

File No. 241090

Committee Item No. 3

Board Item No. 10

## COMMITTEE/BOARD OF SUPERVISORS

### AGENDA PACKET CONTENTS LIST

Committee: Budget and Finance Committee

Date January 22, 2025

Board of Supervisors Meeting

Date January 28, 2025

#### Cmte Board

- |                                     |                                     |  |
|-------------------------------------|-------------------------------------|--|
| <input type="checkbox"/>            | <input type="checkbox"/>            | Motion                                       |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Resolution                                   |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Ordinance                                    |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Legislative Digest                           |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Budget and Legislative Analyst Report        |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Youth Commission Report                      |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Introduction Form                            |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Department/Agency Cover Letter and/or Report |
| <input type="checkbox"/>            | <input type="checkbox"/>            | MOU  |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Grant Information Form                       |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Grant Budget                                 |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Subcontract Budget                           |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Contract/Agreement                           |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Form 126 – Ethics Commission                 |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Award Letter                                 |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Application                                  |
| <input type="checkbox"/>            | <input type="checkbox"/>            | Public Correspondence                        |

#### OTHER (Use back side if additional space is needed)

- |                                     |                                     |   |
|-------------------------------------|-------------------------------------|---|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <u>Statement on Retroactivity 10/28/2024</u>                      |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <u>OEWD Presentation 1/22/2024</u>                                |
| <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <u>Presidential Action Memo – Temp Assignment – BFC 1/22/2025</u> |
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Completed by: Brent Jalipa

Date January 16, 2025

Completed by: Brent Jalipa

Date January 23, 2025

1 [Accept and Expend Grant - Retroactive - James Irvine Foundation - Public Workforce  
2 Capacity Fund - \$496,684]

3 **Resolution retroactively authorizing the Office of Economic and Workforce**  
4 **Development to accept and expend a grant in the amount of \$496,684 from the James**  
5 **Irvine Foundation during the grant period of November 1, 2024, through November 1,**  
6 **2026.**

7  
8 WHEREAS, The Administrative Code requires City departments to obtain Board of  
9 Supervisors' approval to accept or expend any grant funds (Section 10.170 et seq.); and

10 WHEREAS, The James Irvine Foundation released funding for the Public Workforce  
11 Capacity Fund; and

12 WHEREAS, The Office of Economic and Workforce Development, proposed  
13 sustainability efforts to improve holistic outcomes for workers who are low-income,  
14 immigrants, possess limited English proficiency, and lack right-to-work authorization in  
15 partnership with Mission Action DBA Dolores Street Community Services and Mission  
16 Economic Development Agency (MEDA); and

17 WHEREAS, The James Irvine Foundation awarded the Office of Economic and  
18 Workforce Development, the Public Workforce Capacity Fund grant; and

19 WHEREAS, The grant does not require an Annual Salary Ordinance amendment; and

20 WHEREAS, The Project budget includes indirect costs in the amount of \$41,517.00 as  
21 determined by the 10% de minimis rate for modified total direct costs; now, therefore, be it

22 RESOLVED, That the Board of Supervisors hereby approves the inclusion of indirect  
23 costs in the grant budget; and, be it

24 FURTHER RESOLVED, That the Office of Economic and Workforce Development is  
25 responsible for oversight of funding from The James Irvine Foundation; and, be it

1           FURTHER RESOLVED, That the Board of Supervisors hereby authorizes the Office of  
2 Economic and Workforce Development to accept and expend, on behalf of the City and  
3 County of San Francisco, a grant from The James Irvine Foundation, for the Public Workforce  
4 Capacity Fund grant in the amount of \$496,684; and, be it

5           FURTHER RESOLVED, That the Director of the Office of Economic and Workforce  
6 Development is authorized to enter into the Agreement on behalf of the City.

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1 Recommended:

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5 Sarah Dennis Phillips, Director

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8 Approved:

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11 \_\_\_\_\_ /s/

12 London N. Breed, Mayor

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\_\_\_\_\_ /s/

Greg Wagner, Controller

**File Number:** 241090  
(Provided by Clerk of Board of Supervisors)

**Grant Resolution Information Form**  
(Effective July 2011)

Purpose: Accompanies proposed Board of Supervisors resolutions authorizing a Department to accept and expend grant funds.

The following describes the grant referred to in the accompanying resolution:

- 1. Grant Title: Irvine Foundation Public Workforce Capacity Fund
- 2. Department: Office of Economic and Workforce Development
- 3. Contact Person: Alesandra Lozano Telephone/Email: alesandra.lozano@sfgov.org
- 4. Grant Approval Status (check one):  
 Approved by funding agency                       Not yet approved

5. Amount of Grant Funding Approved or Applied for: \$496,684.00

- 6. a. Matching Funds Required: \$0
- b. Source(s) of matching funds (if applicable):
- 7. a. Grant Source Agency: Irvine Foundation
- b. Grant Pass-Through Agency (if applicable):

8. Proposed Grant Project Summary:

Project is a capacity building grant to improve holistic outcomes for workers who are low-income, immigrants, limited English proficient, and lacking right-to-work authorization.

