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**RESPONSE #190949258 SUBMITTED ON 01/13/2022 01:28:27 PM**

OEWDRequestforProposalsRFP219Application

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**Welcome**

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## Part I. Primary Applicant Profile

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### Primary Applicant

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Primary Applicant Official Business Name

#### SF New Deal

Doing Business As (DBA) or Also Known As (AKA), if applicable

*No answer given*

Employer Identification Number (EIN) List the Primary Applicant's federal tax ID number here. This number should contain a total of 10 digits. Nonprofit corporations can look up their EIN on the following website: <https://apps.irs.gov/app/eos/>

**85-0498939**

### Primary Applicant Headquarters

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Street Address

**2501 Phelps St.**

City

**San Francisco**

State

**CA**

Zip Code

**94124**

Website

**<https://sfnewdeal.org>**

Main Telephone Number



**4154801185**

## Primary Applicant Executive Director / CEO Information

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Executive Director / CEO Name

**Jacob Bindman**

Executive Director / CEO Email Address

**hi@sfnewdeal.org**

Executive Director / CEO Title

**Interim Executive Director**

Executive Director / CEO Telephone Number

**4153149720**

## Primary Applicant Type of Entity

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Select all that apply:

**Nonprofit - 501(c)(3)**

## Primary Applicant City & County of San Francisco Supplier Status

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Current status:

**Approved Supplier**

Supplier Number (e.g. 00000#####):

**0000042775**



Primary Applicant Organizational Staffing and Board Composition

Organizational Chart

Upload Primary Applicant's Organizational Chart (no specific template provided).

SFNewDealOrgChart.pdf

Executive Director Tenure

Years

1

Months

10

Total Number of Full Time Equivalent (FTE) Employees

Enter the number of FTE for the whole organization, not just the program being proposed. Your FTE number may be different from the total number of people on your payroll.

15.5

Number of Governing Board Members

Enter the number of Board members, excluding Emeritus/Advisory members.

4

Current Board Members

Board Member Details

Board Member Name



**Lenore Estrada, President**

Years/Months on the Board

**1 year 10 months**

Home Neighborhood (or City/State if outside San Francisco)

**Hayes Valley resident, business locations in Bayview and the Mission**

Job or Relevant Experience

**Lenore Estrada is the co-founder and board president of SF New Deal, as well as the co-founder and owner of Three Babes Bakeshop operating out of the Bayview and with a forthcoming retail space and kitchen opening on Valencia Street in the Mission.**

**Board Member Details**

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Board Member Name

**Simileoluwa Adebajo, Secretary**

Years/Months on the Board

**1 year**

Home Neighborhood (or City/State if outside San Francisco)

**Sunset district resident, business location in SOMA**

Job or Relevant Experience

**Head Chef and Owner of Eko Kitchen****Board Member Details**

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Board Member Name

**Ken Shear, Treasurer**

Years/Months on the Board

**1 year 10 months**

Home Neighborhood (or City/State if outside San Francisco)



## Duboce Triangle

Job or Relevant Experience

**Retired civil rights lawyer, co-founder and CEO of Booktrope, represents his son, SF New Deal founding funder Emmett Shear (co-founder of Twitch, Duboce Triangle resident).**

## Board Member Details

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Board Member Name

**Paul Burns, Director**

Years/Months on the Board

**6 months**

Home Neighborhood (or City/State if outside San Francisco)

**Inner Sunset**

Job or Relevant Experience

**Now retired founder of successful small business Fireclay Tile launched in 1986 that moved headquarters and showroom to San Francisco's Design District in 2014.**

## Board Recruitment

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If you are in the process of recruiting new Board members, please describe any efforts to ensure a diverse and equitable Board that aligns with the community being served. (1,000 character limit)

**SF New Deal is recruiting 2-3 additional board members who live, work and/or, have a business in the City of San Francisco. Our board recruiting goals include individuals who have experience working in government entities, or with government contracts. Our current board, though small, represents diverse perspectives of SF-based business founders/owners with lived experiences as women, immigrants, and people of color living and/or working in Bayview, Hayes Valley, Mission, SOMA, and the Sunset.**

## Total Number of Volunteers

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Enter the total number of volunteers for the organization. Exclude Board Members counted above.

**400**



Page 4 of 15 - Part I. Primary Applicant Profile (continued)

## Primary Applicant Organizational Budget Information

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List the total organizational budget amount for the Primary Applicant for the last completed fiscal year. Please note this is different than the budget for the proposed project.

**21394968**

Upload the Primary Applicant's total organizational budget for the last completed fiscal year (use your own format; no template provided).

**SFNewDealBudget\_2021.pdf**



Page 5 of 15 - Part I. Primary Applicant Profile (continued)

## Program Lead Profile

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Is the Primary Applicant serving only as the fiscal agent for a different Program Lead organization which is actually delivering the proposed services?

