

Social Impact Partnership Documentation Compliance Guide

To verify Firm commitments delivered, the SFPUC Social Impact Partnership (SIP) program requires specific documentation of all financial and/or volunteer SIP Commitments for each reporting period (FY Q1/Q2 and Q3/Q4).

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

- Align with SFPUC policies and values of the Environmental Justice, Community Benefits, and Racial Justice resolutions.
- Directly benefit the communities, neighborhoods, and/or residents served by or impacted by SFPUC operations.
- Support valid non-profit and/or public educational providers.
- Not 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 **program services and program participants**.

Funding **cannot** be used for:

- fundraising activities/sponsorships
- program overhead
- program management salaries such as executive directors

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

- A **Letter of Acknowledgement (LoA) from the non-profit or public educational organization** (Please use the LoA template on SIP Website.)
- **Proof of funds transfer** such as a check or electronic deposit

For financial commitments of \$10,000 or more in a fiscal year, a **Memorandum of Understanding (MOU)** 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. (A sample template is on the SIP Website). While required for commitments of \$10,000 or more, MOUs are encouraged for commitments of any amount.

Social Impact Partnership Documentation Compliance Guide

Additional documents that are suggested:

- 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 and quotes 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 SIP Annual Work Plan.
- Total value of volunteer hours is calculated at the standard SIP volunteer rate of **\$150/hour (This amount is a set rate; no variance will be allowed)**.
- For volunteer hours, please use the required SIP Volunteer template on the SIP Website: SIP Volunteer Hour timesheet includes:
 - Signed confirmation on timesheet from the non-profit or educational organizations verifying all hours provided by the Firm.
 - Please note restrictions:
 - Only mileage for roundtrips that are 100+miles.
 - No food or mileage expenses allowed.
 - Reasonable prep hours will be allowed for presentations, suggested 2:1 ratio.
 - Reasonable planning hours for meetings with beneficiaries.

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.

Commitments in the Volunteer Hours and Goods/Products ("In-Kind") categories can, via a formal request, be converted into financial commitments.

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 are stated in the Firm's SIP Commitment Table. However, volunteer, and in-kind contributions can be substituted for each other only.

Social Impact Partnership Documentation Compliance Guide

Reporting Guidance:

- 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 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 a new SIP Work Plan must be submitted to SIP@sfwater.org.
- 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 public 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+
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
3. **Gender**
 - a. Female
 - b. Male
 - c. Transgender
 - d. Non-Binary
 - e. Other
4. **Zip Codes**

Social Impact Partnership Documentation Compliance Guide

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. Name and Type of educational issue addressed
3. # of Youth Served
4. # of Staff/Teachers Served (if applicable)
5. Types of Activities – classroom presentations, tutoring, scholarships, fieldtrips

Environment and Community Health

1. Type of environmental and/or healthy inequity addressed
2. Name of project
3. Name of Communities or Neighborhoods Served
4. What projects were undertaken; legal services, food security, beach, park clean-up, local farming, housing
5. # of Families/Households Served (if applicable)
6. # of Youth Served (if applicable)
7. # of Adults Served (if applicable)
8. Types of Households Served
9. Other Socio-Economic Factors

Social Impact Partnership Documentation Compliance Guide

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
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)