9. Grant Project Schedule, as allowed in approval documents, or as proposed:

Start-Date: 11/01/2024    End-Date: 11/01/2026

- 10. a. Amount budgeted for contractual services: \$90,000
- b. Will contractual services be put out to bid? N/A
- c. If so, will contract services help to further the goals of the Department’s Local Business Enterprise (LBE) requirements? N/A
- d. Is this likely to be a one-time or ongoing request for contracting out? N/A
- 11. a. Does the budget include indirect costs?  
 Yes                       No
- b. 1. If yes, how much? \$41,517.00
- b. 2. How was the amount calculated? 10% de minimis rate for modified total direct costs.
- c. 1. If no, why are indirect costs not included?  
 Not allowed by granting agency     To maximize use of grant funds on direct services  
 Other (please explain):
- c. 2. If no indirect costs are included, what would have been the indirect costs?

12. Any other significant grant requirements or comments: N/A

**\*\*Disability Access Checklist\*\* (Department must forward a copy of all completed Grant Information Forms to the Mayor's Office of Disability)**

13. This Grant is intended for activities at (check all that apply):

- |  |   |   |
|--|---|---|
| <input checked="" type="checkbox"/> Existing Site(s) | <input checked="" type="checkbox"/> Existing Structure(s) | <input checked="" type="checkbox"/> Existing Program(s) or Service(s) |
| <input type="checkbox"/> Rehabilitated Site(s)       | <input type="checkbox"/> Rehabilitated Structure(s)       | <input type="checkbox"/> New Program(s) or Service(s)                 |
| <input type="checkbox"/> New Site(s)                 | <input type="checkbox"/> New Structure(s)                 |   |

14. The Departmental ADA Coordinator or the Mayor's Office on Disability have reviewed the proposal and concluded that the project as proposed will be in compliance with the Americans with Disabilities Act and all other Federal, State and local disability rights laws and regulations and will allow the full inclusion of persons with disabilities. These requirements include, but are not limited to:

1. Having staff trained in how to provide reasonable modifications in policies, practices and procedures;
2. Having auxiliary aids and services available in a timely manner in order to ensure communication access;
3. Ensuring that any service areas and related facilities open to the public are architecturally accessible and have been inspected and approved by the DPW Access Compliance Officer or the Mayor's Office on Disability Compliance Officers.

If such access would be technically infeasible, this is described in the comments section below:

Comments:

Departmental ADA Coordinator or Mayor's Office of Disability Reviewer:

Armina Brown  
(Name)

Workforce Operations Manager  
(Title)

Date Reviewed:  \_\_\_\_\_

10/15/2024 | 3:21 PM PDT  
(Signature Required)

**Department Head or Designee Approval of Grant Information Form:**

Sarah Dennis Phillips  
(Name)

Executive Director, Office of Economic and Workforce Development  
(Title)

Date Reviewed:  \_\_\_\_\_

10/15/2024 | 2:57 PM PDT  
(Signature Required)



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# **James Irvine Foundation Better Careers Initiative Accept and Expend**

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January 22, 2025  
Jennifer Salerno, Workforce Planning Manager

# James Irvine Foundation Public Workforce Capacity Fund

- ❖ To advance the model of worker-owned cooperatives in an effort to provide low-income, immigrant workers without right-to-work authorization with viable, long-term employment opportunities.
- ❖ To build capacity of existing providers to scale, identify additional providers and build capacity to replicate the program model, continue collecting quantitative and qualitative data from the population, and establish a group of subject matter experts to offer feedback on program design and implementation.
- ❖ To gather and assess information on the development, worker-owner experiences, growth, challenges, and lessons learned to determine the effectiveness of strategies being implemented and modify as needed.



# OEWD Worker Cooperative Programs

- ❖ The James Irvine Foundation's Public Workforce Capacity Fund (PWCF) grant provides funding for capacity building strategies aimed at expanding OEWD's existing worker-owned cooperative programs.
- ❖ Over the last four years, OEWD has piloted and implemented the worker-owned cooperative model as an effective intervention to support low-income, limited English proficient, immigrant workers without right-to-work authorization.
- ❖ The PWCF core partners are – Mission Action and Mission Economic Development Agency (MEDA).
- ❖ These core partners support three distinctive worker-owned cooperatives. Collectively, the cooperatives consist of 86 members, 48 of whom have obtained full-time or part-time employment.
- ❖ The industries associated with the three cooperatives are home healthcare, community health and wellness, and early childhood education.

# James Irvine Foundation Budget

<b>OEWD COSTS</b>	<b>TOTAL</b>
Salary - (.25 FTE 0923 Manager + .50 9774 Senior Community Development Specialist) x 2 years	\$223,691.00
Fringe - (.25 FTE 0923 Manager + .50 9774 Senior Community Development Specialist) x 2 years	\$89,476.20
Meeting Expenses (\$5,000/quarterly meeting)	\$40,000.00
Conference Registration	\$10,000.00
Travel	\$2,000.00
Indirect Costs (FMDC @ 10%)	\$41,516.74
<b>Total OEWD Costs</b>	<b>\$406,683.94</b>
<b>CONTRACTUAL</b>	
Partner Organizations	\$90,000.00
<b>Total Contractual:</b>	<b>\$90,000.00</b>
<b>TOTAL BUDGET</b>	<b>\$496,684.14</b>