**No, Primary Applicant is the Program Lead (no Program Lead profile needed)**





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## Program Area

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Program Area List: Select one

**K - Small Business Grants Payment Administrative Support**



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## Part II. Project Description - Introduction

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### Introduction: Title and Summary

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Project Title (100 character limit)

**Small Business Grants Awards Distribution Administration**

Brief summary of proposed project (1-2 sentences; 350 character limit)

**Leveraging its existing equity framework and small business network and grantmaking service experience, SF New Deal will provide administrative excellence in funds disbursement, spending tracking and verification, and reporting for OEWD's Small Business Grant Programs.**



## Section 1: Applicant Qualifications and Staff Assignments (30 points)

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1. Briefly describe your organization's mission, values, and history providing services to residents and businesses in San Francisco. (2,000 character limit)

**SF New Deal is a 501(c)3 nonprofit founded to provide supportive services and financial opportunities for small businesses in San Francisco. Our organization works to address both the symptoms and root causes of inequity by building pathways which connect local business owners, workers, community leaders, and neighbors in need, for the benefit of the entire city.**

**Every action SF New Deal takes to remove barriers to relief and recovery for communities begins within our equity framework. By acknowledging the systematic and deliberate lack of resources which have been provided to Asian and Pacific Islander, Black, disabled, female-identifying, immigrant, Indigenous, Latinx, LGBTQ+, and low-income communities in San Francisco and across the United States, we are able to explicitly and proportionately provide financial opportunity to workers and businesses from these under-resourced communities.**

**We are empathetic and responsive to the community's needs, collaborating with, and being accountable to, the communities with whom we are creating sustainable solutions. This work is the foundation of all our programs, ensuring that the unique stakeholders, considerations, limitations and opportunities in each program are in context, and developed in participation with the population being served. Our staff is composed of individuals who are from, and have worked in, the communities we serve, bringing a depth of experience and knowledge to inform our equity framework, processes and approach. We are committed to engaging in ongoing practices of accountability, recognizing the responsibility we have to our stakeholders and the community at large about how, where and why we're spending dollars, operating programs, and providing support. Every dollar distributed through SF New Deal programs since the organization's inception is publicly available on <https://sfnewdeal.org>. along with data on our impact and reach.**

2. Describe any past experience successfully implementing similar projects or activities, including grants or contracts with the City of San Francisco or other funders. You may include details on active/ongoing projects as well as prior/completed projects. Please be sure to highlight successful outcomes for the target populations or neighborhoods in the program area. (3,000 character limit)

**Since SF New Deal's launch in March 2020 we have disbursed over \$32 million to 618 small businesses in all 11 districts of San Francisco. In addition to being able to smoothly manage the logistics of fund disbursements, we also maintain business verification documentation (W-9s and licenses) and distribute tax prep documents (1099). We currently manage a monthly average of \$1.4 million in financial disbursements to approximately 130 small businesses across our programs. Over 80% of the ownership of these partners identify as women/BIPOC and/or LGBTQ+.**

**Specific program experience includes our \$1 Million Small Business Micro Grant Debt Relief Program (Micro Grant Program). Launched in May 2021, SF New Deal disbursed \$1,002,500 in grants to 401 small businesses across all 11 districts. Grants of \$2,500 provided immediate, direct financial assistance to small businesses in San Francisco. SF New Deal solicited more than 600 applications for assistance from small businesses, including arts space and artists, restaurants, childcare and educational facilities, and businesses in the transportation and tourism sector. Of the 401 grant recipients, 324 self-identified as BIPOC owned businesses, 189 as women-owned businesses, and 41 as LGBTQ-owned businesses. Verified through a supportive streamlined documentation process, grantees have reported using their grant funds for rent and utilities, re-opening costs, P**



and more, including the build-out of outdoor spaces and parklets. In addition to providing financial relief, the program engaged small business grantees in data collection and research that is being used to inform future programs to benefit grant recipients and other small businesses in San Francisco.

Additional programmatic experience relevant to this RFP includes SF New Deal's longest running program, our CBO Direct Service Meal Program which launched in March 2020. To date, this program has disbursed \$5,669,268 to 47 small businesses.

SF New Deal has or is actively operating seven other programs in partnership with the City of San Francisco: Great Plates Delivered (HSA RFP 999) disbursed \$12.7 million to 70 small businesses; Congregate Housing Sites Meal Program (HSA RFP 885), has disbursed \$9.1 million to 53 businesses; in partnership with the Chinatown Community Development Center and HSA, Feed + Fuel 2.0 supported 57 businesses with \$3.28 million in funds; Prepared Meal Support (HSA RFP 953) will support 17 restaurants with a program budget of \$2.6 million; Takeout Today (HSA RFP 947) is supporting 17 restaurants with a \$500,000 budget; Innovative Neighborhood Food Support (HSA RFP 952) is supporting 13 restaurants with a program budget of \$350,000; and Zero Waste Pilot (SFE), a public-private partnership providing \$2,500 grants to 20 restaurants to support their transition from single use to-go ware, to reusable containers.

