PROPOSAL COVER SHEET

RFP Number	2013-SF-01
County(ies) of Territory	San Francisco
SBA Funding Requested	\$150,000

LATE PROPOSALS WILL NOT BE ACCEPTED

The submission of this proposal does not obligate HSUSPF to fund the proposed program. If the proposal is approved for funding, a contract will be executed between the HSUSPF and the bidder. When funding is authorized, the bidder will be expected to adhere to all terms of the executed contract.

1. APPLICANT INFORMATION							
Name of Organization City of San Francisco, Office of				fice of Economic & Workforce Development			
Street	Address	1 Dr Carlton	B Goodlett I	Place, Room 448			
City, St	ate, Zip Code	San Francisco	o, CA 94102				
Websi	te	www.oewd	org				
Contac	t Person	Jordan Klein					
Contac	t's Title	Senior Projec	ct Manager				
Phone	Number	(415) 554-66	45				
Fax Nu	mber						
Email A	Address	Jordan.klein	@sfgov.org				
2. AP	PLICANT LEGAL ENTITY	STATUS Pl	ease check	one choice only.			
	Non-Profit Organization		Type of No	onprofit (501c3, 501c6, etc):			
			Place and Date of Incorporation:				
			President of Corporation:				
	Institution of Higher Educ	cation	Private or Public Institution:				
			President of the Institution:				
х	Municipality or County		City, Town	n or County: City			
			City Manager or County Executive: Naomi Kelly, City Administrator				
			Mayoror	Chair of Board of Supervisors: Mayor Edwin M. Lee			
	Other Public Economic D	evelopment	Legal Statu	us:			
	Institution		President/ Highest Ranking Director:				
			Chair of Bo	air of Board of Directors:			
3. CE	RTIFICATION						
I herek	by certify that the informa	ation reported	in this prop	oosal is, to the best of my knowledge, complete and	accurate; that the		
applicant organization named has authorized me, as its representative, to submit this proposal; and that the proposal and cost							
information is valid for one hundred twenty (120) days from the date of submission.							
Alle.			Jordan Klein	12/17/13			
			Senior Project Manager				
Signat	ure			Printed Name and Title	Date		

HOST ORGANIZATION CONTACT INFORMATION

Please provide the following contract information.

4 44 11 10 11 10 11 10 11 11	
	TRACT DESIGNEE/ CONTRACT SIGNATORY
Name	Todd Rufo
Title	Director, Office of Economic & Workforce Development
Primary Phone	(415) 554-5694
Alternate Phone	
Fax	
Email	todd.rufo@sfgov.org
2. RESPONSIBLE ADM	/IINISTRATOR (Person to whom the SBDC manager reports to)
Name	Todd Rufo
Title	Director, Office of Economic & Workforce Development
Primary Phone	(415) 554-5694
Alternate Phone	
Fax	
Email	todd.rufo@sfgov.org
3. FISCAL OFFICER/ A	CCOUNTING MANAGER
Name	Merrick Pascual
Title	Chief Financial Officer
Primary Phone	(415) 701-4811
Alternate Phone	
Fax	
Email	merrick.pascual@sfgov.org
4. CONTRACTS/ GRA	NTS MANAGER
Name	Fred Liedl
Title	Finance Manager
Primary Phone	(415) 701-4834
Alternate Phone	
Fax	
Email	fred.liedl@sfgov.org

ATTACHMENT 3

SBDC CONSULTING WORKPLAN AND OUTCOMES: STARTUP/YEAR 1					
RFP # 2013-SF-01					
SERVICE TERRITORY	San Francisco County				
APPLICANT ORGANIZATION	City & County of San Francisco, Office of Economic & Workforce Development				