# Need for Retroactive Approval

*The James Irvine Foundation sent the Notice of Intent to Award on 9/13/2024 with a start date of 11/1/2024. OEWD initiated the accept and expend process in advance of the contract start date, but it did not receive approvals from all required City departments until after 11/1/2024.*

*This grant was introduced at the Board of Supervisors on 11/5/2024.*

## **ORGANIZATIONAL CONTEXT: ABOUT SAN FRANCISCO WORKFORCE DEVELOPMENT BOARD**

In the last ten years, the San Francisco Office of Economic and Workforce Development (SFOEWD)—the operational arm of the local workforce development board—has made significant investments in programming to advance racial equity and holistically support workers who are low-income, immigrants, limited English proficient, and lacking right-to-work authorization. Additional investment in capacity building is necessary to improve holistic outcomes for this economically vulnerable population and scale employment and training services for quality jobs in order to meet a growing need.

According to the American Community Survey<sup>1</sup>, over a third of San Franciscans are born outside of the United States. Over 43% of residents speak a language other than English at home, with 25% speaking Asian and Pacific Islander languages and 10.4% speaking Spanish. Administrative data from the San Francisco Human Services Agency—an SFOEWD partner organization—indicate that nearly 84,000 low-income clients have limited English proficiency, with the number increasing every year. Moreover, according to the Migration Policy Institute<sup>2</sup>, there are an estimated 43,000 immigrants without right-to-work authorization in San Francisco.

SFOEWD oversees the implementation of local, state, and federal funding for San Francisco’s workforce system. The SFOEWD Workforce Division sub-grants over \$30 million annually to over 70 community-based providers that are deeply embedded in their communities. This approach allows SFOEWD to ensure high quality, culturally responsive service delivery for workers who face barriers to employment or who have been historically excluded from the labor force, such as workers who are low-income, immigrants, limited English proficient, and lacking right-to-work authorization. Services for this population are housed in SFOEWD’s Industries of Opportunity portfolio, an incubator strategy for new training programs aligned with high-growth sectors, targeted occupations, and tailored services for special populations.

This barrier to economic opportunity impacts a huge portion of the local population, and SFOEWD is exploring ways to build new programs and scale existing programs to support serving a growing, high-need population. While lack of right-to-work authorization limits access to many federal and state-funded workforce programs, public-private partnerships are the ideal vehicle for implementing innovative solutions.

## **OPPORTUNITY: SCALING SOLUTIONS FOR BROADER IMPACT**

Restrictions on immigrants without right-to-work authorization preclude workers from accessing employment and state/federal workforce programming. New strategies and initiatives are necessary to meet the needs of the immigrant community and counteract the

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<sup>1</sup> U.S. Census Bureau. "Selected Characteristics of the Native and Foreign-Born Populations." *American Community Survey, ACS 1-Year Estimates Subject Tables, Table S0501, 2022*, <https://data.census.gov/table/ACSST1Y2022.S0501?q=San Francisco County, California>. Accessed on June 27, 2024.

<sup>2</sup> Migration Policy Institute. "Profile of the Unauthorized Population: San Francisco County, CA," 2019, <https://www.migrationpolicy.org/data/unauthorized-immigrant-population/county/6075>, Accessed on June 27, 2024.

systemic side-lining of immigrant workers into survival jobs which exploit vulnerable workers. Many immigrant workers – such as day laborers and domestic workers – participate in the informal economy, which is comprised of employment that is not protected by the government or offered the same rights as formal employment arrangements. This often leads to undocumented immigrant workers experiencing exploitation. The average day laborer receives near minimum wage and only about 23 hours of work per week, and 66% of day laborers experience a pay-rated violation each week<sup>3</sup>.

In lieu of traditional employment, one pathway to economic self-sufficiency for this vulnerable population is business ownership, especially through a cooperative business model. A worker-owned cooperative is a values-driven business that prioritizes worker and community benefit. Cooperatives, which function as Limited Liability Cooperatives (LLC), insulate workers from exploitation in the workplace by integrating democratic representation into the corporate governance model, which allows workers to organize, exercise worker voice, and advocate for their working conditions, wages, and partnerships. Workers retain ownership and participate in the financial success of the business based on their labor contribution.

The pathway to higher wages, health benefits, and access to retirement is governed by the democratic process for each worker-owned collaborative. As their revenue and customer base stabilizes, the collaborative members themselves will decide what portion of profit can be devoted to the benefits of the worker-owners versus the costs associated with supporting the collective. Due to their legal status, this may be the first, or only, opportunity to access the protections and benefits offered to most ordinary workers.

Over the last four years, OEWD has piloted and then implemented the worker-owned cooperative model as an effective intervention to support low-income, limited English proficient, immigrant workers without right-to-work authorization. SFOEWD's partner agencies Mission Economic Development Agency (MEDA) and Dolores Street Community Services (DSCS) have created and implemented three distinct worker-owner cooperatives. The Promotoras Activas San Francisco (PASF) and Home Support and Companionship (HSC) cooperatives administer healthcare services to marginalized, primarily monolingual Latinx communities in San Francisco. Both PASF and HSC offer access to training, stable and viable employment, worker protections, and ownership opportunities that have historically not been offered to immigrant workers. The third cooperative, Realizing Education and Creating Hope (REACH) utilizes the same worker-owner structure to administer early educational education (ECE) services to low-income, primarily Latinx San Francisco residents. These programs remediate systemic racial and ethnic inequities by providing immigrants with in-depth training and assisting with access to higher education, professional development, and business ownership.