SF New Deal is a certified vendor with the City and County of San Francisco supplier ID is 0000042775.

3. Describe your staffing plan for the proposed project. Please answer all of the following in this section: • List the names, titles and qualifications of staff, partners, and subcontractors that will make up the project team. If you do not have a person identified yet (e.g. if you have a vacant position), please provide information on the status of the hiring process. • How will work be distributed within the project team? • Are there any specific cultural, linguistic, educational or other skills that will help the project team deliver the proposed project? (3,000 character limit)

The staffing plan for the Small Business Grants Awards Distribution Administration follows the same staffing structure as our successful Micro Grants Program and Small Business and Client Services divisions. The program services, activities and requisite communications outlined in this proposal will be folded into SF New Deal's current org chart/workflow. As in all our programs, our public-facing materials will be available in multiple languages and accessible in a variety of ways, including email, text, phone, in-person/site visits, and marketing communications. To ensure accuracy in business verification and document collection, we may enlist the support of merchant associations and community groups like Tenderloin Community Benefit District, Calle 24 & Be Chinatown to liaise with neighborhood businesses.

The program will be managed by the Director of Small Business Services, Laura Castellanos with financial management from Kelsey Wordeman. Core supporting team members include Program Managers Kate Yachuk, Kelly Casey-Stevens and Kayla Marquez Velloso, who will provide a case management/portfolio approach to all grantees. The team brings 6.5 years working in the City of San Francisco on programs benefiting small businesses, and Castellanos has over 20 years of professional experience in financial programs management.

SF New Deal's existing Call Center, which is operated within our Client Services department, will be central to the successful execution of this program. Our multilingual Call Center currently operates 7 days a week between the hours of 7am and 7pm in English, Cantonese, Mandarin, Tagalog and Spanish. Since May 2020 the Call Center has managed a weekly volume of up to 3000 calls from small business owners, CBO partners, meal recipients, prospective clients, and other members of our community. The Call Center will continue to serve as an information hub for all SF New Deal's programs, including all current and prospective Shared Spaces permit holders, and potential grant resource beneficiaries as outlined in this proposal.



Our finance team members will put SF New Deal's existing administrative infrastructure to work to ensure efficient and effective disbursements, tracking, and monitoring for this proposal and the timely preparation of tax documents for grantees. Our team uses Google and Airtable surveys, Airtable bases, Bill.com and Quickbooks Online to provide financial and administrative expertise including funds disbursement, grant spending tracking and verification, data collection, and audit-ready reporting. SF New Deal has regularly reported to the City across a range of metrics including clients served, SOGI and demographics, small businesses and their workers, dollars disbursed, and a host of other data. The systems we have in place enable us to capture data for the purpose of reporting as well as using it to quickly operationalize actionable changes and adaptations to our program service operations.

4. Describe the target populations you will serve through this project, your experience serving them, and key needs you hope to address with this funding. Highlight the economic, social, financial, institutional or other issues that require a solution. Please also share any work you have done with the relevant communities to confirm that this proposed project is appropriate and necessary. Examples may include: • Surveys or focus groups with community members • Organizing or advocacy efforts with community members • Research or review of data and best practices serving the target populations (3,000 character limit)

SF New Deal is, or has been, a service provider for several multi-million dollar mass feeding and small business support contracts in the City. The recipients of these relief and recovery services are small businesses and impacted communities across San Francisco's 11 districts, with the largest percentage of participation and funds distribution focused in the neighborhoods of Bayview, Hunters Point, Mission, Chinatown, The Tenderloin, Civic Center, SOMA, Fillmore, Western Addition, Visitation Valley, Excelsior, Merced Heights, and Oceanview/Ingleside.

In our most recent small business data collection survey, nearly every business ranked access to capital, weak consumer demand, and supply chain disruptions as their top concerns in 2022. These businesses have on average been in operation for 12 years, and 79% carry debt. Nearly 90% applied for and received some pandemic assistance in the form of PPP, EIDL, or grants/loans. The data represents more than 300 businesses across all 11 Districts, owned and operated by predominantly (70%) Asian and Pacific Islander, Latinx, and Black owners. The Small Business Grant Awards will help to address at least the top two concerns these businesses have, by providing cash and resources so they can safely serve their customers and communities.

