

**Office of Economic & Workforce Development  
Response to Request for Proposal (RFP) NO. 2013-SF-01**

**Proposal to Establish the Office of Economic & Workforce Development of the  
City & County of San Francisco as the local host of the San Francisco Small  
Business Development Center (SBDC)**

**Proposal Narrative - Table of Contents**

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## Description & Qualifications of Host Organization

### *General Overview and Objective*

The Office of Economic & Workforce Development (OEWD) is a department of the City and County San Francisco. Our mission is to support the ongoing economic vitality of San Francisco. Under the direction of Mayor Edwin M. Lee, OEWD provides citywide leadership for workforce development, small business development, business attraction and retention, neighborhood commercial revitalization, international business and development planning.

OEWD's divisions and programs, outlined below, are responsible for strengthening San Francisco's many diverse neighborhoods and commercial corridors, assisting small businesses and major employers, creating a business climate where companies can grow and prosper, and ensuring a continually high quality of life for all San Franciscans.

The services provided by the Small Business Development Center (SBDC) align closely with OEWD's mission; this is demonstrated by the fact that OEWD is a longtime funder of the SF SBDC. As outlined in this narrative, the SBDC would fit well within our existing organizational framework and staff capacity. Therefore, we eagerly seek to establish a partnership with Northern California SBDC Lead Center to become the new host organization for the San Francisco Small Business Development Center.

### *OEWD Divisions and Programs*

OEWD is made up of five distinct divisions, each of which oversees a number of functional operations and programs. Those divisions are Workforce Development, Joint Development, Business Development, Neighborhood Economic Development, and the Office of Small Business. Each division works in close collaboration with the others to pursue the City's economic and workforce development objectives.

- 1. Workforce Development.** The Workforce Development division is designed to improve the responsiveness of the workforce system to meet the demands of sustainable and growing industries, providing employers with skilled workers and expanding employment opportunities for San Francisco residents. The division manages programs in the following areas:
  - **Business services**, assisting employers that are seeking to recruit new workers and access tax credits related to hiring.
  - **Sector Academies**, serving unemployed or underemployed San Francisco residents that seek to build skills to enter a career in one of several industries facing staffing shortages or that project for long-term job growth. Training programs provide job preparation, vocational training, and job placement

services. Current sector academies include technology (TechSF), construction (CityBuild Academy), health care, and hospitality.

- **Job Seeker Services**, serving San Francisco residents who are unemployed or underemployed. These services include access points where job seeker can access career planning services and job search assistance; re-entry navigator services, assisting job seekers with criminal backgrounds to navigate through the challenges of balancing returning home and preparing to re-enter the workforce; and programs to assist job seekers addressing barriers to employment, including mental illness, substance abuse, or other issues.
- **Youth Services**, providing San Francisco's most disadvantaged youth with access to a broad continuum of education, work experience opportunities and supportive services that lead to educational attainment, occupational skills development, and attachment to the workforce.

- 2. Joint Development.** The Joint Development division facilitates catalytic real estate projects and public-private initiatives that create jobs and benefit San Francisco's economy. During the complex process of redeveloping opportunity sites and parcels around the City and along the waterfront, the division serves as the City's lead negotiator as well as the principal conduit between federal, state and City departments, the private sector and the many community interests involved. Current and recent projects include America's Cup, Piers 30-32, and California Pacific Medical Center expansion.
- 3. Business Development.** The Business Development division serves as a centralized clearinghouse of information and services to support the ongoing success for emerging and established companies in San Francisco. The business development team focuses on industries including technology, biotech, tourism manufacturing, financial services, and film. The division provides a single point of contact for business and industry leaders; assists companies in accessing tax incentives and other benefits; provides site location assistance; and other relevant services.
- 4. Neighborhood Economic Development.** The Neighborhood Economic Development division is responsible for the ongoing support and improvement of the City's many neighborhood commercial districts. The overall goals of the division are to create cleaner, safer and more vibrant neighborhoods in order to increase the quality of life for the City's residents and workers; and to create economic opportunities for residents of the City's low- and moderate-income neighborhoods. These goals are pursued through the following programs:

