

Social Impact Partnership Documentation Compliance

To verify firm commitments delivered, the SFPUC Social Impact Partnership (SIP) program requires specific documentation of all financial commitments and volunteer hours for each reporting period.

Regardless of the type of commitment (Financial and/or Volunteer Hours), **all Social Impact Partnership commitments must:**

- Directly benefit the communities, neighborhoods, and/or residents served by or impacted by SFPUC operations.
- Support non-profit or educational activities (including public schools).
- Not go to, nor benefit any city employee or department (educational entities such as public-school districts are allowed).
- Be separate from and in addition to any regulatory or legal requirements related to the Contract Agreement.
- Delivered at zero-dollar cost to the SFPUC.

Financial:

A financial commitment is funding for 1) **program delivery**, 2) **end recipients**, and 3) **long-term benefit**.

- 1) Program Delivery: Funding for the planning and implementation of programs that benefit local communities.
- 2) End Recipient: Funding for direct payment to program participants, including but not limited to scholarships, stipends for internships and training programs, and childcare expenses.
- 3) Long-Term Benefit: Funding to provide ongoing and long-term benefits, including but not limited to a science maker's space, software licenses at a public school, or a vehicle to support a growing small business.

Both of the following documents must be submitted to verify the commitments delivered:

- A **letter from the non-profit or educational organization** acknowledging receipt of the financial contribution(s) detailing the following:
 - Description of the intended use of the contribution
 - Amount donated and check number
 - Date received
- A **copy of a check, check stub, credit card statement, or proof of electronic funds transfer**.

For financial commitments of \$10,000 or more in a fiscal year, a **Memorandum of Understanding** is required between the firm and the non-profit or educational organization prior to making the initial contribution. The MOU should specify the purpose of the contribution and include reporting requirements for the non-profit or educational organization to the firm. While required for commitments of \$10,000 or more, MOUs are encouraged for commitments of any amount.

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Additional documents that are suggested but not required:

- Agendas, presentations, and sign-in sheets from meetings
- Flyers, outreach materials, and sign-in sheets from events and trainings
- PowerPoints, pictures and videos from events and trainings
- Narrative statements of each highlighted activity
- Profiles of participant(s) (including consented pictures and interviews).

Volunteer Hours

- Volunteer hours are the firm employees' time and service with non-profit or educational organizations specified in the approved annual workplan.
- Total value of volunteer hours calculated at the standard SIP volunteer rate of **\$150/hour (This amount is set by the City Attorney.)**
- For volunteer hours, please use the templates provided:
 - Volunteer hour timesheet
 - Confirmation from the with non-profit or educational organizations verifying all hours provided by the firm named.

Goods/Products

- **As of January 1, 2022, Goods/Products (previously "In-Kind" commitments) will no longer be a SIP commitment category for new contracts.** Any existing contracts that have goods/products included in their original proposal must complete the delivery of those commitments.
- Though this SIP commitment category is being phased out, firms are not prohibited from contributing in this manner to non-profit or educational organizations.

Commitments in the Volunteer Hours and Goods/Products ("In-Kind") categories can, via a formal request, be converted into financial commitments. Financial commitments cannot be converted into other categories.

Non-financial commitments, such as volunteer hours and in-kind donations, **cannot** be used to replace, reduce, or fulfill financial commitments. Any extra non-financial contributions made by the contractor **do not** serve as a substitute for any proposed direct financial contribution(s) that have been agreed upon. However, volunteer and in-kind contributions can be substituted for each other only.

Reporting Guidance:

- Please only include relevant receipts and data on spreadsheets. If that is not possible, please redact unnecessary data.
- During the course of SIP commitments, activities from a firm's original proposal may become ineligible. If a firm has already participated in those activities as part of their

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original proposal, they will be credited up to the date of ineligibility. The remaining commitments must be reallocated to eligible activities.

- Any changes to firm commitments must be approved in advance by SIP staff and new workplan must be submitted to sfpuc.org/SIPreporting.
- Please email Social Impact Partnership staff at SIP@sfwater.org with any questions or to request a meeting.

Social Impact Partnership Program Key Performance Indicators Examples

The following are suggested Key Performance Indicators (KPIs) for firms to gather information from non-profit or educational organizations related to outcomes of Social Impact Partnership commitments. KPIs are categorized by program areas. Event Metrics (the first category below) may apply to all program areas.

Participant Demographics for Programs

1. **Age** (specify the # of participants in each category)
 - a. 0-5
 - b. 6-13
 - c. 14-17
 - d. 18-24
 - e. 25-65
 - f. 66+
 - g. Unknown
 - h. Decline to State
2. **Ethnicity/Race**
 - a. American Indian/Indigenous
 - b. African American/Black
 - c. Asian
 - d. Latino/a/x
 - e. Pacific Islander
 - f. White/Caucasian
 - g. Mixed Race/Ethnicity
 - h. Other
 - i. Unknown
 - j. Decline to State
3. **Gender**
 - a. Female
 - b. Male
 - c. Transgender
 - d. Non-Binary
 - e. Other
 - f. Unknown
 - g. Decline to State
4. **Zip Code**

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Event Metrics (e.g. Workshops, Presentations, Fairs)

1. # of Event(s) Supported
2. Name of event(s) Supported
3. Estimated # of Participants Served at Event(s)

Jobs Exposure and Internships

1. # of Interns/Trainees Supported or Enrolled
2. # of Interns/Trainees Who Successfully Completed Program
3. # of Interns/Trainees Who Secured Jobs or Another Placement After Program

KPIs on Barriers to Employment Addressed for Trainees (if applicable)

4. # of Trainees Who Received Tools and Work Materials
5. # of Trainees Who Received Personal Protective Equipment
6. # of Trainees Receiving Childcare Services
7. # of Trainees Who Received Transportation
8. # of Trainees' Union Dues Paid
9. # of Trainees' Driver's License Fees Paid
10. # of Trainees with Other Barriers Addressed

Small Business Support

1. Name(s) of Local Business(es) Supported
2. Industry of Local Business(es) Supported
3. Name of Communities, Neighborhoods, or Client Type Supported
4. # of Existing Employees Retained at Each Local Business Supported
5. # of New Employees Hired and/or Jobs Created by Each Local Business Supported
6. # of Businesses Prevented from Immediate Closure or Displacement

Education

1. Names of School(s) Served
2. # of Youth Served
3. # of Staff/Teachers Served (if applicable)

Environment and Community Health

1. # of Youth Served (if applicable)
2. # of Adults Served (if applicable)
3. # of Households Served (if applicable)
4. # of Community Gardens or Green Spaces Supported (if applicable)
5. Name of Communities or Neighborhoods Served

Housing and Economic Support (Only for existing contracts that include this program area. This program area is no longer offered as of December 2022.)

1. # of Households Supported
2. # of Households Receiving Financial Assistance
3. # of Households Receiving Financial Literacy Coaching

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4. # of Households Receiving Legal Services
5. # of Households Prevented from Immediate Eviction or Displacement
6. # of Households with Other Interventions (describe in Summary of Outcomes & Activities)