic SeamlessDocs RFP Application.

## Step by Step Instructions (continued)

**Step 7:** Prepare optional attachments.

**Step 8:** Determine the representative to complete the SeamlessDocs Application. Access the RFP Application by clicking on the City of San Diego SeamlessDocs portal link on the website (available March 20, 2023).

**IMPORTANT:** The RFP Application is optimized in Mozilla Firefox, Google Chrome and Safari.  
(Use of Internet Explorer is not recommended.)



# Step by Step Instructions (continued)

## Application Sections:

1. Organization Profile (includes two subsections)
  - 1.2 Administrative Capacity
  - 1.3 Eligibility Survey
2. Proposed Program/Project
3. Program/Project Budget and Spending Plan
4. Financial Management
5. Attachments – Upload (maximum of 17 Attachments @ 250MB each)
6. Conditions for Submission and Verification

## Step by Step Instructions (continued)

**Step 9:** Complete the online SeamlessDocs Application in one session.

**Step 10:** Complete the online RFP Application by the deadline of April 6, 2023 at 5:00 p.m. (no exceptions).

Submit as complete. After this you can download and email a copy of your submission.



# Completing the RFP Application Online

- One session
- Questions and Responses
- Narratives
- Navigation
- Financials
- Attachments
- Submit
- Processing

## SECTION 1: ORGANIZATION PROFILE

1.1A. Legal Name of Organization.  
Click or tap here to enter text.

1.1B. DBA Name of Organization, if applicable.  
Click or tap here to enter text.

1.2. Organization Address  
<Address Line 1> Click or tap here to enter text.  
<Address Line 2 Unit #>Click or tap here to enter text.  
< City >< State >< Zip Code >

1.3. Provide a 25 to 35-word mission statement or statement of purpose, goals and objectives of your Organization. **500 CHARACTERS MAXIMUM**  
Click or tap here to enter text.

1.4. Provide a brief title for your Program/Project. **150 CHARACTERS MAXIMUM**  
Click or tap here to enter text.

1.5. Is this application for the continuation or expansion of an existing Program/Project or for implementation of a new Program/Project?  
 New Program/Project  
 Expansion of Existing Program/Project  
 Continuation of Existing Program/Project

1.6A. Provide the start date for the Program/Project. If no specific date is applicable, then enter July 1, 2023.  
Click or tap to enter a date.

1.6B. Provide the end date for the Program/Project. If no specific date is applicable, then enter June 30, 2024.  
Click or tap to enter a date.

1.7. Provide the total estimated budget for the Program/Project (including all funding sources) (Must equal the sum of amounts entered in Questions 3.1 plus 3.2A plus 3.3B.)  
Click or tap here to enter currency.

1.8. Funding request for this Proposal per Section 3.1.  
Click or tap here to enter currency.

1.9A. Primary Contact for RFP  
<First Name> Click or tap here to enter. <Last Name>Click to enter text.

1.9B. Primary Contact Title

## Completing the RFP Application Online

- Prepare for the application does NOT allow you to save and continue.

**TIP:** Prepare your responses and copy-and-paste responses from Word into SeamlessDocs Application for submittal.

**TIP:** Allow at least one hour to complete your entries into the Application and to upload attachments.

## Completing the RFP Application Online

- Most questions are narrative with some multiple choice.
- Some questions have multiple parts.
- Don't repeat information to be included under a different question.
- Provide succinct responses; there are character limits.

**TIP:** Be sure to respond to every question. Generally, "N/A" is provided as an option to respond. Otherwise, enter "0" or "N/A" if the question is not applicable to your RFP Application or Organization.

# Completing the RFP Application Online: Narratives

- Narrative questions are specific/detailed, similar to previous years.

Narrative response boxes allow scrolling to enter the maximum characters permitted.