- **Small Business Technical Assistance.** OEWD provides funding to nonprofit agencies that provide technical assistance directly to small business owners and entrepreneurs at all stages of business development, including pre-startups, startups, and existing businesses. OEWD's grantees—including SF SBDC—provide assistance in a variety of forms, including one-on-one consulting, workshops, and classes. In total, OEWD provides approximately \$1.4 million annually to 20 different nonprofit partners. Through these services, 1,371 businesses were served in FY2011-12, resulting in the creation or retention of 635 jobs, and the funding of 141 loans.
  
- **Access to Capital Programs.** OEWD ensures that loans and grants are available for small businesses seeking to strengthen or expand their business. Through partnerships with a variety of nonprofit lenders, OEWD has established a number of loan products, ranging in size from \$5,000 to \$1 million, available to a wide variety of potential borrowers. These products include:
  - i. **StepAheadSF** is a pilot program providing zero interest loans to support small businesses, boost local economy, and create jobs. The program is administered by Working Solutions and will provide loans for 3-year terms at 0% interest rate. Applications will be accepted through December 31, 2013; depending on the success of the program, it could be expanded into 2014.
  - ii. **SF Small Business Revolving Loan Fund**, also a partnership with Working Solutions, offers loans ranging from \$5-50K to qualifying small businesses. OEWD manages a \$1.1M grant from the US Department of Commerce Economic Development Administration (EDA) to administer the City's Revolving Loan Fund. OEWD provides bi-annual accounting and reports to EDA.
  - iii. **Emerging Business Loan Fund**, a partnership with Oakland Business Development Corporation, offers loans ranging from \$50,000 to \$1,000,000 to qualifying commercial projects. The purpose of the EBLF is to originate commercial loans that support high impact businesses and projects with the potential to increase economic activity in San Francisco as well as create jobs for low- and moderate-income individuals.

In addition to these loan programs, OEWD offers other microfinance products through partnerships with Opportunity Fund and Kiva Zip. In total, since July 2009, OEWD and its partners have funded 1,341 loans totaling over \$7.3 million.

In addition to these loan programs, the **SF Shines Façade and Tenant Improvement Program** provides grants to small businesses and property owners seeking to upgrade the physical conditions of their business. The program

includes support for design, construction and project management; OEWD staff works closely with business owners and property owners to ensure successful implementation of the projects. In total, since December 2009, OEWD has funded 55 projects totaling over \$2.7 million.

- **Invest in Neighborhoods.** Invest in Neighborhoods is a cross-departmental initiative, led by OEWD, to strengthen neighborhood commercial districts around the City. The program, currently being piloted in 25 commercial districts, provides focused, customized services that meet the specific needs and opportunities of each neighborhood. The Invest in Neighborhoods team includes nine staff members, each assigned to various commercial districts, conducting outreach to merchants and other community stakeholders. OEWD staff, in partnership with merchant leaders and community stakeholders, is working to identify the strengths, opportunities and challenges specific to each neighborhood, and then develop a customized service plan in response to those needs. For more information on Invest in Neighborhoods visit [www.oewd.org/IIN.aspx](http://www.oewd.org/IIN.aspx)
- **Jobs Squad.** The Jobs Squad is a 2-person staff team that conducts door-to-door outreach to small businesses around the City to connect them with help and information, including: information on existing City resources and programs that directly benefit small businesses; technical assistance to help businesses navigate permitting processes; and any other time-sensitive or geographic-specific information that needs to be shared with the small business community. The Jobs Squad also maintains a database of each of the storefront retail businesses within the 25 neighborhood commercial districts where Invest in Neighborhoods is being piloted.
- **Community Benefit District Program.** Community Benefit Districts (CBDs), known in other communities as Business Improvement Districts, improve the overall quality of life in targeted commercial districts and mixed-use neighborhoods through a partnership between the City and local communities. Once an area has voted to establish a CBD, local property owners are levied a special assessment to fund improvements to their neighborhood. The funds are administered by a non-profit organization established by the neighborhood. OEWD staff provides technical assistance for the establishment of new CBDs, and programmatic support to existing CBDs.
- **Nightlife Program.**