	Month 1	Month 2	Month 3	Month 4 (July	Month 5	Month 6 (September	Month 7 (October	Month 8 (November	Month 9 (December	
	(April 2014)	(May 2014)	(June 2014)	2014)	(August 2014)	2014)	2014)	2014)	2014)	YEAR 1 TOTAL
COUNSELING Service Delivery				-						
# of business clients to receive										
private (1-on-1) business consulting										
	50	50	75	100	100	100	100	100	100	775
Total # of hours of consulting	100	150	250	250	250	350	350	400	400	2500
Total # of business clients receiving										
more than 5 hours of consulting										
within the calendar year (Long										
Term Clients)										
	5	5	15	25	25	25	25	30	30	185
COUNSELING Economic Impacts										
# of business clients to produce a										
measurable economic impact										
(outcome) that is attributed to the										
SBDC consulting provided										
	20									
Total Jobs Created	8	8	11	15	15	15	15	15	15	117
Total Jobs Retained (that were										
previously slated for elimination)										
	8	8	11	15	15	15	15	15	15	117
Total New Businesses Started	3	3	4	5	5	5	5	5	5	40
Total Increases in Sales	\$ 150,000	\$ 225,000	\$ 375,000	\$ 375,000	\$ 375,000	\$ 525,000	\$ 525,000	\$ 600,000	\$ 600,000	\$ 3,750,000
Total Dollar Amount- Loans Secured										
	\$ -	\$ -	\$ 375,000	\$ 625,000	\$ 625,000	\$ 625,000	\$ 625,000	\$ 750,000	\$ 750,000	\$ 4,375,000
Total Dollar Amount- Equity			,						·	
Secured	\$ -	\$ -	\$ 225,000	\$ 375,000	\$ 375,000	\$ 375,000	\$ 375,000	\$ 450,000	\$ 450,000	\$ 2,625,000
Total Capital Infusion (Dollar										
amount of Business Loans Secured										
+ Dollar amount of Equity Capital										
Secured)	\$ -	\$ -	\$ 600,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,000,000	\$ 1,200,000	\$ 1,200,000	\$ 7,000,000

Notes:

- * Service provision will scale up gradually over time
- * Jobs created and retained estimates are calculated based on a percentage of total businesses served
- * Sales increases estimates are calculated based on a product of total hours of consulting services
- * Capital infusion estimates are calculated based on a product of long term clients