1.3. Provide a 25- to 35-word mission statement or statement of purpose, goals and objectives of your Organization (500 characters maximum). \*

placemat fusce natoque orci praesent ad morbi auctor bibendum habitant semper tortor eu quisque, maecenas integer convallis id dictumst mauris felis eget cum pharetra quam porttitor mollis. Velit natoque cursus parturient mus id ut etiam ultrices sem, dictum ligula senectus ante vel nostra tristique vestibulum

# Completing the RFP Application Online

SECTION 1: ORGANIZATION PROFILE

1.1A. Legal Name of Organization

1.1B. DBA Name of Organization, if applicable

1.2. Organization Address

Street Address

City State Zip

Previous

Next

**TIP:** Be sure to scroll down to view all questions within each section.

If you wish to revisit an earlier question or section, Click "Previous" to go back.

Once all questions in a section have been answered, Click "Next" to move on.

**This field is required.**

Please note if the section is incomplete, the missing response will be flagged.

# Completing the RFP Application Online



To download, click *Financial Statements Templates*, and save to your own computer.

## Please download all:

 [Funding Guidelines](#)

 [Step by Step Instructions](#)

[Sample Application](#) (Microsoft Word format) or

 [Sample Application](#)

[Program Budget Templates](#) (Microsoft Excel format)

[Financial Statements Templates](#) (Microsoft Excel format)

Save each worksheet as an individual PDF.



# Completing the RFP Application Online

Enter your Organization name, and financial information in the highlighted cells for each worksheet.

	A	B	C	D	E	F	G	H
1	<b>PROGRAM / PROJECT BUDGET - FISCAL YEAR July 1, 2022 to June 30, 2023</b>							
2	<i>Organization Name</i>							
3		<b>Sources and Uses for Funds for Program/Project</b>	<b>This RFP Application Funding Request</b>	<b>"City - Other Sources" Funding</b>	<b>Anticipated Fee Income Funding</b>	<b>Non-City Other Funding</b>	<b>Total Program/Project Funding</b>	
4	<b>'ANTICIPATED AVAILABLE FUNDING' FOR PROGRAM/PROJECT</b>							
5	1	RFP Requested Funding		N/A	N/A	N/A	\$	-
6	2	"City - Other Sources" funding <i>(anticipated or allocated)</i>	N/A		N/A	N/A	\$	-
7	3	Program/Project Fee Income <i>(from participants)</i>	N/A	N/A		N/A	\$	-
8	4	"Non-City Other" Funding <i>(excluding participant fees)</i>	N/A	N/A	N/A		\$	-
9	5	Total	N/A	N/A	N/A	N/A	\$	-
10	<b>PROPOSED EXPENSES FOR PROGRAM/PROJECT UTILIZING FUNDING SOURCES AS NOTED ABOVE</b>							
11	6	Gross Salaries/Wages					\$	-
12	7	Employer Taxes					\$	-
13	8	Benefits					\$	-
14	9	Total Personnel Expenses	\$ -	\$ -	\$ -	\$ -	\$	-
15	10a	Consultant/ Contractual 1					\$	-
16	10b	Consultant/ Contractual 2					\$	-
17	10c	Consultant/ Contractual 3					\$	-
18	11	Accounting/Audit Services					\$	-
19	12	Facility/Space Rent Expense					\$	-
20	13	Utilities					\$	-
21	14	Phone/Computer/ Internet					\$	-

# Completing the RFP Application Online

To upload attachments, click on applicable box.

Click "here" to locate the correct file and select or drag the file to the black box.

If you make a mistake, just click in the black box again to select a different file or drag the correct file to the black box.

**5.3. Documents from Section 2: Completed Program/Project Budget and Justification using the Excel file templates**

- Proposed Program/Project Budget for FY2023 (July 1, 2022 through June 30, 2023)
- Program/Project Budget Justification (by line item)
- Personnel Schedule

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**Proposed Program/Project Budget for FY2023**

[Click Here to Upload](#)

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**Program/Project Budget Justification (by line item)**

[Click Here to Upload](#)