San Francisco's nightlife and entertainment sector – which includes restaurants, bars, nightclubs, live music venues, and other performance spaces – is both a major economic driver as well an integral part of the City's cultural fabric. Working with City and industry stakeholders, OEWD's nightlife initiative supports the growth of San Francisco's nightlife and entertainment industry through the following strategies:

- Connecting San Francisco nightlife and entertainment businesses to City resources;
- Supporting legislative and policy developments to advance nightlife and entertainment;
- Advocating for the development of new nightlife and entertainment spaces and support existing spaces and venues;
- Building awareness of the nightlife and entertainment industry locally and among tourists;
- Facilitating collaboration between the nightlife and entertainment and technology industries; and
- Supporting improvements in late-night transportation.

Along with these signature programs, the Neighborhood Economic Development division develops and deploys additional programs to meet the changing needs of San Francisco's small business community. These include:

- The Americans with Disabilities Act (ADA) program, providing business owners with education about ADA compliance and grant funding to mitigate their exposure to lawsuits and increase the accessibility of their business. Since its inception, ADA program has provided direct technical assistance to 138 small businesses and small grants totaling \$138,000.
- StorefrontSF, an Internet tool for searching for storefront retail spaces available for lease or purchase.
- BizFitSF, strengthening existing retail businesses and restaurants that may be at risk of displacement or closure.
- The Healthy Food Retail Program, enabling corner stores in San Francisco to increase access to healthy foods.
- Targeted Leasing and Real Estate Assistance, a partnership with Urban Solutions to facilitate business expansions by connecting entrepreneurs with appropriate spaces assistance with lease negotiations.

- 5. Office of Small Business.** The Office of Small Business (OSB) is the City's central point of information and referral for entrepreneurs and small businesses located in San Francisco. OSB staffs the Small Business Commission and runs the Small Business Assistance Center at City Hall.

The Small Business Commission is a 7-member volunteer commission whose mission is to foster, promote, and retain small businesses in the City and County of San Francisco. By championing "business-friendly" policies, marketing the contributions of the small business sector, and developing appropriate assistance programs, the SBC works to support and enhance an environment where small businesses can succeed and flourish. The SBC reviews pertinent small business legislation and policy matters and makes recommendations to the sponsor of the legislation, including the Mayor, Board of Supervisors, or other City Agencies.

The Small Business Assistance Center (SBAC), launched in 2007, is the City's central point of information and referral for entrepreneurs and small businesses located in San Francisco. Three case managers respond to client inquiries available by phone, e-mail, walk-in, and by appointment. Services are available in English, Spanish, Cantonese and Mandarin. SBAC case managers provide business owners with assistance navigating permits and licensing processes, becoming certified City vendors and doing business with the City, accessing tax credits and incentive programs, and other relevant topics. Case managers also conduct client intake and assessment and make referrals to other small business services, including those offered by outside partners such as the SF SBDC. Since the SBAC's inception, case managers have served an average of over 2,800 businesses and entrepreneurs per year, including over 4,000 in fiscal year 2012-13.

This year SBAC launched the San Francisco Business Permits and Licenses website. In partnership with the vendor License 1-2-3, the website provides users with customized information based on the type of business they plan to launch, including license applications for download, instructions for filing the application, fees and timeline information, and the contact information for each licensing authority. The tool is currently available at [sf.license123.com](http://sf.license123.com).

In the coming year, OSB, in partnership with the Department of Technology and the Mayor's Office of Civic Innovation, will pursue the next phase of this project, to establish a robust business portal that provides personalized information to start or grow a business and transition hundreds of permits and licenses to a fully digital workflow. The goals of this project are to streamline and simplify business permitting interactions with the City, making it easier to start, stay and grow jobs in San Francisco, and to use innovative technologies to create a great experience for San Francisco businesses.