ATTACHMENT 4, SHEET 1 of 2

2012 CDDC BUDGET BRODG	ATTACHMENT 4, SHEET 1 of 2								
2013 SBDC BUDGET PROPO									
		RFP # 2013-SF-01 CORY City & County of San Francisco							
APPLICANT ORG	SANIZATION	City & County	y of San Francis	co, Office of	Economic	& Workforce D	evelopmen	t	
DESCRIPTION		SBA	Cash Match	In-Kind Match	Indirect (waived)	Total Match	Program Income	Non- Match Cash	TOTAL
A. PERSONNEL	FTE%								
Director of Small Business Services	100%	55,738.00	30,012.00	0.00		30,012.00	0.00		85,750.00
Lead Case Manager	100%	18,254.00	54,763.00	0.00		54,763.00	0.00		73,017.00
Case Manager	75%	0.00	54,763.00	0.00		54,763.00	0.00		54,763.00
Case Manager	60%	0.00	43,811.00	0.00		43,811.00	0.00		43,811.00
Jobs Squad	60%	0.00	35,424.00	0.00		35,424.00	0.00		35,424.00
Jobs Squad	60% 25%	0.00	35,424.00	0.00		35,424.00 0.00	0.00		35,424.00
Data Management Assistant	0%	7,800.00 0.00	0.00	0.00		0.00	0.00		7,800.00
т	otal Personnel	81,792.00	254,197.00	0.00	0.00		0.00		0.00 335,989.0 0
B. FRINGE BENEFITS	%	81,732.00	234,137.00	0.00	0.00	234,137.00	0.00	0.00	333,383.00
Director of Small Business Services	100%	22,295.00	12,005.00	0.00		12,005.00	0.00	0.00	34,300.00
Lead Case Manager	100%	7,302.00	21,905.00	0.00		21,905.00	0.00		29,207.00
Case Manager	75%	0.00	21,905.00	0.00		21,905.00	0.00		21,905.00
Case Manager	60%	0.00	17,524.00	0.00		17,524.00	0.00		17,524.00
Jobs Squad	60%	0.00	14,170.00	0.00		14,170.00	0.00	0.00	14,170.00
Jobs Squad	60%	0.00	14,170.00	0.00		14,170.00	0.00		14,170.00
Data Management Assistant	25%	1,560.00	0.00	0.00		0.00	0.00		1,560.00
	0%	0.00	0.00	0.00		0.00	0.00		0.00
	ringe Benefits	31,157.00	101,679.00	0.00	0.00	101,679.00	0.00	0.00	132,836.00
C. TRAVEL	0.50	500.00	0.00	0.00		0.00	0.00	0.00	500.00
# of Miles: 1,000 mi rate: # of Airfare: 1 avg rate			0.00	0.00		0.00	0.00		560.00
# of Airfare: 1 avg rate # of Hotels: 3 avg rate			0.00	0.00		0.00	0.00		450.00 450.00
# of Per-Diem: 3 day rate		225.00	0.00	0.00		0.00	0.00		225.00
Other	75.00	730.00	0.00	0.00		0.00	0.00		730.00
- Carlei	Total Travel		0.00	0.00	0.00		0.00		2,415.00
D. EQUIPMENT		Í							,
(only for items \$5,000 or more)		0.00	0.00	0.00		0.00	0.00	0.00	0.00
To	tal Equipment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
E. SUPPLIES									
General Office and Operational		0.00	5,000.00	0.00		5,000.00	0.00		5,000.00
	Total Supplies	0.00	5,000.00	0.00	0.00	5,000.00	0.00	0.00	5,000.00
F. CONTRACTUAL		0.00	0.00	0.00		0.00	0.00	0.00	0.00
		0.00 0.00	0.00	0.00		0.00	0.00		0.00
		0.00	0.00	0.00		0.00	0.00		0.00
Tot	tal Contractual		0.00	0.00	0.00		0.00		0.00
G. CONSULTANTS		5.00	3.00	0.50	5.50	0.00	0.00	0.00	0.00
Contractor Hrs Hrly rate	9								
Business Consultants 1,750	60	20,000.00	85,000.00	0.00		85,000.00	0.00	0.00	105,000.00
	al Consultants	20,000.00	85,000.00	0.00	0.00	85,000.00	0.00	0.00	105,000.00
H. OTHER									
Facilities		0.00		0.00		0.00	0.00		0.00
Training and conferences		1,000.00	1,000.00	0.00		1,000.00	0.00		2,000.00
Telecom		0.00	1,000.00	0.00		1,000.00	0.00		1,000.00
Printing/Copying		0.00	3,000.00 2,000.00	0.00		3,000.00	0.00		3,000.00
Postage	Total Other	0.00 1,000.00	,	0.00	0.00	2,000.00 7,000.00	0.00		2,000.00 8,000.0 0
I. TOTAL DIRECT	Total Other	136,364.00		0.00			0.00		589,240.00
	Rate: 22.9 %		432,070.00	0.00	0.00	432,070.00	0.00	U.00	303,240.00
Note: IDC basis is SBA IDC Clai						0.00			13,636.00
% of Salaries/Fringe SBA IDC Wa		13,030.00			93,678.00				93,678.00
TOTAL BUDGET		150,000.00	452,876.00	0.00			0.00	0.00	696,554.00
		133,000.00	-32,070.00	0.00	33,070.00	3-0,334.00	0.00	0.00	0,00,004.0