Each of the three cooperatives develops worker-owners into jobs in industries that lead to economic mobility. The REACH program focuses on the high-demand sector of early care and education (ECE), which was severely impacted during COVID-19 pandemic and has grown following the pandemic. ECE continues to face provider staffing shortages, and the industry has the potential to establish career pathway opportunities for self-sufficiency and economic mobility, especially in light of state and federal investments in the care economy sectors. While

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<sup>3</sup> Gonzalez, A. (2007). Day Labor in the Golden State. *Public Policy Institute California Economic Policy*, 3(3).

entry-level ECE jobs pay near minimum wage, the REACH program guarantees a training wage of \$28/hour. REACH's program has a clear, sector-based pathway with career ladders and targeted occupations that have entry-level access points, accelerated on-the-job training, on-ramps to a sustainable living wage, benefits, ongoing professional development, predictable work schedules, and ample opportunity for career and wage advancement.

The PASF and HSC cooperatives serve the healthcare industry, which has been identified on the national, state, and local levels as a workforce investment priority due to increasing demand for new workers, replacement of retirees, and skills development in response to new technologies, treatment options, and service delivery options. Participants of the PASF and HSC cooperatives receive training wages of \$25-\$30 per hour, while also receiving financial capability training.

The PASF, HSC, REACH programs have demonstrated success over the last four years, and community members report growing need in serving immigrant workers without right-to-work authorization. Funding from the Irvine Foundation Public Workforce Capacity Fund will allow SFOEWD to build off of the programs' existing success and grow programming to support a highly vulnerable population by building internal capacity to scale and replicate these models for the target population, building provider capacity to expand models, as well as exploring other occupations or sectors which may be a good fit for this intervention model.

#### **APPROACH: WORKER VOICE LEADS THE PROJECT**

SFOEWD needs to build capacity of existing providers to scale, identify additional providers and build capacity to replicate the program model, continue collecting quantitative and qualitative data from the population, and establish a group of subject matter experts to offer feedback on program design and implementation.

Worker voice is core to SFOEWD's approach. SFOEWD implements an equity-led and community-based procurement model, where worker input is centered from planning to design to implementation and built into the evaluation process. As an example, as the community engagement plan for its last four-year procurement cycle, SFOEWD convened two virtual meetings with over 500 participants, as well as an immigrant worker community strategy meeting to gather input from community members and service providers on the workforce needs of the immigrant community. SFOEWD distributed a multi-language community survey to gather input on existing programs and community needs. These inputs surfaced the need for worker-owned cooperatives, especially within the Latinx immigrant worker community, and SFOEWD developed program areas and partnerships in response to this need. SFOEWD needs additional support to continue to collect inputs from stakeholders to substantiate need, iterate program design, and build partnerships to grow the model.

The worker cooperative model is unique in that worker voice is integral to the success of the program. Training in the democratic model of worker ownership enables each worker-owner to participate in their cooperative's structure, design, and decisions. Because cooperatives are worker-owned organizations, these entities are managed by democratic ownership principles where the cooperative votes on policies, procedures, and sustainable development models. Each member has one vote, and contributes to how programming is shaped, modified, and implemented. Program participants will not just inform programming,

they will democratically determine everything from wages to working conditions while communicating their needs to their host community organization. SFOEWD will continue to solicit feedback from the worker cooperatives for the design and implementation of the funding model.

After program design, SFOEWD continues to collect quantitative and qualitative program data from staff, participants, employers, and via survey in order to meaningfully evaluate programs and make mid-point adjustments. SFOEWD also provides 1:1 technical assistance to providers to ensure program success, and convenes providers regularly in several small, medium, and large communities of practice based on program area. Additionally, SFOEWD monitors all programs annually, which includes technical assessment of accessibility and performance, as well as client interviews to gather feedback from clients on their user experience. These methods have produced data which validate the worker-cooperative model and the three funded programs while establishing increased need. As part of its capacity building efforts related to this project, SFOEWD intends to continue these activities for a larger caseload and/or portfolio, and the SFOEWD team will convene quarterly gatherings for the community organizations to share their successes and challenges, participate in resource sharing and staff development, and plan sustainability strategies for the initiative.

SFOEWD also supports programs in building research and evaluation capacity. The three cooperatives developed a Spanish-English bilingual pre-program survey to gauge participants' income, soft skills, occupational skills, and housing and food security. As the program continues, quantitative data, such as income and # hours worked, are recorded by the cooperative's accounting system(s), and thereby compared to the self-reported, pre-cooperative figures. SFOEWD uses this information to build success stories and narratives for program evaluation.

## **PROJECT TEAM**

SFOEWD Industries of Opportunity Program Manager, Jennifer Salerno, will be responsible for coordinating the project for SFOEWD and working closely with key stakeholders and community-based partners, such as MEDA, DSCS, and the Democracy at Work Institute. Ms. Salerno will provide technical assistance to build capacity of new and existing community-based partners, as well as conduct data collection and performance evaluation. Ms. Salerno will convene quarterly meetings with community partners focused on project management and oversight. This project will also coincide with planning for the next four-year procurement, and Ms. Salerno will lead community outreach to the priority population for planning purposes.