#### *The SBDC & OEWD: A Natural Fit*

The services and functions of the Small Business Development Center align closely with those of San Francisco's Office of Economic & Workforce Development. There is clear alignment of the

missions of each organization; OEWD exists to ensure the ongoing economic vitality of San Francisco, and small businesses play an essential role in the City's economic wellbeing.

While the City has a wide range of organizations whose mission is to serve entrepreneurs in the pre-startup phase of business development, there are fewer organizations and entities serving existing small businesses. San Francisco is currently experiencing an economic boom, with the lowest unemployment rate in the state and an extremely competitive real estate market. Many existing businesses are feeling the pressure of rising commercial leasing rates, forcing them to increase their revenues in order to secure their long-term stability and ensure that they will be able to grow in place and stay in San Francisco. As such, it is more important than ever that existing businesses are well served by small business consulting and counseling services. OEWD seeks to host the SBDC in order to ensure the long-term viability of these services, and with the hopes of expanding these services to benefit more entrepreneurs and small business owners in San Francisco.

Over the past several years OEWD has dramatically increased the services and outreach offered directly to the City's small businesses. Through the Small Business Assistance Center, the Jobs Squad, Invest in Neighborhood, Access to Capital programs, and other OEWD programs, over a dozen City staff members at OEWD are currently providing services and technical assistance directly to small business clients. Additionally, our outreach capacity has expanded dramatically; through the Jobs Squad the City now has two staff members dedicated to conducting on-the-ground outreach in neighborhood commercial districts to inform small businesses about available services and recruit their participation in programs that will help them save money and access capital. By becoming the host organization for the SBDC, OEWD will foster closer collaboration between these staff members and staff members and consultants that can provide direct, high level counseling and technical assistance.

The SBDC's consulting and counseling services will be an excellent complement to the existing services and staffing framework of OEWD. The new Director of Small Business Services and small business consultants will have direct access to City programs and resources that can benefit their clients. In turn, they will help us promote these resources to a larger network of potential beneficiaries. The City's existing small business resources, outreach and case management, directly leveraging the consulting services offered through the SBDC, will maximize our impact and increase the outcomes for small business clients.

In addition, there is close alignment between the programmatic goals of OEWD and SBDC. Over the past year, OEWD developed two new programs in close collaboration with SBDC: the BizFitSF business strengthening program, and the Healthy Food Retail Program. Each of these programs relies on the provision of small business counseling services delivered by SBDC consultants; by establishing OEWD as the SBDC host organization, we can ensure closer



collaboration between those consultants and the OEWD staff members that manage these programs. OEWD is also eager to maintain the SF SBDC's restaurant program, and maintain and expand our participation in the Tech Futures Group by leveraging our business development team staff dedicated to serving the City's technology sector.

The alignment and natural fit of SBDC with OEWD is clear. Staff members at OEWD and members of the Small Business Commission are extremely enthusiastic about the prospect of establishing OEWD as the local host organization for SBDC. We are hopeful that the partnership will result in increased efficiency, closer collaboration, an expansion of services and outcomes, and broad benefits for the small business community of San Francisco.

## **SBDC Structure and Management**

### *SBDC Location and Facilities*

Currently OEWD staff and operations are located at two different facilities in San Francisco: San Francisco City Hall (1 Dr. Carlton B Goodlett Place) and 1 South Van Ness Avenue. The proposed activities would be offered at one or both of these facilities. Each facility is owned by the City of San Francisco, is accessible to people with disabilities, would allow for the posting of SBDC signage, includes private office space for individual consulting, is accessible via municipal and regional transportation systems, and is nearby parking facilities.

### *SBDC Personnel Structure*

Resumes for each employee listed herein are included as attachments.

SBDC operations will primarily be managed by a new position, the Director of Small Business Services. 100% of this staff member's time will be dedicated to implementation of SBDC activities. This person is yet to be hired. The Director of Small Business Services will provide counseling services to clients; coordinate the assignments and activities of small business consultants; manage strategic partnerships; and ensure the continued pursuit of overall programmatic goals, outputs and outcomes.

