# **DIVERSITY EQUITY INCLUSION SLO BUSINESS GRANT 22-23**

THIS AGREEMENT, dated  $\frac{6/27/2023 + 4:43 \text{ PM}_{\text{F}}\text{PDT}_{\text{for the convenience of the parties hereto, is}}{\text{for the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Alpenglow Industries (referred to herein as GRANTEE).}$ 

# WITNESSETH:

WHEREAS, GRANTEE has requested CITY to contribute to six Soldering and Electronics for Folks Underrepresented in STEM workshops as submitted in its application to the CITY on March 31, 2023.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

- 1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to City residents from July 1, 2023 to June 30, 2024.
- 2. GRANTEE will provide CITY with a mid-year report, due January 10, 2024, and final program report, due July 10, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
- 3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees or volunteers of GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
- 4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability of the part of the CITY as a result of any act or omission, negligent, or otherwise, by GRANTEE.
- 5. CITY agrees to pay the GRANTEE a one-time only grant, in the sum of \$18,353, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
- 6. The Department Head- Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination.

- 7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Commission "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
- 8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo 919 Palm Street San Luis Obispo, CA 93401 Attn: Greg Hermann, Assistant City Manager

**GRANTEE**:

Alpenglow Industries 3485 Sacramento Dr Suite F San Luis Obispo, CA 93401 Attn: Carrie Sundra carrie@alpenglowindustries.com

IN WITNESS WHEREOF, the parties have executed this agreement by their proper officers duly authorized:

### GRANTEE

By:

Carrie Sundra

Carrie Sundra, Founder

Signed by

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:

Greg Hermann, Assistant City Manager

### APPROVED AS TOFORM:

Grey Herman

By: Markie bersten for Christine Dietrick

Christine Dietrick, City Attorney



# **HUMAN RELATIONS COMMISSION**

Diversity, Equity, & Inclusion SLO Business Grant: 2023-24 DEI SLO Business Grant Application

# The funding and grant application will support initiatives to diversify the local economy and shall be accessible to anyone. All proposals must be inclusive of all individuals and communities.

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# **BUSINESS INFORMATION**

#### **BUSINESS NAME**

Alpenglow Industries

#### PROJECT/PROGRAM NAME

Soldering & Electronics for Folks Underrepresented in STEM

#### DATE BUSINESS ESTABLISHED

12/18/2017

#### **BUSINESS LICENSE NUMBER**

113124

#### WEBSITE

https://www.alpenglowindustries.com

Ad	d	ress

State / Province / Regior
CA
Country
United States

\*If you are not currently a business, you must be willing to participate in 5 hours of one-on-one coaching with the Small Business Development Center and secure a business license.

🗌 Yes 📃 No

# CONTACT INFORMATION

(This person will receive notifications regarding grant decisions, contract execution, and reporting requirements)

#### **BUSINESS CONTACT**\*

Carrie Sundra

**PHONE** 8055876399

E-MAIL ADDRESS\* carrie@alpenglowindustries.com

#### WHO PREPARED THIS APPLICATION (if different than above)

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### **GRANT REQUEST INFORMATION**

1) Which of the below best describes your business proposal reflected in this application \*

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- Service
- Product
- Experience
- Promotion
- Other

#### 2) Provide an executive summary of the proposal (Max 200 words)\*

There is a large diversity problem in the field of electrical engineering and electronics, where 90.5% of people in the industry are men and 66.6% are white. Alpenglow Industries' mission is to break down barriers to entry in electronics and tech, so that it can become a more diverse workplace with less toxic tech bro culture. We can do this at our workshop space here in SLO through this DEI grant. We'll teach 5 Learn to Solder workshops and 3 Learn About Electronics workshops, for a total of 105 people served. We'll work with local community organizations that serve underrepresented communities to reach out to folks who typically receive fewer opportunities and encouragement in tech than their white male counterparts. We'll develop written instructional materials in both English and Spanish, and free videos with both English and Spanish subtitles which participants (and anyone in the community) can use to teach, learn, or refresh their skills. Our focus is building fundamental knowledge and confidence that participants can use to gain entry-level tech or manufacturing employment, or further their education in electronics.

#### 3) Is this proposal for: \*

- A new program
- Continuation of an existing program

#### 4) Requested Amount\*

25,000

#### 5) Itemized breakdown of requested amount (e.g., products or services purchased, hours subsidized, etc.):

Please see Budget included with Business Propsal attachment for a table of itemized costs. Here is a summary:

\$20,300 - Workshop Development & Operating Labor (236 total hours)

- \$2,000 Graphic Design Labor
- \$1,000 Translation Services
- \$4,747 Tools, Materials, & Printing

#### 6) What percentage of the funding needed will this grant cover?\*

89%

#### 7) How will this proposal benefit underrepresented and/or underserved communities in the City of SLO?\*

People who attend our workshops will leave with skills and knowledge they can use to further their education, and attain entry-level jobs in manufacturing and tech.

#### 8) Briefly describe 1-3 methods of evaluation with indicators of success for your proposal.\*

We will submit metrics based on our observations: number of students who attend each workshop, level of success with completing the workshop, and a summary of comments, discussion, and interest in technical jobs and education expressed by participants and through a web contact form. We will also ask students to complete an anonymous questionaire where they can (optionally) report their demographics, background in STEM before the workshop, level of confidence after the workshop, and intentions to pursue further education, training, or jobs in STEM or manufacturing. We will consolidate and report this data back to the DEI office.

### Signature

I certify that the information contained in this application is, to the best of my knowledge, true and accurate; that my business subscribes to the Human Relations Commission's "Statement of Purpose and Bylaws" which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental or economic status; and that this application is submitted with the full knowledge and endorsement of the business and that I am authorized submit the application on behalf of the business.

#### Signature\*

Carrie Sundra

Date\* 3/30/2023

Attachments

Please include the following attachments. If these are not included, it will be considered as incomplete application and will not be reviewed.

1. The Business Proposal/Plan (max 3 pages) <sup>*</sup>	
Alpenglow Industries Electronics & Soldering Workshops.pdf	173.91KB
2. Summary of P&L/Financials (max 1 page) <sup>*</sup>	
AlpenglowIndustries_PnL.pdf	207.99KB
3. Diversity, Equity, & Inclusion Statement (1-3 paragraphs)*	
Alpenglow Industries DEI Statement.pdf	81.32KB

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3485 Sacramento Dr Ste F San Luis Obispo, CA 93401 www.alpenglowindustries.com

March 26, 2023

# **Electronics & Soldering Workshops**

Skill Development for Folks Underrepresented in Electronics & STEM

# Introduction:

There is a large diversity problem in the field of electrical engineering and electronics, where 90.5% of people in the industry are men and 66.6% are white.<sup>1</sup> I founded my electronics company Alpenglow Industries with the mission of breaking down race and gender barriers to entry. I've been the only woman engineer in the room far too many times, and struggled to have my voice heard and my ideas considered at an equal level to those of my colleagues. Diverse role models and mentors are desperately needed in electronics so that others don't have to fight these cultural biases alone. Through the workshops and educational materials funded by this grant, we will make basic electronics and soldering skills more accessible to underrepresented adults who traditionally have not been encouraged to tinker and learn about electronics as much as their white male counterparts. These skills help someone get their foot in the door for a job in tech, provide a basis for further skill development and higher wages, and help alleviate the shortage of trained tech workers here in SLO. They can instill the confidence in someone to pursue an education in electrical engineering, who was otherwise hesitant about lacking specific knowledge or experience.

# **Company Background:**

Alpenglow Industries is a woman-owned business which employs women and members of the LGBTQIA and disabled communities. We were founded in 2017 by Carrie Sundra who is a graduate of Harvey Mudd College, has over 25 years of engineering experience, and has lived and worked in SLO since 2004. We design and manufacture DIY (do it yourself) electronics kits that teach introductory and advanced soldering and electronics skills, assist circuit board design and prototyping, and inspire people to view electronics as a creative and fun medium to work in. We livestream every other Thursday and feature a diverse variety of guests who work with electronics—as engineers, artists, tinkerers, and everything in between. We focus on showing that college isn't the only path into STEM, and that it's never too late to start learning about electronics. We have been featured by MAKE: magazine, HackSpace magazine, Hackster Cafe, the embedded.fm podcast, Attie Grande's Show and Tell livestream, have spoken at Hackaday

<sup>&</sup>lt;sup>1</sup> https://data.census.gov/table?codeset=eeo~1410:1541:6355:7720&tid=ACSEE05Y2018.EE0ALL1R

Supercon, taught soldering remotely on Maker Campus, in person at Maker Faire, and privately here in SLO.

# **Proposal:**

# **Overview**:

We will develop and offer in-person Learn to Solder and Learn About Electronics workshops at our SLO workspace, teach them multiple times over the course of 3 months to maximize opportunities, and specifically reach out to underrepresented communities in San Luis Obispo. We will create take-home instructional pamphlets in both English and Spanish, and add 2 more videos to our "How to Solder" series with both English and Spanish subtitles. We intend to charge a minimal fee for participants, only because we have a limited number of spaces and want to discourage no-shows. We can provide 4 to 5 free slots per workshop for anyone for whom the fee would be a hardship, first-come first-serve no-questions-asked via a publicized coupon code.

# Workshops:

Learn to Solder will teach participants the basics of how to solder components to a circuit board. At the end of the workshop, they will have completed at least one beginning soldering kit, composed of a light-up circuit. They will have an understanding of the techniques and materials needed to create a good solder joint, the proper way to use a soldering iron, and be able to identify good and bad solder joints. Workshop Time: 2 hrs Fee for Participants: \$20 Minimum Age for Participants: 18 Materials Provided: 2 beginning soldering kits and an illustrated pamphlet for participants to take home. Soldering irons and consumable soldering materials will be available to use on-site.

Number of Participants per Workshop: 12

Number of Workshops: 5

Total Number of Participants: 60

Learn About Electronics will teach participants the basics of voltage, current, and electrical flow. They'll learn how to use a breadboard, how a multimeter works, be able to identify a variety of electronic components, and learn the basic relationship between resistance, current, and voltage. These skills form a basis for working with circuits, and are the fundamentals for starting to train as an electronics technician or assembler. Workshop Time: 4 hrs Fee for Participants: \$40 Minimum Age for Participants: 18 Materials Provided: solderless breadboard and an illustrated pamphlet for participants to take home. Number of Participants per Workshop: 15 Number of Workshops: 3 Total Number of Participants: 45

# Pamphlets & Videos:

These provide folks with a way to review what they learned in the workshop at any time in the future, and refresh their skills. Pamphlets will show the soldering process with illustrations and tips and tricks, show illustrated electronics components, and be a take-home "cheat sheet" for basic electronics concepts. They will be downloadable from our website at no cost, free for any other instructors to use, in both English and Spanish. Videos will be free on our YouTube channel. We already have made one video that shows the basics of How to Solder, the two additional videos funded with this grant will focus on fixing mistakes, and how to choose materials & supplies. These videos are more than generic how-tos; they focus on developing foundational skills and knowledge at a level that someone can use as a basis for obtaining a job. We will also have both English and Spanish subtitle support, and add subtitles to our existing video.

# Outreach:

We welcome anyone regardless of demographic at our workshops, but since our goal is to provide opportunities for underrepresented folks, our outreach will focus on local community groups to help us promote the workshops. These include: the NAACP, RaceMatters SLO, Diversity Coalition, SLO Women in Tech group, GALA Pride Center, Latino Outreach Council, and the YTT Northern Chumash Tribe. We'll also reach out to several groups on the CalPoly campus including: the Society of Women Engineers, Women Involved in Software and Hardware, Society of Professional Hispanic Engineers, the Multicultural Engineering Program, National Society of Black Engineers, American Indian Science and Engineering Society, and Out in STEM. We'll also canvas local coffee shops and other places with community bulletin boards, reach out to other business owners, and ask to be put on the community calendars of local media outlets.

# **Measurable Impact:**

We will provide a questionnaire to participants at the end of each workshop and report this anonymous information back to the Office of DEI. In the questionnaire, we will ask participants to optionally self-report demographic data, ask about their confidence level in soldering or electronics after the workshops, and how likely they are to continue working with electronics as a hobby, pursue a technical career in electronics, or pursue further education in electronics or engineering. We will also report the number of participants in each workshop, the percentage who completed it successfully, and the number who asked for further workshops or learning opportunities and of what type/subject.

# **Detailed Budget:**

I've added this page as there was limited room on the application form. I'm happy to provide any additional details or information.

Labor:	Hrs	\$/hr	Total \$	Notes
Workshop - Curriculum Development	80	\$75	\$6,000	Carrie
Workshop - Adding Sign-Ups to Website	2	\$50	\$100	Robyn
Workshop Time - Learn to Solder	20	\$125	\$2,500	Carrie & Robyn, 4 hrs per workshop includes set up & breakdown & staying late for extra help, 5 workshops total
Workshop Time - Learn About Electronics	18	\$125	\$2,250	Carrie & Robyn, 6 hrs per workshop includes setup & breakdown & staying late for extra help, 3 workshops total
Outreach (emails, calls, marketing, posting flyers)	40	\$75	\$3,000	Carrie
Outreach (emails, calls, marketing, posting flyers)	20	\$50	\$1,000	Robyn
Flyer & Postcard Design - Alpenglow	2	\$75	•	Carrie
Flyer & Postcard Design - graphic design			\$500	Graphic Designer
Pamphlet Design - text & draft photos	16	\$75	\$1,200	Carrie
Pamphlet Design - graphic design & illustration			\$1,500	Graphic Designer
Pamphlet Design - Spanish translation			\$500	estimated for translator
Video Creation			\$4,100	for 2 videos, see separate breakdown
Video Subtitles - Spanish			\$500	for 2 videos, estimated for translator
			\$20,300	Total for Alpenglow Industries Labor
			\$2,000	Total for Graphic Design Labor
			\$1,000	Total for Translation Labor
Materials:	Qty	Cost Ea	Total \$	
Tools - Soldering Irons	12	\$110	\$1,320	
Tools - Multimeters	15	\$30	\$450	
Consumables - Solder	5	\$15	\$74	
Consumables - Solder Wick	15	\$1	\$20	
Consumables - Flux	1	\$39	\$39	
Participants Take Home - Soldering Kits	12 0	\$10	\$1,194	
Participants Take Home - Breadboards	45	\$2	\$101	
Participants Take Home - Jumper Wires	45	\$7	\$305	
Participants Take Home - Battery Boards	45	\$1	\$45	
Participants Take Home - Components	1	\$100	\$100	
Printing - Flyers			\$250	

Printing - Learn to Solder Pamphlet			\$300	
Printing - Learn About Electronics Pamphlet			\$300	
			\$4,747	Total Tools, Materials, & Printing
Income from Class Fees:	Qty	Fee	Total \$	
Soldering Class Fee	40	\$20	\$800	12 spots per workshop, 8 paid and 4 free 5 workshops
Electronics Class Fee	30	\$40		15 spots per workshop, 10 paid and 5 free, 3 workshops
				Total Workshop Income
				Total Cost of Proposal
			\$25,000	Total Grant Ask



3485 Sacramento Dr Ste F San Luis Obispo, CA 93401 www.alpenglowindustries.com

# **Diversity, Equity, and Inclusion Statement:**

Electronics is for everyone. We strive to make the skills and learning surrounding electronics available to those underrepresented in the field, and especially welcome women, black & indigenous people of color, hispanic and latino folks, the LGBTQIA community, and disabled people. We work to highlight contributions from members of those communities in our social media and livestreams. There is no right or wrong way into the maker community and into STEM hobbies or work, and we love to share stories of non-traditional and self-taught ways that makers and engineers have come by their passion for working with electronics. We actively oppose gatekeeping and toxic "tech bro" culture, and aim to provide a welcoming and non-judgmental environment where we can meet people where they are and reduce learning curves. Questions and creativity are encouraged. We believe that greater diversity creates better workplaces, products, and betters life for everyone.

# Alpenglow Industries Profit and Loss

Since March 30, 2022

	Total
Income	
Total Product Sales	\$88,464.98
Total Discounts	-\$55.35
Office Sublease	\$12,375.00
Refunds-Allowances	-\$707.92
Other Sales	\$28.68
Sales Tax Paid - Contra	-\$287.00
Services	\$21,602.50
Shipping Income	\$45.00
Total Income	\$121,465.89
Total Cost of Goods Sold	\$34,244.01
Gross Profit	\$87,221.88
Expenses	
Total Marketing	\$44,462.58
Total Office & Admin	\$9,879.21
Total Operating Expenses	\$36,711.78
Total Payroll Expenses	\$107,720.52
Research & Dev	\$7,099.70
Uncategorized Expense	\$1,360.00
Total Expenses	\$207,233.79
Net Operating Income	-\$120,011.91
Total Other Income	\$5,007.90
Net Other Income	\$5,007.90
Net Income	-\$115,004.01

Thursday, Mar 30, 2023 09:44:38 AM GMT-7 - Cash Basis

Note: Prior to last year, the business made half of its income from consulting services and was profitable. The loss last year is because we shifted from consulting to developing new products in a new market - maker and educational electronics, and are in the process of ramping up in that market. We cut back on labor in the fall of last year to extend our runway. We are privately funded through at least summer of 2024 with our current rate of burn.

### Exhibit B

# <u>City of San Luis Obispo</u> Grant Recipient Report Template

# Midyear Report Due: January 10, 2024 - Year-End Report Due: July 10, 2024

Grant Name:	DEI SLO Business Grant			
Grant Year:	FY 2022-2023			
Type of Report:	Midyear Report (check box)		End-year Report (check box)	
Organization:				
Project Name:				
service or programs provided that have occurred during the <b>the reasoning and response t</b> Statistical Report: (77	Drt: (A brief synopsis of the activities of the ras described in Exhibit A (your grant applications or service proceed of the organism of the service proceed of the survey shared by the C collected through the survey shared by the C	ted a	sing the business grant provided, and any ch sions have changed, please disclose and e	anges xplain

**Financial Report:** (A financial statement detailing how the City's grant funding has been or planned to be allocated.)

# **DEI SLO Business Grant Additional Metrics & Performance Outcomes Template**

Metrics/Performance Outcomes	Results
1. Number of individuals served.	
<ul> <li><u>Served</u> refers to individuals specifically receiving any of the following:</li> <li>Services directly provided by the grantee;</li> <li>Program/project applications, instructions, trainings, products, or concepts;</li> <li>Information (orally or in printed, in-person, virtually or over the phone);</li> <li>Any materials (flyers, brochures, etc.);</li> <li>Referrals</li> </ul>	
2. Number of service hours provided.	
<u>Service hours</u> refer to any amount of time that is directly linked or performed as part of the work defined within the scope of the agreement signed by the grantee.	
3. Number of activities.	
<ul> <li>Activities can be defined as gatherings either the grantee organizes or attends. In either case, grantee must specify if it attended or organized the activity. This can be events, workshops, panel discussions, roundtable discussions, presentations, etc.</li> <li>Activities refer to any gathering designed to <i>promote</i> programs, services, concepts related to the components within the scope of the agreement signed by the grantee.</li> <li>Activities also refer to any gathering designed to <i>create awareness</i> of the programs, services, or concepts related to the components as defined within the agreement signed by the grantee.</li> <li>Activities relate to any gathering designed to outreach, engage, and consult, and collaborate with the community as defined within the agreement signed by the grantee</li> </ul>	
<b>4. Estimated number of individuals attending activities.</b> Based on the scope of the agreement signed by the grantee, <b>please provide a rough number</b> or <b>best estimate</b> of individuals that 1) either attend a grantee led event or 2) approach the booth/table in which the grantee participates.	

5. Report perception of services provided and/or engaged activities.	
Survey individuals to <b>measure the impact</b> of the services provided and/or engaged activities as described within the scope of the agreement signed by the grantee. Report in percent and total number of individuals served. Sample questions will be provided to grantees for technical assistance.	
6. Demographic Questions Demographic questions are highly encouraged to be completed by individuals that fall within the grantee's scope of services. Grantees will be sent the City's current demographic survey and are highly encouraged to use such template to implement and report back.	To be reported by grantee in a separate page.

Name	Title	Phone
Signature	Date	

Once signed, please scan and e-mail to Nestor Veloz-Passalacqua, DEI Manager (nveloz@slocity.org)

# AMENDMENT No. 1 TO DEI SLO BUSINESS GRANT AGREEMENT

THIS AMENDMENT, dated \_\_\_\_\_\_ for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Banchan Foods (referred to herein as GRANTEE).

### WITNESSETH:

WHEREAS, on June 29, 2023, GRANTEE and CITY entered into an Agreement for Diversity Equity Inclusion SLO Business Grant (the "Agreement"), in which GRANTEE agreed to provide and increase culinary diversity and promote Korean culture in San Luis Obispo as further described in GRANTEE's application submitted to the CITY on March 28, 2023 (the "Services"); and

WHEREAS, GRANTEE was unable to complete the Services by June 30, 2024 because of delays in processing by the State for the Processed Foods Registration permit, and, after being forced to move business locations, GRANTEE was required to amend their State and County operating permits; and

WHEREAS, GRANTEE is now able to complete the services further described in Exhibit 1 because they have successfully obtained the required State and County permits for operation, and the remaining unused funds will be used to amend their permits to reflect their new business location; and

WHEREAS, the CITY reaffirms its finding that GRANTEE's services will provide a benefit to the community by enhancing a sense of belonging for all people and contributing to a community that is welcoming, inclusive, equitable, and safe, and the goals of GRANTEE'S services will be properly met if GRANTEE is allowed a reasonable extension of time to perform the services.

NOW THEREFORE, in consideration of their mutual promises, obligations and covenants hereinafter contained, the parties hereto agree as follows:

- 1) AMENDMENTS. The parties agree to amend the Agreement as follows:
  - a) Paragraph 1 is deleted and replaced as follows:

The Parties acknowledge that GRANTEE made some of its Services, as described in its application (the "Application"), incorporated by reference and attached to the Agreement as Exhibit A, available to CITY residents in 2023 and 2024. GRANTEE further agrees to complete the services described in Exhibit 1 of this Amendment by December 31, 2024.

b) Paragraph 2 is deleted and replaced as follows:

The Parties acknowledge that GRANTEE provided CITY with a mid-year report on January 10, 2024. GRANTEE shall provide a final program report, summarizing administrative, statistical, financial, and client Service activities in the form of Exhibit 2 of this Amendment, by January 20, 2025.