Community partners such as MEDA and DSCS currently deliver direct services including recruitment, enrollment, support services, case management, career navigation and retention, and as such are valuable thought partners for building capacity and scale in services for this special population. Partners will serve as the subject matter experts for the project, and work collectively for ongoing oversight, resource development, and sustainability planning.

Partners are located in the San Francisco Mission District, which has a poverty rate higher than the City average and where the unemployment rate for Latinx residents is higher than for White residents of the same district. The Mission District is an epicenter for Latinx residents, small businesses, advocacy and service organizations, artists and activists, and historically marginalized communities.

MEDA is a Latinx-led nonprofit organization that invests in underserved Latinx families through direct services, community development initiatives and policy advocacy. Their work is collaborative, being part of a trusted infrastructure of culturally responsive service providers in the welcoming immigrant neighborhood of San Francisco's Mission District. They leverage the community's inherent strengths to collectively build Latinx prosperity, community ownership and civic power. This program has been, and will continue to be supported by, Jose Mariscal, Associate Director of Workforce Development; Dairo Romero, Community Initiatives Manager; and Ernesto Martinez, Vice President of Asset Building Programs.

DSCS has been Mission District community non-profit organization that has served Latinx immigrant families since 1982. DSCS administers education, and free or low-cost services to immigrants such as legal services for immigrants facing deportation, shelter for refugees, and collaboratives to advance immigrants' community power and opportunity, while advocating for dignified work and fair wages for all. This project has been, and will continue to be, supported by Cooperative Developer Manager Emiliano Bourgois-Chacon as well as Sanika Mahajan, Director of Community Engagement and Organizing.

The Democracy at Work Institute (DAWI), a cooperative development specialist, provided start-up guidance and will continue to provide ongoing coaching, mentoring and training to the three cooperatives' members. DAWI wrote that "the cooperative model has proven to be an effective tool for creating and maintaining sustainable, dignified jobs; generating wealth; improving the quality of life of workers; and promoting community and local economic development." SFOEWD intends to continue drawing from DAWI's subject matter expertise for support.

## **PROGRESS AND LEARNING**

The cooperative model is predicated on helping vulnerable workers develop skills and increase earning potential, assets, and household income. The three cooperatives outlined in this proposal, supported by community-based organizations that have the ability to leverage their initial funding, deliver an effective strategy for community members who have historically been left out of the formal economy and traditional labor market to become worker-owners, and have access to economic stability. Through the partnership, information on the development, worker-owner experiences, growth, challenges, and lessons learned will be gathered to assess the effectiveness of strategies being implemented and modified as needed.

Since their inception, PASF, HSC, and REACH have trained 90 participants. Funding from the Irvine Foundation will allow SFOEWD to scale and sustain the activities across existing and new providers. SFOEWD aims to build its internal capacity and support an external funding strategy in order to enroll an additional 125 new program participants by the end of Year 2. SFOEWD also intends to identify if there are other occupations or sectors which demonstrate good fit for the population and are aligned with the City's sector strategy.



Scaling Solutions for San Francisco Immigrants  
San Francisco Office of Economic & Workforce Development

**Appendix A: Budget Template**

**Proposal Budget For:** San Francisco Office of Economic and Workforce Development

Expense Category	Amount Requested
<b>Direct Expenses</b>	
Salaries:	
Sector Programs Manager (.25% FTE x 2 years)	\$89,089.00
Industries of Opportunity Manager (50% FTE x 2 years)	\$134,602.00
Benefits: (40% of salaries)	\$89,476.40
Other Direct Expenses:	\$0
Facilities cost for project (venue, furniture, internet, etc.)	\$0
Meeting expenses (\$5,000 per quarterly meeting)	\$40,000.00
Publications and Conference/Training Registration Fees	\$10,000.00
Travel (airfare, ground transportation, lodging, meals/incidentals)	\$2,000.00
<b>Subtotal</b>	\$365,167.40
Indirect costs	\$41,516.74
Consultant Fees	
Partner Organization Expenses	\$90,000.00
<b>Total</b>	\$496,684.14

**Irvine Foundation Public Workforce Capacity Fund (November 1, 2024 - November 1, 2026)**

<b>Budget Item</b>	<b>Total</b>
OEWD:	
.25 Staff Salary - 0923 Manager II x 2 years	\$ 89,089.00
.25 Staff Fringe - 0923 Manager II x 2 years	\$ 35,635.00
.50 Staff Salary - 9774 Senior Community Development Specialist x 2 years	\$ 134,602.00
.50 Staff Fringe - 9774 Senior Community Development Specialist x 2 years	\$ 53,841.00
Meeting Expenses (\$5,000/quarterly meeting)	\$ 40,000.00
Conference Registration	\$ 10,000.00
Travel	\$ 2,000.00
Indirect Costs (FMDC @ 10%)	\$ 41,517.00
<b>Total OEWD Costs</b>	<b>\$ 406,684.00</b>
<b>Contractual:</b>	
Partner Organizations	\$ 90,000.00
<b>Total Contractual:</b>	<b>\$ 90,000.00</b>
<b>Total Budget</b>	<b>\$ 496,684.00</b>



September 13, 2024

Chad Houston,  
Director of Workforce Strategy,  
SF Office of Economic and Workforce Development  
1 South Van Ness, 5<sup>th</sup> Floor  
San Francisco, CA. 94103

Dear Chad,

Congratulations! On behalf of the James Irvine Foundation's Better Careers initiative team, I am delighted to share that San Francisco Office of Economic and Workforce Development (SFOEWD) proposal to the Public Workforce Capacity Fund (PWCF) has been recommending for funding!