Additional staff members dedicated to the implementation of SBDC activities include current SBAC case managers Martha Yanez (fluent in Spanish) and Christian Murdock, as well as an additional SBAC case manager position that is currently unfilled (recruitment is underway for a fluent Cantonese and Mandarin speaker). Additionally, Jobs Squad staff members Manish Goyal and Francis Chan (fluent in Cantonese, Mandarin) will conduct outreach for the program.

### *Consultant Services*

OEWD will conduct a Request for Qualifications to recruit small business consultants to provide counseling services. OEWD aims to leverage existing relationships and establish new relationships with a broad set of small business consultants whose hourly consulting rate should range from \$40/hour to \$125/hour depending on qualifications and experience.

### *Supervision*

Ultimate supervision over the SBDC services will be provided by OEWD Director Todd Rufo. Mr. Rufo reports to the Mayor's Chief of Staff, has been with the organization for 8 years and is responsible for overseeing all of the operations of the Office of Economic & Workforce Development. Mr. Rufo will be assisted in supervision of SBDC services by OEWD Deputy Director Joaquin Torres and Office of Small Business Director Regina Dick-Endrizzi.

### *Additional OEWD Personnel*

Other existing personnel to be leveraged through this program, either in an outreach capacity or through the provision of direct counseling services, include: Laurel Barsotti, Business Development Manager, Technology Sector; Amy Cohen, Director of Neighborhood Business Development; Holly Lung, Program Manager, Economic Development; Jordan Klein, Senior Project Manager, Invest in Neighborhoods; Crezia Tano, Senior Project Manager, CBD Program; Ellyn Parker, Project Manager; Diana Ponce De Leon, Project Manager; Jorge Rivas, Project Manager; Richard Kurylo, Project Manager.

Fiscal compliance staff includes Merrick Pascual, Chief Financial Officer; Fred Liedl, Finance Manager; and Lisa Estrada, Fiscal Compliance Officer.

Additional support staff may be leveraged for functions such as data entry and management, graphic design, information technology, facilities, and administrative functions.

### **Fiscal Compliance**

#### *Financial Management and Practices*

The Fiscal Compliance Officer (Lisa Estrada) monitors the budget by maintaining an Expenditure Report Log, comparing budget and actual expenditures by budget category. The Fiscal Compliance Officer also uses this Log to prepare expenditure reports according to schedule given by grant agreement, which are reviewed by the Finance Manager (Fred Liedl). The Finance Manager compares the report with the financial system to ensure all expenditures are recorded accurately. Upon completion of review, the expenditure report is signed and submitted by the Chief Financial Officer (Merrick Pascual). Both the Fiscal Compliance Officer and the Finance Manager report directly to the CFO.

The City and County of San Francisco uses FAMIS (Financial Accounting Management Information System) for financial accounting and reporting. OEWD maintains separate cost centers in FAMIS called grant codes for each funding source. Subaccounts called grant details are created for each separate contract. Spending controls are established in FAMIS for each subaccount to maintain separate budgets and restrict spending by level given according to budgetary restrictions given by the grant agreement.

The City and County of San Francisco is required to use fund accounting. All OEWD grants are accounted for in the City's Community and Neighborhood Development Special Revenue Fund using modified accrual accounting. OEWD reports on spending to each funding agency according to contract schedule. We currently are administering approximately \$30M in grant funding. OEWD has successfully passed its A-133 Single Audit each of the last several years without any findings or material weaknesses identified.

## **Financial Stability**

### *Core Funding*

OEWD receives approximately \$40 million in annual funding which primarily includes:

- 22% or \$8.8 million from the Federal Government – Workforce Investment Act (WIA) and Community Development Block Grants (CDBG)
- 30% or \$12 million from Public/Private Development reimbursements
- 48% or \$19.2 million from the City's General Fund and local sources

Over the last 3 years, OEWD's annual budget has increased by approximately 23%, or \$7.5 million. Although Federal funding has slightly decreased by approximately 6%, or approximately \$520K, these decreases have largely been backfilled by the City's General Fund, which has increased by approximately 60%, or over \$7 million. The increases can be primarily attributed to a shift in Mayoral policy and focus towards Economic and Workforce Development. In particular, the growth can be primarily attributed to (1) establishment of a Small Business Revolving Loan Fund, (2) Invest In Neighborhoods Initiative, which is a neighborhood economic development program aimed to strengthen and revitalize neighborhood commercial districts through customized assistance, (3) expansion of business development and business attraction programs, (4) increase in the number of Public/Private Real Estate Developments and (5) expansion of local Workforce Compliance and Training programs.