- 2) FAILURE TO PERFORM. Should GRANTEE fail to perform the services described in Exhibit 1 on or before December 31, 2024, GRANTEE shall return to the CITY a prorated sum calculated by the CITY which represents the funds granted to GRANTEE but unused by December 31, 2024. Additionally, should GRANTEE complete the services described in Exhibit 1 at a cost lower than the funding amount granted by the CITY, GRANTEE shall return to the CITY the excess funds. Either or both reimbursement(s) shall be made no later than January 20, 2025. Should GRANTEE fail to provide a final program report by January 20, 2024, GRANTEE may be deemed ineligible for future grants or other financial aid offered by the CITY.
- 3) **FORCE AND EFFECT.** Except as set forth in this Amendment, all terms and conditions of the Agreement shall remain in full force and effect.
- 4) **PRIORITY ORDER.** In the event of a conflict between the Agreement and this Amendment, the terms of this Amendment shall take precedence.
- 5) AUTHORITY TO EXECUTE. Each Party represents and warrants that it has full power and authority to execute this Amendment and to undertake each and all of its respective obligations hereunder, and that each person executing this Amendment on its behalf is duly and validly authorized to do so.
- 6) **COUNTERPARTS**. This Amendment may be executed in counterparts, each of which shall be deemed an original and all of which shall be taken together and deemed to be one instrument. The parties further agree that a signature transmitted via facsimile or e-signature shall be deemed original for all purposes hereunder.

GRANTEE

By:

Trina Lee, Owner

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:

Greg Hermann, Deputy City Manager

APPROVED AS TO FORM:

By:

Sadie Symens, Deputy City Attorney

#### MEMO

- TO: City of San Luis Obispo 919 Palm Street San Luis Obispo, CA 93401 Attn: Nestor Veloz-Passalacqua Diversity, Equity, & Inclusion Manager
- FROM: Trina Lee Banchan Foods DEI SLO Business Grant FY 2022-2023

### SUBJECT: REQUEST FOR EXTENSION OF AGREEMENT

Thank you for considering this request for extension of the DIVERSITY EQUITY INCLUSION SLO BUSINESS GRANT 22-23 Agreement between Trina Lee/Banchan Foods and the City of SLO.

Due to setbacks in securing the necessary permits to operate, the grant funds have not been exhausted before the end of the Agreement period. Therefore, I am requesting a 6-month extension to the Agreement.

I experienced setbacks in the process of securing the necessary permits to operate, which delayed the launch of my business by several months. The most significant setback was the processing of my California Processed Foods Registration application by the California Department of Public Health's Food and Drug Branch.

#### Permit Application Processing Delays

Commercial kimchi production requires several permits. One of these permits is a Processed Foods Registration from the California Department of Public Health (CDPH). Navigating the permitting process was extremely challenging, but after numerous meetings and phone calls with local and State Health Department representatives, as well as outside resources, I completed my application for Processed Foods Registration in September 2023. Unfortunately, the State had a backlog of applications, and processing took 5 months. I received final approval on February 6, 2024.

Subsequently, I applied for the Dependent Food Service Operator Permit from the SLO County Environmental Health Services Division, which was approved on March 25, 2024. After that, I applied for the Temporary Food Facility Multiple Events Permit, which was approved on May 9, 2024. I made my first legal sale the following day on May 10, 2024.

Unfortunately, the period of time during which I was able to legally sell kimchi was very brief. Ownership of the Commercial Kitchen space I rented changed, and the new landlord refused to honor the terms of my lease. I was forced to move. On May 22, 2024, I moved to a new commercial kitchen location within

the City of SLO. Since all of my permits are attached to the old kitchen address, I will have to obtain new permits before I can return to legally selling my kimchi.

#### **Financial Report**

Balance:

\$23,656.00 spent \$1,344.00 remaining

> Equipment - \$4,663.17 Supplies - \$4,223.83 Rent - \$9,350.00 Permits & Licensing - \$2,236.08 Insurance - \$289.00 Food Costs - \$662.32 Services - \$194.80 Mileage - \$2,036.80

#### **Planned Business Activities**

Changing kitchens requires amending my permits to reflect the new kitchen location. This will cost \$1,344 in permit application fees.

August

Apply for Processed Foods Registration from the California Department of Public Health.

#### September

Apply for updated Dependent Food Service Operator Permit and Temporary Food Facility Multiple Events Permit from SLO County Environmental Health Department.

Submit an updated Year-End Report reflecting the utilization of remaining grant funds.

#### **Planned Utilization of Remaining Funds**

Upcoming expenditures:

Application fees to amend all permits to reflect new kitchen location:

- \$556 Processed Foods Registration+Health Safety Fee
- \$488 Dependent Food Service Operator Permit-Moderate Prep
- \$300 Temporary Foods Facility Multiple Events Permit

Thank you for your consideration of my request for extension. I look forward to completing the necessary steps to get this business fully launched in the coming months.

Trina Lee Banchan Foods 805-704-5004 banchanfoods@gmail.com

# **DIVERSITY EQUITY INCLUSION SLO BUSINESS GRANT 22-23**

THIS AGREEMENT, dated  $\frac{6/29/2023 + 10:37 \text{ AM PDT}}{\text{for the convenience of the parties hereto, is}}$  between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Banchan Foods (referred to herein as GRANTEE).

# WITNESSETH:

WHEREAS, GRANTEE has requested CITY to contribute to Kimchi Business as submitted in its application to the CITY on March 31, 2023.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

- 1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to City residents from July 1, 2023 to June 30, 2024.
- 2. GRANTEE will provide CITY with a mid-year report, due January 10, 2024, and final program report, due July 10, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
- 3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees or volunteers of GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
- 4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability of the part of the CITY as a result of any act or omission, negligent, or otherwise, by GRANTEE.
- 5. CITY agrees to pay the GRANTEE a one-time only grant, in the sum of \$25,000, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
- 6. The Department Head- Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination.
- 7. GRANTEE shall complete the five-hour Small Business Development Center (SBDC) course within 30 business days of fund disbursement. Proof of completion shall be provided to

CITY. If GRANTEE fails to provide timely proof of completion, CITY reserves the right to pursue return of the awarded funds in civil action.

- 8. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Commission "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
- 9. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo 919 Palm Street San Luis Obispo, CA 93401 Attn: Greg Hermann, Assistant City Manager

GRANTEE: Banchan Foods 97 Ash Ave #183 Cayucos, CA 93430 Attn: Trina Lee caltrinalee@gmail.com

IN WITNESS WHEREOF, the parties have executed this agreement by their proper officers duly authorized:

GRANTEE

By:

Jrina Lee

Trina Lee, Owner

# CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:

Grey Hermann

DocuSigned by:

Greg Hermann, Assistant City Manager

# APPROVED AS TOFORM:

DocuSigned by:

By:

Markie kersten for Christine Dietrick

Christine Dietrick, City Attorney



# **HUMAN RELATIONS COMMISSION**

Diversity, Equity, & Inclusion SLO Business Grant: 2023-24 DEI SLO Business Grant Application

The funding and grant application will support initiatives to diversify the local economy and shall be accessible to anyone. All proposals must be inclusive of all individuals and communities.

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## **BUSINESS INFORMATION**

**BUSINESS NAME** 

Banchan Foods

PROJECT/PROGRAM NAME

Kimchi Business

DATE BUSINESS ESTABLISHED

3/31/2023

**BUSINESS LICENSE NUMBER** 

NA

WEBSITE

NA

#### Address

Street Address

Address Line 2

City

Postal / Zip Code

Country

State / Province / Region

\*If you are not currently a business, you must be willing to participate in 5 hours of one-on-one coaching with the Small Business Development Center and secure a business license.

🗸 Yes 📃 No

# CONTACT INFORMATION

(This person will receive notifications regarding grant decisions, contract execution, and reporting requirements)

#### **BUSINESS CONTACT\***

Trina Lee

**PHONE** 8057045004

E-MAIL ADDRESS\*

calltrinalee@gmail.com

WHO PREPARED THIS APPLICATION (if different than above)

#### PHONE

# GRANT REQUEST INFORMATION

1) Which of the below best describes your business proposal reflected in this application \*

^

- Service
- Product
- Experience
- Promotion
- Other

#### 2) Provide an executive summary of the proposal (Max 200 words)\*

Banchan Foods is a new kimchi business that seeks to increase culinary diversity and promote Korean culture in San Luis Obispo. With a grant request amount of \$25,000 and a total project budget of \$55,000 (with the other \$30,000 self-funded), Banchan Foods will produce and sell kimchi directly to consumers through its website and at local farmers' markets. The company will also wholesale the product to SLO Oriental Market, SLO Co-Op and other brick and mortar outlets.

To ensure sustainability, Banchan Foods will prioritize using locally sourced ingredients, eco-friendly packaging, and a zero-waste production process. To make Korean culture more accessible and inclusive, Banchan Foods will offer a range of kimchi options to cater to different dietary needs and preferences, including spicy, vegan, and traditional options.

In addition to selling kimchi, Banchan Foods will use its social media platforms to promote Korean culture through instructional and informative videos about the significance of kimchi to Korean culture. The business owner intends to collaborate with the local Korean American community, including the CalPoly Korean American Student Association, to increase community involvement and foster appreciation for Korean culture.

Through this venture, Banchan Foods aims to create a sustainable business model that benefits underserved communities in San Luis Obispo while promoting the importance of cultural diversity and inclusion.

#### 3) Is this proposal for: \*

- A new program
- Continuation of an existing program

4) Requested Amount\* 25,000

#### 5) Itemized breakdown of requested amount (e.g., products or services purchased, hours subsidized, etc.):

EQUIPMENT \$4,570 Robo Coupe \$2,200 Mandoline x 3 \$105 Commercial Vitamix \$530 Knives \$200 20-qt Stock Pot x 2 \$120 Cambros x 6 \$300 Booth Supplies \$400 Smart Lav+ Mic \$80 Ring Light \$35 Tripod + Mount \$200

MILEAGE \$1,800 2800 miles/year \$1,800

FOOD COSTS \$9,100 Food \$175 /100 jars \$9,100

MATERIALS \$6,890 Jars + Lids \$4,530

Labels \$1,510 Merchandise \$600 Office Supplies \$250

RENT \$10,040 kitchen \$25/hrx40hs/mo \$1,000 Cold Storage \$200/mo \$200 Farmer's \$170/wk \$8,840

INSURANCE \$1,200 Product liability \$1,200

LICENSING \$1,085 CA Processed Food Registration \$456 SLO Health Dept Temp Food Facility \$294 SLO Business License \$95 Food Manager Certification \$150 County Farmers Market Certified Producer Permit \$90

SERVICES \$8,436 Webhosting \$40/mo \$480 Bookkeeping \$300/mo \$3,600 Website Design \$3,000 Legal and Tax Services \$1,200 Canva \$13/mo \$156

TAXES \$12,289 Income Tax \$12,289

TOTAL \$55,010

6) What percentage of the funding needed will this grant cover?\* Approximately 45%

#### 7) How will this proposal benefit underrepresented and/or underserved communities in the City of SLO?\*

It will provide a new and unique culinary experience to the community, which will increase the diversity of food options available in the city. This will not only benefit those who are already familiar with Korean cuisine, but also those who may not have been exposed to it before, thereby promoting cultural exchange and appreciation. Secondly, as a Korean American-owned business that specializes in producing a traditional Korean dish, Banchan Foods will bring visibility to the underrepresented Korean American community in SLO. By sharing my cultural heritage and story through food, I hope to foster understanding and appreciation for Korean culture among the wider community. In doing so, Banchan Foods will also serve as a unifying force for the local Korean American community, who will see their culture represented and celebrated through this business. Finally, Banchan Foods will utilize its social media platform to promote Korean culture and increase understanding and appreciation for Korean food and traditions. Through instructional videos and educational content, Banchan Foods will provide a window into the rich history and cultural significance of kimchi and other traditional Korean dishes. Furthermore, Banchan Foods plans to collaborate with the local Korean American community to promote and celebrate Korean culture in SLO. One avenue for collaboration is through engagement with the Korean American Student Association at CalPoly. By partnering with the club, Banchan Foods can engage with the community and foster a deeper appreciation for Korean food and traditions. Through these efforts, Banchan Foods will increase the visibility of Korean culture and provide a unique and valuable contribution to the culinary diversity of SLO. By promoting inclusivity and understanding of diverse cultures, Banchan Foods will also foster a more connected and supportive community for all.

#### 8) Briefly describe 1-3 methods of evaluation with indicators of success for your proposal.\*

Indicators of Success:

- average of at least 100 units sold per week
- available in at least 5 brick and mortar locations within the first year
- average of at least 20 instances of social media engagement (likes, comments, shares) per week

#### Signature

I certify that the information contained in this application is, to the best of my knowledge, true and accurate; that my business subscribes to the Human Relations Commission's "Statement of Purpose and Bylaws" which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental or economic status; and that this application is submitted with the full knowledge and endorsement of the business and that I am authorized submit the application on behalf of the business.

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Signature \*

TRINA LEE

Date \* 3/28/2023

#### Attachments

Please include the following attachments. If these are not included, it will be considered as incomplete application and will not be reviewed.

1. The Business Proposal/Plan (max 3 pages) *	
Banchan Foods - Business Plan.pdf	50.16KB
2. Summary of P&L/Financials (max 1 page) *	
Banchan Foods - Profit and Loss Report.pdf	65.93KB

3. Diversity, Equity, & Inclusion Statement (1-3 paragraphs)\*

Banchan Foods - DEI Statement.pdf

24.29KB

# Business Plan Banchan Foods

Banchan Foods is a new business that specializes in producing and selling authentic Korean Kimchi. Our product will be sold at local farmers' markets and health food stores in San Luis Obispo County at a competitive price of \$12 per jar. Our mission is to provide customers with a unique, healthy, and flavorful product that will keep them coming back for more. We are committed to providing top-notch customer service, and we aim to expand our product offerings in the future. Our startup budget of \$55,000 will be used for the purchase of necessary equipment, website development, branding, packaging, and marketing.

## Market Analysis:

The market for fermented food products like Kimchi has been on the rise due to the increasing awareness of the importance of gut health. Furthermore, Korean food has gained popularity in recent years, and the demand for authentic Kimchi has increased in the US. Our target market is health-conscious individuals who are looking for natural and organic food products that taste great. Our customers will be those who are looking for unique and flavorful condiments to add to their meals.

## Marketing and Sales:

Our marketing strategy will be to leverage the power of social media platforms such as Instagram, Facebook, and TikTok to reach our target audience. We will also partner with local health food stores and farmers' markets to promote our product. To increase brand awareness, we will attend food festivals and events, and we will offer samples to customers. Our sales strategy will include offering a discount for customers who buy in bulk.

### **Product Line:**

Our initial product line will include three flavors of Kimchi: traditional, vegan, and spicy. We will use high-quality ingredients to ensure the best taste and flavor in each jar. Our Kimchi will be made in small batches to ensure freshness, and we will use glass jars that are recyclable and environmentally friendly.

### **Operations:**

To start, I will be the only employee. I will handle production, sales, and delivery. I will be responsible for making Kimchi, packaging, labeling, and delivering the product to the farmers' market and health food stores. We will rent a space in a commercial kitchen in the City of SLO where we will make our Kimchi.

### **Financial Projections:**

Our total startup budget is \$55,000, which includes equipment, website development, branding, packaging, and marketing. We project our revenue in the first year to be \$79,000 with a net profit of \$32,000. By the end of the third year, we expect to reach a revenue of \$133,000 with a

net profit of approximately \$54,000. We will reinvest our profits into expanding our product line and increasing production capabilities.

### **Conclusion:**

Banchan Foods aims to provide customers with a unique and flavorful product that is healthy and affordable. We are confident that our focus on quality, customer service, and marketing will enable us to grow and establish ourselves as a reputable brand in the fermented food industry.

Banchan Foods is a proposed kimchi business that aims to increase the culinary diversity of SLO by sharing a beloved and essential aspect of Korean culture. Kimchi is not only a staple in Korean cuisine but an essential part of Korean identity. By starting this business, I hope to share my culture and unite the local Korean American community while also fostering understanding and appreciation for Korean culture among the broader community.

The lack of representation of underrepresented cultures in the local food industry is a significant issue. My mission is to increase the culinary diversity of the City of SLO by introducing traditional Korean kimchi to the local food scene and to use my business as a vehicle for promoting diversity, equity, and inclusion.

Overall, Banchan Foods seeks to contribute to a more diverse and inclusive community in SLO by sharing the cultural significance and deliciousness of kimchi with everyone. The grant will provide an opportunity to turn this vision into a reality and make a meaningful impact in the community.

Banchan Foods Profit and Loss Report			
Profit and Loss Report			
Revenue	Year 1	Year 2	Year 3
Sales	\$79,200.00	\$110,880.00	\$133,056.00
Less: Discounts and Allowances	\$1,000.00	\$1,400.00	\$1,680.00
Net Sales	\$78,200.00	\$109,480.00	\$131,376.00
Cost of Goods Sold			
Materials	\$15,740.00	\$22,036.00	\$26,443.20
Overhead	\$4,655.00	\$6,517.00	\$7,820.40
Total Cost of Goods Sold	\$20,395.00	\$28,553.00	\$34,263.60
Gross Profit	\$57,805.00	\$80,927.00	\$97,112.40
Operating Expenses			
Advertising	\$500.00	\$700.00	\$840.00
Rent	\$10,040.00	\$14,056.00	\$16,867.20
Insurance	\$1,200.00	\$1,680.00	\$2,016.00
Mileage	\$1,800.00	\$2,520.00	\$3,024.00
Depreciation	\$600.00	\$840.00	\$1,008.00
Other Expenses	\$500.00	\$700.00	\$840.00
Total Operating Expenses	\$14,640.00	\$20,496.00	\$24,595.20
Operating Profit (Loss)	\$43,165.00	\$60,431.00	\$72,517.20
Add: Other Income			
Other Income	\$1,200.00	\$1,680.00	\$2,016.00
Profit (Loss) Before Taxes	\$44,365.00	\$62,111.00	\$74,533.20
Less: Tax Expense	\$12,289.11	\$17,204.75	\$20,645.70
Net Profit (Loss)	\$32,075.90	\$44,906.25	\$53,887.50

Exhibit B

# <u>City of San Luis Obispo</u> Grant Recipient Report Template

# Midyear Report Due: January 10, 2024 - Year-End Report Due: July 10, 2024

DEI SLO Business Grant				
FY 2022-2023				
Midyear Report (check box)		End-year Report (check box)		
			·	
as described in Exhibit A (your grant application	on) us	sing the business grant provided, and any ch	hanges	
is section should include 1) the metrics repor collected through the survey shared by the C	rted a ïty.)	ıs described in Exhibit A (your grant applica	rtion)	
	FY 2022-2023 Midyear Report (check box)	FY 2022-2023 Midyear Report (check box)	FY 2022-2023         Midyear Report (check box)       End-year Report (check box)         Prt: (A brief synopsis of the activities of the reporting period, including a statement of the act as described in Exhibit A (your grant application) using the business grant provided, and any che reporting period. If operations or service provisions have changed, please disclose and e o changes here.	

**Financial Report:** (A financial statement detailing how the City's grant funding has been or planned to be allocated.)

# **DEI SLO Business Grant Additional Metrics & Performance Outcomes Template**

Metrics/Performance Outcomes	Results
1. Number of individuals served.	
<ul> <li><u>Served</u> refers to individuals specifically receiving any of the following:</li> <li>Services directly provided by the grantee;</li> <li>Program/project applications, instructions, trainings, products, or concepts;</li> <li>Information (orally or in printed, in-person, virtually or over the phone);</li> <li>Any materials (flyers, brochures, etc.);</li> <li>Referrals</li> </ul>	
2. Number of service hours provided.	
<u>Service hours</u> refer to any amount of time that is directly linked or performed as part of the work defined within the scope of the agreement signed by the grantee.	
3. Number of activities.	
<ul> <li>Activities can be defined as gatherings either the grantee organizes or attends. In either case, grantee must specify if it attended or organized the activity. This can be events, workshops, panel discussions, roundtable discussions, presentations, etc.</li> <li>Activities refer to any gathering designed to <i>promote</i> programs, services, concepts related to the components within the scope of the agreement signed by the grantee.</li> <li>Activities also refer to any gathering designed to <i>create awareness</i> of the programs, services, or concepts related to the components as defined within the agreement signed by the grantee.</li> <li>Activities relate to any gathering designed to outreach, engage, and consult, and collaborate with the community as defined within the agreement signed by the grantee.</li> </ul>	
<b>4. Estimated number of individuals attending activities.</b> Based on the scope of the agreement signed by the grantee, <b>please provide a rough number</b> or <b>best estimate</b> of individuals that 1) either attend a grantee led event or 2) approach the booth/table in which the grantee participates.	

5. Report perception of services provided and/or engaged activities.	
Survey individuals to <b>measure the impact</b> of the services provided and/or engaged activities as described within the scope of the agreement signed by the grantee. Report in percent and total number of individuals served. Sample questions will be provided to grantees for technical assistance.	
6. Demographic Questions Demographic questions are highly encouraged to be completed by individuals that fall within the grantee's scope of services. Grantees will be sent the City's current demographic survey and are highly encouraged to use such template to implement and report back.	To be reported by grantee in a separate page.

Name	Title	Phone
Signature	Date	 E-mail

Once signed, please scan and e-mail to Nestor Veloz-Passalacqua, DEI Manager (nveloz@slocity.org)

# **DIVERSITY EQUITY INCLUSION SLO BUSINESS GRANT 22-23**

THIS AGREEMENT, dated \_\_\_\_\_\_\_\_ for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Concussion Navigation Services (referred to herein as GRANTEE).

# WITNESSETH:

WHEREAS, GRANTEE has requested CITY to contribute to Financial Aid for Concussion Care program as submitted in its application to the CITY on March 31, 2023.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

- 1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to City residents from July 1, 2023 to June 30, 2024.
- 2. GRANTEE will provide CITY with a mid-year report, due January 10, 2024, and final program report, due July 10, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
- 3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees or volunteers of GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
- 4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability of the part of the CITY as a result of any act or omission, negligent, or otherwise, by GRANTEE.
- 5. CITY agrees to pay the GRANTEE a one-time only grant, in the sum of \$10,000, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
- 6. The Department Head- Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination.
- 7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Commission "Bylaws," which creates an environment within the City in which all persons

can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.

8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo 919 Palm Street San Luis Obispo, CA 93401 Attn: Greg Hermann, Assistant City Manager

**GRANTEE**:

Concussion Navigation Services 75 Higuera St Suite 155 San Luis Obispo, CA 93401 Attn: Stacey Ritter Concussion.navigator@gmail.com

IN WITNESS WHEREOF, the parties have executed this agreement by their proper officers duly authorized:

### GRANTEE

By:

Stacey Ritter, Concussion Specialist

# CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By:

Greg Hermann, Assistant City Manager

# APPROVED AS TOFORM:

Grey Hermann

SPATTY

By: Markie ursten for Unistine Dietrick Christine Dietrick, City Attorney



# **HUMAN RELATIONS COMMISSION**

Diversity, Equity, & Inclusion SLO Business Grant: 2023-24 DEI SLO Business Grant Application

The funding and grant application will support initiatives to diversify the local economy and shall be accessible to anyone. All proposals must be inclusive of all individuals and communities.