2013 SBDC BUDGET JUSTIFICAT	ΓΙΟΝ		
		2013-SF-01	
SERVICE T			y of San Francisco
			y of San Francisco, Office of Economic & Workforce Development
DESCRIPTION	MILATION	TOTAL	BUDGET NARRATIVE
A. PERSONNEL	FTE%	101112	
AT ENGOTHEE	1112/0		Small business consulting services; loan packaging; referrals to partner organizations;
Director of Small Business Services	1.00	85,750.00	assignment of clients to consultants; overall coordination of activities; and strategic partnerships.
Lead Case Manager	1.00	73,017.00	Intake and assessment; permits and licensing assistance; referrals to partner
Case Manager	0.75	54,763.00	
Case Manager	0.60	43,811.00	consultants.
Jobs Squad	0.60	35,424.00	Program outreach; intake and assessment; referrals to partner organizations; and
Jobs Squad	0.60	35,424.00	
Data Management Assistant	0.25	7,800.00	Data entry and management
Tota	al Personnel	335,989.00	
B. FRINGE BENEFITS	%		
Director of Small Business Services	1.00	34,300.00	
Lead Case Manager	1.00	29,207.00	
Case Manager	0.75	21,905.00	
Case Manager	0.60	17,524.00	
Jobs Squad	0.60	14,170.00	
Jobs Squad	0.60	14,170.00	
Data Management Assistant	0.25	1,560.00	
	nge Benefits	132,836.00	
C. TRAVEL			
# of Miles: 1,000 mi rate:		560.00	For travel to serve clients
# of Airfare: 1 avg rate:		450.00	For travel to SBDC conference
# of Hotels: 3 avg rate:	150	450.00	For travel to SBDC conference
# of Per-Diem: 3 day rate:	75	225.00	For travel to SBDC conference
Other		730.00	For travel to serve clients
	Total Travel	2,415.00	
D. EQUIPMENT			
(only for items \$5,000 or more)		0.00	
Tota	l Equipment	0.00	
E. SUPPLIES			
General Office and Operational		5,000.00	
	otal Supplies	5,000.00	
F. CONTRACTUAL			
		0.00	
		0.00	
		0.00	
	Contractual	0.00	
G. CONSULTANTS			
Contractor Hrs Hrly rate			
Business Consultants 1,750 60			Average hourly rate for all business consultants
		0.00	
		0.00	
	Consultants	105,000.00	
H. OTHER			
Facilities		0.00	Included in indirect waived
Training and conferences		2,000.00	
Telecom		1,000.00	
Printing/Copying		3,000.00	
Postage		2,000.00	
		0.00	
	Total Other	8,000.00	
I. TOTAL DIRECT		589,240.00	
J. INDIRECT COSTS IDC Rate:	22.9%		
SBA IDC Claimed:	10.0%	13,636.00	
SBA IDC Waived:	0.0%	93,678.00	
TOTAL BUDGET		696,554.00	

CERTIFICATION OF CASH AND IN-KIND MATCH

CASH MATCH The total Cash Match on this sheet should match the total Cash Match on ATTACHMENT 3- Sheet 1						
Source of Cash Match (include name of funding entity, grant name, etc)	Brief Description (What does funding pay for?)	Dollar Amount	Is funding already secured?	If not Secured, when do you expect to know if is secured?	Funder's Performance Period (start and end date)	
energy grant name, etc.	(What ares randing pay 101.)	7	(1.01.14)	FY14-15	7/1/13-	
Community Development	Business consultants; Director of Small Business		FY13-14 funds	funds to be secured by	6/30/14; 7/1/14-	
Block Grants	Services	\$105,000	secured.	May 2014.	6/30/15	
City & County of SF General	Remaining salaries, benefits,	¢444 FF4	FY13-14 funds	FY14-15 budget to be finalized by	7/1/13- 6/30/14; 7/1/14-	
Fund	expenses and indirect costs	\$441,554	secured	June 2014	6/30/15	
Total Cash Match						

IN-KIND MATCH The total In-Kind Match on th	nis sheet should match the total	In-Kind Matc	h on ATTACHMENT 3-	Sheet 1
Source of In-Kind Match (include name of donating entity)	Brief Description (What is the in-kind for?)	Dollar Value	New in-kind source or used in the past?	Documentation type to be used to for certifying in-kind?
Total Cash Match				_1

As the authorized representative of the Applicant Organization, I hereby certify that the Small Business Development Center program budget as set forth in this proposal contains match in the amount and from the sources listed above. I certify that these funds and contributions are/will be under the control of the top SBDC manager and that these funds are not being used to match any other federal funds.