SF New Deal's equity framework is the foundation of all our actions. An example of this framework in practice was prioritizing the outreach for our Micro Grants Program toward small businesses owned and operated by under-resourced groups; specifically, businesses that continue to experience barriers to accessing capital due to a lack of credit history and/or exclusion from investor networks. Being transparent and collaborative in our approach builds trust with our communities, and has made SF New Deal a known and reliable resource.

The impact of the \$32 million SF New Deal has disbursed to date is quantifiable: on average, businesses that participated in our direct service programs retained at least 50% of their existing staff. Our programs are particularly vital for the approximately 25% of restaurant workers who are immigrants and/or undocumented. From the start we've partnered with small businesses and community groups in neighborhoods that the City of San Francisco has declared "areas of vulnerability," centering the wisdom of their lived experience to inform decision making around the programs that we implement together.



## Section 2: Approach, Activities and Outcomes (40 points)

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1. Clearly state your approach to the project. Provide detailed goals and objectives, and describe any evidence-based practices that inform your project design. (4,000 character limit)

**Leveraging its existing equity framework and small business network and grantmaking service experience, SF New Deal will provide administrative excellence in funds disbursement, tracking and reporting for OEWD's Small Business Grants Awards Distribution.**

SF New Deal's existing organizational infrastructure and systems have the capacity to efficiently manage a high volume of billing, spending tracking and verification, and reporting for small businesses in San Francisco, with the cash flow capabilities to distribute a minimum of \$1 million in grant funds each month, on a net 60 day OEWD reimbursement structure. While we currently communicate with, and provide grants and services to, small businesses across all 11 Districts of San Francisco, SF New Deal has designed all of its programs within an equity framework, so that the largest beneficiaries of our services are historically under-resourced small businesses, those in neighborhoods labeled "areas of vulnerability," and those hit hardest by COVID-19.

### Primary Goals

- Distribute a minimum of \$10 million in grant funds to small businesses across all 11 districts in San Francisco
- Streamline collection and documentation of business verification and tax information, as well as grant spending verification that is able to accommodate the reporting capabilities of small business recipients
- Provide proactive, streamlined communications with all grant recipients to ensure appropriate documentation has been received, funds are distributed in a timely manner, and grantee expenditures are accurately verified
- Provide multichannel, multilingual technical support to grantees to ensure they are able to submit all necessary documentation, and/or to identify additional documentation that can satisfy spending verification
- Gather data and information from recipients regarding the services provided in this proposal, to better clarify best practices for funds distribution and tracking

### Primary Objectives

- Engage SF New Deal network in multichannel, multilingual marketing and outreach to inform recipients about the necessary documentation needed in order to trigger payment of the funds; develop streamlined systems to acquire these documents
- Manage timely and efficient distribution of grant funds through various channels, utilizing bill.com, and track all payments made/received in Quickbooks Online
- Offer widely accessible guidance and direction on verification and documentation of permissible grant expenditures, and develop streamlined systems to acquire these documents
- Provide a detailed report to OEWD that reviews data and feedback in order to:
  - Better understand current and/or persistent challenges that small businesses are experiencing,
  - Clarify barriers and limits to providing adequate documentation for receipt of grants and submission of expenditures verification documents, and
  - Provide insights and innovations to help streamline these processes in subsequent disbursement cycles



SF New Deal will ensure that OEWD's grant funds are distributed and that all small business grantees are able to receive and utilize their funds quickly. The significant administrative lift will fall to SF New Deal, who will work proactively to engage with grantees to ensure all paperwork is received and documented with audit-level accuracy and transparency. In a 2020 survey SF New Deal conducted with its partners, businesses reported having to cut 977 jobs following the initial shelter in place order, but that participation in SF New Deal's programs enabled 32% of those jobs to be rehired. Our work providing relief in the shape of funds, technical assistance, and communication of additional opportunities to small businesses continues to be a much-needed lifeline.

2. Describe the services to be provided. For each service component, provide detail on the following, as appropriate: types of activities; number of hours; frequency of services; location(s) of services; and methods that will be used to deliver services. (4,000 character limit)

**Modeled after our own successful Micro Grants Program and community feeding funds distribution mechanisms, SF New Deal will provide the following services to ensure streamlined, efficient, and effective Small Business Grants Awards Distribution for OEWD's small business grants program.**

**Grantee Tax Document Acquisition—**SF New Deal will provide information and guidance to all OEWD grant recipients about the tax verification and other relevant documentation needed in order to trigger grant payments. Communication of this information will be provided in multiple languages, with individual support and follow-up to targeted applicants as needed through a case-management/portfolio approach, and SF New Deal's Call Center. As appropriate SF New Deal will work with its partners including Calle 24, Be Chinatown, Tenderloin Community Benefit District and other CBOs, neighborhood merchant associations and CBDs, to acquire the needed documentation from small businesses as quickly as possible.