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# **BUSINESS INFORMATION**

### **BUSINESS NAME**

**Concussion Navigation Services** 

### PROJECT/PROGRAM NAME

Financial Aid for Concussion Care

### DATE BUSINESS ESTABLISHED

7/1/2021

### **BUSINESS LICENSE NUMBER**

116948

#### WEBSITE

theconcussionnavigator.com

Street Address	
75 Higuera St	
Address Line 2	
Suite 155	
City	State / Province / Region
San Luis Obispo	CA
Postal / Zip Code	Country
93401	United States

\*If you are not currently a business, you must be willing to participate in 5 hours of one-on-one coaching with the Small Business Development Center and secure a business license.

🗌 Yes 📃 No

# CONTACT INFORMATION

(This person will receive notifications regarding grant decisions, contract execution, and reporting requirements)

### **BUSINESS CONTACT\***

Stacey Ritter

**PHONE** 8054524196

E-MAIL ADDRESS\* concussion.navigator@gmail.com

### WHO PREPARED THIS APPLICATION (if different than above)

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### **GRANT REQUEST INFORMATION**

1) Which of the below best describes your business proposal reflected in this application \*

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- Service
- Product
- Experience
- Promotion
- Other

### 2) Provide an executive summary of the proposal (Max 200 words)\*

Concussion Navigation Services (CNS) is the only specialty concussion rehab clinic on the Central Coast. Insurance coverage and reimbursement for patients and healthcare providers is inadequate, therefore CNS does not accept insurance. While CNS fees for initial evaluation (\$125, 90 minutes), and concussion rehab appointments (\$90, 60 minutes) are very reasonable, out-of-pocket medical costs can still be prohibitive. Every brain is important, and should have access to appropriate care, regardless of insurance or income. Youth athletes are especially vulnerable, including children who participate in recreational activities, club sports, and school teams. Others who may be impacted include those experiencing healthcare disparity, Medical/CenCal clients, out-of-area students, and individuals who cannnot work because of their concussion.

The purpose of this proposal is to secure funding to offset the cost of concussion care for the uninsured/underinsured, marginalized, or economically insecure. The intention is to create sliding scale or pro bono options, so that ability to pay is not a barrier to brain health. Current research evidence states that "rest & wait" is no longer considered best practice; early, active rehab leads to best outcomes. Ensuring that everyone has the opportunity to heal completely after concussion supports developmental, academic, business & community success.

### 3) Is this proposal for: \*

- A new program
- Continuation of an existing program

#### 4) Requested Amount\*

10,000

#### 5) Itemized breakdown of requested amount (e.g., products or services purchased, hours subsidized, etc.):

\$10,000 would allow CNS to see 2 patients per month pro bono or sliding scale for an initial assessment, plus 2 follow up appointments. (IA= \$125, FU x 2= \$180; \$305 per patient. \$305 x 2 patients, x 12 months = \$7320; \$2680 remaining allows for pro bono or sliding scale pre-injury baseline testing, additional patients, additional appointment per patient, etc.

### 6) What percentage of the funding needed will this grant cover?\*

100

### 7) How will this proposal benefit underrepresented and/or underserved communities in the City of SLO?\*

Diversity: people of color, and members of the LGBTQ+ community experience health care bias and disparity as a statistical fact, leading to below average access to affordable health care option, or access to healthcare providers to represent DEI standards. Equity: every brain should have access to the best concussion care available in the community. Inclusion: every individual should feel safe in seeking care after concussion, regardless of their individual circumstance.

### 8) Briefly describe 1-3 methods of evaluation with indicators of success for your proposal.\*

Number of patients seen per month who would otherwise not be able to avoid concussion care. Number of referrals from other health care providers who are aware this service is available. Cost savings per year to community members for care they otherwise would not have had access to.

### Signature

I certify that the information contained in this application is, to the best of my knowledge, true and accurate; that my business subscribes to the Human Relations Commission's "Statement of Purpose and Bylaws" which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental or economic status; and that this application is submitted with the full knowledge and endorsement of the business and that I am authorized submit the application on behalf of the business.

( )

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Signature \*

Date \* 3/16/2023

### Attachments

Please include the following attachments. If these are not included, it will be considered as incomplete application and will not be reviewed.

1. The Business Proposal/Plan (max 3 pages) $^{\star}$	
CNS Business Plan summary 2023.docx	45.04KB
2. Summary of P&L/Financials (max 1 page) *	
CNS 2022 TAX.docx	15.54KB
3. Diversity, Equity, & Inclusion Statement (1-3 paragraphs) *	
DEI statement.docx	13.48KB



# **Business Plan**

# **Company Description**

Concussion Navigation Services (CNS) provides the community with evidence-based, bestpractice recommended resources for education, compliance, testing and case management for groups and individuals, specific to concussion/mild traumatic brain injury (mTBI). As the local industry leader in concussion management, CNS clients receive one-on-one, patient-centered care from a concussion specialist, who creates a plan of care specific to the client's individual needs. In collaboration with other multi-disciplinary clinicians, the CNS Athletic Trainer Navigator helps clients access support, resources and referrals to ensure best recovery outcomes. CNS will always ensure a welcoming, inclusive, positive and professional atmosphere to aid in the healing process. CNS also provides on-going professional education for healthcare providers who may have contact with concussion patients.

# <u>Vision</u>

To create access to evidence-based, comprehensive concussion care, management, and education.

Mission: to maximize injury recovery and positive patient outcomes

- o Concussion care is complicated, confusing, and constantly changing
- Be the AT/concussion specialist for those who otherwise would not have access to rehab services
- Concussions are not being treated according to the evidence, patients are suffering for far too long, with little hope for recovery, and it is a solvable problem.
- o NAVIGATION by an experienced concussion specialist is essential to full recovery
- Provide evidence-based, best practice standards in concussion management
- o Demonstrate ability as local industry leader in concussion management
- o Ensure a welcoming, positive and professional atmosphere to aid in healing process

### Core Values

- o Integrity
- Professional ethics and standards
- Empathy and compassion
- Individualized, whole-person care
- Equal access to all patients in need
- Interdisciplinary collaboration

# Strategic Objectives

- 1. Pre-Injury Baseline Testing
  - Beginning with individual clients, eventually expanding to teams and/or organizations
  - Middle school, youth sports (minimum age 12 years old), adult athletes
  - Baseline testing significantly improves likelihood that client will return for injury management should a concussion occur



- 2. Injury Management and Navigation
  - Become to primary provider for concussion management in San Luis Obispo County
  - KPIs:
    - Patient Reported Outcome Measure (PROM): >90%
    - Net Promoter Score (NPS): >50
    - new clients per month: 8
    - visits per week: 20
    - cancellation rate: <10%</li>
- 3. Community and Healthcare Provider Education
  - Pre-season concussion education for youth and middle school sports communities
  - On-going, research update in-services for healthcare clinicians regarding concussion statutes, management, legalities, etc.
  - KPI: 10 presentations per year
- 4. Develop multidisciplinary, comprehensive network of concussion specialists for San Luis Obispo County residents
  - Maintain and build on current relationships within local community
  - Curate new relationships locally, as well as those available via telehealth
  - Participation in CME/CEU events that attract like-minded clinicians

# Service Features

- Central location within San Luis Obispo County, and mid-way between San Francisco and Los Angeles
- No Insurance Required- Health Savings Accounts accepted
- o Cash Program
- o Concussion Specialist- undivided specialized care/attention
- o Individualized, patient-centered care
- Certified Athletic Trainer with over 30 years of clinical experience, with multiple awards of achievement
- Next Day Access
- Pre-Injury Baseline testing
- State-Mandated Graduated Return to Play
- Care for acute or prolonged concussions
- Collaboration with MDs/DOs and Athletic Trainers
- o Assist patients in navigation to additional specialty clinicians
- o Coordination with school nurses, counselors, academic support
- Continuing provider education updates
- On-going evidence based research updates via CCMI, a global network of concussion specialists.

# Market Analysis

Comprehensive, multidimensional concussion management is overwhelming for patients as well as health care professionals. According to most current research, concussion management and full return to pre-injury status is a complicated process, requiring multiple specialists. In addition, each brain injury is unique, and must be treated in an individualized manner for best outcomes. Best-practice recommendations for recovery strategies continue to evolve in real time. CNS offers navigation of case management throughout the continuum of care that patients or health



care providers can access in order to facilitate & expedite full and complete recovery from concussion.

To date, it appears there is no other service in the local medical community that offers this level of comprehensive care. There is no other concussion specialty rehab clinic within approximately 150 miles. The closest concussion-based service is Cottage Hospital, with locations in Solvang and Goleta. There are concussion care programs in San Francisco, Bakersfield, and Los Angeles, which are all approximately 200 miles away. There are individual physical therapy practices that offer concussion rehab. Physical therapy appointments are generally shorter and utilize aides to carry out pre-set plans of care. They will also perform only those interventions for which they can bill insurance for reimbursement, limiting the degree to which a patient's care can be individualized based on their needs.

San Luis Obispo County has a very high volume of physically active residents, spanning all ages and skill levels. There are 9 local high schools, a Division I university, a community college, and countless youth, club, intramural and recreational sports/activities.

# Profile of target customer

Physically active individuals who desire to recover to pre-morbid levels of physical, cognitive, professional and/or academic function. Acute and chronic cases, as well as those youth athletes who are mandated to complete CA/CIF return to play protocols. Individuals who have no access to an AT, or whose case requires a higher level of service than an AT is able to provide.

### CA State Youth Sports Concussion Law

CNS will adhere to the following state mandates:

In accordance with California state law (Ca Ed Code 49475, AB25, AB2007):

- A. An athlete who is suspected of sustaining a concussion or other head injury in an athletic activity shall be immediately removed from the athletic activity for the remainder of the day, and shall not be permitted to return to any athletic activity until he or she is evaluated by a licensed health care provider.
- B. The athlete shall not be permitted to return to athletic activity until he or she receives written clearance to return to athletic activity from a licensed health care provider. If the licensed health care provider determines that the athlete sustained a concussion or other head injury, the athlete shall also complete a graduated return-to-play protocol of no less than seven days in duration under the supervision of a licensed health care provider.
- C. "Licensed health care provider" means a licensed health care provider who is trained in the evaluation and management of concussions and is acting within the scope of his or her practice.
- D. To be in compliance with California Interscholastic Federation (CIF): The "scope of practice" for licensed health care providers and medical professionals is defined by California state statutes. This scope of practice will limit the evaluation to a medical doctor (MD) or doctor of osteopathy (DO).

For purposes of the policies and procedures of CNS to satisfy the requirement of the CA State Youth Sport Concussion Law, the evaluation required of a licensed health care provider shall be performed by the PTP, who may be a California licensed medical doctor (MD) or doctor of osteopathy (DO).

# **DEI STATEMENT**

Concussion Navigation Services takes the broadest possible view of diversity, equity and inclusion. Every member of our community should have equal access to evidence-based, best practice health care services.

Each person brings unique perspectives and experiences to their healthcare journey. All of our community members deserve equal access to educated, current, compassionate, & professional health care providers.

Visible and invisible qualities that make up each individual are valued at CNS CNS is committed to using diversity, equity, and inclusion practices to create an atmosphere that supports the needs of each person seeking care.

CONCUSSION NAVIGATION SERVICES, LLC	
TAX YEAR 2022	
Revenue:	
Baseline Plus	600
ImPACT only	150
Injury Screens	125
Initial Assessment	6375
Regular Visit	24478.17
Honorariums/consult	3125
CX-NS fee	600
Total Revenue	35453.17
Expenses:	
clark	1315.89
CCMI	1188
marketing	1659.5
entertainment/meals	462.82
rent	16968
uniforms	0
sway?	0
website	216
fax	83.87
Impact	130
con ed	2376.34
bus lic/LLC	388.25
insurance	546
equip/furnish/ofc supp	1247.96
repairs/maint	0
square fees	604.97
NATA dues	66.25
self-empl tax	0
phone/internet	1079.7
electric	20.57
trash	191.89
water/sewer	133.39
owner draw	3500
Total Expenses	\$32,179.40
Profit / -Loss	3273.77
-	

Exhibit B

# <u>City of San Luis Obispo</u> Grant Recipient Report Template

# Midyear Report Due: January 10, 2024 - Year-End Report Due: July 10, 2024

Grant Name:	DEI SLO Business Grant			
Grant Year:	FY 2022-2023			
Type of Report:	Midyear Report (check box)	(check box) End-year Report (check box)		
Organization:				
Project Name:				
service or programs provided a that have occurred during the <b>the reasoning and response to</b> Statistical Report: (Thi	ort: (A brief synopsis of the activities of the r as described in Exhibit A (your grant applications reporting period. If operations or service p o changes here.	on) us provis	sing the business grant provided, and any cl sions have changed, please disclose and e	hanges explain

**Financial Report:** (A financial statement detailing how the City's grant funding has been or planned to be allocated.)

# **DEI SLO Business Grant Additional Metrics & Performance Outcomes Template**

Metrics/Performance Outcomes	Results
1. Number of individuals served.	
<ul> <li><u>Served</u> refers to individuals specifically receiving any of the following:</li> <li>Services directly provided by the grantee;</li> <li>Program/project applications, instructions, trainings, products, or concepts;</li> <li>Information (orally or in printed, in-person, virtually or over the phone);</li> <li>Any materials (flyers, brochures, etc.);</li> <li>Referrals</li> </ul>	
2. Number of service hours provided.	
<u>Service hours</u> refer to any amount of time that is directly linked or performed as part of the work defined within the scope of the agreement signed by the grantee.	
3. Number of activities.	
<ul> <li>Activities can be defined as gatherings either the grantee organizes or attends. In either case, grantee must specify if it attended or organized the activity. This can be events, workshops, panel discussions, roundtable discussions, presentations, etc.</li> <li>Activities refer to any gathering designed to <i>promote</i> programs, services, concepts related to the components within the scope of the agreement signed by the grantee.</li> <li>Activities also refer to any gathering designed to <i>create awareness</i> of the programs, services, or concepts related to the components as defined within the agreement signed by the grantee.</li> <li>Activities relate to any gathering designed to outreach, engage, and consult, and collaborate with the community as defined within the agreement signed by the grantee</li> </ul>	
<b>4. Estimated number of individuals attending activities.</b> Based on the scope of the agreement signed by the grantee, <b>please provide a rough number</b> or <b>best estimate</b> of individuals that 1) either attend a grantee led event or 2) approach the booth/table in which the grantee participates.	

5. Report perception of services provided and/or engaged activities.	
Survey individuals to <b>measure the impact</b> of the services provided and/or engaged activities as described within the scope of the agreement signed by the grantee. Report in percent and total number of individuals served. Sample questions will be provided to grantees for technical assistance.	
6. Demographic Questions Demographic questions are highly encouraged to be completed by individuals that fall within the grantee's scope of services. Grantees will be sent the City's current demographic survey and are highly encouraged to use such template to implement and report back.	To be reported by grantee in a separate page.

Name	Title	Phone
Signature	Date	E-mail

Once signed, please scan and e-mail to Nestor Veloz-Passalacqua, DEI Manager (nveloz@slocity.org)

# **DIVERSITY EQUITY INCLUSION SLO BUSINESS GRANT 22-23**

THIS AGREEMENT, dated  $\frac{6/27/2023 + 11:20}{\text{AM}}$  for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Corazón Café (referred to herein as GRANTEE).

# WITNESSETH:

WHEREAS, GRANTEE has requested CITY to contribute to the Café, Comida, Cultura & Community business as submitted in its application to the CITY on March 31, 2023.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

- 1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to City residents from July 1, 2023 to June 30, 2024.
- 2. GRANTEE will provide CITY with a mid-year report, due January 10, 2024, and final program report, due July 10, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
- 3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees or volunteers of GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
- 4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability of the part of the CITY as a result of any act or omission, negligent, or otherwise, by GRANTEE.
- 5. CITY agrees to pay the GRANTEE a one-time only grant, in the sum of \$9,011, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
- 6. The Department Head- Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination.
- 7. GRANTEE shall complete the five-hour Small Business Development Center (SBDC) course within 30 business days of fund disbursement. Proof of completion shall be provided to

CITY. If GRANTEE fails to provide timely proof of completion, CITY reserves the right to pursue return of the awarded funds in civil action.

- 8. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Commission "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
- 9. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo 919 Palm Street San Luis Obispo, CA 93401 Attn: Greg Hermann, Assistant City Manager

**GRANTEE**:

Corazón Café 847 Higuera St. San Luis Obispo, CA 93401 Attn: Sarah McGrath corazoncafeslo@gmail.com

IN WITNESS WHEREOF, the parties have executed this agreement by their proper officers duly authorized:

GRANTEE

By:

EFSEBSFDAAD1476

Sarah McGrath, Grant Writer

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By: Greg Hermann, Assistant City Manager

APPROVED AS TOFORM:

By: Markie Eersten for Christine Dietrick

Christine Dietrick, City Attorney



# HUMAN RELATIONS COMMISSION

Diversity, Equity, & Inclusion SLO Business Grant: 2023-24 DEI SLO Business Grant Application

# The funding and grant application will support initiatives to diversify the local economy and shall be accessible to anyone. All proposals must be inclusive of all individuals and communities.

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# **BUSINESS INFORMATION**

### **BUSINESS NAME**

Corazon Cafe SLO LLC

### PROJECT/PROGRAM NAME

Cafe, Comida, Cultura & Community!

### DATE BUSINESS ESTABLISHED

3/27/2023

### **BUSINESS LICENSE NUMBER**

pending- already applied

### WEBSITE

@corazoncafeslo - Instagram

Address	
Street Address	
847 Higuera St	
Address Line 2	
City	State / Province / Region
San Luis Obispo	Са
Postal / Zip Code	Country
93401	USA

\*If you are not currently a business, you must be willing to participate in 5 hours of one-on-one coaching with the Small Business Development Center and secure a business license.

🗸 Yes 📃 No

# CONTACT INFORMATION

(This person will receive notifications regarding grant decisions, contract execution, and reporting requirements)

**BUSINESS CONTACT\*** 

Sara McGrath

**PHONE** 805-540-1673

E-MAIL ADDRESS\* corazoncafeslo@gmail.com

### WHO PREPARED THIS APPLICATION (if different than above)

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### **GRANT REQUEST INFORMATION**

1) Which of the below best describes your business proposal reflected in this application \*

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- Service
- Product
- Experience
- Promotion
- Other

### 2) Provide an executive summary of the proposal (Max 200 words)\*

From decades of experience in downtown restaurants, to starting a starting catering business, and now opening a store front, we are excited to provide coffee culture with a Mexican twist as well as as a small Mexican fusion menu in downtown SLO. We have big dreams of sourcing all products from diverse providers, of showcasing- and underrepresented- local talent on our walls, creating a system for donations back to the community and being a hub for cultural experiences. We especially hope that our Latino community, especially those who work inservice in downtown SLO, feel at home in our cafe. We have families made up of immigrants, non English speakers, LGBTQ and neurodiverse members. Inclusion is our game! "Corazon" means heart in Spanish. We put all our heart into our food and our business, and it is in the heart of our beautiful downtown!

### 3) Is this proposal for: \*

- A new program
- Continuation of an existing program

### 4) Requested Amount\*

9,011

#### 5) Itemized breakdown of requested amount (e.g., products or services purchased, hours subsidized, etc.):

Printing (bilingual, large print menus), signage, tshirts and promotional, Positive Xpression Design: \$1011 Art After Dark with underrepresented artists - promotion, gallery space upkeep, refreshments (Neurodiverse, BIPOC, etc): \$1200 Website design: \$5000 Business strategy and marketing from Heraldo Creative Studio: \$800 Accounting consultation in our first year so we can have all legal and financial matters in good standing \$1000 Total: \$9011

### 6) What percentage of the funding needed will this grant cover?\*

We are incurring significant start up costs in all areas. We tried to identify areas in which to ask for support that were specific to a fixed amount. We hope the grant will cover all it is specifying. Our start up costs will be totaling approximately \$70,000

### 7) How will this proposal benefit underrepresented and/or underserved communities in the City of SLO?\*

Most of our immigrant friends in SLO do not frequent existing coffee shops. We want to create a cafe where they feel welcome, serving coffee and pastries the way they love them. Cafe de olla y conchas! We want to share our pride in our roots and teach the whole community how rich and diverse Mexican culture is. Food brings people together!

### 8) Briefly describe 1-3 methods of evaluation with indicators of success for your proposal.\*

Successful business that supports our families (made up of immigrants and family members with disabilities) The need to hire more people.

Inquiries from diverse community members to: showcase their work, work at the cafe, get involved. Seeing who becomes our "regulars"

The success of our early morning coffee hour "Buenos Dias SLO" with Mexican cafe de olla and pan dulcedoes it become a "thing"? Do our fellow working immigrants start to gather in our space to start the day? Do we now need to make additional pots of cafe de olla, instead of one?

Signature

I certify that the information contained in this application is, to the best of my knowledge, true and accurate; that my business subscribes to the Human Relations Commission's "Statement of Purpose and Bylaws" which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental or economic status; and that this application is submitted with the full knowledge and endorsement of the business and that I am authorized submit the application on behalf of the business.

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### Signature\*

Sara McGrath

# Date \*

3/30/2023

### Attachments

Please include the following attachments. If these are not included, it will be considered as incomplete application and will not be reviewed.

1. The Business Proposal/Plan (max 3 pages) $^{m \star}$	
Corazón Café.docx	199.4KB
2. Summary of P&L/Financials (max 1 page) *	
Corazon Cafe 2023 proforma.xlsx	14.12KB
3. Diversity, Equity, & Inclusion Statement (1-3 paragraphs) *	
Diversity Equity and Inclusion Statement.docx	12.89KB

# Corazón Café



# 847 Higuera St, San Luis Obispo

# Vision

Our vision is to be a community gathering space for both tourists and locals where our customers can experience popular coffee drinks as well as learn and appreciate aspects of Mexican and Latin American culture not widely seen locally. Specifically, we hope to share about Southern Mexico and indigenous Mayan recipes. Our vision is that our diverse Latino population will feel at home in our space and that others will feel they have had a cultural experience after they leave. We want to be involved in our community by donating to local nonprofits. We hope to support other local BIPOC and women owned businesses by contracting with them for things such as baked goods and marketing support.

# **Mission**

To serve drinks and a small menu in the heart of downtown San Luis Obispo influenced by our experiences of coffee culture in Southern Mexico and Latin America.

<u>Owners:</u> Pedro Arias Lopez, Crescencio Villar and Sara McGrath. The proprietors of Corazon Café have over 35 years of combined experience in popular downtown restaurants and cafes. They have successfully run a catering business for the last 5 years and have developed relationships with many local businesses and community members. They have participated in street festivals such as Dia de los Muertos, catered for many private parties, and have regular pop-ups at local wineries and breweries.

Operations: Owners Pedro and Crescencio to work full time. 3-4 part time employees.

Hours: 7 am to 5 pm Sunday-Wednesday, 7am-7pm Thursday-Saturday

<u>Menu and Customer base:</u> Being centrally located in the very heart of downtown we will naturally attract tourists passing by. But what drives our love of the food and beverage business is getting to know our fellow locals. Corazon Café will open early for those who work nearby. We hope to have specials for our downtown crew.