Alle.	Jordan Klein Senior Project Manager	December 17, 2013
Signature	Printed Name and Title	Date

PLANNED CLOSURE DATES

Please indicate all closure dates for the location(s) where SBDC services will be provided. It is completely acceptable if some of the listed holidays are not observed and/or are observed on a different date by the applicant organization.

Fourteen (14) closures is an the normal number of days SBDCs are closed for holidays. This allows for ten (10) federal holidays, Cesar Chavez Day—a holiday in California, and three other days normally used the day after Thanksgiving and in conjunction to Christmas. SBDC closures of more than fourteen (14) days may impact funding levels.

Holiday	2014 Date	2014 Center Closure (Date Observed)
New Year's Day	January 1	January 1
Martin Luther King Day	January 20	January 20
President's Day	February 17	February 17
Cesar Chavez Day	March 31	n/a
Memorial Day	May 26	May 26
Independence Day	July 4	July 4
Labor Day	September 1	September 1
Columbus Day	October 13	October 13
Veterans Day	November 11	November 11
Thanksgiving Day	November 27	November 27 & 28
Christmas day	December 25	December 25
SBDC Staff Trainings	TBD	TBD (2)

Total closure days: 13

Attachments 8: Résumés

Enclosed are résumés for the following existing personnel referenced in the proposal:

Todd Rufo, Director, Office of Economic & Workforce Development
Joaquin Torres, Deputy Director
Regina Dick-Endrizzi, Director, Office of Small Business
Martha Yanez, Small Business Assistance Center Supervisor
Christian Murdock, Administrative Analyst, Office of Small Business
Manish Goyal, Program Manager, Jobs Squad
Francis Chan, Project Manager, Jobs Squad
Merrick Pascual, Chief Financial Officer
Fred Liedl, Finance Manager
Lisa Estrada, Fiscal Compliance Officer
Laurel Arvanitidis (née Barsotti)
Amy Cohen, Director, Neighborhood Business Development
Holly Lung, Economic Development Program Manager

Holly Lung, Economic Development Program Manager
Jordan Klein, Senior Project Manager, Invest in Neighborhoods
Crezia Tano, Senior Project Manager, Community Benefit District Program
Ellyn Parker, Project Manager
Jorge Rivas, Project Manager
Diana Ponce De Leon, Project Manager





SMALL BUSINESS COMMISSION OFFICE OF SMALL BUSINESS

CITY AND COUNTY OF SAN FRANCISCO EDWIN M. LEE, MAYOR

December 10, 2013

Todd Rufo, Director Office of Economic and Workforce Development City and County of San Francisco 1 Dr. Carlton B. Goodlett Place, Room 448 San Francisco, CA 94102

Subj: Passage of Resolution No. 001-13-SBC [Supporting SF Small Business Development Center Proposal]

Dear Mr. Rufo:

At a special meeting on Monday, December 9, 2013, the Small Business Commission unanimously passed a resolution in support of your office's application to host the Northern California Small Business Development Center (SBDC) program. The Commission believes the SBDC program is a natural fit to compliment the ongoing small business support and development services provided by your staff and by the Office of Small Business.

I wish you luck with your application, and want to convey the Commission's appreciation for your hard work and continuous support to San Francisco's small business community.

Please feel free to contact me should you have any questions related to the Commission's action.