### *Reimbursement Basis Grant Expenditures*

Federal, State, and Private grants make up about \$1 billion, or about 25%, of the City's revenue from governmental funds. Most of these funds are paid to the City on a reimbursement basis. In particular, all of OEWD's Federal Grant sources are paid on a reimbursement basis. The costs are floated by the General Fund, which is primarily funded by tax revenue. Given the City's ability to float such costs through the General Fund, any potential issue with cash flow is very minimal. To minimize any potential cash flow issues to the City's General Funds, our department draws down on grant funding sources at least quarterly.

### *Capacity for Growth*

Given the overall breadth of Economic Development initiatives and services currently being provided by OEWD, the capacity for growth is likely due to the ability to leverage other program dollars that can either partly supplement and/or complement business assistance programs. Currently, OEWD's annual budget for Economic Development and Small Business initiatives total approximately \$11 million for FY14. These initiatives currently provide services that include technical assistance provided by either OEWD staff or consultants, attracting and retaining business in San Francisco, revitalizing commercial corridors in economically disadvantaged neighborhoods, providing information and resources for start-ups and expanding small businesses.

### **SBDC Service Delivery**

#### *Implementation and Management*

We propose that the SF SBDC maintain as its core services the provision of consulting services for small businesses. Consulting services will focus on operations, personnel administration, marketing, merchandising, accounting and financial management, capital planning, securing loans, and other issues relevant to small business in San Francisco. While the services will produce outputs such as businesses served and loans funded, the desired outcomes of the consulting services will be to create and retain jobs; to increase the profitability, efficiency, and stability of small business clients; to increase entrepreneurs' access to capital; and to facilitate business startups and expansions.

There are a number of nonprofit organizations in San Francisco that focus on serving businesses in the pre-startup and startup phases. These organizations—including Renaissance Center for Entrepreneurship, Mission Economic Development Agency, Women's Initiative for Self Employment, the LGBT Center, and others—each provide business planning services and training courses available for new entrepreneurs. Pre-startups are aptly served by these organizations. Case managers at SF SBDC will provide intake and assessment services for these clients, and in most cases would refer them to our partner organizations. SF SBDC will focus its services primarily on existing businesses that have been in operation for at least two years, and secondarily on new business startups.

SF SBDC services will aim to serve a large number of existing retail and restaurant small businesses at risk of displacement from neighborhood commercial districts, primarily through the BizFitSF program. Given the economic circumstances in San Francisco, and the lack of other services available for this target population, this has been identified as a high priority for SF SBDC services. In year one, approximately 25% of clientele should fit this description, which will result in high levels of job retention.

#### *Client Recruitment*

SF SBDC will primarily rely on existing OEWD staff for outreach activities and client recruitment. This includes:

- Small Business Assistance Center case managers, who respond to client inquiries via phone, e-mail, and walk-in services.
- Jobs Squad, which conducts door-to-door outreach to small businesses throughout the City.
- Invest in Neighborhood staff, which conducts outreach to small businesses in select neighborhood commercial districts around the City.

Specific outreach strategies will include the following:

- OEWD will rely on partner and grantee organizations to refer clients in need of one-on-one consulting services.
- SBDC staff will establish partnerships to enable staff to attend training workshops offered by partners—including the SBA, the Treasurer and Tax Collector, and grantee organizations—to recruit prospective clients.
- OEWD will leverage and grow existing mailing lists and newsletters including those administered by the SBDC, the Office of Small Business, Invest in Neighborhoods, the Neighborhood Empowerment Network, and the Mayor’s Office of Neighborhood Services.
- As necessary, OEWD will host introductory workshops to introduce clients to the suite of services available through the SBDC.
- OEWD will create new outreach materials including flyers and physical collateral.
- OEWD will leverage annual mailers distributed by the Treasurer and Tax Collector and other partner agencies to share information about SBDC services.