As with any quality coffee shop, we will have tried and true drinks such as latte, cappuccino and espresso with choice of milk (regular, almond, soy and oat). For the younger college crowd, we will have drinks such as matcha latte and golden milk latte. For our Latino community and all who appreciate the flavors of southern Mexico we will have some fusion specialties such as *horchalatte, café de olla* and Mexican cacao with roasted corn and cinnamon.

Our food items will include sweet and savory waffles, burritos and bowls, salads and local pastries and pan dulce. We believe in having delicious options for those who have vegan or gluten free diets. The first month's menu will be small as we ascertain how much can be done in our small back prep room.

<u>Industry Analysis:</u> There are 2 coffee shops within 2 blocks of our proposed location on Higuera St. We have done a cost analysis and will have drinks and products at comparable prices.

<u>Community involvement:</u> All owners have graduated from the Chamber of Commerce Leadership SLO program and will become members of the Chamber of Commerce and Downtown SLO. We have participated for the last two years with At Her Table, a collective of local woman owned and co-owned businesses with over 250 members. We will have artist displays and participate in Art After Dark with curation by co-owner Sara McGrath who is an artist and advocate for children with special needs and women living with breast cancer. Sara hopes to give space to under-represented artists and give them a chance to shine.

# Media and Marketing Plan:

Corazon Café is connected to the catering company Corazon 805 Tacos which has appeared in the following media:

https://ediblesanluisobispo.com/tacos-with-heart/

https://www.letsgetconsumed.com/episodes/season-ix-pedro-arias-lopez-and-crescencio-villarowners-corazn-805-tacos-san-luis-obispo-ca

https://www.newtimesslo.com/sanluisobispo/pop-up-paradise-relationships-between-breweriesand-food-vendors-were-invaluable-during-the-covid-19-pandemic/Content?oid=11140805

Our catering company already has a successful social media following of over 1700 followers and we plan to capitalize on our existing client base and followers and create new pages on Instagram and Facebook to promote our products and our business. Our memberships in the different community organizations mentioned above will also be an avenue of promotion. Sara will use her background in the arts and her last 5 years of social media experience to create an online presence for Corazon Café

# **Diversity Equity and inclusion statement**

The founders of Corazon Café believe in the inclusion of all individuals in the economic and social landscape of San Luis Obispo. We believe food (comida) and drink bring people together. We believe in the power of "comida" to connect and teach about culture and community. We want to create a space for our hard working immigrant community downtown while also bridging and connecting them to the dominant culture. We want our BIPOC, neurodiverse, LGBTQ neighbors to feel welcome in the café space we create. "Corazon" means heart in Spanish and we want everyone to feel the heart we put into the drinks, the food, and the space.



Our first project, upon opening Corazon Café will be our early morning "Buenos Dias SLO" coffee hour. Latino immigrants who work early morning hours in downtown SLO will be able to come to Corazon Café for café de olla, a traditional way to drink coffee in Mexico, made in a big pot with cinnamon and piloncillo. There will be pan dulce, Mexican sweet bread. This will be open to all who wish to consume, and we hope that we can help build a warm and inviting community space.

# **Diversity Equity and Inclusion Statement**

The founders of Corazon Café believe in the inclusion of all individuals in the economic and social landscape of San Luis Obispo. We believe food (comida) and drink bring people together. We believe in the power of "comida" to connect and teach about culture and community. We want to create a space for our hard working immigrant community downtown while also bridging and connecting them to the dominant culture. We want our BIPOC, neurodiverse, LGBTQ neighbors to feel welcome in the café space we create. "Corazon" means heart in Spanish and we want everyone to feel the heart we put into the drinks, the food, and the space.

On a personal level, small business owners sometimes need support to become successful entrepreneurs. That support creates the possibility of success and stability. Pedro and Crescencio came to this community as immigrants without the dominant language to help them access opportunities. Over the years they have worked hard to pursue the American Dream: economic success and something to pass on to their children. For Pedro and Sara, raising a child with a disability has opened their eyes to the lack of economic opportunities for neurodiverse adults. A future dream is to have their son be part of the family business, and then also provide space in their café for others with disabilities to work and feel integrated into the community.

# **CORAZON CAFE**

Open 7 days a week; 7:00am to 5:00pm

		Apr-23		May-23		Jun-23		Jul-23
Revenues								
Output in Development								
Operating Revenues	\$	10,000	\$	25,000	ć	30,000	ç	30,000
Sales, food and beverage Sales, merchandise	ې \$	10,000 500	ې \$	25,000 750	\$ \$	30,000 850	\$ \$	1,000
Sales, merchandise	ڔ	500	ڔ	/50	ç	830	Ļ	1,000
Total Revenues	\$	10,500	\$	25,750	\$	30,850	\$	31,000
Expenditures								
Personnel								
Labor incl all payroll taxes, workers comp Owner draw	\$	6,000	\$	12,000	\$	12,000	\$	12,000
Sub-total	\$	6,000	\$	12,000	\$	12,000	\$	12,000
Non -Personnel								
Advertising / marketing	\$	200	\$	200	\$	200	\$	200
Book keeping	\$	200	\$	200	\$	200	\$	200
City permits	\$	100	\$	100	\$	100	\$	100
Insurance	\$	110	\$	110	\$	110	\$	110
Legal, Legal Notices								
Licenses and fees								
Rent	\$	4,000	\$	4,000	\$	4,000	\$	4,000
Taxes								
Utilities	\$	100	\$	100	\$	100	\$	100
Sub-total	\$	4,710	\$	4,710	\$	4,710	\$	4,710
Cost of Goods Sold								
Food and beverage	\$ /	4,000.00	<b>خ</b> :	3 000 00	ς :	3 000 00	ς :	3 000 00
Merchandise	\$- \$	100.00	Υ.	5,000.00	Ţ.	5,000.00	Υ.	5,000.00
Sub-total		4,100	\$	3,000	\$	3,000	\$	3,000
Total Expenditures	\$	14,810	\$	7,710	\$	7,710	\$	7,710
Revenues less Expenditures	\$	(4,310)	\$	18,040	\$	23,140	\$	23,290

	Aug-23		Sep-23	Oct-23		Nov-23	De	ec-23		Jan-24		Feb-24		Mar-24
\$	-	\$	31,000	\$ -	\$	- 5	\$	-	\$	-	\$	-	\$	-
\$	-	\$	-	\$ -	\$	- 5	\$	-	\$	-	\$	-	\$	-
\$	-	\$	-	\$ -	\$	- (	ŝ	_	\$	-	\$	-	\$	-
\$ \$	-	\$ \$	-	\$ -	\$ \$	- \$		-	\$ \$	-	\$ \$	-	\$ \$	-
\$	-		31,000	-				-	\$	-	\$	-	\$	-

Exhibit B

# <u>City of San Luis Obispo</u> Grant Recipient Report Template

# Midyear Report Due: January 10, 2024 - Year-End Report Due: July 10, 2024

Grant Name:	DEI SLO Business Grant						
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Type of Report:	Midyear Report (check box)		End-year Report (check box)				
Organization:							
Project Name:							
service or programs provided a that have occurred during the <b>the reasoning and response to</b> Statistical Report: (Th	is section should include 1) the metrics repor	pon) us provis	sing the business grant provided, and any ch sions have changed, please disclose and e	anges <b>xplain</b>			
and 2) the demographic data o	collected through the survey shared by the C	ity.)					

**Financial Report:** (A financial statement detailing how the City's grant funding has been or planned to be allocated.)

# **DEI SLO Business Grant Additional Metrics & Performance Outcomes Template**

Metrics/Performance Outcomes	Results
1. Number of individuals served.	
<ul> <li><u>Served</u> refers to individuals specifically receiving any of the following:</li> <li>Services directly provided by the grantee;</li> <li>Program/project applications, instructions, trainings, products, or concepts;</li> <li>Information (orally or in printed, in-person, virtually or over the phone);</li> <li>Any materials (flyers, brochures, etc.);</li> <li>Referrals</li> </ul>	
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<u>Service hours</u> refer to any amount of time that is directly linked or performed as part of the work defined within the scope of the agreement signed by the grantee.	
3. Number of activities.	
<ul> <li>Activities can be defined as gatherings either the grantee organizes or attends. In either case, grantee must specify if it attended or organized the activity. This can be events, workshops, panel discussions, roundtable discussions, presentations, etc.</li> <li>Activities refer to any gathering designed to <i>promote</i> programs, services, concepts related to the components within the scope of the agreement signed by the grantee.</li> <li>Activities also refer to any gathering designed to <i>create awareness</i> of the programs, services, or concepts related to the components as defined within the agreement signed by the grantee.</li> <li>Activities relate to any gathering designed to outreach, engage, and consult, and collaborate with the community as defined within the agreement signed by the grantee</li> </ul>	
<b>4. Estimated number of individuals attending activities.</b> Based on the scope of the agreement signed by the grantee, <b>please provide a rough number</b> or <b>best estimate</b> of individuals that 1) either attend a grantee led event or 2) approach the booth/table in which the grantee participates.	

5. Report perception of services provided and/or engaged activities.	
Survey individuals to <b>measure the impact</b> of the services provided and/or engaged activities as described within the scope of the agreement signed by the grantee. Report in percent and total number of individuals served. Sample questions will be provided to grantees for technical assistance.	
6. Demographic Questions Demographic questions are highly encouraged to be completed by individuals that fall within the grantee's scope of services. Grantees will be sent the City's current demographic survey and are highly encouraged to use such template to implement and report back.	To be reported by grantee in a separate page.

Name	Title	Phone
Signature	Date	E-mail

Once signed, please scan and e-mail to Nestor Veloz-Passalacqua, DEI Manager (nveloz@slocity.org)

# **DIVERSITY EQUITY INCLUSION SLO BUSINESS GRANT 22-23**

# WITNESSETH:

WHEREAS, GRANTEE has requested CITY to contribute to the Autism Fitness Program as submitted in its application to the CITY on March 31, 2023.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

- 1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to City residents from July 1, 2023 to June 30, 2024.
- 2. GRANTEE will provide CITY with a mid-year report, due January 10, 2024, and final program report, due July 10, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
- 3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees or volunteers of GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
- 4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability of the part of the CITY as a result of any act or omission, negligent, or otherwise, by GRANTEE.
- 5. CITY agrees to pay the GRANTEE a one-time only grant, in the sum of \$23,336, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
- 6. The Department Head- Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination.
- 7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Commission "Bylaws," which creates an environment within the City in which all persons

can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.

8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo 919 Palm Street San Luis Obispo, CA 93401 Attn: Greg Hermann, Assistant City Manager

GRANTEE:

Mission Headstrong 1237 Archer St San Luis Obispo, CA 93401 Attn: Robby McLaughlin robby@headstrongfit.com

IN WITNESS WHEREOF, the parties have executed this agreement by their proper officers duly authorized:

GRANTEE

By:

Robby McLaughlin, CEO

# CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By: Greg Hermann, Assistant City Manager

# APPROVED AS TOFORM:

By: Markie kersten for Unistine Dietrick Christine Dietrick, City Attorney



# HUMAN RELATIONS COMMISSION

Diversity, Equity, & Inclusion SLO Business Grant: 2023-24 DEI SLO Business Grant Application

# The funding and grant application will support initiatives to diversify the local economy and shall be accessible to anyone. All proposals must be inclusive of all individuals and communities.

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# **BUSINESS INFORMATION**

### **BUSINESS NAME**

**Mission Headstrong** 

### PROJECT/PROGRAM NAME

Autism Personal Training Program

### DATE BUSINESS ESTABLISHED

12/12/2022

### **BUSINESS LICENSE NUMBER**

Non profi IDt: 920,727,218

### WEBSITE

missionheadstrong.org (going live in 2023)

### Address

Street Address 1237 Archer Street

Address Line 2

City

san luis obsipo

Postal / Zip Code

93422

State / Province / Region
са
Country
United States

\*If you are not currently a business, you must be willing to participate in 5 hours of one-on-one coaching with the Small Business Development Center and secure a business license.

🗌 Yes 📃 No

# CONTACT INFORMATION

(This person will receive notifications regarding grant decisions, contract execution, and reporting requirements)

**BUSINESS CONTACT**\*

Jill Bilich

**PHONE** 8052348302

E-MAIL ADDRESS\*

### WHO PREPARED THIS APPLICATION (if different than above)

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### **GRANT REQUEST INFORMATION**

1) Which of the below best describes your business proposal reflected in this application \*

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- Service
- Product
- Experience
- Promotion
- Other

### 2) Provide an executive summary of the proposal (Max 200 words)\*

Mission Headstrong strives to decrease equity gaps that exist in the health and fitness community by making these services and their accompanying health benefits accessible to all. It also strives to elevate the fitness industry by certifying coaches/trainers to serve special populations, thereby broadening their involvement with the community. We are requesting seed money that allows for all coaches (trainers) to be trained in how to best serve the Autistic population. This can be a place for Autistic individuals to train for something they never felt comfortable doing at any other gym or through partnerships with various developmental services, meeting with a certified coach weekly can be built into a treatment plan. We want Mission Headstrong to be the space that provides safety and belonging no matter the developmental and/or physical abilities. We hope that our Autism Personal Training program will not only increase the overall health of individuals with autism in San Luis Obispo but will also give them a sense of belonging in the local fitness community. This service is difficult, if not impossible to find in SLO County and many related therapies (Occupational/Physical Therapy) for this population can be cost prohibitive for low income individuals/families. Included in the application is the proposal made by Eric Chessen, who is the founder of the evidence-based program, to Mission Headstrong. We cannot serve Autistic individuals in the culturally competent way we hope without a proven training and Eric's program is reputable and effective.

#### 3) Is this proposal for: \*

- A new program
- Continuation of an existing program

### 4) Requested Amount\*

23,336

#### 5) Itemized breakdown of requested amount (e.g., products or services purchased, hours subsidized, etc.):

Cost breakdown Certification: \$552 per person; 15 coaches = \$8,280 Leadership Practical: \$2,500 Travel for Eric: Fights- \$700; Lodging- \$1,000; Food/Car- \$300 = \$2,000 Equipment (3 sets): \$1,392 (plus shipping \$200) = \$1,592 Ongoing training and development (\$400/mx12)= \$4,800 Total: \$19,172

### 6) What percentage of the funding needed will this grant cover?\*

100%

### 7) How will this proposal benefit underrepresented and/or underserved communities in the City of SLO?\*

Mission Headstrong is being built with the sole purpose of benefiting underrepresented and underserved people and the Autistic population is the first group of people we hope to appropriately and competently coach. We believe this program will decrease the marginalization of these individuals and their families by paving the way for community and connection. We also hope to lead by example in serving special populations, using our experience to educate the community and other fitness/wellness providers about the equity gaps in our industry, thereby encouraging them to join us in the pursuit of providing fitness and its accompanying health benefits to all. As we launch a healthy, sustainable organization, we hope we will then go on to affect the citizens of San Luis Obispo in additional ways including: providing fitness programming by trauma informed coaches for women in domestic violence shelters, gym memberships for previously incarcerated individuals and those facing economic hardship, and much more. \* Autism Fitness was created for the Autistic community, however, Eric (the founder) is extending his approaches to be inclusive for all neurodivergent people. He also has two more certifications we want to have two coaches go through that will allow for those coaches to train future coaches without having to hire Autism Fitness. We hope to offer this certification to other fitness centers throughout the county in a few years. \*We are also pursuing other streams of funding (ie % of gym Headstrong gym membership goes to Mission Headstrong, other grants, fundraising) in order to ensure economic hardship does not interfere with services.

### 8) Briefly describe 1-3 methods of evaluation with indicators of success for your proposal.\*

All 15 coaches will successfully complete their certification by January 2024 and will be prepared to serve folks with autism.

### Signature

I certify that the information contained in this application is, to the best of my knowledge, true and accurate; that my business subscribes to the Human Relations Commission's "Statement of Purpose and Bylaws" which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental or economic status; and that this application is submitted with the full knowledge and endorsement of the business and that I am authorized submit the application on behalf of the business.

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#### Signature\*

Till Bilich

# Date \*

3/31/2023

### Attachments

Please include the following attachments. If these are not included, it will be considered as incomplete application and will not be reviewed.

1. The Business Proposal/Plan (max 3 pages) $^{igstarrow}$	
Mission Headstrong Proposal_March 30 2023.pdf	289.83KB
2. Summary of P&L/Financials (max 1 page)*	
Profit and Loss Explenation.pages	100.97KB
3. Diversity, Equity, & Inclusion Statement (1-3 paragraphs) *	
DEI statement.pages	371.16KB

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Autism Fitness Mission Headstrong Proposal





# Mission Headstrong Autism Fitness<sup>™</sup> Program



Autism Fitness Mission Headstrong Proposal

# **Introduction**

Mission Headstrong, under the direction of Robby McLaughlin is poised to bring a more inclusive, accessible, and effective model of fitness to the San Luis Obispo area of California. The challenges to this vison include understanding neurodiverse populations including their general and specific life needs, structuring fitness programs and protocols, staff training and development, and scalability.

For many children, teens, and adults with autism spectrum disorder (ASD) and other neurodivergent diagnoses, high quality fitness programs with appropriately trained professionals are inaccessible. Continued presence of this gap results in lower quality of life, life expectancy, and the high potential of medical complications otherwise preventable through ongoing long-term, fitness programming.

Mission Headstrong has contacted Autism Fitness<sup>™</sup> for certification and ongoing consulting. Through a strategic relationship Mission Headstrong will be trained and empowered to meet the fitness needs of the SLO, CA autism and neurodivergent community.

# The Autism Fitness® Difference

Autism Fitness<sup>™</sup> is the bridge between the fitness world and the autism/neurodivergent community. With 20 years of developing and implementing successful fitness and adapted physical education programs, Autism Fitness<sup>™</sup> has been a pioneer in programs that deliver intended outcomes and beyond. The AF method has been validated and replicated in an array of settings from homes to schools to organizations that serve diverse members around the world.

The Autism Fitness<sup>™</sup> approach is based upon the PAC Profile<sup>®</sup> method. The PAC Profile<sup>®</sup> is an unparalleled model for assessing and strategically planning fitness and APE. Assessing Physical, Adaptive, and Cognitive functioning as they related to fitness activities, the PAC Profile<sup>™</sup> eliminates the guesswork and provides appropriate starting points according to individual baseline skills.

Programs are both individualized and progressive. The foundation of our fitness approach is developing strength, stability, and motor planning skills using the Autism Fitness<sup>™</sup> approach to functional exercise. This process develops abilities that generalize from the gym/fitness setting to enhancing activities of daily living (ADLs). This program can serve preventative measures in injury prevention and building physical resilience.

Autism Fitness Mission Headstrong Proposal

# Partnership with Autism Fitness™

Imagine Mission Headstrong and the SLO community having a regionally renowned reputation for offering fitness programs that truly work for this population. This can be a turning point in health and self-efficacy for current and future generations.

Autism Fitness<sup>™</sup> is equipped to provide Certification and ongoing training/consulting for Mission Headstrong. We invest our time and expertise into long-term relationships helping to light the path ahead. From providing the foundations of programming to strategies for each individual, AF provides the answers at each step.

# Phase 1: Identifying Leaders

Autism Fitness will work directly with point personnel to identify where programs will be run, outreach coordination, and continuing education and support following Certification. We know that once programs are implemented, new and more specific questions will arise.

# Phase 2: Certification

It all begins with the <u>Autism Fitness Certification Level 1</u>, providing the standard practices in AF with the practical skills for delivering programs in any environment.

Level 1 students discover the reasoning behind the PAC Profile®, exercise selection, positive behavior support, and program design. Additionally, attendees get access to the <u>Autism Fitness<sup>™</sup> Toolbox</u> including our vast library of exercise progressions and regressions.

The Certification process is a blended learning model consisting of 8 online modules (typically 3-4 weeks to complete) followed by a full-day live practical. For groups of 8+ Autism Fitness<sup>™</sup> offers closed-door on-site practical training.

# Phase 3: Ongoing Support

The Certification begins the journey. The critical questions are asked once programs are implemented. We know this, and are ready to support ongoing programming review, input, and support. Autism Fitness<sup>™</sup> consulting will continue to provide direct continuing education to Mission Headstrong as part of a long-term strategy for optimal performance of staff and integrity of the program as it expands.

Autism Fitness Mission Headstrong Proposal

# Your Investment

Certification:

\$649/attendee with a 10% discount for groups of 3+, however a 10-attendee minimum is required for travel requiring flight.

Travel and accommodations to/from SLO, CA for Autism Fitness Founder Eric Chessen, MS

Ongoing Consulting Includes:

Check-ins and questions weekly (as needed) via Voxer App

Quarterly 90-min Zoom trainings w/ Staff

\$400/month

Additional:

Equipment Package from Perform Better (Base Price \$464 + Shipping)

Optional ½ day (4 hr) training for leadership personnel following Level 1 Certification practical: \$2500

The terms discussed above are good until July 1, 2023.

To proceed, please contact Eric Chessen, MS, at Eric@AutismFitness.com



Eric Chessen, MS, Founder, Autism Fitness

### Headstrong DEI Statement

Diversity, Equity, and Inclusion (DEI) is an essential field as there are many historic and systemic ways entire people groups have been oppressed, discriminated against, and marginalized. In order to see a day where all people belong, there needs to be focused efforts in closing all equity gaps that exist in our world, nation, state, and in our community. Every person and industry plays a part in this and either advances these efforts or creates barriers (knowingly or unknowingly) and at Headstrong, we want to be a place that advances DEI, which is why Mission Headstrong was created.

It was always the intention of the owner (Robby) to have a non- profit branch to the gym, though that is not a common model of a gym. There are many barriers that exist in the health, wellness, and fitness community such as a lack of representation racially of trainers/coaches, female identifying athletes needing a safe place to work out, neurodivergent community needing a place that understands sensory needs, Veterans with history of PTSD needing a place that is predictable with sounds, and economically disadvantaged people who do not have the means to pay for a membership. These are all populations who fall under the DEI umbrella and Mission Headstrong wants to close these equity gaps and be a model for other gyms/fitness centers/health & Wellness centers of the efforts that can be made to be an inclusive environment. There are many barriers for historically marginalized people in our City and County, and though we cannot address all equity issues, we can within our field and apply DEI values, principles, and approaches.

A very important pillar of DEI is doing the introspective work to undo biases we have and to ensure we do not compound existing traumas, which is why we are seeking robust and comprehensive trainings in order to be transformed and grow in our cultural competency as we serve various

underrepresented/underserved populations. We have to be willing to be transformed and that will be what brings sustainable trauma-informed services that are client-centered and create spaces of belonging that our community has needed for many years.

As a recently established non-profit organization connected to Headstrong Fitness, we do not yet have a P&L or financial history.