Sincerely,

Regina Dick-Endrizzi

Director, Office of Small Business

cc: Jason Elliot, Mayor's Office

Joaquin Torres, OEWD Jordan Klein, OEWD

ZMick- Endenzi

SMALL BUSINESS COMMISSION 1 Dr. Carlton B. Goodlett Place, Room 110 San Francisco, CA 94102 415.554.6134





CITY AND COUNTY OF SAN FRANCISCO EDWIN M. LEE, MAYOR

STEPHEN ADAMS, PRESIDENT
MONETTA WHITE, VICE PRESIDENT
KATHLEEN DOOLEY, COMMISSIONER
MARK DWIGHT, COMMISSIONER
LUKE O'BRIEN, COMMISSIONER
WILLIAM ORTIZ-CARTAGENA, COMMISSIONER
IRENE YEE RILEY, COMMISSIONER

December 9, 2013

FILE NO. R-2013-001-SBC RESOLUTION NO. 001-13-SBC

Supporting SF Small Business Development Center Proposal

Whereas, small businesses are a vital part of San Francisco's economy; and

Whereas, the provision of business assistance services and one-on-one consulting is proven to be an effective method of establishing, growing, strengthening and retaining small businesses, boosting the local economy, and creating local jobs; and

Whereas, the San Francisco Small Business Development Center (SF SBDC) is an effective provider of business assistance services and an essential part of the continuum of services provided to small business in San Francisco; and

Whereas, the San Francisco Small Business Development Center is currently without a local host organization to house and provide fiscal sponsorship and oversight for SF SBDC's small business consulting services; and

Whereas, the Northern California SBDC Lead Center seeks to establish a partnership with a municipality, nonprofit corporation, or institute of higher education to serve as the new host organization for the San Francisco Small Business Development Center, and has issued a request for proposals (RFP) from entities that are interested in establishing such a partnership; and

Whereas, San Francisco's Office of Economic & Workforce Development (OEWD) plans to submit a proposal in response to that RFP, seeking to establish the City and County of San Francisco as the new host for the San Francisco Small Business Development Center; and

SMALL BUSINESS COMMISSION 1 Dr. Carlton B. Goodlett Place, Room 110 San Francisco, CA 94102 415.554.6134

REGINA DICK-ENDRIZZI, EXECUTIVE DIRECTOR CHRISTIAN MURDOCK, ACTING COMMISSION SECRETARY

Whereas, San Francisco voters, through the passage of Proposition I in November 2007, established the Small Business Assistance Center to increase and streamline services for small businesses in the City; and

Whereas, through the Jobs Squad and Invest in Neighborhoods, San Francisco's Office of Economic & Workforce Development has greatly expanded the City's provision of direct services to small businesses and commercial districts; and

Whereas, the services provided by the San Francisco Small Business Development Center align closely with these existing services for small businesses already provided by the City and County of San Francisco; and

Whereas, the City and County of San Francisco would benefit greatly from the opportunity to directly leverage the business assistance services provided by the San Francisco Small Business Development Center, to the benefit of the City's small businesses; now therefore, be it

Resolved, that the Small Business Commission of the City and County of San Francisco hereby supports the proposal submitted by the Office of Economic & Workforce Development to establish the City and County of San Francisco as the host organization for the San Francisco Small Business Development Center; and be it

Further Resolved, that the Small Business Commission urges the Northern California SBDC Lead Center to accept the proposal submitted by the Office of Economic & Workforce Development and award OEWD full funding for the expansion of consulting services in San Francisco.

I hereby certify that the foregoing Resolution was adopted by the Small Business Commission of the City and County of San Francisco on 12/9/2013.

Christian Murdock

Acting Commission Secretary

AYES: DOOLEY, DWIGHT, O'BRIEN, ORTIZ-CARTAGENA, YEE RILEY, WHITE

NAYS: NONE

ABSENT: ADAMS RECUSED: NONE