**Grantee Distribution Communications and Distribution of Funds—**SF New Deal will communicate on at least a monthly basis with OEWD to gather information on the small businesses selected to receive grants in that month. Once this information is received, SF New Deal will communicate directly with recipients regarding documentation required to trigger payment. Once appropriate documentation is received, funds will be distributed within 30 days via Bill.com either electronically or with paper check for less tech enabled businesses. SF New Deal will provide OEWD with proof of payments made to grantees on a monthly basis, to be reimbursed net 60 days. All documentation, disbursements, and communications will be logged in SF New Deal accounting software and Airtable database.

**Permissible Uses of Grant Funds Tracking and Verification—**SF New Deal will provide ongoing guidance for tracking and verifying use of the funds as defined by SF New Deal in collaboration with OEWD, taking into account the limitations of small business record-keeping. The Call Center will provide ongoing technical support to small business grantees around uses of grant funds and spending verification. As needed, SF New Deal will work with its partners including Calle 24, Be Chinatown, Tenderloin Community Benefit District and other CBOs, neighborhood merchant associations and CBDs to collect this documentation.

**Research and reporting—**SF New Deal will collect internal team feedback on processes on an ongoing basis, including team observations of any significant roadblocks and potential ways to streamline the disbursement and documentation process, which can be adjusted in real-time. All small businesses who receive a grant will be added to SF New Deal's Bill.com and Airtable database. As documentation is received, it will be stored in each small business profile, along with documentation of the grant disbursement, and spending verification. All data is maintained in Google Workspace and Airtable bases, and Quickbooks Online. At the close of the grant period, SF New Deal will survey participating small businesses to assess the effectiveness of its communications and tracking mechanisms with the target population.



3. Describe the qualitative and quantitative outcomes your project proposes to achieve. Provide projections of the accomplishments to be achieved for each activity or function proposed, such as the number of activities or steps to be accomplished or number of individuals or businesses to be served. If accomplishments cannot be quantified, list them in chronological order to show a sequence of steps and their projected start and end dates. (3,000 character limit)

**Overall outcomes:**

- Distribute at least \$10 million in grants funds over a 12 month period
- Collect tax and other relevant documentation from all grantees, both to verify eligibility to receive funds, and verify their use of the funds
- Collect additional demographic and essential information from participating small businesses and partners in order to develop a concrete list of actionable, measurable adaptations for future disbursement cycles. Provide OEWD with audit-level accuracy and transparency in reporting on the disbursement of funds, and systems and mechanisms used to communicate with grantees.

**Additional outcomes:**

**Grantee Tax Document Acquisition**—SF New Deal will reach out to all small business grant recipients to let them know about the documentation requirements for receipt of funds, and the expectations around timelines for submission of spending verification. SF New Deal will take these communications as an ongoing opportunity to learn from small businesses about their internal capacity limitations, while also providing guidance and coaching on best practices.

**Grantee Distribution Communications and Distribution of Funds**—SF New Deal has the capacity to efficiently outreach to hundreds of small businesses per week, and can process and distribute a minimum of \$1 million in funds on a monthly basis. SF New Deal will communicate with, and collect data and information from, all recipients in order to inform future outreach and reporting efforts.

**Permissible Uses of Grant Funds Tracking and Verification**—In addition to providing detailed information to grantees around payment documentation and spending tracking and verification, SF New Deal will identify the barriers that small businesses have to submitting financial documents in order to adapt and adjust systems to meet the capacity of small businesses in the target population. SF New Deal will again take this as an opportunity to learn from small businesses, and provide guidance and coaching on achievable best practices for tracking expenditures. This is particularly important: in SF New Deal's most recent survey of small businesses, more than half spend most of their time on bookkeeping and financials tracking, and 45% listed financial and accounting services as the number one supportive service they'd like to help their business in 2022.

**Research and reporting**—SF New Deal will provide transparency of the entire administrative process, including all payment/disbursement receipts and documentation, as well as any additional demographics and feedback gathered at various points.

SF New Deal acknowledges that not all businesses are equipped with the technological and/or administrative capacity to operate on digital platforms with rapid turnaround times. SF New Deal will learn and share with the City and all partners how SF New Deal's specific approach enables historically under-resourced small businesses to successfully access the resources.

4. Provide a project timeline. Please include all major milestones and target dates, as appropriate. Describe any factors that might speed or hinder implementation of the project, and explain how you will manage unanticipated project hurdles, should they arise. (4,000 character limit)





Because of the 12 month, rolling nature of the grants process, SF New Deal will engage in the following activities on an ongoing basis. The process below outlines the most efficient way to launch an administrative effort able to handle a high volume of grant funds disbursements each month. SF New Deal's continuous collection of data and monitoring of the process will enable us to adapt and adjust our efforts to maximize efficiency throughout the 12-month duration of this proposal.