Exhibit B

## <u>City of San Luis Obispo</u> Grant Recipient Report Template

## Midyear Report Due: January 10, 2024 - Year-End Report Due: July 10, 2024

Grant Name:	DEI SLO Business Grant			
Grant Year:	FY 2022-2023			
Type of Report:	Midyear Report (check box)		End-year Report (check box)	
Organization:				-
Project Name:				
service or programs provided that have occurred during the <b>the reasoning and response t</b> Statistical Report: (Th	Ort: (A brief synopsis of the activities of the reas described in Exhibit A (your grant applications or service protocold period. If operations or service protocold by the content of the service of the	tted a	sing the business grant provided, and any ch sions have changed, please disclose and e	anges x <b>plain</b>

**Financial Report:** (A financial statement detailing how the City's grant funding has been or planned to be allocated.)

## **DEI SLO Business Grant Additional Metrics & Performance Outcomes Template**

Metrics/Performance Outcomes	Results
1. Number of individuals served.	
<ul> <li><u>Served</u> refers to individuals specifically receiving any of the following:</li> <li>Services directly provided by the grantee;</li> <li>Program/project applications, instructions, trainings, products, or concepts;</li> <li>Information (orally or in printed, in-person, virtually or over the phone);</li> <li>Any materials (flyers, brochures, etc.);</li> <li>Referrals</li> </ul>	
2. Number of service hours provided.	
<u>Service hours</u> refer to any amount of time that is directly linked or performed as part of the work defined within the scope of the agreement signed by the grantee.	
3. Number of activities.	
<ul> <li>Activities can be defined as gatherings either the grantee organizes or attends. In either case, grantee must specify if it attended or organized the activity. This can be events, workshops, panel discussions, roundtable discussions, presentations, etc.</li> <li>Activities refer to any gathering designed to <i>promote</i> programs, services, concepts related to the components within the scope of the agreement signed by the grantee.</li> <li>Activities also refer to any gathering designed to <i>create awareness</i> of the programs, services, or concepts related to the components as defined within the agreement signed by the grantee.</li> <li>Activities relate to any gathering designed to outreach, engage, and consult, and collaborate with the community as defined within the agreement signed by the grantee</li> </ul>	
<b>4. Estimated number of individuals attending activities.</b> Based on the scope of the agreement signed by the grantee, <b>please provide a rough number</b> or <b>best estimate</b> of individuals that 1) either attend a grantee led event or 2) approach the booth/table in which the grantee participates.	

5. Report perception of services provided and/or engaged activities.	
Survey individuals to <b>measure the impact</b> of the services provided and/or engaged activities as described within the scope of the agreement signed by the grantee. Report in percent and total number of individuals served. Sample questions will be provided to grantees for technical assistance.	
6. Demographic Questions Demographic questions are highly encouraged to be completed by individuals that fall within the grantee's scope of services. Grantees will be sent the City's current demographic survey and are highly encouraged to use such template to implement and report back.	To be reported by grantee in a separate page.

Name	Title	Phone
Signature	Date	

Once signed, please scan and e-mail to Nestor Veloz-Passalacqua, DEI Manager (nveloz@slocity.org)

## **DIVERSITY EQUITY INCLUSION SLO BUSINESS GRANT 22-23**

## WITNESSETH:

WHEREAS, GRANTEE has requested CITY to contribute to Seeds Community Events as submitted in its application to the CITY on March 31, 2023.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

- 1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to City residents from July 1, 2023 to June 30, 2024.
- 2. GRANTEE will provide CITY with a mid-year report, due January 10, 2024, and final program report, due July 10, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
- 3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees or volunteers of GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
- 4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability of the part of the CITY as a result of any act or omission, negligent, or otherwise, by GRANTEE.
- 5. CITY agrees to pay the GRANTEE a one-time only grant, in the sum of \$14,800, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
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- 7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Commission "Bylaws," which creates an environment within the City in which all persons

can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.

8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo 919 Palm Street San Luis Obispo, CA 93401 Attn: Greg Hermann, Assistant City Manager

**GRANTEE**:

Seeds 1040 Court St San Luis Obispo, CA 93401 Attn: Zak Khan zak@tasteseeds.com

IN WITNESS WHEREOF, the parties have executed this agreement by their proper officers duly authorized:

GRANTEE

By:

Zak khan Zak Khan, Manager

DocuSigned by

## CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By: Greg Hermann, Assistant City Manager

## APPROVED AS TOFORM:

By: <u>Markie kersten for Uristine Dietrick</u> <u>Orzaberotoranse</u> Christine Dietrick, City Attorney



## HUMAN RELATIONS COMMISSION

Diversity, Equity, & Inclusion SLO Business Grant: 2023-24 DEI SLO Business Grant Application

# The funding and grant application will support initiatives to diversify the local economy and shall be accessible to anyone. All proposals must be inclusive of all individuals and communities.

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## **BUSINESS INFORMATION**

BUSINESS NAME Seeds	
PROJECT/PROGRAM NAME Seeds Community Events	
DATE BUSINESS ESTABLISHED 12/28/2015	
BUSINESS LICENSE NUMBER 111690	
WEBSITE www.tasteseeds.com	
Address	
Street Address	
1040 Court Street	
Address Line 2	
City	State / Province / Region
San Luis Obispo	CA
Postal / Zip Code	Country
93401	USA

\*If you are not currently a business, you must be willing to participate in 5 hours of one-on-one coaching with the Small Business Development Center and secure a business license.

🗌 Yes 📃 No

## CONTACT INFORMATION

(This person will receive notifications regarding grant decisions, contract execution, and reporting requirements)

**BUSINESS CONTACT**\*

Zak Khan

**PHONE** 8057097799

E-MAIL ADDRESS\* zak@tasteseeds.com

#### WHO PREPARED THIS APPLICATION (if different than above)

PHONE
-------

#### **GRANT REQUEST INFORMATION**

1) Which of the below best describes your business proposal reflected in this application \*

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Service

Product

Experience

Promotion

Other

#### 2) Provide an executive summary of the proposal (Max 200 words)\*

I am writing to propose:

1. Larger and more Seeds community events that seek to advance diversity, equity, and inclusion through wellness and environmental awareness. Our events aim to bring people of different backgrounds and cultures together to promote a shared vision of a more sustainable and equitable world.

Our goal is to create an inclusive, welcoming and safe space for all members of the community to come together, learn from each other, and promote healthy living and environmental sustainability. By bringing together people of different backgrounds and experiences, we hope to foster a sense of unity and understanding that will lead to a more equitable and just society.

The events in the past and future events will include a variety of activities, including yoga and meditation sessions, mindfulness practices featuring free healthy and sustainable foods, free music festival, educational talks on environmental issues such as climate change, pollution, and waste reduction. We will also provide opportunities for attendees to engage with participating local organizations and businesses that promote wellness and sustainability. To ensure that our events are accessible to all community members, we will be offering them free of charge.

In addition to promoting environmental awareness, our event will also serve as a fundraising initiative for local charities and Calpoly organizations that share our vision of a more equitable, healthy and sustainable world. We believe that by partnering with these organizations, we can have a greater impact on the SLO community and create lasting change.

2. Providing affordable and nutritious food options for underserved and underrepresented communities. As we know, food insecurity is a growing issue, particularly for those living in poverty or in areas with limited access to healthy food options.

This project aims to address this issue by creating a menu model that can help bring down the prices of nutritious foods and make them accessible to all by adding additonal food options at Seeds that can be 25% less than current prices.

Costs associated with launching and maintaining this, including new menus boards, handheld menus, POS reconstruction, purchasing new packaging in bulk, new plateware, and advertisement.

Overall, our project has the potential to make a significant impact on the health and wellbeing of underserved communities. We believe that by having more affordable options, we can create a sustainable model that will continue to benefit the SLO community for years to come.

With your support, we can make more consistent and accesible events a reality and create a positive impact on affordability, health, and wellbeing of underserved communities.

#### 3) Is this proposal for: \*

- A new program
- Continuation of an existing program

#### 4) Requested Amount\*

25,000

#### 5) Itemized breakdown of requested amount (e.g., products or services purchased, hours subsidized, etc.):

Year Events Costs: Venue: \$4000 Food & Drinks: \$8000 Music: \$10000 Equipment Rental: \$2000 Classes: \$4000 Decorations: \$4000 Advertising: \$3000 Staffing: \$2000

Menu Addition: Menu consultation: \$5000 Menu Graphic design: \$2000 Menu Boards: \$7000 Menus handheld: \$2500 Menu online implementation: \$2000 POS implementation: \$1500 New bulk packaging: \$8000 New plateware: \$1000 Advertisement: \$3000

## 6) What percentage of the funding needed will this grant cover?\*

#### 7) How will this proposal benefit underrepresented and/or underserved communities in the City of SLO?\*

Our goal is to create an inclusive, welcoming and safe space for all members of the community to come together, learn from each other, and promote healthy living and environmental sustainability. By bringing together people of different backgrounds and experiences, we hope to foster a sense of unity and understanding that will lead to a more equitable and just society. In addition, our project has the potential to make a significant impact on the health and wellbeing of underserved communities. We believe that by having more affordable options, we can create a sustainable model that will continue to benefit the SLO community for years to come.

#### 8) Briefly describe 1-3 methods of evaluation with indicators of success for your proposal.\*

-Engagement Data: Evaluate the level of engagement and interaction that participants have with the event. Indicators of success in this category could include the number of likes, shares, and comments on social media, the number of people and denographic attending the event/fundraiser.

- Sales data analysis: Seeds can track sales data to evaluate the success of the healthy affordable menu. Indicators of success can include increased sales of healthy menu items, high repeat customer rates, and increased overall volume due to the popularity of the menu. Additionally, tracking food waste can be an indicator of success as lower food waste means the dishes are being consumed more often.

#### Signature

I certify that the information contained in this application is, to the best of my knowledge, true and accurate; that my business subscribes to the Human Relations Commission's "Statement of Purpose and Bylaws" which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental or economic status; and that this application is submitted with the full knowledge and endorsement of the business and that I am authorized submit the application on behalf of the business.

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Signature\* Zak Khan Date\* 3/29/2023 Attachments

Please include the following attachments. If these are not included, it will be considered as incomplete application and will not be reviewed.

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1. The Business Proposal/Plan (max 3 pages) *	
Affordable Menu Business Plan.pdf	45.37KB
Event Business Plan.pdf	43.62KB
<pre>2. Summary of P&amp;L/Financials (max 1 page)* sales_summary_2022_10_29-2023_03_29.xls</pre>	55.5KB
3. Diversity, Equity, & Inclusion Statement (1-3 paragraphs) *	
Diversity, Equity and Inclusion Statement.pdf	36.81KB



## **Business Plan: Affordable Menu**

## **Executive Summary:**

Our business plan proposes to develop affordable restaurant menu options for more accessibility to underserved and underrepresented communities. We aim to address the issue of food insecurity and promote healthy eating habits in these communities by creating meals that are both nutritious and affordable. Our business plan will focus on measuring the impact of our initiative through customer feedback, revenue markers, and repeat business data.

#### **Initiative Overview:**

Seeds will be committed to improving access to healthy food options for underserved communities to develop affordable and healthy menu options, which will be available to all customers regardless of their income level. We will look to provide a 25% drop in pricing to promote health-based foods as a day-to-day option. Our team will partner with a menu consultant, project manager, nutritionist, community members, and current customers.

## **Market Analysis:**

There is a significant need for affordable and healthy food options. Underserved and underrepresented communities often lack access to fresh, locally sourced ingredients and face higher rates of obesity, diabetes, and other chronic health conditions. Our initiative will address this issue by curating new affordable and healthy menu options that meet the unique tastes and preferences of these communities.

## **Product and Services:**

We will work with our chefs and nutritionists to create meals that are both nutritious and delicious, using fresh and locally sourced ingredients whenever possible. We will also provide equipment, as well as marketing and promotional support to enhance the outreach opportunity.

## **Marketing and Sales:**

Our marketing strategy will focus on building local partnerships with businesses and community organizations. We will leverage social media platforms and local media outlets to



promote our initiative and build awareness around the importance of healthy eating habits. We will also work closely with community leaders and organizations to foster a sense of social engagement and create a network of support for our initiative.

## **Operations:**

We will track the impact of our initiative through customer feedback and data on the number of meals sold, as well as measuring changes in health outcomes.

Main tracking metric:

Volume data analysis: Seeds can track sales data to evaluate the success of the healthy affordable menu. Indicators of success can include increased sales of healthy menu items, high repeat customer rates, and increased overall volume due to the popularity of the menu. Additionally, tracking food waste can be an indicator of success as lower food waste means the dishes are being consumed more often.

## **Financial Plan:**

Our budget for this initiative is \$32,000, which will cover the cost of menu development, implementation, materials, the initial cost of goods, marketing, and outreach. We will self-fund a portion of this initiative but will need assistance.

## Conclusion:

Our business plan proposes a sustainable solution to address the issue of food insecurity for the underserved and underrepresented community. We aim to create affordable and healthy menu options for underserved and underrepresented communities to promote healthy eating habits. We believe that our initiative will create a positive impact on the health and well-being of these communities in San Luis Obispo.



## **Business Plan: Seeds Earth Day & Fall Equinox Event/Fundraiser**

#### **Executive Summary:**

The proposed business plan aims to create a sustainable and engaged event that promotes diversity, equity, and inclusion through wellness and environmental awareness. Seeds will organize community events that bring people of different backgrounds and cultures together to promote a shared vision of a more sustainable and equitable community. The events will consist of a series of activities and workshops designed to promote wellness, inclusion, and environmental awareness.

#### **Market Analysis:**

There is a growing demand for community events that promote diversity, equity, and inclusion through wellness and environmental awareness. People are increasingly aware of the impact of their actions on the environment and are looking for ways to live a more sustainable lifestyle. In addition, the events industry has been growing steadily in recent years, with an increasing number of people attending events and looking for unique experiences.

#### **Target Market:**

The target market for our events is individuals and organizations that are interested in promoting diversity, equity, and inclusion through wellness and environmental awareness. We will target individuals and groups who are passionate about environmental sustainability, social justice, and wellness.

#### **Products and Services:**

Seeds will organize these events which will consist of a series of activities and workshops designed to promote wellness and environmental awareness. The activities will include yoga, meditation, music, food and drinks, local businesses, mindfulness practices, and workshops by non-profit organizations on sustainable living, environmental conservation or positively impacted community issues.

#### **Fundraising Revenue Streams:**



Our fundraising revenue streams will come from daily sales for the events, sponsorships from local businesses and organizations, and partnerships with local charities and non-profit organizations as well as corporate partnerships throughout San Luis Obispo.

#### **Marketing Strategy:**

Our marketing strategy will focus on social media, email, in-store, word-of-mouth, and partnerships with local businesses and organizations. We will create a social media presence to promote our events and engage with potential attendees. We will also leverage partnerships with local businesses and organizations to increase awareness of our events and reach a wider audience.

#### **Operations:**

Our events will be based in San Luis Obispo, Court Street area, and will require a small team of staff to manage operations, marketing, and event planning. We will also work with a network of corporate partners and the property manager to help with event logistics, venue and day-to-day operations.

#### **Engagement Projections:**

Our engagement projections indicate that we will double in attendees for the second year in a row based on current increases in classes and workshops and continue generating more engagement with larger class offerings, bigger music set-ups, and more NPO involvement. We expect to generate double fundraising revenue.

#### **Conclusion:**

The proposed event business plan aims to create a sustainable and engaged venture that promotes diversity, equity, and inclusion through wellness and environmental awareness. The events will provide a platform for individuals from different walks of life to come together and participate in the community by attending a free event.



## **Diversity, Equity, and Inclusion Statement**

Seeds is a San Luis Obispo-born business and is locally owned. We have been honored to be owners of this business and part of this community that shaped who we are and also instilled some of our most important core values. We have a strong commitment to helping create a diverse, equitable, and inclusive community. We recognize that diversity comes in many forms, including but not limited to race, ethnicity, gender identity, sexual orientation, age, ability, religion, socioeconomic status, and culture. We believe that having a diverse community enriches our perspectives and enables us to create innovative solutions that benefit everyone in San Luis Obispo.

We also understand that diversity alone is not enough; we must also strive for equity and inclusion. We recognize that historical and systemic inequalities exist in our society and that we must actively work to dismantle them even at the city level. We appreciate the city of San Luis Obispo's initiative to do this through a business-focused channel. We are committed to providing equal opportunities and fair treatment to all individuals, regardless of their background or identity. We also strive to create a welcoming and safe environment where everyone feels valued and respected.

To achieve these goals, we will continue to learn, listen, and engage in open and honest conversations about diversity, equity, and inclusion. We will hold ourselves, our business, our employees, vendors, and customers accountable for their actions and decisions, and we will work collaboratively to create a community where everyone feels empowered to contribute their unique perspectives and talents.

-Seeds Ownership & Management

<u> </u>			-	
Sales Summary	Export			
10/29/22 - 3/29/23				
Sales Summary	Net Sales	Tax	Gratuity	Tips
	\$504,122.39	\$44,081.83	\$0.00	\$50,125.05
	Guest Count	Order Count	Discounts	Tips Withheld
	24491	24491	21248.14	\$0.00
Payment Summary	Payment Type	Count	Amount	Tips
	Credit	20572	459646.5	50125.0
	Gift Card	427	7065.66	
	Cash			
	Other	2936	87321.42	
	Total	23935	554033.58	50125.0
	Credit Types			
	Amex	1182	31692.23	3719.33
	Discover	429	8806.32	885.23
	Mastercard	3111	70202.91	7510.04
	Visa	15850	348945.04	38010.4
	Alternate Paymer		004.00	
	Donations	6	921.86	(
	Door Dash	2809 19	83293.22	(
	Gift Certificate (P Uber Eats		3119.17	
		102	3119.17	
Sales Categories	Category	Order Count	Item Count	Gross Amt
Calco Calcgonico	Draft/Liquor	866	1086	9850.4
	Coffee	5057	6128	32211.2
	Grab & Go	2198	2688	11158.10
	Wine	97	119	1480
	Alcoholic Beverag	-	3	2
	Juice	2357	3498	2062
	Retail	87	111	2509.9
	NA Beverage			2000.
	Food	20444	33140	442164.52
	Non-Grat Svc Ch		135	538.6
	No Category	10	12	8
	Total			520641.84
Revenue Centers	Revenue Center	Order Count	Item Count	Gross Amt
			4287	50558.28
	Takout	2160	4287	50558.28
	Takout Patio		4287	50558.28
	Takout		4287	50558.24

Dining Options	<b>Dining Option</b>	Order Count	Net Sales	
	Delivery by Door	130	5427.54	
	Dine In	10976	260261.38	
	DoorDash - Deliv	2545	70150.4	
	DoorDash Takeo	1	6	
	DoorDash - Take	265	6434.69	
	Mobile App - Take	3	31	
	Online Ordering	2041	44235.27	
	Pick-Up	29	327.64	
	Take Out	8377	114372.48	
	Uber Eats - Deliv	93	2658.29	
	Uber Eats - Take	10	217.7	
	None	21	0	
Taxes	Тах	Order Count	Tax Amount	Net Sales
14763	State Tax	Sider Coulit		500811.52
		000	43831.65	
	Non Taxable	823	050.40	0.01
	Marketplace Faci	litator raxes P	250.18	2868.99
Service Charges	Service Charge	Count	Amount	
U	Delivery Service	135	538.65	
	Delivery Service	155	550.05	
		135		
Menu Item Discou				
Menu Item Discou	r Discount	Count	Amount	
Menu Item Discou	r Discount 1/2 Price Wine	Count 4	Amount 66.5	
Menu Item Discou	Ir Discount 1/2 Price Wine Buy any coffee dr	<b>Count</b> 4 4	Amount 66.5 18	
Menu Item Discou	I Discount 1/2 Price Wine Buy any coffee dr Downtown Emplo	Count 4 4 58	Amount 66.5 18 201	
Menu Item Discou	Discount           1/2 Price Wine           Buy any coffee dr           Downtown Emplo           Employee OFF th	Count           4           58           54	Amount 66.5 18 201 134.09	
Menu Item Discou	Discount           1/2 Price Wine           Buy any coffee dr           Downtown Emploit           Employee OFF th           Employee ON the	Count           4           58           54           575	Amount 66.5 18 201 134.09 3430.12	
Menu Item Discou	Discount           1/2 Price Wine           Buy any coffee dr           Downtown Employ           Employee OFF th           Employee Shift D	Count           4           58           54           575           242	Amount 66.5 18 201 134.09 3430.12 1577.65	
Menu Item Discou	Discount           1/2 Price Wine           Buy any coffee dr           Downtown Employ           Employee OFF th           Employee Shift D           Free Barista item	Count           4           58           54           575           242           1	Amount 66.5 18 201 134.09 3430.12 1577.65 6.25	
Menu Item Discou	Discount           1/2 Price Wine           Buy any coffee dr           Downtown Emplo           Employee OFF th           Employee ON the           Employee Shift D           Free Barista item           Free Drip Downto	Count 4 58 54 575 242 1 114	Amount 66.5 18 201 134.09 3430.12 1577.65 6.25 421	
Menu Item Discou	Discount           1/2 Price Wine           Buy any coffee dr           Downtown Emploi           Employee OFF th           Employee ON the           Employee Shift D           Free Barista item           Free Student Cof	Count           4           58           54           575           242           1           114           13	Amount 66.5 18 201 134.09 3430.12 1577.65 6.25 421 46	
Menu Item Discou	Discount           1/2 Price Wine           Buy any coffee dr           Downtown Emploi           Employee OFF th           Employee ON the           Employee Shift D           Free Barista item           Free Drip Downto           Free Student Cof           General Manager	Count           4           4           58           54           575           242           1           114           13           178	Amount 66.5 18 201 134.09 3430.12 1577.65 6.25 421 46 2717.14	
Menu Item Discou	Discount           1/2 Price Wine           Buy any coffee dr           Downtown Employ           Employee OFF th           Employee ON the           Employee Shift D           Free Barista item           Free Student Cof           General Manager           Happy Hour(Food	Count           4           58           54           575           242           1           114           13           178           1	Amount 66.5 18 201 134.09 3430.12 1577.65 6.25 421 46 2717.14 2	
Menu Item Discou	I Discount 1/2 Price Wine Buy any coffee dr Downtown Emplo Employee OFF th Employee ON the Employee Shift D Free Barista item Free Drip Downto Free Student Cof General Manager Happy Hour(Food Healthcare Free O	Count           4           58           54           575           242           1           114           13           178           1           5	Amount 66.5 18 201 134.09 3430.12 1577.65 6.25 421 46 2717.14 2 24	
Menu Item Discou	I         Discount           1/2 Price Wine           Buy any coffee dr           Downtown Emploi           Employee OFF th           Employee ON the           Employee Shift D           Free Barista item           Free Drip Downto           Free Student Cof           General Manager           Happy Hour(Food           Kitchen Manager	Count           4           58           54           575           242           1           114           13           178           1           5           95	Amount 66.5 18 201 134.09 3430.12 1577.65 6.25 421 46 2717.14 2 24 1019.15	
Menu Item Discou	I         Discount           1/2 Price Wine           Buy any coffee dr           Downtown Employ           Employee OFF th           Employee ON the           Employee Shift D           Free Barista item           Free Drip Downto           Free Student Cof           General Manager           Happy Hour(Food           Kitchen Manager           Mustang Village(I	Count           4           4           58           54           575           242           1           114           13           178           1           5           95           6	Amount 66.5 18 201 134.09 3430.12 1577.65 6.25 421 46 2717.14 2 2 24 1019.15 35.75	
Menu Item Discou	Image: Constraint of the second state of the second sta	Count           4           4           58           54           575           242           1           114           13           178           1           5           95           6           1	Amount 66.5 18 201 134.09 3430.12 1577.65 6.25 421 46 2717.14 2 24 1019.15 35.75 13.5	
Menu Item Discou	Image: Constraint of the second state of the second sta	Count           4           58           54           575           242           1           114           13           178           1           5           95           6           1           3	Amount 66.5 18 201 134.09 3430.12 1577.65 6.25 421 46 2717.14 2 24 1019.15 35.75 13.5 8.65	
Menu Item Discou	I         Discount           1/2 Price Wine           Buy any coffee dr           Downtown Emploi           Employee OFF th           Employee ON the           Employee Shift D           Free Barista item           Free Drip Downto           Free Student Cof           General Manager           Happy Hour(Food           Healthcare Free O           Kitchen Manager           Mustang Village(I           Petra Cooks           Sephora 1/29 Cla           Walk to End Alzh	Count 4 4 58 54 575 242 1 114 13 178 1 5 95 6 1 3 12	Amount 66.5 18 201 134.09 3430.12 1577.65 6.25 421 46 2717.14 2 24 1019.15 35.75 13.5	
Menu Item Discou	Image: Constraint of the second state of the second sta	Count 4 4 58 54 575 242 1 114 13 178 1 5 95 6 1 3 12	Amount 66.5 18 201 134.09 3430.12 1577.65 6.25 421 46 2717.14 2 24 1019.15 35.75 13.5 8.65 45	
	I         Discount           1/2 Price Wine           Buy any coffee dr           Downtown Emploi           Employee OFF th           Employee ON the           Employee Shift D           Free Barista item           Free Drip Downto           Free Student Cof           General Manager           Happy Hour(Food           Healthcare Free O           Kitchen Manager           Mustang Village(I           Petra Cooks           Sephora 1/29 Cla           Walk to End Alzh           Yelp Check-In(Dr	Count           4           58           54           575           242           1           114           13           178           1           5           95           6           1           3           12           5	Amount 66.5 18 201 134.09 3430.12 1577.65 6.25 421 46 2717.14 2 24 1019.15 35.75 13.5 8.65 45 15	
Menu Item Discou	Image: Constraint of the second state of the second sta	Count         4         58         54         575         242         1         114         13         178         1         5         95         6         1         3         12         5	Amount 66.5 18 201 134.09 3430.12 1577.65 6.25 421 46 2717.14 2 24 1019.15 35.75 13.5 8.65 45 15 15	
	I         Discount           1/2 Price Wine           Buy any coffee dr           Downtown Emploi           Employee OFF th           Employee ON the           Employee Shift D           Free Barista item           Free Drip Downto           Free Student Cof           General Manager           Happy Hour(Food           Healthcare Free O           Kitchen Manager           Mustang Village(I           Petra Cooks           Sephora 1/29 Cla           Walk to End Alzh           Yelp Check-In(Dr	Count         4         58         54         575         242         1         114         13         178         1         5         95         6         1         3         12         5         Count         19	Amount 66.5 18 201 134.09 3430.12 1577.65 6.25 421 46 2717.14 2 24 1019.15 35.75 13.5 8.65 45 15	