#### *Client services*

Client services will be provided free of charge and will primarily consist of the following:

- **Intake and assessment.** Staff will conduct a thorough analysis of the current status of the business / entrepreneur; identify opportunities and challenges for business development; and make recommendations for appropriate next steps.
- **Permits and licensing assistance.** Staff will provide clients with information and technical assistance regarding permits, licensing and registration requirements specific to the client’s industry and business development phase.
- **Small business consulting.** Staff will provide clients with multiple hours of consulting services with the goal of strengthening the business by increasing profitability, efficiency, or stability; facilitating expansion, relocation or closure; or securing access to capital. Clients receiving small business consulting services will pursue an action plan with specific objectives related to operations, financial management, human resources, marketing, capital planning, product analysis and development, site selection, management, strategic planning, or other topics relevant to small businesses in San Francisco.
- **Loan packaging.** Staff will assist clients in the completion of loan applications, including applications to commercial lenders as well as alternative lenders and microfinance providers.
- **Referrals to partner organizations.** Staff will refer the client to partner organizations that provide services such as business planning courses, workshops, industry-specific services, or other relevant services not offered directly by the SBDC. Staff will conduct subsequent follow-up activities to determine whether clients were able to successfully access the referred service.

Client services will be provided Director of Small Business Services, SBAC Case Managers, Jobs Squad, and consultants, with specific assignments as follows:

- The Director of Small Business Services will be responsible for small business consulting services; loan packaging; referrals to partner organizations; assignment of clients to consultants; overall coordination of activities; and strategic partnerships.
- SBAC case managers (3) will be responsible for intake and assessment; permits and licensing assistance; referrals to partner organizations; and assignment of clients to the Director of Small Business Services and consultants.
- Jobs Squad staff members (2) will be responsible for program outreach; intake and assessment; referrals to partner organizations; and referrals to SBAC case managers.
- Consultants will be responsible for small business consulting services; and loan packaging.

Services will not only be available on site at OEWD facilities; the staff and consultant team will increase the accessibility of consulting services by offering to deliver services at the locations most convenient for the client. As is necessary and appropriate, the staff or consultant will travel to the client's place of business. Additionally, OEWD will seek to establish closer partnerships with our existing nonprofit grantee organizations to enable SF SBDC staff and consultants to provide one-on-one consulting services in their facilities around the City.

#### *Special Programs*

In addition to the core services listed above, SF SBDC staff and associated OEWD personnel will contribute to the following special programs:

- **BizFitSF.** The OEWD staff member responsible for BizFitSF, Diana Ponce De Leon, will continue to work on the development of program materials and guidelines; communications tools (including translated versions); outreach and client recruitment; and program evaluation. Diana will work closely with SBDC staff and consultants to coordinate the deployment of consulting services. If successful, the BizFitSF pilot will be expanded to other neighborhoods around the City with additional funding from San Francisco's General Fund.
- **Healthy Food Retail Program.** The OEWD staff member responsible for the Healthy Food Retail Program, Jorge Rivas, will continue to work on the development of program materials and guidelines; communications tools (including translated versions); outreach and client recruitment; coordination with other City agencies and advisory board; and program evaluation. Jorge will work closely with SBDC staff and consultants to coordinate the deployment of consulting services, and to assist clients seeking to access incentive programs such as SF Shines tenant improvement grants.
- **Tech Futures Group.** SBDC staff and consultants and OEWD Business Development Manager Laurel Barsotti will market the Tech Futures Group to prospective clients, help to coordinate local marketing and networking events, conduct initial screening of



qualifications, and pursue other partnership and support activities.