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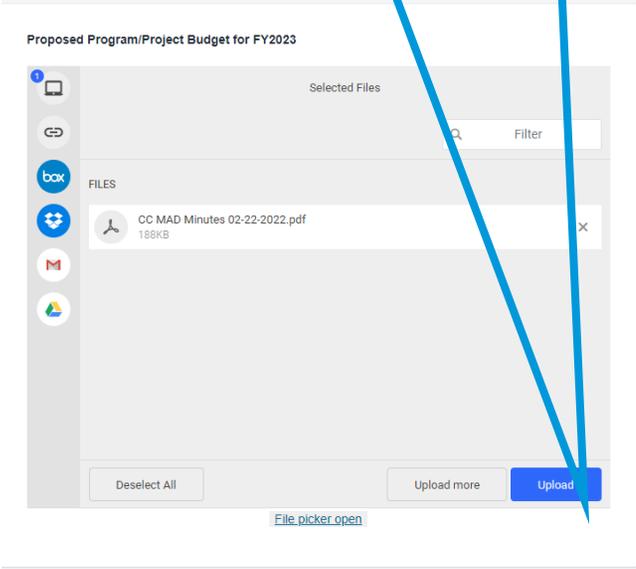
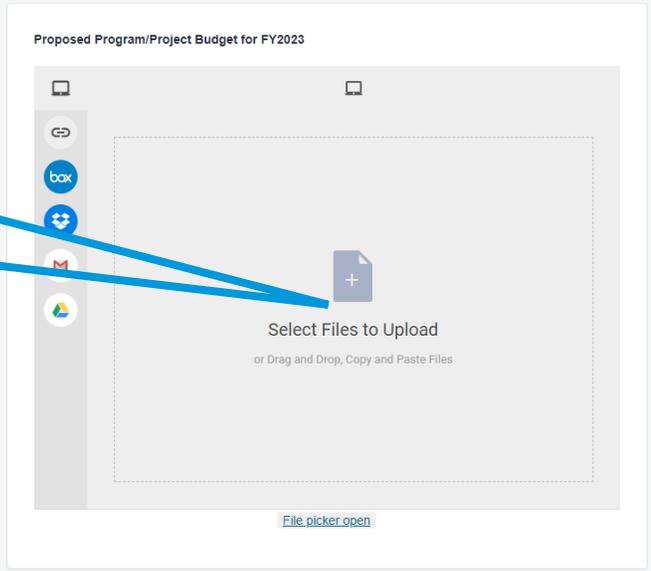
**Program/Project Budget Justification (by line item)**

[Click Here to Upload](#)

# Completing the RFP Application Online

Click "select files" to browse and select the correct file or drag the file to the marked box.

Once the file is selected, click "Upload".



You will see the attachment listed once the upload is complete.



# Completing the RFP Application Online

1. Acknowledge the conditions by checking the circle.

**ACKNOWLEDGEMENT OF CONDITIONS \***

I acknowledge, understand and accept these conditions.  
 I do not acknowledge, understand and accept these conditions.

*Note: You must select "I acknowledge, understand and accept these conditions" for your RFP Application to be considered.*

2. Complete the *Electronic Signature* information

**Sign Here \***

First Name: Amy  
 Last Name: Someone

Email: A\_Someone@sdassociation.net

Draw  Type  
 Amy Someone

*Amy Someone*

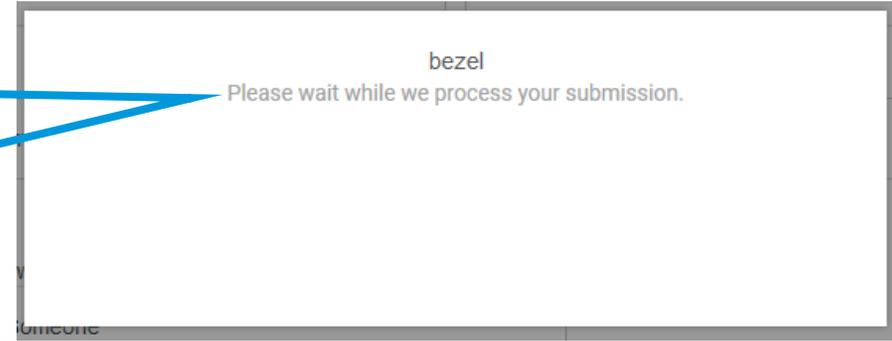
I agree to electronically sign and to create a legally binding contract between the other party and myself, or the entity I am authorized to represent.