Cash Adjustment Cash before Tipe Cash Gratuity Credit / Non-Cash Credit / Non-Cash Total Cash	outs n gratuity	\$0.00 -\$0.00 -\$0.00 -\$50,125.05 \$0.00	
Cash before Tipe Cash Gratuity	outs	<b>\$0.00</b> -\$0.00	
Cash before Tip		\$0.00	
Cash Aujustment	3	+	
Coch Adjustment	ç	\$0.00	
Total Cash Payn	nents	\$0.00	
\$3,153.10	203	285	0.6%
Amount	Order Count	Item Count	Percent
	98		
. ,		. ,	
Breakfast (8-11)	6.042	\$119,899,44	
Service	Orders	Net Sales	
	1	1	
	_		
		0	
		770.29	
		770.22	
Customer Credit	6	40	
Amazon Employe	1	3.65	
	Amazon Employe Customer Credit Donation Comp Downtown Emplo Email \$5 Off (\$20 Friend/Family Gift Card discourn Guayaki Bundle Petra Employee Rammy(100% Of Reward Dollars Society of Civil En Vybes Bundle Whalebird Bundle Whalebird Bundle Breakfast (8-11) Lunch (11-2) Late Lunch (2-5) Dinner(5-8) No Service Amount \$3,153.10	Rinkzen Emproys1Customer Credit6Donation Comp6Downtown Emplo552Email \$5 Off (\$201Friend/Family250Gift Card discoun5Guayaki Bundle2Petra Employee22Rammy(100% OF143Reward Dollars291Society of Civil Er1Vybes Bundle9Whalebird Bundle7ServiceOrdersBreakfast (8-11)6,042Lunch (11-2)12,409Late Lunch (2-5)5,248Dinner(5-8)694No Service98AmountOrder Count\$3,153.10203Total Cash Payments	Amazon Employe       1       3.65         Customer Credit       6       40         Donation Comp       6       770.22         Downtown Emplo       552       770.29         Email \$5 Off (\$20       1       0         Friend/Family       250       494.2         Gift Card discoun       5       670         Guayaki Bundle       2       2.52         Petra Employee       22       61.8         Rammy(100% OF       143       6493.2         Reward Dollars       291       1980.36         Society of Civil Er       1       2.1         Vybes Bundle       9       18         Whalebird Bundle       7       7         Service       Orders       Net Sales         Breakfast (8-11)       6,042       \$119,899.44         Lunch (11-2)       12,409       \$273,763.65         Late Lunch (2-5)       5,248       \$97,618.99         Dinner(5-8)       694       \$11,863.27         No Service       98       \$977.04         Amount       Order Count       Item Count         \$3,153.10       203       285         Imagetii Amount       Order Count       I

		Generated 3/29/23 9:59 PM	
		Seeds	
Deferred	Total		
\$5,661.38	\$603,990.65		
Tips Refunded 12.51			
12.51			
Gratuity	Tip/Grat %	Refunds	Total
0		-147.08	509624
0		-7.61	7058.1
	0	7.01	0
0			87321
0	1	-154.69	604004
0	0.126751		35412
0			9691.6
0	0.115366	-24.47	77688
0		-122.61	386833
0	0		921.86
0	0		83293
0	0		-12.83
0	0		3119.2
Discounts	Net	Тах	
202.11	9648.29	842.94	
4847.45	27363.76	2393.42	
244.2	10913.96	956.25	
176.88	1303.12	113.97	
0	21	1.83	
683.41	19934.59	1739.18	
309.56	2200.34	192.57	
9905.81		37834.4	
	538.65	0	
0		7.27	
16369.42	504122.4	44081.83 \$	
Discounts	Net	Тах	
1445.34		4298.83	
<b></b>	10010.10	+230.03	

Exhibit B

## <u>City of San Luis Obispo</u> Grant Recipient Report Template

## Midyear Report Due: January 10, 2024 - Year-End Report Due: July 10, 2024

Grant Name:	DEI SLO Business Grant				
Grant Year:	FY 2022-2023				
Type of Report:	Midyear Report (check box) End-year Report (check bo				
Organization:					
Project Name:					
service or programs provided a	<b>rt:</b> (A brief synopsis of the activities of the ro s described in Exhibit A (your grant application reporting period. <b>If operations or service p</b> o changes here.	on) us	ing the business grant provided, and any ch	anges	
	is section should include 1) the metrics repor collected through the survey shared by the C		s described in Exhibit A (your grant applica	tion)	

**Financial Report:** (A financial statement detailing how the City's grant funding has been or planned to be allocated.)

## **DEI SLO Business Grant Additional Metrics & Performance Outcomes Template**

Metrics/Performance Outcomes	Results
1. Number of individuals served.	
<ul> <li><u>Served</u> refers to individuals specifically receiving any of the following:</li> <li>Services directly provided by the grantee;</li> <li>Program/project applications, instructions, trainings, products, or concepts;</li> <li>Information (orally or in printed, in-person, virtually or over the phone);</li> <li>Any materials (flyers, brochures, etc.);</li> <li>Referrals</li> </ul>	
2. Number of service hours provided.	
<u>Service hours</u> refer to any amount of time that is directly linked or performed as part of the work defined within the scope of the agreement signed by the grantee.	
3. Number of activities.	
<ul> <li>Activities can be defined as gatherings either the grantee organizes or attends. In either case, grantee must specify if it attended or organized the activity. This can be events, workshops, panel discussions, roundtable discussions, presentations, etc.</li> <li>Activities refer to any gathering designed to <i>promote</i> programs, services, concepts related to the components within the scope of the agreement signed by the grantee.</li> <li>Activities also refer to any gathering designed to <i>create awareness</i> of the programs, services, or concepts related to the components as defined within the agreement signed by the grantee.</li> <li>Activities relate to any gathering designed to outreach, engage, and consult, and collaborate with the community as defined within the agreement signed by the grantee</li> </ul>	
<b>4. Estimated number of individuals attending activities.</b> Based on the scope of the agreement signed by the grantee, <b>please provide a rough number</b> or <b>best estimate</b> of individuals that 1) either attend a grantee led event or 2) approach the booth/table in which the grantee participates.	

5. Report perception of services provided and/or engaged activities.	
Survey individuals to <b>measure the impact</b> of the services provided and/or engaged activities as described within the scope of the agreement signed by the grantee. Report in percent and total number of individuals served. Sample questions will be provided to grantees for technical assistance.	
6. Demographic Questions Demographic questions are highly encouraged to be completed by individuals that fall within the grantee's scope of services. Grantees will be sent the City's current demographic survey and are highly encouraged to use such template to implement and report back.	To be reported by grantee in a separate page.

Name	Title	Phone
Signature	Date	E-mail

Once signed, please scan and e-mail to Nestor Veloz-Passalacqua, DEI Manager (nveloz@slocity.org)

## **DIVERSITY EQUITY INCLUSION SLO BUSINESS GRANT 22-23**

THIS AGREEMENT, dated  $\frac{6/30/2023 + 10:26 \text{ AM}}{10:26 \text{ AM}}$  for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and SLOCAR Inc. dba Certified Auto Repair (referred to herein as GRANTEE).

## WITNESSETH:

WHEREAS, GRANTEE has requested CITY to contribute to Keep the Community Rolling repair mini-grants project as submitted in its application to the CITY on March 31, 2023.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

- 1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to City residents from July 1, 2023 to June 30, 2024.
- 2. GRANTEE will provide CITY with a mid-year report, due January 10, 2024, and final program report, due July 10, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
- 3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees or volunteers of GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
- 4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability of the part of the CITY as a result of any act or omission, negligent, or otherwise, by GRANTEE.
- 5. CITY agrees to pay the GRANTEE a one-time only grant, in the sum of \$10,000, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
- 6. The Department Head- Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination.
- 7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Commission "Bylaws," which creates an environment within the City in which all persons

can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.

8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo 919 Palm Street San Luis Obispo, CA 93401 Attn: Greg Hermann, Assistant City Manager

**GRANTEE**:

SLOCAR Inc. dba Certified Auto Repair 393 March St San Luis Obispo, CA 93401 Attn: Isaac Feldman isaac@carofslo.com

IN WITNESS WHEREOF, the parties have executed this agreement by their proper officers duly authorized:

#### GRANTEE

By:

Isaac Feldmen, Grant Writer

for of

## CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By: Greg Hermann, Assistant City Manager

## APPROVED AS TOFORM:

By: Markie Levsten for Christine Dietrick

Christine Dietrick, City Attorney



## **HUMAN RELATIONS COMMISSION**

Diversity, Equity, & Inclusion SLO Business Grant: 2023-24 DEI SLO Business Grant Application

The funding and grant application will support initiatives to diversify the local economy and shall be accessible to anyone. All proposals must be inclusive of all individuals and communities.

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1

#### **BUSINESS INFORMATION**

#### **BUSINESS NAME**

SLOCAR Inc. dba Certified Auto Repair

#### PROJECT/PROGRAM NAME

Keep the Community Rolling

#### DATE BUSINESS ESTABLISHED

5/1/2015

#### **BUSINESS LICENSE NUMBER**

112891

#### WEBSITE

www.carofslo.com

Address	
Street Address	
393 Marsh Street	
Address Line 2	
City	State / Province / Region
San Luis Obispo	CA
Postal / Zip Code	Country
93401	United States

\*If you are not currently a business, you must be willing to participate in 5 hours of one-on-one coaching with the Small Business Development Center and secure a business license.

🗌 Yes 📃 No

## CONTACT INFORMATION

(This person will receive notifications regarding grant decisions, contract execution, and reporting requirements)

**BUSINESS CONTACT**\*

Isaac Feldman

**PHONE** 3108040974

## E-MAIL ADDRESS\*

isaac@carofslo.com

#### WHO PREPARED THIS APPLICATION (if different than above)

#### PHONE

#### **GRANT REQUEST INFORMATION**

1) Which of the below best describes your business proposal reflected in this application \*

 $(\land)$ 

- Service
- Product
- Experience
- Promotion
- Other

#### 2) Provide an executive summary of the proposal (Max 200 words)\*

Certified Auto Repair (CAR) has been serving the local community for over 30 years.

We are a family-owned-and-operated auto repair business situated in Downtown SLO.

CAR offers full-service auto repair for import and domestic vehicles, utilizing advanced auto diagnostic equipment. Most of our mechanics are UTI graduates and/or ASE Certified, trained and qualified to service import and domestic vehicles, including hybrid and electric vehicles.

Our Services Include but are not limited to:

- Belts/Hoses
- Brake Inspection
- Brake Repair/Service
- Check Engine Light Diagnostics
- Drivability Diagnostics
- Engine/Transmission Services
- Hybrid Battery Replacement
- Hybrid Repair
- Oil Change / Scheduled Maintenance
- Suspension Repair/Service

CAR proposes utilizing Jewish Family Services (JFS), a 501(c)3 nonprofit human services organization, to screen customers for economic hardship so that we may issue micro-grants to have vehicles serviced. To our knowledge, no other businesses, organizations, or agencies in our community provide vehicle repair assistance to people enduring financial hardship. Requests for auto repairs to just 1 agency exceeded \$40,000 in 2022.

This grant would:

• Expand our marketing to include outreach to Spanish speaking households and other underserved/underrepresented groups (ie. Black, Indigenous, People of Color, Women, disabled, LGBTQIA+).

• Grow our customer base, especially within the underserved community

• Provide vital vehicle repairs to underserved/underrepresented individuals improving independence and safety.

#### 3) Is this proposal for: \*

- A new program
- Continuation of an existing program

#### 4) Requested Amount\*

25,000

#### 5) Itemized breakdown of requested amount (e.g., products or services purchased, hours subsidized, etc.):

Advertising and Marketing: additional \$500 to \$1,000 per month as long as funds are available. Direct microgrant towards automotive repair: up to \$800 per customer as long as funds are available. Contribution from shop: Varies, up to \$300 per customer. CAR will often and upon ability directly contribute towards lowering the bill of the pre screened underserved customer.

#### 6) What percentage of the funding needed will this grant cover?\*

50-70%

#### 7) How will this proposal benefit underrepresented and/or underserved communities in the City of SLO?\*

Certified Auto Repair can provide an essential service for those who are economically challenged and consistently underserved and underrepresented. There are no other businesses, agencies or organizations in our community that formally provide vehicle repair assistance to people with financial hardship. The DEI grant would allow us to: • Expand our marketing to include outreach to Spanish speaking households and other underserved groups (ie. Black, Indigenous, People of Color, Women, Students, diverseabled, LGBTQIA+). • Provide vital vehicle repairs to underserved/underrepresented individuals improving independence and safety. • Help women, seniors, homeless, diverseabled, medically indigent and many others enduring financial hardships with life changing opportunities, enabling people to drive to work, school, medical appointments and meet basic needs. • With proper founding, we will be able to maintain and grow our services to the underserved for years to come.

#### 8) Briefly describe 1-3 methods of evaluation with indicators of success for your proposal.\*

It is fairly easy to keep in touch with these customers over time. When we follow up with them, if they are still able to rely on their vehicles and get to/from work/school, therapy, etc, we will consider this program a success. All the repair and customer data are easily accessible in our point-of-sale system, which makes the program trackable.

#### Signature

I certify that the information contained in this application is, to the best of my knowledge, true and accurate; that my business subscribes to the Human Relations Commission's "Statement of Purpose and Bylaws" which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental or economic status; and that this application is submitted with the full knowledge and endorsement of the business and that I am authorized submit the application on behalf of the business.

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Signature<sup>\*</sup>

Date\*

#### Attachments

Please include the following attachments. If these are not included, it will be considered as incomplete application and will not be reviewed.

1. The Business Proposal/Plan (max 3 pages) $^{m \star}$	
DEI Grant Business Plan for Certified Auto Repair.docx	14.66KB
2. Summary of P&L/Financials (max 1 page) *	
2022 P&L.pdf	102.07KB
3. Diversity, Equity, & Inclusion Statement (1-3 paragraphs) *	

DEI Grant Business Plan for Certified Auto Repair:

At Certified Auto Repair, we pride ourselves in being an integral part of the San Luis Obispo community and have been striving to take care of all of our SLO neighbors as much as possible. Our owner and many of our employees belong to minority communities and we are very sensitive to our communities' needs. We understand how important it is for everyone in our amazing area to be able to have reliable transportation to and from school and work, especially the underserved, who are often even more reliable upon their vehicles than the more affluent community members. We understand that without reliable transportation, many of our clients would not be able to go to school or work, which can have extremely negative results in their lives. Without reliable transportation, our community members would not be able to get themselves or their children to school or work, and many may end up back on the streets. Below is a break down of some of the ways these funds will help us continue servicing our communities as well as our process for serving those in need:

• Increase marketing to underserved/underrepresented individuals (ie. Spanish speakers,

Black, Indigenous, People of Color, Women, LGBTQIA+, diverse-abled) using printed

materials, advertising including social media and internet, 211 listing (budget \$500-1,000 per month)

• Jewish Family Services of SLO (JFS) will contact community organizations (including but

not limited to: 211, Access Support Network, California Department of Rehabilitation,

CAPSLO, Center for Family Strengthening, Diversity Coalition, Gala Pride and Diversity

Center, Independent Living Resource Center, Latino Outreach Council, Lumina Alliance,

Transitions Mental Health Association, Restorative Partners, Womenade of Estero Bay)

distributing information and flyers explaining the project.

• Customers complete an online application for assistance with paying for their vehicle repairs, which includes stating their needs and demographic information, all of which is entered into a spreadsheet for record keeping and evaluation.

• They are then interviewed by the JFS Intake Coordinator and submit supporting

documents (ie. Identification, proof of income, written estimate of repair).

• Determination of eligibility for assistance is made based on need, income (based on

200% of the federal poverty level guidelines), and availability of funds.

• Once determined eligible, a micro-grant (up to \$800) will be given to the customer to cover part or all of the vehicle repair. If only part of the repair is covered, JFS will work with the customer to find the balance of funds.

- The vehicle repair is scheduled and completed.
- Follow-up with the customer with surveys to ensure satisfaction with the work

performed (via email and text) and customer still able to use car in longer term.

Breakdown of expenses: (exact numbers to be determined based on availability of funds)

Advertising: Around \$500 per month

Print material (ie flyers): Around \$500 per month

Micro-grants for vehicle repairs: \$100-\$800 per customer, based on repair costs and availabilities of funds.

• Not all customers in underserved communities will require the micro-grants. Most are able to pay for their own repairs. We would like to be able to be more accessible to the community at large and let them know we are here to help. We employ Spanish speaking Service Advisors and Technicians. Our shop owner is also in the minority community and fluent in Spanish.

#### **Program Sustainability:**

Certified Auto Repair has a long history of taking care of those around us. Since our conception, we have always had a compassion for helping those that need it to the best of our ability. We have been working with the JFS for a couple of years now and are both enjoying the relationship. It seems that we will be continuing our program for as long as needed, as long as we're able. Receiving the DEI grant will have an enormous impact in our ability to serve, and if it is available in the years to come, our program will certainly thrive. As far as we see it there will always be people in need, so the longer this grant is available for, the more folks will be able to be assisted.

Certified Auto Repair's Statement of Diversity, Equity and Inclusion:

Certified Auto Repair provides services to anyone in our community regardless of their circumstances, religious beliefs, race, ethnicity, national origin, diversability, gender identity/expression or sexual orientation. What matters to us is that our customers can get to and from work and school reliably.

To screen for economic hardship we would utilize Jewish Family Services of San Luis Obispo (JFS), a 501(c)3 nonprofit human services organization that serves anyone in need regardless of their circumstances, religious beliefs, race, ethnicity, national origin, diversability, gender identity/expression or sexual orientation.

The Certified Auto Repair team puts people first. Our mechanics ensure vehicles are reliable to serve our customers' needs. We believe in a shared responsibility to support impactful changes throughout our community and take a holistic approach, assessing the various needs of the individual or family. We continuously evaluate the evolving challenges of our diverse community and adapt our support to the resulting needs. "We are your community repair shop".