- **Restaurant Program.** OEWD would continue to develop the SBDC Restaurant Program by creating a curriculum specific to restaurants, conducting a restaurant client recruitment campaign, and developing a restaurant network cohort.
- **Small Business Week.** The Office of Small Business partners with the Small Business Administration to produce Small Business Week, a partnership formed to honor and support San Francisco's small businesses through a week of networking and educational events. As the host of the SBDC, OEWD will seek to collaborate with SBA incorporate small business consulting services into the framework of Small Business Week.

#### *Other considerations*

- **Language access.** Given the diverse population of San Francisco, it is a top priority of OEWD to ensure that services are available in multiple languages. Current SBAC and Jobs Squad staff members give us the capacity to provide services in English, Spanish, Cantonese and Mandarin. OEWD will continue to recruit staff and consultants with multi-lingual capacity.
- **Partnership with commercial lenders and financial institutions.** OEWD, through its business development, real estate development, neighborhood economic development, and workforce development activities, has developed long-term relationships with leaders at financial institutions with headquarters, regional offices, and branches located within the City. OEWD will seek to leverage those relationships to provide increased access to capital for SBDC clients.
- **Separation of Functions / Client waiver.** It is important that SBDC clients recognize that different City departments function independently of each other, and that the regulatory activities of City departments will remain separate from the small business consulting services. The SBDC's staff and small business consultants can and will maintain confidential, discretionary relationships with their clients; for example, the client should not feel that they are unable to be fully honest with the consultant regarding their permitting status for fear of reprisal from inspectors of another agency. Staff and consultants will clearly communicate this fact to clients to avoid any misconceptions.  
Conversely, clients should never assume that because the City is providing free consulting services, the City would also provide special treatment, exemption from standard regulations, or fee waivers. Nor should clients assume that any advice provided by SBDC staff or consultants should be taken as a guarantee of business success or profitability. OEWD will develop processes to ensure that this point is fully understood by clients, such as the review of a waiver statement.
- **Data Management and Reporting.** SBDC staff and consultants will track service provisions and client activities through the WebCATS system as well as the Salesforce.com database currently utilized by OEWD staff. SBDC will create monthly

reports on outputs and outcomes.

*Startup Timeline*

1. February – May, 2014
  - Pursue the passage of an ordinance by the San Francisco Board of Supervisors authorizing the acceptance and expenditure of the grant award and the creation of the new staff position.
  - Develop a more formal work plan for the implementation of SBDC activities. Seek review and feedback on work plan from Small Business Commission.
  - Hire the Director of Small Business Services.
  - Conduct a request for qualifications to recruit consultants.
  - Conduct program outreach (SBAC, Jobs Squad, Invest in Neighborhoods).
  - Develop intake and assessment forms and communications tools.
  - Continue to develop BizFit, Healthy Food Retail Program.
  - Revise relationships and update agreements with partner organizations to reflect new service delivery offerings
2. April 1, 2014
  - Launch new small business consulting service components.

**List of Attachments**

Attachment 3, Consulting Work plan and Outcomes

Attachment 4, Budget forms

Attachment 5, certification of cash and in-kind match

Attachment 6, Planned closure dates

Attachment 7, Org chart

Attachments 8, Rèsumès

Attachment 9, Letter from OSB Director Regina Dick-Endrizzi to OEWD Director Todd Rufo regarding the passage of Small Business Commission resolution # 001-13-SBC

Attachment 10, Small Business Commission resolution # 001-13-SBC Supporting SF Small Business Development Center Proposal

**Business Client References**

The following small businesses are previous clients of the Small Business Assistance Center:

Wise Sons Jewish Delicatessen

Leo Beckerman

[leobeckerman@gmail.com](mailto:leobeckerman@gmail.com)

(818) 926-6655 (mobile)

<http://wisesonsdeli.com/>

Dr. Frank Gilson

Potrero Chiropractors & Acupuncture

[frankgilson@hotmail.com](mailto:frankgilson@hotmail.com)

(415) 431-7600

[www.potrerochiro.com](http://www.potrerochiro.com)

Ramni Levy

Ramni Levy Catering and Events and King Kinish

[ramnilevy@gmail.com](mailto:ramnilevy@gmail.com)

(415) 407-7292