



# Contract Monitoring Division

We oversee the City's contracting process to ensure economic justice for all.



# LBE Program & Resources

**San Francisco aims to promote policies that stimulate fair and equitable involvement of local, economically disadvantaged businesses.**

**The Contract Monitoring Division certifies local businesses as SF LBEs and implements the mandate to include LBEs on City contracts.**

**CMD Attachment 2 Professional Services Contracts**  
[www.sfgov.org/cmd](http://www.sfgov.org/cmd)

## **Monthly Workshop**

Register 1st or 2nd Wednesday of each month

## **Certification Unit**

Apply to become a LBE or find a LBE to work with  
[lbecert@sfgov.org](mailto:lbecert@sfgov.org)

# How 14B Applies to LBEs and Non-LBEs for Contracts



## **RATING BONUS**

CMD CERTIFIED LOCAL BUSINESSES ARE ELIGIBLE TO RECEIVE A 10% RATING BONUS



## **SUBCONTRACTING REQUIREMENT**

ALL PROPOSERS MUST LIST CMD CERTIFIED LOCAL BUSINESSES FOR SUBCONTRACTING %



## **GOOD FAITH EFFORTS**

ALL PROPOSERS MUST DEMONSTRATE EQUITABLE PRACTICES THAT INCLUDE LOCAL BUSINESSES

# How 14B Applies to LBEs and Non-LBEs for this Grant



**RATING BONUS** CMD CERTIFIED  
LOCAL BUSINESSES ARE ELIGIBLE TO  
RECEIVE A 10% RATING BONUS



**SUBCONTRACTING REQUIREMENT**  
PERCENTAGE OF THE CONTRACT  
MUST LIST CMD CERTIFIED LOCAL  
BUSINESSES



**GOOD FAITH EFFORTS**  
DEMONSTRATE EQUITABLE  
PRACTICES THAT INCLUDE LOCAL  
BUSINESSES

LBE Rating  
Bonus  
Applies

10%: CMD Certified LBE  
Applicant

5%: CMD Certified SBA-  
LBE Applicant, only if  
Micro or Small LBE is  
not adversely affected

**CMD  
Attachment 2  
Forms Due  
with  
Grant  
Application**

**IF Firm is an LBE**

- ✓ CMD Form 2A: LBE Participation
- ✓ CMD Form 3: Affidavit
- ✓ CMD Form 4: Joint Venture (If applicable)
- ✓ CMD Form 5: Employment



**FORM 2A: CMD CONTRACT PARTICIPATION FORM**

Section 1: This form must be submitted with the proposal or the proposal may be deemed non-responsive and rejected. Proposer, each Joint Venture partner, Subconsultants, Vendors, and lower sub tiers must be listed on this form. The RFP/RFQ will state which LBE size category (e.g., Micro, Small, and/or SBA-LBE) can be used to meet the LBE sub participation requirement(s). All LBE Proposers/JVs with LBE participation must meet the LBE sub participation requirement(s). Any LBE Proposer/JV with LBE participation may not count its participation towards meeting the LBE sub participation requirement(s). Be sure to check the appropriate box for Rating Bonus under Section 2. If more space is needed for Section 1, attach additional copies of this form.

Contract No.:	
Contract Title:	<b>LBE SUBPARTICIPATION REQUIREMENT(S)</b>
Firm:	<input type="checkbox"/> Micro and Small-LBE Sub Requirement - ___%
Contact Person:	<input type="checkbox"/> Micro, Small, SBA-LBE Sub Requirement - ___%
Address:	<input type="checkbox"/> Micro-LBE Sub Requirement - ___%
City/ZIP:	<input type="checkbox"/> Small-LBE Sub Requirement - ___%
Phone, Email:	<input type="checkbox"/> SBA-LBE Sub Requirement - ___%

\*Type: Identify if Prime (P), JV partner (J), Subconsultant (S), or Vendor (V)

TYPE *	Firm	Portion of Work (Describe Scope(s) of Work)	% of Work	Indicate LBE or Non-LBE. If LBE, identify MBE, WBE, or OBE; AND Micro, Small, or SBA.	% of LBE Subwork (Carry-Over from % OF Work Column)		
					Micro	Small	SBA
			%		%	%	%
			%		%	%	%
			%		%	%	%
			%		%	%	%
			%		%	%	%
		<b>Total % of Work:</b>	<b>100%</b>	<b>Total LBE Sub Participation:</b>	%	%	%

I declare, under penalty of perjury under the laws of the State of California, that I am utilizing the above Consultants for the portions of work and amounts as reflected in the proposal for this Contract.

Owner/Authorized Representative (Signature): \_\_\_\_\_ Date: \_\_\_\_\_  
 Print Name and Title: \_\_\_\_\_

\*\* MBE = Minority Business Enterprise, WBE = Women Business Enterprise, OBE = Other Business Enterprise. See CMD website: <http://www.sfgov.org/cmd> for each firm's status

CMD  
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# CMD Attachment 2 Forms Due with Grant Application



## Section 2. Rating Bonus

Check applicable boxes.

- A.  NO Rating Bonus Requested 0%
- B.  Contracts with an Estimated Cost in Excess of \$400,000 and Less Than or Equal to \$10,000,000. See instructions in Sections 2.01 and 2.02.
- Micro or Small-LBE 10%
  - Joint Venture 7.5%
  - Joint Venture 5%
  - Joint Venture (Micro or Small-LBEs only) 10%
  - SBA-LBE 5%

- C.  Contracts with an Estimated Cost in Excess of \$10,000 and Less Than or Equal to \$10,000,000. The below rating bonuses DO NOT apply to Chapter 21 contracts and only apply to Chapter 6 contracts, including Chapter 6.40. See instructions in Section 2.01 for details. This Neighborhood/Zip Code LBE Program shall apply to projects located within the jurisdictional boundary of San Francisco. The program shall not apply to Job Order Contracts (JOC), As-Needed contracts, or other contracts where no specific project location is specified at the time of proposal. The RFP/RFQ will clearly state whether the Pilot Neighborhood/Zip Code LBE Program is applicable to the specific project. A Proposer may receive up to a maximum rating bonus of 13% depending on the particular application.

### Prime Neighborhood/Zip Code LBE rating bonus:

- Prime Neighborhood LBE (or a JV where the Neighborhood LBE JV partner(s)' participation is at least 40%) 1%

OR

- Prime Zip Code LBE (or a JV where the Prime Zip Code LBE JV partner(s)' participation is at least 40%) 1.5%

### Subconsulting Neighborhood/Zip Code LBE rating bonus:

- Sub Neighborhood LBE 0.5%

OR

- Sub Zip Code LBE 1.5%

- D.  Contracts in Excess of \$10,000,000 and Less Than or Equal to \$20,000,000. See instructions in Section 2.01.

- Micro, Small, or SBA-LBE 2%

- E.  Mentor-Protégé Program Bid Discount/Rating Bonus. The Mentor Protégé rating bonus is not applicable to professional services contracts. However, for this CMD Attachment 2, the Mentor Protégé rating bonus/bid discount is applicable for Design-Build and/or CM/GC projects only. See instructions in Section 2.01.

- Mentors of the Mentor-Protégé Program 1%





# Q&A

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