2:33 PM 02/10/23 Accrual Basis

## Certified Auto Repair Profit & Loss January through December 2022

	Jan - Dec 22
Ordinary Income/Expense	
Income Sales of Parts Service Income Sublet Income Haz Mat Income	392,325.25 636,221.67 21,707.00 5,863.61
Total Income	1,056,117.53
Cost of Goods Sold Parts Labor Outside Labor Hazardous Materials Fees Total COGS	215,593.31 259,493.51 8,803.41 81.88
	483,972.11
Gross Profit	572,145.42
Expense Postage, Freight & Delivery Advertising Automobile Expense Licenses Fuel Automobile Expense - Other	106.29 32,300.77 15.00 3,025.57 953.94
Total Automobile Expense	3,994.51
Bank Service Charges Business Licenses & Permits Credit Card Fees Customer Relations Dues & Publications Employee Benefits Afflac Benefits Health Insurance Simple IRA	318.70 1,005.17 24,431.76 1,281.90 18,137.70 4,027.60 49,029.76 4,760.13
Total Employee Benefits	57,817.49
Fees and Licenses Insurance Prof Fees Legal & Acctng Consulting Services Prof Fees Legal & Acctng - Other	800.00 13,697.72 6,010.00 26,937.74
Total Prof Fees Legal & Acctng	32,947.74
Maintenance Equip Maint & Repairs General Maintenance	709.67 15,695.35
Total Maintenance	16,405.02
Meals & Entertainment Office Supplies & Expense Parking Payroll Expenses Employer Payroll Tax Officer Salary Service Writer Wages	5,682.57 10,502.99 4.25 29,425.93 24,900.00 35,774.58
Payroll Expenses - Other	15,018.18
Total Payroll Expenses	105,118.69

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## Certified Auto Repair Profit & Loss January through December 2022

	Jan - Dec 22
Rent	60,000.00
Security	270.00
Shop Supplies & Small Tools	7,997.42
Taxes-Property	466.43
Team Building	120.64
Training & Education	5,222.12
Travel & Entertainment	1,754.31
Utilities	
Trash	349.60
Water / Sewer	865.36
Telephone & Internet	12,572.37
Utilities - Other	14,567.01
Total Utilities	28,354.34
Worker's Compensation Ins	13,912.58
Total Expense	442,651.11
Net Ordinary Income	129,494.31
Other Income/Expense	
Other Income	
Interest Income	7.91
Total Other Income	7.91
Other Expense	
Charitable Contributions	2,022.71
Fix Me	3,041.06
Interest Expense	16,408.26
Total Other Expense	21,472.03
Net Other Income	-21,464.12
Net Income	108,030.19

Exhibit B

## <u>City of San Luis Obispo</u> Grant Recipient Report Template

## Midyear Report Due: January 10, 2024 - Year-End Report Due: July 10, 2024

Grant Name:	DEI SLO Business Grant			
Grant Year:	FY 2022-2023			
Type of Report:	Midyear Report (check box)		End-year Report (check box)	
Organization:				
Project Name:				
service or programs provided a that have occurred during the <b>the reasoning and response to</b> Statistical Report: (Th	is section should include 1) the metrics repor	pon) us provis	sing the business grant provided, and any ch sions have changed, please disclose and e	anges <b>xplain</b>
and 2) the demographic data o	collected through the survey shared by the C	ity.)		

**Financial Report:** (A financial statement detailing how the City's grant funding has been or planned to be allocated.)

## **DEI SLO Business Grant Additional Metrics & Performance Outcomes Template**

Metrics/Performance Outcomes	Results
1. Number of individuals served.	
<ul> <li><u>Served</u> refers to individuals specifically receiving any of the following:</li> <li>Services directly provided by the grantee;</li> <li>Program/project applications, instructions, trainings, products, or concepts;</li> <li>Information (orally or in printed, in-person, virtually or over the phone);</li> <li>Any materials (flyers, brochures, etc.);</li> <li>Referrals</li> </ul>	
2. Number of service hours provided.	
<u>Service hours</u> refer to any amount of time that is directly linked or performed as part of the work defined within the scope of the agreement signed by the grantee.	
3. Number of activities.	
<ul> <li>Activities can be defined as gatherings either the grantee organizes or attends. In either case, grantee must specify if it attended or organized the activity. This can be events, workshops, panel discussions, roundtable discussions, presentations, etc.</li> <li>Activities refer to any gathering designed to <i>promote</i> programs, services, concepts related to the components within the scope of the agreement signed by the grantee.</li> <li>Activities also refer to any gathering designed to <i>create awareness</i> of the programs, services, or concepts related to the components as defined within the agreement signed by the grantee.</li> <li>Activities relate to any gathering designed to outreach, engage, and consult, and collaborate with the community as defined within the agreement signed by the grantee</li> </ul>	
<b>4.</b> Estimated number of individuals attending activities. Based on the scope of the agreement signed by the grantee, please provide a rough number or best estimate of individuals that 1) either attend a grantee led event or 2) approach the booth/table in which the grantee participates.	

5. Report perception of services provided and/or engaged activities.	
Survey individuals to <b>measure the impact</b> of the services provided and/or engaged activities as described within the scope of the agreement signed by the grantee. Report in percent and total number of individuals served. Sample questions will be provided to grantees for technical assistance.	
6. Demographic Questions Demographic questions are highly encouraged to be completed by individuals that fall within the grantee's scope of services. Grantees will be sent the City's current demographic survey and are highly encouraged to use such template to implement and report back.	To be reported by grantee in a separate page.

Name	Title	Phone
Signature	Date	E-mail

Once signed, please scan and e-mail to Nestor Veloz-Passalacqua, DEI Manager (nveloz@slocity.org)

## **DIVERSITY EQUITY INCLUSION SLO BUSINESS GRANT 22-23**

THIS AGREEMENT, dated  $\frac{6/29/2023 | 10:36 \text{ AM PDT}}{10:36 \text{ AM PDT}}$  for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Ten Over Studio (referred to herein as GRANTEE).

#### WITNESSETH:

WHEREAS, GRANTEE has requested CITY to contribute to Affordable and workforce feasibility studies as submitted in its application to the CITY on March 31, 2023.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

- 1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to City residents from July 1, 2023 to June 30, 2024.
- 2. GRANTEE will provide CITY with a mid-year report, due January 10, 2024, and final program report, due July 10, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
- 3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees or volunteers of GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
- 4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability of the part of the CITY as a result of any act or omission, negligent, or otherwise, by GRANTEE.
- 5. CITY agrees to pay the GRANTEE a one-time only grant, in the sum of \$15,000, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
- 6. The Department Head- Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination.
- 7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Commission "Bylaws," which creates an environment within the City in which all persons

can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.

8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo 919 Palm Street San Luis Obispo, CA 93401 Attn: Greg Hermann, Assistant City Manager

**GRANTEE**:

Ten Over Studio 539 Marsh St San Luis Obispo, CA 93401 Attn: Chantal Stewart chantals@tenoverstudio.com

IN WITNESS WHEREOF, the parties have executed this agreement by their proper officers duly authorized:

GRANTEE

By: Docusigned by: (liantal Stewart

## CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By: Greg Hermann, Assistant City Manager

#### APPROVED AS TOFORM:

By: Markie kersten for Ukristine Dietrick Christine Dietrick, City Attorney



# **HUMAN RELATIONS COMMISSION**

Diversity, Equity, & Inclusion SLO Business Grant: 2023-24 DEI SLO Business Grant Application

# The funding and grant application will support initiatives to diversify the local economy and shall be accessible to anyone. All proposals must be inclusive of all individuals and communities.

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# **BUSINESS INFORMATION**

#### **BUSINESS NAME**

TEN OVER STUDIO

#### PROJECT/PROGRAM NAME

TEN OVER STUDIO AFORDABLE & WORKFORCE HOUSING FEASIBILITY STUDIES

#### DATE BUSINESS ESTABLISHED

10/10/2014

#### **BUSINESS LICENSE NUMBER**

107254

#### WEBSITE

www.tenoverstudio.com

Address	
Street Address	
539 Marsh Street	
Address Line 2	
City	State / Province / Region
San Luis Obispo	CA
Postal / Zip Code	Country
93401	USA

\*If you are not currently a business, you must be willing to participate in 5 hours of one-on-one coaching with the Small Business Development Center and secure a business license.

🗌 Yes 📃 No

# CONTACT INFORMATION

(This person will receive notifications regarding grant decisions, contract execution, and reporting requirements)

BUSINESS CONTACT\*

Chantal Stewart

PHONE 8054570211

E-MAIL ADDRESS\* chantals@tenoverstudio.com

#### WHO PREPARED THIS APPLICATION (if different than above)

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# **GRANT REQUEST INFORMATION**

1) Which of the below best describes your business proposal reflected in this application \*

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- Service
- Product
- Experience
- Promotion
- Other

#### 2) Provide an executive summary of the proposal (Max 200 words)\*

TEN OVER STUDIO is a team of driven professionals with a mission to make the world a better place. We offer our architectural, landscape and interiors expertise to design spaces for our community to live, work and play. A significant portion of our work focuses on the development of affordable and workforce housing in our community.

We support affordable housing efforts in San Luis Obispo by working with local developers on feasibility studies to build a more welcoming, diverse, and inclusive city. \$15,000 in grant funds will help our knowledgeable team provide five feasibility studies to local nonprofit developers from when the grant is awarded through the 2023-2024 fiscal year, We can encourage affordable and workforce housing projects by leveraging our experience, professional working relationships and community reputation. These efforts will ultimately support those who traditionally have been relocated or unable to live here due to rising housing costs. Our team of architects is a knowledgeable resource and able to provide a thorough analysis of the opportunities, challenges, and potential solutions for these impactful projects.

We look forward to helping to make our San Luis Obispo a fairer and more stable place for all.

#### 3) Is this proposal for: \*

- A new program
- Continuation of an existing program

#### 4) Requested Amount\*

15,000

#### 5) Itemized breakdown of requested amount (e.g., products or services purchased, hours subsidized, etc.):

- 1. \$11,000 Earmarked for up to five feasibility studies at \$2,200 each
- 2. \$2,000 Program development, training, and deliverables
- 3. \$2,000 Outreach and marketing of the program to affordable housing developers

#### 6) What percentage of the funding needed will this grant cover?\*

100%

#### 7) How will this proposal benefit underrepresented and/or underserved communities in the City of SLO?\*

1. This proposal directly benefits groups who historically have been impacted by the high cost of housing and cannot afford to live in the City of San Luis Obispo. 2. By working with local nonprofit developers who are committed to building and maintaining affordable housing, we can directly target underserved groups in need of affordable housing. 3. 250 homes could be built in the City of San Luis Obispo providing much needed housing allowing people to work AND live in our community without having to commute from more affordable locations in our region.

#### 8) Briefly describe 1-3 methods of evaluation with indicators of success for your proposal.\*

1. Five nonprofit developers using the feasibility study for site locations in the City of San Luis Obispo,

potentially leading to 250 new affordable homes built within the City.

2. Three sets of affordable housing plans submitted the City of San Luis Obispo for review and approval directly due to feasibility study.

## Signature

I certify that the information contained in this application is, to the best of my knowledge, true and accurate; that my business subscribes to the Human Relations Commission's "Statement of Purpose and Bylaws" which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental or economic status; and that this application is submitted with the full knowledge and endorsement of the business and that I am authorized submit the application on behalf of the business.

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Signature\*

Chartal Stewart

Date \* 3/31/2023

## Attachments

Please include the following attachments. If these are not included, it will be considered as incomplete application and will not be reviewed.

 1. The Business Proposal/Plan (max 3 pages)\*

 2023 DEI BUSINESS GRANT PROPOSAL\_TEN OVER STUDIO.pdf
 98.67KB

 2. Summary of P&L/Financials (max 1 page)\*

 2022 P&L summary.pdf
 168.73KB

3. Diversity, Equity, & Inclusion Statement (1-3 paragraphs) \* 2023 DIVERSITY EQUITY & INCLUSION STATEMENT\_TEN OVER STUDIO.pdf 108.96KB



# CITY OF SAN LUIS OBISPO DEI BUSINESS GRANT PROPOAL 2023-24

# THE BUSINESS PROPOSAL/PLAN (MAX 3 PG)

TEN OVER STUDIO will support The City of San Luis Obispo's Diversity, Equity and Inclusion efforts by conducting feasibility studies focused on affordable and workforce housing for local nonprofit developers. Our team has extensive knowledge and experience in providing housing feasibility studies and is a valuable resource that many developers may not be aware of. Due to limited internal resources our team has not been able to meet the feasibility study demand. With additional financial support of this service, we can make more of an impact on the effort to build more affordable housing and support the City of San Luis Obispo's 2021-2023 Major City Goals. We are directly supporting the City's Housing and Homelessness goal of expanding the housing options for all, continuing to facilitate the production of housing, including the necessary supporting infrastructure, with an emphasis on affordable and workforce housing San Luis Obispo's effort to be a more inclusive and equitable community and we believe we have the perfect team to help achieve this.

TEN OVER is an innovative, experienced, and award-winning architecture firm providing the highest levels of design and customer service. We offer full architectural, landscape, interiors and media services with thoughtful, honest advice, and an emphasis on environmentally sensitive design. TEN OVER started in 2014 as a local architecture firm with a simple mission; leave the world better than we found it. Everything we do is centered around making the world a better place. Utilizing our skills, experience, and passion, we create places and spaces that connect people with each other and with their surroundings. We feel very fortunate to live and work in beautiful parts of the world and have the opportunity help our clients meet their needs and fulfill their dreams while leaving a minimal environmental footprint. Part of our dream is to help make the place we call home a more equitable and welcoming community for all.

To gain this knowledge, we listen intently to our client's needs, goals, and priorities. As an industry leader and group of community members, we see the lack of diverse housing for those who cannot afford to work and live here in San Luis Obispo. As a small local architecture firm we can pivot quickly and focus on what is needed. Our team has extensive experience in designing affordable housing projects such as Bridge Street Mixed-Use, Toscano Inclusionary Housing, Victoria Mixed-Use, Bishop Street Studios and the Iron Works Apartments. These are all projects located in San Luis Obispo. Our team takes into account the demographics and groups seeking to fill the affordable housing market and helps align a beautiful and welcoming design that feels like home.

According to the United States Census Bureau, as of 2020, the race and ethnicity of the City is predominately white with 76% of the population identifying as white,. non-Hispanic. The next largest ethnic group is Hispanic or Latino, comprising about 16% of the population. Asian, Black, and Native American residents make up a smaller 8% of the 48,892 city's population. San Luis Obispo has a relatively high cost of living, with the median home price in the city hovering around \$800,000 while the median income averages near \$62,000. There is also a significant rental market in the city, with roughly 60% of residents renting their homes rather than owning them. Traditionally, those working in the City of San Luis Obispo who are struggling or not able to find local affordable housing are the backbone to our workforce economy and are forced to commute from outside of our City and County. The Regional Economic Action Coalition (REACH) for the Central Coast, has noted that there's an alarming number of residents on the Central Coast due to the lack

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Page 1 of 3



of workforce housing available. There's a well-known sentiment in the area that housing is unfordable, but studies show that underserved groups are especially vulnerable leading to a less diverse and welcoming community. The most recent Housing Opportunity Index by the National Association of Home Builders' shows that only about 20% of homes in San Luis Obispo County are affordable for a family earning the median household income. That makes the Central Coast the nation's 8th-least affordable region. Gleaned from the same survey report by REACH, over 50% of all middle-class residents, 63% of Latinx and 83% of African Americans are likely to leave the Central Coast which will in turn lead to a less diverse community. TEN OVER wants to help create a more equitable and inclusive homebase here in San Luis Obispo.

A feasibility study can help encourage more affordable housing projects in the City of San Luis Obispo by providing an objective assessment of the viability of projects. Additionally, by providing feasibility studies to nonprofits who already have a goal of creating affordable housing will help make a bigger and faster impact for our city. Our team at TEN OVER has established working relationships with the nonprofit developer/builders in the area including People's Self-Help Housing and Housing Authority San Luis Obispo (HASLO). Our goal is to provide these nonprofit groups and others with a streamlined roadmap for success by identifying and analyzing suitable properties for the greatest number of housing units. We will also design homes and developments that complement the neighborhood, obtaining permits and approvals, and managing the construction of these affordable housing projects.

Feasibility studies help identify potential sites by evaluating the availability of land, zoning regulations, and other factors that might affect the suitability of a site for affordable housing. These studies also assess the demand for affordable housing in the city by analyzing demographic data, housing trends, and other factors. The study can provide an estimate of the number of units needed to meet the demand and help determine the optimal size and type of affordable housing projects. The study can also assess the costs of construction, environmental impact and long-term maintenance and operations of affordable housing projects. The information from a feasibility study will help to determine the most cost-effective approach. A feasibility study can also identify potential obstacles to the development of affordable housing projects in the city, such as regulatory barriers, community opposition, or environmental issues. The study can also suggest ways to mitigate or overcome these obstacles.

Our team of experts can successfully provide feasibility studies by focusing on four primary steps:

- 1. Identifying an appropriate parcel within the city
- 2. Research lot configuration, zoning ordinances and any other regulatory requirements
- 3. Establish allowable density, required parking and any other required programs
- 4. Draft a site plan illustrating potential project build-out

If TEN OVER is able to provide five feasibility studies to local nonprofit developers that focus on building affordable and workforce housing in the City of San Luis Obispo, this may result in an increase in affordable and workforce housing of up to 250 affordable housing units within the next 3-5 years. This grant has the potential to make a drastic difference in hundreds of people's lives while decreasing the number of vehicle miles traveled throughout our City.

To help ensure that we successfully use the grant funds, it will be imperative to market these feasibility studies. Marketing efforts will focus on direct relationship client meetings and local newsletters. Promotion in local newsletters will include our own TEN OVER marketing newsletter, a newsletter with REACH and content provided to the nonprofit developers for their own direct communication efforts. These should be free of charge, however up to 12 hours of billable time will be dedicated to our in-house Marketing Manager.

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Outside of the feasibility studies and marketing, we have an amazing team of folks who will touch and support this program from the operations of the program to increased training on feasibility studies. The billable time put into this will be \$2,000.

Marketing Manager Content Creation & Billable Time SLO Chamber of Commerce Monthly E-Blast Email Business Development/marketing incidentals \$725	\$1,100 \$175
Total marketing spend	\$2,000
Program development, training, and deliverables	\$2,000
Five feasibility studies	\$11,000
Total grant request	\$15,000

Using our design experience and local knowledge, TEN OVER STUDIO would like to support the City of San Luis Obispo with their effort to increase Diversity, Equity, and Inclusion locally. This grant will allow our team to build out a more robust affordable and workforce housing feasibility study program working with local nonprofit developers to realize The City of San Luis Obispo's goals of making San Luis Obispo a more welcoming and inclusive place for all community members. The financial support to local businesses like TEN OVER will help promote the economic and social well-being of community members.

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Page 3 of 3



# TEN OVER STUDIO DIVERSITY, EQUITY & INCLUSION STATEMENT

# DIVERSITY, EQUITY & INCLUSION STATEMENT (1-3 PARAGRAPHS)

TEN OVER STUDIO'S mission is to leave the world better than we found it. To achieve this, we empower our team to keep it real by being fearlessly authentic with themselves, their work, and their relationships. We are committed to building a team with a variety of backgrounds, skills and views while supporting the different needs of employees through education and creating a culture of inclusivity. We believe that great work starts with a great team who feels valued and appreciated.

We believe that architecture is a powerful way to create more equitable and welcoming spaces through design that thinks past the "me" and focuses on the "we". Through empowering a diverse and inclusive team, we are able to listen to our clients and support design that feel true to who we are and symbiotic with the surrounding environment.

Here at TEN OVER STUDIO, we are committed to making sure Diversity, Equity, and Inclusion (DEI) is not a phrase but is a core value. We not only look inward for ways to improve, but we stive to be leaders in improving equity within our communities and beyond.

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Page 1 of 1

2:07 PM 03/27/23 Accrual Basis

# Ten Over Studio, Inc. Profit & Loss January through December 2022

	TOTAL
Ordinary Income/Expense	
Income Invoiced Services Lost Income	6,516,089.62 -57,771.51
Client Reimbursables Income In house Service Subcontracted Income	202,429.96 4,396.14 1,169,562.70
Total Income	7,834,706.91
Cost of Goods Sold	3,687,507.23
Gross Profit	4,147,199.68
Expense Wages, Benefits and Staff	1,853,239.08
Automobiles	27,239.47
Business Development	262,429.10
Computers & Technology	312,478.14
Donations	6,878.00
Dues, Memberships,Subscriptions Employee Appreciation	6,941.20 71,628.64
Employee Education	92,674.40
Equipment & Small Fixtures Facilities	32,894.86
Rent	398,913.81
Repairs & Maintenance Utilities	33,878.34 53,305.86
Total Facilities	486,098.01
Fees & Interest	5,978.57
Insurance	51,970.14
Licensure & Fees	14,669.29
Postage & Shipping Professional Fees	540.52 94,640.68
Supplies Taxes	14,087.52 115,988.24
Total Expense	3,450,375.86
Net Ordinary Income	696,823.82
Other Income/Expense Other Income	42,484.35
Other Expense	171,435.02
Net Other Income	-128,950.67

# Exhibit B

# <u>City of San Luis Obispo</u> Grant Recipient Report Template

# Midyear Report Due: January 10, 2024 - Year-End Report Due: July 10, 2024

Grant Name:	DEI SLO Business Grant				
Grant Year:	FY 2022-2023				
Type of Report:	Midyear Report (check box)		End-year Report (check box)		
Organization:					
Project Name:					
service or programs provided of that have occurred during the <b>the reasoning and response t</b> Statistical Report: (Th	Drt: (A brief synopsis of the activities of the rans described in Exhibit A (your grant applications or service proceed or changes here.	on) us provis	sing the business grant provided, and any cl sions have changed, please disclose and e	hanges explain	

**Financial Report:** (A financial statement detailing how the City's grant funding has been or planned to be allocated.)

# **DEI SLO Business Grant Additional Metrics & Performance Outcomes Template**

Metrics/Performance Outcomes	Results
1. Number of individuals served.	
<ul> <li><u>Served</u> refers to individuals specifically receiving any of the following:</li> <li>Services directly provided by the grantee;</li> <li>Program/project applications, instructions, trainings, products, or concepts;</li> <li>Information (orally or in printed, in-person, virtually or over the phone);</li> <li>Any materials (flyers, brochures, etc.);</li> <li>Referrals</li> </ul>	
2. Number of service hours provided.	
<u>Service hours</u> refer to any amount of time that is directly linked or performed as part of the work defined within the scope of the agreement signed by the grantee.	
3. Number of activities.	
<ul> <li>Activities can be defined as gatherings either the grantee organizes or attends. In either case, grantee must specify if it attended or organized the activity. This can be events, workshops, panel discussions, roundtable discussions, presentations, etc.</li> <li>Activities refer to any gathering designed to <i>promote</i> programs, services, concepts related to the components within the scope of the agreement signed by the grantee.</li> <li>Activities also refer to any gathering designed to <i>create awareness</i> of the programs, services, or concepts related to the components as defined within the agreement signed by the grantee.</li> <li>Activities relate to any gathering designed to outreach, engage, and consult, and collaborate with the community as defined within the agreement signed by the grantee</li> </ul>	
<b>4. Estimated number of individuals attending activities.</b> Based on the scope of the agreement signed by the grantee, <b>please provide a rough number</b> or <b>best estimate</b> of individuals that 1) either attend a grantee led event or 2) approach the booth/table in which the grantee participates.	

5. Report perception of services provided and/or engaged activities.	
Survey individuals to <b>measure the impact</b> of the services provided and/or engaged activities as described within the scope of the agreement signed by the grantee. Report in percent and total number of individuals served. Sample questions will be provided to grantees for technical assistance.	
6. Demographic Questions Demographic questions are highly encouraged to be completed by individuals that fall within the grantee's scope of services. Grantees will be sent the City's current demographic survey and are highly encouraged to use such template to implement and report back.	To be reported by grantee in a separate page.

Name	Title	Phone
Signature	Date	

Once signed, please scan and e-mail to Nestor Veloz-Passalacqua, DEI Manager (nveloz@slocity.org)

# **DIVERSITY EQUITY INCLUSION SLO BUSINESS GRANT 22-23**

THIS AGREEMENT, dated \_\_\_\_\_\_\_ for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Texture (referred to herein as GRANTEE).