#### Collaboration & Discovery

-February Outline the parameters of the program

--Gain clarity around OEWD's fund disbursement goals, including # of grants and total amount distributed within the 12 month timeframe

--Gain clarity around acceptable forms of documentation required by OEWD from SF New Deal as proof of grantee eligibility to receive funds, and gain clarity around permissible uses of grant funds and eligible verification

--Develop multilingual, multichannel communications about the grant disbursement process and steps

#### Grantee Distribution Communications & Distribution of Funds

-March Creation of multilingual, multichannel grantee communications

--Notification of grants by email, phone and text

--Dissemination of information around documents needed in order to trigger payment; introduction to the grant funds spending verification

--Engage with merchants associations and CBDs to support small businesses in gathering and submitting required documentation for receipt of funds

--Update contact information and basic demographics of all small business recipients with particular emphasis on discovering any significant changes in operations since applying for the grant

--Gather required grant documentation, including financial information (e.g., W-9s, business licenses, tax information) in order to process funds

-April Review grant recipient documentation and set up/verify grantee business accounts in bill.com. Issue reminders to grantees who have not submitted required documentation

-April Disburse grant funds to business accounts within 30 days of receipt of acceptable tax documentation—funds can be disbursed electronically or via paper check.

-May-Ongoing Provide OEWD with agreed-upon proof of grants disbursements made the previous month, and invoice OEWD for net 60 day reimbursement. --Provide any insights into the grant process or trends in changes for small businesses.

#### Permissible Uses of Grant Funds Tracking and Verification

April–Ongoing Provide guidance on use of funds verification process

Proactive follow-up with grantees to provide information on permissible use of funds

Provide examples of eligible documentation types such as bank statements, checks, electronic payment receipts, payroll journals, invoices, or bills.

Partner with neighborhood organizations to assist with spending verification as needed

Provide technical support via the Call Center, and assist with document submission as needed

May-Ongoing Provide OEWD with documentation and records for all completed grants: those small businesses who have used their funds and submitted all spending and verification documents to SF New Deal. Provide OEWD with preliminary information on grant usage trends.

#### Research, survey, analysis and reporting

November Develop a final survey for all participating businesses to discover spending trends and actionable adaptations to distribution processes and communications, in order to better serve our target populations



**December Email surveys in multiple languages**

**Mid-December Follow-up emails and calls made to grantees who have not submitted responses; direct outreach made to community groups for their support in helping grantees submit surveys**

**January First draft of report on survey findings completed**

**January Provide granular and transparent financial tracking documentation for both SF New Deal's distributed grant funds, as well as small businesses' use of funds.**

**February 2023 Final report made available**

5. Describe your expertise serving demographic and geographical areas of focus where appropriate, or as required by the program area. Describe specific outreach or engagement strategies that you will use to reach target populations identified in the RFP. (2,000 character limit)

SF New Deal's approach prioritizes collaboration, proactive outreach, accessibility, accountability, & dignity. These qualities are why the communities we serve continue to partner with us, and help improve and expand our programs. In practice, these qualities translate to: multilingual and multichannel communications to reach our communities in the ways that are accessible to them (the Call Center, email, text, social media and in-person); continuous open feedback and program adaptation with our partners, participants, stakeholders, and small businesses (through surveys, calls, interviews, meetings); actionable solutions to daily service provisions (via the Call Center, which functions as a communications hub and connector); and continual dialogue about the immediate and foreseeable challenges and potential solutions ahead for the communities we serve (through research, analysis, surveys and reporting).

Because not all residents, small businesses and communities in San Francisco experience the same challenges, SF New Deal's programs are flexible, adaptive and innovative to the real-time needs of the communities we serve. We learn about the unique challenges of our neighbors through a continuous review and reflection of our programs. For example, as part of our Micro Grants program, we utilized the Call Center for over-phone grant application submissions, to accommodate those small businesses in our target communities who are more comfortable communicating verbally. We apply grassroots marketing techniques like flyering and in-person communication across many of our programs, to ensure we are reaching less tech enabled/connected businesses.

SF New Deal provides services in all 11 Districts of San Francisco, but from the start, services have been located primarily in the Bayview, Hunters Point, Mission, Visitation Valley, Chinatown, the Tenderloin, Civic Center, SOMA, Fillmore, Western Addition, Excelsior, Merced Heights, and Oceanview/Ingleside neighborhoods.