PWCF aims to provide California's local public workforce development boards with flexible funding to build their internal capacity to advance racial equity, serve customers more holistically, and promote access to quality jobs within the workforce development field and in the communities that boards serve.

PWCF intends to recommend two grants of \$248,342.00 each to Amalgamated Foundation to support each year of the work of SFOEWD. Amalgamated Foundation, Irvine's partner that independently oversees the Fund, will provide the first of two award letters, and share payment terms and conditions after final approval. The award letter will serve as the grant agreement.

We look forward to the opportunity to support SFOEWD as we make progress towards Irvine's North Star—a California where all low-income workers have the power to advance economically!

Please direct any questions to Kriztina at [kpalone@irvine.org](mailto:kpalone@irvine.org).

In Partnership,

Kriztina Palone  
Sr. Program Officer  
James Irvine Foundation



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**Grant Award Recommendation Notice: James Irvine Foundation Public Workforce Capacity Fund**

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**From** Kriztina Palone <kpalone@irvine.org>

**Date** Fri 9/13/2024 2:46 PM

**To** chad.houston@sfov.org <chad.houston@sfov.org>; Hand, Jennifer (ECN) <jennifer.hand@sfgov.org>

**Cc** Haden Springer <hspringer@irvine.org>

2 attachments (82 KB)

PWCF Grant Award Recommendation Letter\_Pacific Gateway.docx; PWCF Grant Recommendation Review Form\_FINAL.docx;

This message is from outside the City email system. Do not open links or attachments from untrusted sources.

Greetings Director Houston and Jennifer,

Congratulations! On behalf of the James Irvine Foundation's Better Careers initiative team, I am delighted to share that San Francisco Office of Economic and Workforce Development's (SFOEWD) proposal to the Public Workforce Capacity Fund (PWCF) has been recommending for funding! Please find a formal grant award recommendation letter attached.

Through PWCF, we aim to provide California's local public workforce development boards with flexible funding to build their internal capacity to advance racial equity, serve customers more holistically, and promote access to quality jobs within the workforce development field and in the communities that boards serve.

As indicated in the attached recommendation letter, a final grant award decision and payment will be made by [Amalgamated Charitable Foundation](#), which Irvine has engaged to oversee the Fund and associated grantmaking. Following an award, I and my Better Careers initiative colleague, Haden (cc'd), will provide your team with partnership and support throughout the grant period, to help ensure that SFOEWD is successful in its efforts. I will serve as your primary point of contact for the duration of the grant.

I would like to schedule a brief call as soon as possible to get acquainted, review information collection needs to facilitate a final grant award decision and payment by Amalgamated Charitable Foundation and answer any questions you may have at this stage. Please use this [scheduling link \(https://doodle.com/meeting/participate/id/en87IV7b\)](https://doodle.com/meeting/participate/id/en87IV7b) to select a date/time, and I will circulate a meeting invitation.

In advance of our call, please review the attached form, titled "PWCF Grant Recommendation Review Form." Feel free to begin populating the form with the information requested as this will help expedite the grantmaking process.

We look forward to this opportunity to partner more closely with SFOEWD and other workforce boards to build the capacity of California's local public workforce development system's to serve customers and communities in more holistic ways that advance racial equity and expand access to quality jobs!

A reply at your earliest convenience is greatly appreciated.

In Partnership,

Kriztina

**Kriztina Palone**

Senior Program Officer

[www.irvine.org](http://www.irvine.org)





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**RE: Grant Award Recommendation Notice: James Irvine Foundation Public Workforce Capacity Fund**

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**From** Kriztina Palone <kpalone@irvine.org>  
**Date** Thu 10/10/2024 8:01 AM  
**To** Hand, Jennifer (ECN) <jennifer.hand@sfgov.org>  
**Cc** Houston Chad (ECN) chad.houston@sfgov.org Floyd Rodriguez Ren (ECN) ren.floyd-rodriguez@sfgov.org>; Paisley, Charles (ECN) <charles.paisley@sfgov.org>; Salerno, Jennifer (ECN) <jennifer.salerno@sfgov.org>

Good Morning Jennifer,

My utmost apologies for the delay in getting back to you [REDACTED]  
[REDACTED] Thank you so much for your team's patience and understanding

Thank you for sending over your completed registration form Regarding to your question about the term of the grant, you can absolutely use November 1<sup>st</sup>, 2024, through November 1<sup>st</sup>, 2026, as the terms of the grant.