3. Click on Agreement button

4. Click on *Submit*.

# Completing the RFP Application Online

This message is displayed while the submitted application is being processed.



Followed by:

## Thank you!

Your submission is complete.

Click here to download a copy of the application.

Click here to email a copy of the application.



**Thank you!**  
Your submission is complete.

**Share by Email**

Recipient(s):

Subject:

Note: (optional)

**San Diego- Fiscal Year 2020 RFP**  
City of San Diego

Submitted On: January 08, 2020 @ 1:17pm  
Submitted By: Meredith O'Brien-Drown

1.1.A. Legal Name of Organization	x
1.1.B. DDB Name of Organization, if applicable	x
1.2. Organization Address	x
1.3. Provide a 25- to 35-word mission statement or statement of purpose, goals and objectives of your Organization (500 characters maximum).	x
1.4. Provide a brief title for your Program/Project (150 characters maximum).	x
1.5. Is this application for the continuation of an existing Program/Project or for implementation of a new Program/Project?	New Program/Project
1.6.A. Please provide a start date for the Program/Project. If no specific date is applicable, then enter July 1, 2020.	12/19/2019
1.6.B. Please provide an end date for the Program/Project. If no specific date is applicable, then enter June 30, 2020.	12/19/2020
1.7. Provide the total estimated budget for the Program/Project (including all funding sources).	\$0.00
1.8. Funding request for this proposal per Section 3.	\$0.00
1.9A. Primary Contact	x
1.9B. Primary Contact Title	x
1.9C. Primary Contact Email	ad@gmail.com

# RFP Evaluation

- All responses will be evaluated by an Review Panel based on the scoring sheet shown in the Funding Guidelines.
- Preliminary Funding Recommendations in April
- Award Notification in June

Request for Proposals (RFP) Scoring Sheet			
<i>The document serves as a general preview to familiarize applicants with the RFP scoring process. Any minor informalities or irregularities in this preview will not invalidate the RFP process</i>			
FISCAL YEAR 2023 ECONOMIC DEVELOPMENT FUNDING			
RFP CRITERIA AND RESPONSES		FACTORS CONSIDERED	SCORING
<b>RFP SECTION 1: ORGANIZATION PROFILE</b>			
1-9	Is the entire section complete?	Completion and completeness of responses	
RFP QUESTION		GRADING	RATIONALE
<b>RFP SUB-SECTION 1.2: ADMINISTRATIVE CAPACITY</b>			
1.2.1	Provide an Organizational chart showing names and titles of your Organization's staff.	Attached = Qualified Not Attached = Not Qualified N/A - Microdistrict Organization not Incorporated = Qualified	Evidence of organizational structure and management systems in place.
1.2.2	Primary Administrator Who will administer the agreement between your Organization and the City should funds be awarded? Indicate whether this person is an Employee, Board Member, Contractor or Volunteer. Indicate the years of relevant experience. Describe the qualifications and experience managing contracts of the primary person who will administer the agreement between your Organization	Strong = Qualified Basic = Qualified Weak = Not Qualified N/A - Microdistrict Organization not Incorporated = Qualified	[STRONG] = Managed more than one agreement or grant in past + BASIC quals. [BASIC] = Managed at least one contract or grant in past and has qualifications such as legal expertise, decision-making authority or access to the organization's top decision- makers, access to legal expertise and/or reasonably transferable qualifications. [WEAK] = No contract or grant management experience



## Resources and Questions

- Funding Guidelines and Sample Application are available
- SeamlessDocs Online Portal Open on March 20
- Last day for questions to staff is April 3
- RFP Application Deadline is Thursday, April 6 at 5 p.m.
- Questions:
  - Email: [sdbusiness@san Diego.gov](mailto:sdbusiness@san Diego.gov)
  - Phone: 619-236-6700

For more information, key dates, and to download files, visit [www.sandiego.gov/economic-development-funding](http://www.sandiego.gov/economic-development-funding)