### Section 3: Performance Measurement and Reporting (15 points)

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For this section, provide a narrative describing: • How data on project activities and outcomes will be collected and reported • Measures that will be developed and/or used to determine the extent to which the project has achieved its stated objectives • How data will be used to determine whether the needs identified are being met and whether project results are being achieved • Any processes and procedures that are or will be in place to determine whether the project is being conducted in a manner consistent with the work plan and how effectiveness and efficiency will be improved • How the outcomes proposed and measured will demonstrate positive impact based on the Scope of Work outlined in the program area. (6,000 character limit)

**Monitoring and reporting is an essential and core activity across all our programs. SF New Deal tracks quantitative and qualitative data continually and simultaneously in order to get a clear picture of inequities and outcomes gaps for the communities we serve, both internally (barriers and challenges that come up through the process of the program) as well as externally (current challenges for small businesses, including the barriers to accessing relief and recovery supports that are available). Our organizational goals around data collection are to provide transparency on how, why, and where we're spending dollars, and analyze the data to determine ways to adapt our work to better provide services to our community. In-depth information on our operations, impact, spending and fund distribution since our founding is available to the public at SFNewDeal.org.**

Internal data will be collected on an ongoing basis by the program manager and core staff. Primarily qualitative in nature, our highly-skilled team will provide observations of any significant roadblocks and potential ways to streamline application and grant processing, as well as feedback on ongoing program management. Internal data is maintained in Google Workspace and Airtable bases which are accessible to program team members, and are consistently reviewed to provide insight and adaptations to activities.

Collecting data from external stakeholders and participants will help SF New Deal and all stakeholders understand the specific challenges to participation that those we serve face at critical points in communication, and in providing documentation. Data will also be collected from external stakeholders to understand who received the funds, how those funds are being used, and what the challenges are for businesses in obtaining relief and recovery support. Understanding these challenges and the time and materials required to address them provides critical information for developing the range of services and resources that our target communities need.

Final reporting will take place at the close of the proposal period. In addition to accurate and granular financial tracking of all grant disbursements, SF New Deal will also track, on an ongoing basis, all small business grant expenditures, to ensure the funds have been permissibly utilized. Depending upon OEWD needs, detailed information can be provided.

A final survey will be sent to all grantees, and will be developed using best practice methodologies and distributed in multiple languages. Our aim is to collect data showing trends in how grant money was spent and where the greatest and least effective impacts from the grant happened (from the small businesses' perspective), including detailed data on any businesses that closed or restructured operations or services. SF New Deal will analyze all closing survey responses in order to develop a concrete list of actionable, measurable adaptations for future grant rounds based on what these businesses identify as the most pressing needs and challenges around relief and recovery.



Independently, SF New Deal has surveyed and reported on our work to the San Francisco Food Security Task Force, the San Francisco Small Business Commission, members of the San Francisco Board of Supervisors, members of the Office of Economic and Workforce Development, members of the San Francisco Human Rights Commission, Department of Public Health, and Human Services Agency, and the West Coast Regional Director of the Federal Emergency Management Agency.



## Section 4: Financial Management and Budget (15 points)

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Please provide a brief narrative detailing the financial management of the Primary Applicant organization. (6,000 characters)

Specific recommendations:

- Describe the key features of your organization's financial tracking system and confirm it is capable of generating all financial information needed for required reports, including data needed to monitor, evaluate and if necessary, modify program performance.
- Describe in detail any cost allocation plan utilized when costs are chargeable to more than one cost category, or to more than one program and/or funding source.
- If proposing a management fee/fiscal fee, identify how the requested percentage was identified.
- Provide a narrative justification for items in the budget
- Provide details on any matching or leveraged funds including anticipated source, amount, and restrictions. Although encouraged for all requests, matching funds are required by some Program Areas. Refer to the Program Area descriptions in Section II of the RFP to determine if a match is required.
- Upload a proposed budget for the project using the budget template available on the RFP 219 website ("Appendix B: Proposal Budget Template").

**SF New Deal's goal is to quickly and accurately distribute a minimum of \$10 million in grant funds to OEWD grant recipients.**

The cost for SF New Deal to manage the administration of OEWD grant distribution is approximately \$749,950, which represents a percentage of SF New Deal's existing FTE personnel costs, specifically the Program Manager and core team, and Call Center service to be allocated from this budget to support the provisions outlined in this proposal. Please note that our existing Call Center employs 10 individuals to operate the Call Center from 7am - 7pm, seven days per week, providing knowledgeable services for up to 3,000 calls in multiple languages every week. We project that this proposal will utilize approximately 80% of the Call Center's time/volume, and so have reflected this as a lump sum in personnel based on annual Call Center operations costs, rather than add each individual Call Center employee to the budget. That said, no fringe benefits from the Call Center were included in the fringe amount budgeted to this proposal.