**Just a couple of updates since we last spoke that I need to make you aware of:**

- Since your department needs BOS approval to accept + receive the grant, the Amalgamated foundation informed us that the Irvine team is to process your recommendation form in their system once your elected body has approved receiving the grant
- If by chance, that process is completed before my return to work, pls let my colleague, Haden Springer know She will be your point of contact while I'm out Her email is [hspringer@irvine.org](mailto:hspringer@irvine.org)
- I will be reaching out to all of my PWCF grantees upon my return, to get a status update on their elected approval process
- If your approval process is completed by or before 11/18, once you contact Haden that your grant has been approved, she will process your paperwork in the system to begin Amalgamated's process of allocating the grant to your department through their online portal.

Much thanks again for your continued patience and flexibility with us and our grantmaking process. I look forward to be in contact the week of Nov 18<sup>th</sup>, if not sooner

Best Regards,  
Kriztina

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**From:** Hand, Jennifer (ECN) <jennifer.hand@sfgov.org>  
**Sent:** Friday, October 4, 2024 10:40 AM  
**To:** Kriztina Palone <kpalone@irvine.org>  
**Cc:** Houston, Chad (ECN) <chad.houston@sfgov.org>; Floyd-Rodriguez, Ren (ECN) <ren.floyd-rodriguez@sfgov.org>; Paisley, Charles (ECN) <charles.paisley@sfgov.org>; Salerno, Jennifer (ECN) <jennifer.salerno@sfgov.org>  
**Subject:** Re: Grant Award Recommendation Notice: James Irvine Foundation Public Workforce Capacity Fund

**CAUTION: This email originated from outside of the organization. Do not click links or open attachments unless you recognize the sender and know the content is safe.**



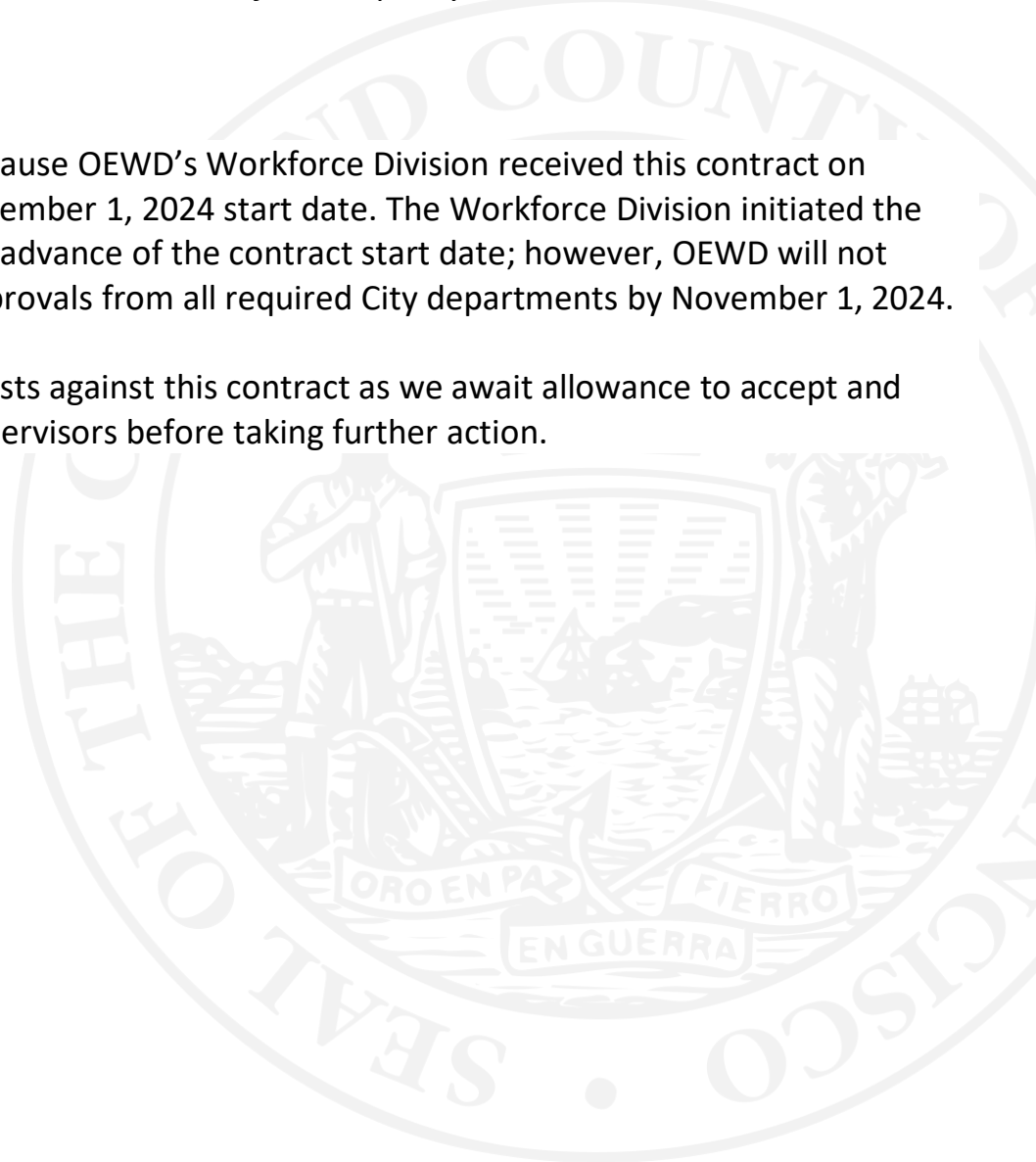
October 28, 2024

## STATEMENT ON RETROACTIVITY

*Accept and Expend Grant - Retroactive -  
Irvine Foundation Public Workforce Capacity Fund - \$496,684*

This request is retroactive because OEWD's Workforce Division received this contract on September 13, 2024 for a November 1, 2024 start date. The Workforce Division initiated the accept and expend process in advance of the contract start date; however, OEWD will not secure accept and expend approvals from all required City departments by November 1, 2024.

OEWD has not accrued any costs against this contract as we await allowance to accept and expend from the Board of Supervisors before taking further action.



President, District 8  
BOARD of SUPERVISORS



City Hall  
1 Dr. Carlton B. Goodlett Place, Room 244  
San Francisco, CA 94102-4689  
Tel. No. 554-6968  
Fax No. 554-5163  
TDD/TTY No. 544-5227

**RAFAEL MANDELMAN**

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**PRESIDENTIAL ACTION**

Date: 1/16/25

To: Angela Calvillo, Clerk of the Board of Supervisors

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Madam Clerk,  
Pursuant to Board Rules, I am hereby:

Waiving 30-Day Rule (Board Rule No. 3.23)

File No. \_\_\_\_\_

\_\_\_\_\_  
(Primary Sponsor)

Title. \_\_\_\_\_

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Transferring (Board Rule No 3.3)

File No. \_\_\_\_\_

\_\_\_\_\_  
(Primary Sponsor)

Title. \_\_\_\_\_

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From: \_\_\_\_\_ Committee

To: \_\_\_\_\_ Committee


Assigning Temporary Committee Appointment (Board Rule No. 3.1)

Supervisor: Dorsey Replacing Supervisor: Melgar

For: 1/22/25 Budget & Finance Meeting  
(Date) (Committee)

Start Time: \_\_\_\_\_ End Time: \_\_\_\_\_

Temporary Assignment:  Partial  Full Meeting

  
\_\_\_\_\_  
Rafael Mandelman, President  
Board of Supervisors



**TO:** Angela Calvillo, Clerk of the Board of Supervisors

**FROM:** Alesandra Lozano, Legislative & Government Affairs  
Manager, Office of Economic and Workforce  
Development

**DATE:** October 15, 2024

**SUBJECT:** Accept and Expend Resolution

**GRANT TITLE:** Irvine Foundation Public Workforce Capacity Fund

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Attached please find the original\* and one copy of each of the following:

X Proposed grant resolution; original\* signed by Department, Mayor, Controller

X Grant information form, including disability checklist

X Grant budget

X Grant application

X Letter of Intent or grant award letter from funding agency

N/A Ethics Form 126 (if applicable)

N/A Contracts, Leases/Agreements (if applicable)

N/A Other (Explain): Notice of Funds Availability

**Special Timeline Requirements:**

November 1, 2024 start date per grantor.

**Departmental representative to receive a copy of the adopted ordinance:**

Name: Alesandra Lozano Phone/Email: alesandra.lozano@sfgov.org

Interoffice Mail Address: 1 Dr. Carlton B. Goodlett Pl., City Hall, Room 448, San Francisco, CA 94102

Certified copy required Yes

No

(Note: certified copies have the seal of the City/County affixed and are occasionally required by funding agencies. In most cases ordinary copies without the seal are sufficient).

**From:** [Trejo, Sara \(MYR\)](#)  
**To:** [BOS Legislation, \(BOS\)](#)  
**Cc:** [Paulino, Tom \(MYR\)](#); [Fu, Han \(ECN\)](#); [Lozano, Alesandra \(ECN\)](#); [Hand, Jennifer \(ECN\)](#); [Salerno, Jennifer \(ECN\)](#)  
**Subject:** Mayor -- Resolution -- James Irvine Foundation Grant  
**Date:** Tuesday, November 5, 2024 2:31:31 PM  
**Attachments:** [0. Resolution Cover Memo & Checklist Irvine.pdf](#)  
[1. Grant Resolution - Irvine Foundation Public Workforce Capacity Fund.docx](#)  
[1. Grant Resolution - Irvine Foundation Public Workforce Capacity Fund SIGNED.pdf](#)  
[2. Resolution Information Form Irvine SIGNED.pdf](#)  
[3. Irvine PWCF Grant Budget.pdf](#)  
[4. Application - Public Workforce Capacity Fund SFOEWD.pdf](#)  
[5. PWCF Grant Award Recommendation Letter SFOEWD WDB.pdf](#)  
[Irvine Foundation Public Workforce Capacity Fund Statement on Retroactivity.pdf](#)  
[RE OEWD Accept and Expend Resolution Review - \\$496684.00 Irvine Foundation Grant - Public Workforce Capacity Fund.msg](#)

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Hello Clerks,

Attached is a Resolution retroactively authorizing the Office of Economic and Workforce Development to accept and expend a grant in the amount of \$496,684.00 from the James Irvine Foundation during the grant period of November 1, 2024 through November 1, 2026.

Best regards,

**Sara Trejo**

Legislative Aide

Office of the Mayor

City and County of San Francisco