Administration of OEWD's grants disbursement is a natural extension of SF New Deal's existing funds management and distribution infrastructure, with transactional operations led by Bookkeeper and Finance Manager, Kelsey Wordeman, and will not require the hiring of additional individuals. Contractors used for the purposes of this proposal are contractors with whom SF New Deal already works to support our regular programming, and their contracted time will be increased as needed to provide the service provisions outlined in this proposal. Specifically, Bannigan McDade and ABBC Services will provide assistance with financial oversight, bookkeeping and accounting services, as well as audit-prep. Each grant disbursement and confirmation of funds received will be recorded in SF New Deal's Quickbooks Online accounting platform, and reconciled with Airtable data collected by program teams about each grantee. On a monthly basis, SF New Deal will provide OEWD with documentation of each grant that was disbursed, along with an invoice for reimbursement of the monthly amount payable net 60 days.

All SF New Deal's current customer service, tracking, and financial information is collected through Airtable, Quickbooks, and Google Workspace. As such, the project and program supplies line item reflects a portion of our IT systems and technology platform costs, which provide the infrastructure enabling SF New Deal's tracking, reporting, monitoring, efficiency, and rapid responsiveness, including the underlying platforms to operate our Call Center and our existing public-facing communications systems. Reporting for all programs is tracked on a weekly basis and information is shared among internal and external stakeholders as needed to comply with contract requirements.



**The staff travel line item supports site visits and in-person technical assistance, and the staff development line accounts for the development of a Call Center playbook and staff training to ensure excellence in customer service around the provisions outlined in this grant as well as ongoing data security training.**

## Proposed Budget

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Total Proposed Project Budget Amount - The amount of funding requested from OEWD for this proposed project.

**749950**

Proposed Leverage Amount - The amount of funding being leveraged from other funding sources for this proposed project, if applicable.

*No answer given*

Appendix B: Budget Template - Upload the budget for your proposed project using the Excel template provided. No other budget formats will be accepted.

**SFNewDeal\_K\_Appendix B\_Budget\_RFP\_219.xlsx**



Page 12 of 15 - Part II. Project Description - Section 5

## Section 5: Capacity Building (not scored)

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Your response to this question is not required and it will not be scored. It gives us information to inform our capacity building investments to potential grantees in the future. • Beyond those addressed directly by this grant proposal, what are the top three needs of your organization? • What are the top three strengths or assets? (2,000 character limit)

*No answer given*



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## Primary Point of Contact for This Application

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Primary Point of Contact Name

**Jenais Zarlin**

Primary Point of Contact Title

**Chief Impact Officer**

Primary Point of Contact Email Address

**jenais@sfnewdeal.org**

Primary Point of Contact Telephone Number

**415-841-2644**





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## Submission Authorization

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Name

**Jenais Zarlin**

Date

**01/13/2022**



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## Ready to Submit?

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## Attached Files



### SFNewDealOrgChart.pdf

<https://oewdprocurement.tfaforms.net/uploads/get/7f78f4714266b7b6ac124d1b0f119c90-SFNewDealOrgChart.pdf>

(<https://oewdprocurement.tfaforms.net/uploads/get/7f78f4714266b7b6ac124d1b0f119c90-SFNewDealOrgChart.pdf>)



### SFNewDealBudget\_2021.pdf

[https://oewdprocurement.tfaforms.net/uploads/get/a562aaa80e0df62b2323c48a20343821-SFNewDealBudget\\_2021.pdf](https://oewdprocurement.tfaforms.net/uploads/get/a562aaa80e0df62b2323c48a20343821-SFNewDealBudget_2021.pdf)

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### SFNewDeal\_K\_Appendix B\_Budget\_RFP\_219.xlsx

[https://oewdprocurement.tfaforms.net/uploads/get/2256df8ebf83d78f2da4a1fa75b68a08-SFNewDeal\\_K\\_Appendix-](https://oewdprocurement.tfaforms.net/uploads/get/2256df8ebf83d78f2da4a1fa75b68a08-SFNewDeal_K_Appendix-B_Budget_RFP_219.xlsx)

[B\\_Budget\\_RFP\\_219.xlsx](https://oewdprocurement.tfaforms.net/uploads/get/2256df8ebf83d78f2da4a1fa75b68a08-SFNewDeal_K_Appendix-B_Budget_RFP_219.xlsx) ([https://oewdprocurement.tfaforms.net/uploads/get/2256df8ebf83d78f2da4a1fa75b68a08-](https://oewdprocurement.tfaforms.net/uploads/get/2256df8ebf83d78f2da4a1fa75b68a08-SFNewDeal_K_Appendix-B_Budget_RFP_219.xlsx)

[SFNewDeal\\_K\\_Appendix-B\\_Budget\\_RFP\\_219.xlsx](https://oewdprocurement.tfaforms.net/uploads/get/2256df8ebf83d78f2da4a1fa75b68a08-SFNewDeal_K_Appendix-B_Budget_RFP_219.xlsx))