# WITNESSETH:

WHEREAS, GRANTEE has requested CITY to contribute to the product inventory as submitted in its application to the CITY on March 31, 2023.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

- 1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to City residents from July 1, 2023 to June 30, 2024.
- 2. GRANTEE will provide CITY with a mid-year report, due January 10, 2024, and final program report, due July 10, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
- 3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees or volunteers of GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
- 4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability of the part of the CITY as a result of any act or omission, negligent, or otherwise, by GRANTEE.
- 5. CITY agrees to pay the GRANTEE a one-time only grant, in the sum of \$12,000, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
- 6. The Department Head- Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination.
- 7. GRANTEE shall complete the five-hour Small Business Development Center (SBDC) course within 30 business days of fund disbursement. Proof of completion shall be provided to

CITY. If GRANTEE fails to provide timely proof of completion, CITY reserves the right to pursue return of the awarded funds in civil action.

- 8. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Commission "Bylaws," which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.
- 9. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo 919 Palm Street San Luis Obispo, CA 93401 Attn: Greg Hermann, Assistant City Manager

GRANTEE: Texture 474 Marsh St San Luis Obispo, CA 93401 Attn: Courtney Haile hello@racemattersslo.org

IN WITNESS WHEREOF, the parties have executed this agreement by their proper officers duly authorized:

GRANTEE

By:

Courtney Haile, Executive Director

CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By: Greg Hermann, Assistant City Manager

APPROVED AS TOFORM:

By: <u>Markie kursten for Unistine Dietrick</u> Christine Dietrick, City Attorney



# **HUMAN RELATIONS COMMISSION**

Diversity, Equity, & Inclusion SLO Business Grant: 2023-24 DEI SLO Business Grant Application

# The funding and grant application will support initiatives to diversify the local economy and shall be accessible to anyone. All proposals must be inclusive of all individuals and communities.

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# **BUSINESS INFORMATION**

#### **BUSINESS NAME**

Texture

#### PROJECT/PROGRAM NAME

Retail + Admin Support

#### DATE BUSINESS ESTABLISHED

2/8/2023

#### **BUSINESS LICENSE NUMBER**

119508

#### WEBSITE

www.racemattersslo.org - Texture page forthcoming

#### Address

Street Address	
474 Marsh Street	
Address Line 2	
A & B	
City	State / Pr
SAN LUIS OBISPO	Californ
Postal / Zip Code	Country

State / Province / Region California Country United States

\*If you are not currently a business, you must be willing to participate in 5 hours of one-on-one coaching with the Small Business Development Center and secure a business license.

🗸 Yes 📃 No

93401-3801

# CONTACT INFORMATION

(This person will receive notifications regarding grant decisions, contract execution, and reporting requirements)

#### **BUSINESS CONTACT**\*

Courtney Haile

**PHONE** (415) 264-8641

E-MAIL ADDRESS\*

hello@racemattersslo.org

#### WHO PREPARED THIS APPLICATION (if different than above)

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# **GRANT REQUEST INFORMATION**

1) Which of the below best describes your business proposal reflected in this application \*

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- Service
- Product
- Experience
- Promotion
- Other Seeking funds for retail inventory and staffing, for personal services business.

#### 2) Provide an executive summary of the proposal (Max 200 words)\*

Texture salon and boutique is managed by R.A.C.E. Matters SLO County and housed in the larger Texture multi use space. The goal of the business is to provide Black hair care services and to sell Black-owned, made, and centered products – expanding services and access for Black community members in particular while also providing programs for the larger BIPOC community and education for all. The first year of rent and utilities, plus one time costs of decor, renovations, and salon fixtures are covered by other grants and/or sponsorships. Sales goals for the first year are for revenue to break even with ongoing costs to sustain the Texture Salon & Boutique.

The services provided are 1)Station rental for stylists who specialize in textured hair 2) Services for community members with textured hair. 3) Retail rental to Black-owned artisans (consignment) 4) Meeting space rental for community organizations. The retail products for sale will include beauty supply products, books, jewelry, accessories, and art. Beyond just offering hair services, Texture is an intentionally designed multi-use space and hub for R.A.C.E Matters operations, programs, and special events.

#### 3) Is this proposal for: \*

- A new program
- Continuation of an existing program

#### 4) Requested Amount\*

25,000

#### 5) Itemized breakdown of requested amount (e.g., products or services purchased, hours subsidized, etc.):

\*\$12,000 for the purchase of inventory, purchased throughout the course of the first year, including but not limited to: beauty supply products, culturally affirming and educational books, Black-owned and and made jewelry, accessories, art, and self-care products.

\*\$13,000 towards administrative support position which will include operations support, communications and marketing support including social media management, and customer service (remaining cost of position covered by other grants obtained by R.A.C.E. Matters).

#### 6) What percentage of the funding needed will this grant cover?\*

Approximately 60%

#### 7) How will this proposal benefit underrepresented and/or underserved communities in the City of SLO?\*

This proposal specifically benefits the underrepresented and underserved community that identifies as Black or African American by providing culturally affirming products and services. The Texture space in its entirety will feature rotating art by the local BIPOC artists, and events that cultivate a welcoming space for underrepresented folks.

#### 8) Briefly describe 1-3 methods of evaluation with indicators of success for your proposal.\*

2 stylist stations booked, 3-4 days a week each >> evaluated by number of stylists and frequency of their chair rental

Strong inventory sales that match projection >> evaluated by sales records Qualitative data from community members >> evaluated with surveys

#### Signature

I certify that the information contained in this application is, to the best of my knowledge, true and accurate; that my business subscribes to the Human Relations Commission's "Statement of Purpose and Bylaws" which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental or economic status; and that this application is submitted with the full knowledge and endorsement of the business and that I am authorized submit the application on behalf of the business.

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Signature\*

Courtney Haile

Date \* 3/31/2023

#### Attachments

Please include the following attachments. If these are not included, it will be considered as incomplete application and will not be reviewed.

1. The Business Proposal/Plan (max 3 pages) <sup>*</sup>	
RM_Texture_BusinessPlan.docx	56.56KB
2. Summary of P&L/Financials (max 1 page) *	
Projected_P&L_Texture_DEI_2023.xlsx	38.67KB
3. Diversity, Equity, & Inclusion Statement (1-3 paragraphs) $^{\star}$	
RM_DiversityStatement .docx	14.1KB



# TEXTURE- Business Plan

# **General Company Description**

Texture is a multi use space, salon, and boutique managed by the non-profit corporation R.A.C.E. Matters SLO County.The goal of the business is to provide Black hair care services, and to sell unique Black-owned, made, and centered products, ultimately expanding services and access for Black community members in particular. Texture embodies R.A.C.E. Matters' mission to amplify Black voices through artistic, cultural, educational, and social experiences.

# Sales goals

The first year of rent and utilities, plus one time costs of decor, renovations, and salon fixtures are covered by other grants and/or sponsorships and a robust fundraising campaign is still underway. Sales goals for Texture's first year (until May 2024) are to at least break even. See projected profit and loss spreadsheet.

# Products, Services, Advantages

The **services** provided are 1) Station rental for stylists who specialize in textured hair 2) Personal hair services for community members with textured hair. 3) Retail space rental, ie: consignment. The **products** provided are 1) Black owned or made retail including but not limited to beauty supply products, books, jewelry, accessories, and art. 2) Facility rental to other community organizations for Diversity, Equity, Inclusion, and Justice related workshops and/or meetings.

There are no salons in SLO that service Black hair, and very few Black-owned brick and mortar businesses that provide a sense of place, along with chic and stylish Afrocentric products. While only 2.3% of people in the city and county identify as Black or African American and 5.5% identify as 2 or more races – through retail sales, facility rental, and special events, *Texture* provides an opportunity for the larger community to support services and visible space for the historically minoritized Black community.

## Marketing

R.A.C.E. Matters has approximately 10,000 followers across social media platforms and enjoys fruitful collaboration with Diversity Coalition of SLO County, San Luis Obispo Museum of Art, San Luis Obispo International Film Festival, Cal Poly Office of University Diversity and Inclusion, Cal Poly Black Faculty and Staff Association, among others. We plan to leverage the prominence of R.A.C.E. Matters while also reaching out to Black communities in Northern Santa Barbara county. Texture also operates as a community space and hub for R.A.C.E. Matters' programs, and therefore donors who wish to support R.A.C.E. Matters, space for the Black community, and corporations who wish to attract and retain more diversity in the area would do well to support the project.

# **Customers**

**Our salon customers** are primarily Black people, especially women and children, as well as multiracial families. They are in San Luis Obispo and Northern Santa Barbara Counties. Non-Black people with tightly curled or textured hair may also be potential customers.

**Potential retail customers** include the entire community of R.A.C.E. Matters supporters who have enjoyed our events and content since 2016. We plan to leverage events such as our annual Belonging series, monthly art after dark gatherings, and host the majority of R.A.C.E. Matters programs in the Texture space to attract customers.

**Retail rental (Consignment) tenants** include Belle Noire Accessories out of the Bay Area, along with a network of other vendors.

**Workshop/Meeting rental** potential tenants include Diversity Coalition SLO County, Cultural Creations, AAPI SLO, and other community organizations.

# **Pricing**

Prices for hair services will be set by stylists.

- Prices for **retail sales** will be set in comparison with other similar businesses (ie: non-profit gift shops).
- Prices for retail space rental **(consignment)** will be set in comparison with consignment models in similar markets, and space rental for organizations to rent space for workshops or meetings will also be set competitively and with equity top of mind.

## **Projected sales estimates**

See projected profit and loss spreadsheet.

## **Operational Plan**

Location: We have a year to year lease in San Luis Obispo at 474 Marsh Street A&B

**Licensing and Permits:** We've obtained our business license, salon establishment license, our minor electrical and tenant improvements have cleared all city agencies and we are finalizing our minor electrical permitting on Monday, April 3rd.

## **Suppliers**

- We have relationships with visiting stylists throughout California, including Caprisha Daniels who has serviced San Luis Obispo for a year with facilitation by R.A.C.E. Matters.
- We have relationships with local and California-based vendors of Black-owned products, including Belle Noire Accessorsories, as a result of R.A.C.E. Matters' Belonging Block parties.
- We've identified contemporary Black authors such as Chrissy King, Rachel Cargle, Damon Young, games such as Culturetags, and more.

# Management and Organization

*Texture* is a non-profit corporation conducting commercial operations. Executive Director Courtney Haile will devote.25 FTE to the ongoing management of Texture and is currently finalizing the administrative support position that will require experience in retail, customer service, administrative or office management experience, and social media management content creation – with lived experience reflective of the community served highly preferred. Other grants have been obtained by R.A.C.E. Matters to fund the administrative support position.

# **Financial Statement**

*Texture* is supported by \$56,000 in grants and sponsorships, a second phase of our capital fundraising campaign kicks off April 29th, and *Texture*- specific fundraising efforts on behalf of R.A.C.E. Matters will continue.

The first year of Texture's operations are considered a proof of concept with a goal of "breaking even" when balancing revenue and expenses. Funding for the purchase of inventory would allow profits from our first lot of inventory to fund future orders. At the close of year one R.A.C.E. Matters will assess pricing, revenue streams, and ongoing donor support, making adjustments if needed.

See RM financial statement.

By engaging the public through the creation of Black-centered social spaces, cultural and arts events that center Black creative expressions, and racial justice educational programming, R.A.C.E. Matters has emerged as a publicly recognized local leader in matters of racial justice. The organization has courageously pushed conversation and action around Diversity, Equity and Inclusion forward with three essential programmatic elements:

We organize a variety of social and cultural events for and centered around the local Black community, helping to build ties among local Black residents, families, and businesses, and contributing to the fostering of Black culture locally.

We organize an extensive range of arts events that engage our local community with the works of Black artists as well as Black-focused works. From visual arts programs to performing arts events to films--including two films that we have produced as well as other films that we have screened for the local community-our programs utilize an expansive array of media to uplift and amplify the voices of underrepresented Black and other POC populations. These events and programs reflect our belief in the necessity of art to the cultivation of human belonging, the empowerment of underserved and underrepresented communities, and the envisioning of a more just and equitable world.

We organize community dialogues, panel discussions, workshops, and trainings that contribute to a broader culture of racial justice within our community. Our educational programming has ranged widely, from racial justice-oriented yoga workshops, to educational workshops on White privilege, a panel and forum focused on the subject of cultural appropriation, webinars devoted to the racial dimensions of the COVID-19 crisis locally and the challenges and possibilities of homeschooling children of color in the pandemic.

Exhibit B

# <u>City of San Luis Obispo</u> Grant Recipient Report Template

# Midyear Report Due: January 10, 2024 - Year-End Report Due: July 10, 2024

Grant Name:	DEI SLO Business Grant				
Grant Year:	FY 2022-2023				
Type of Report:	Midyear Report (check box)		End-year Report (check box)		
Organization:				<u>.</u>	
Project Name:					
service or programs provided a that have occurred during the <b>the reasoning and response to</b> Statistical Report: (Th	prt: (A brief synopsis of the activities of the ro is described in Exhibit A (your grant application reporting period. If operations or service p to changes here.	on) us provis	sing the business grant provided, and any ch sions have changed, please disclose and e	nanges explain	

**Financial Report:** (A financial statement detailing how the City's grant funding has been or planned to be allocated.)

# **DEI SLO Business Grant Additional Metrics & Performance Outcomes Template**

Metrics/Performance Outcomes	Results
1. Number of individuals served.	
<ul> <li><u>Served</u> refers to individuals specifically receiving any of the following:</li> <li>Services directly provided by the grantee;</li> <li>Program/project applications, instructions, trainings, products, or concepts;</li> <li>Information (orally or in printed, in-person, virtually or over the phone);</li> <li>Any materials (flyers, brochures, etc.);</li> <li>Referrals</li> </ul>	
2. Number of service hours provided.	
<u>Service hours</u> refer to any amount of time that is directly linked or performed as part of the work defined within the scope of the agreement signed by the grantee.	
3. Number of activities.	
<ul> <li>Activities can be defined as gatherings either the grantee organizes or attends. In either case, grantee must specify if it attended or organized the activity. This can be events, workshops, panel discussions, roundtable discussions, presentations, etc.</li> <li>Activities refer to any gathering designed to <i>promote</i> programs, services, concepts related to the components within the scope of the agreement signed by the grantee.</li> <li>Activities also refer to any gathering designed to <i>create awareness</i> of the programs, services, or concepts related to the components as defined within the agreement signed by the grantee.</li> <li>Activities relate to any gathering designed to <i>create awareness</i> of the programs, services, or concepts related to the components as defined within the agreement signed by the grantee.</li> <li>Activities relate to any gathering designed to outreach, engage, and consult, and collaborate with the community as defined within the agreement signed by the grantee</li> </ul>	
<b>4. Estimated number of individuals attending activities.</b> Based on the scope of the agreement signed by the grantee, <b>please provide a rough number</b> or <b>best estimate</b> of individuals that 1) either attend a grantee led event or 2) approach the booth/table in which the grantee participates.	

5. Report perception of services provided and/or engaged activities.	
Survey individuals to <b>measure the impact</b> of the services provided and/or engaged activities as described within the scope of the agreement signed by the grantee. Report in percent and total number of individuals served. Sample questions will be provided to grantees for technical assistance.	
6. Demographic Questions Demographic questions are highly encouraged to be completed by individuals that fall within the grantee's scope of services. Grantees will be sent the City's current demographic survey and are highly encouraged to use such template to implement and report back.	To be reported by grantee in a separate page.

Name	Title	Phone
Signature	Date	E-mail

Once signed, please scan and e-mail to Nestor Veloz-Passalacqua, DEI Manager (nveloz@slocity.org)

# **DIVERSITY EQUITY INCLUSION SLO BUSINESS GRANT 22-23**

THIS AGREEMENT, dated \_\_\_\_\_\_\_ for the convenience of the parties hereto, is between the City of San Luis Obispo, a chartered municipal corporation (referred to herein as CITY), and Twig & Arrow Salon (referred to herein as GRANTEE).

# WITNESSETH:

WHEREAS, GRANTEE has requested CITY to contribute to Diversity and Inclusion program as submitted in its application to the CITY on March 31, 2023.

WHEREAS, the Services will be available to residents of the City, thereby serving both a public and municipal purpose.

NOW, THEREFORE, CITY and GRANTEE for and in consideration of the mutual benefits, promises, and agreements set forth herein, do agree as follows:

- 1. GRANTEE will make its Services, as described in its application (the "Application"), incorporated by reference and attached as Exhibit A, available to City residents from July 1, 2023 to June 30, 2024.
- 2. GRANTEE will provide CITY with a mid-year report, due January 10, 2024, and final program report, due July 10, 2024, summarizing administrative, financial, and client Service activities. Said reports shall be in the form of "Exhibit B," attached hereto.
- 3. GRANTEE and all its agents, representatives, or participants in any manner in the performance of its obligations and duties hereunder shall be employees or volunteers of GRANTEE. They shall not, for any purpose, be considered employees or agents of the CITY.
- 4. GRANTEE agrees to hold CITY harmless and to defend CITY against, from, and in any claim, action, proceeding, or hearing wherein there is an allegation charging liability of the part of the CITY as a result of any act or omission, negligent, or otherwise, by GRANTEE.
- 5. CITY agrees to pay the GRANTEE a one-time only grant, in the sum of \$12,500, to be used for the Services as described in the Application. The grant will be paid in one installment when a signed contract is received.
- 6. The Department Head- Administration may terminate this agreement at his sole discretion, after a public hearing and upon ten (10) days written notice to GRANTEE. Said termination shall be effective thirty (30) after CITY mails notice of termination of agreement to GRANTEE. Any funds not paid pursuant to paragraph 5 above shall revert to CITY upon said termination.
- 7. GRANTEE hereby certifies and agrees that it will comply with the Human Relations Commission "Bylaws," which creates an environment within the City in which all persons

can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental, or economic status.

8. For purposes of notice under this agreement, all notices shall be considered effective upon being sent by certified mail to the following addresses:

CITY:

City of San Luis Obispo 919 Palm Street San Luis Obispo, CA 93401 Attn: Greg Hermann, Assistant City Manager

GRANTEE:

Twig & Arrow Salon 712 Marsh St San Luis Obispo, CA 93401 Attn: Amanda Miller amanda@twigandarrowsalon.com

IN WITNESS WHEREOF, the parties have executed this agreement by their proper officers duly authorized:

GRANTEE

By:

Amanda Miller, Owner

m-

# CITY OF SAN LUIS OBISPO, A MUNICIPAL CORPORATION

By: Greg Hermann, Assistant City Manager

# APPROVED AS TOFORM:

By: Markie kersten for Christine Dietrick

Christine Dietrick, City Attorney



# **HUMAN RELATIONS COMMISSION**

Diversity, Equity, & Inclusion SLO Business Grant: 2023-24 DEI SLO Business Grant Application

# The funding and grant application will support initiatives to diversify the local economy and shall be accessible to anyone. All proposals must be inclusive of all individuals and communities.

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# **BUSINESS INFORMATION**

#### **BUSINESS NAME**

Twig & Arrow Salon

#### PROJECT/PROGRAM NAME

Twig & Arrow Salon Diversity & Inclusion

#### DATE BUSINESS ESTABLISHED

2/1/2017

#### **BUSINESS LICENSE NUMBER**

114025

#### WEBSITE

www.twigandarrowsalon.com

#### Address

Street Address	
712 Marsh Street	

Address Line 2

City

San Luis Obispo

Postal / Zip Code

93401

State / Province / Region
Са
Country
United States

\*If you are not currently a business, you must be willing to participate in 5 hours of one-on-one coaching with the Small Business Development Center and secure a business license.

🗌 Yes 🔽 No

# CONTACT INFORMATION

(This person will receive notifications regarding grant decisions, contract execution, and reporting requirements)

BUSINESS CONTACT\*

Amanda Miller

**PHONE** 8056984557

E-MAIL ADDRESS\* amanda@twigandarrowsalon.com

#### WHO PREPARED THIS APPLICATION (if different than above)

#### PHONE

## **GRANT REQUEST INFORMATION**

1) Which of the below best describes your business proposal reflected in this application \*

 $(\land)$ 

 $(\land)$ 

- Service
- Product
- Experience
- Promotion
- Other

#### 2) Provide an executive summary of the proposal (Max 200 words)\*

This grant will be used for furthering the education and training of our entire staff on many types of diverse and multi cultural hair and makeup types, styles and colors that we believe is an area truly lacking on the central coast. It will allow us to bring in educators and put on classes for our staff. We strive to be able to provide the absolute best services and experience to every single person that walks through our doors from an all walks of life.

#### 3) Is this proposal for: \*

- A new program
- Continuation of an existing program

#### 4) Requested Amount\*

15,000

5) Itemized breakdown of requested amount (e.g., products or services purchased, hours subsidized, etc.): Class #1 \$7500

Class #2 \$5000

Hair Product for Multi Cultural Hair \$2500

#### 6) What percentage of the funding needed will this grant cover?\*

85

#### 7) How will this proposal benefit underrepresented and/or underserved communities in the City of SLO?\*

This will give a large underrepresented part of our community a truly great place to come and get their hair and makeup done by and amazing and welcoming staff that will be trained to properly take care of their needs and give them a great experience at the same time. I believe that a large portion of this community goes out of our area to get these services done

#### 8) Briefly describe 1-3 methods of evaluation with indicators of success for your proposal.\*

We will be able to track the specific services provided through our POS system. That will allow us to know how many clients come in for the new services and how many new people we are reaching.

## Signature

I certify that the information contained in this application is, to the best of my knowledge, true and accurate; that my business subscribes to the Human Relations Commission's "Statement of Purpose and Bylaws" which creates an environment within the City in which all persons can enjoy equal rights and opportunities regardless of race, religion, sex, national origin, sexual orientation, age, physical, mental or economic status; and that this application is submitted with the full knowledge and endorsement of the business and that I am authorized submit the application on behalf of the business.

DocuSign Envelope ID: 09D8E06A-01A2-482C-9E9F-80A9C2485E77

Signature* <i>Amanda Miller</i>		
Date *		
3/31/2023		
Attachments		٢
Please include the following atta application and will not be review	chments. If these are not included, it w ved.	vill be considered as incomplete
1. The Business Proposal/Plan (ma	x 3 pages) *	
Twig Diversity Proposal copy.docx	15.09KB	
2. Summary of P&L/Financials (ma	< 1 page) *	
P&L copy.xlsx	9.65KB	
3. Diversity, Equity, & Inclusion Sta	tement (1-3 paragraphs) *	
Diversity^J equity ^0 inclusion copy c	ppy.docx 12.68KB	

Twig & Arrow's dedication to diversity, equality, and inclusion are long-running components of our company and values.

Twig & Arrow is committed to equal employment principles. We strive to find ways to attract, develop, and retain the talent necessary to meet our business objectives and goals, and to recruit and employ highly qualified individuals representing the diverse communities in which we live.

Twig & Arrow provides equal employment opportunities to all employees and applicants for employment without regard to race, creed, color, religion, gender, sex, marital status, sexual orientation, national origin, age, physical or mental disability, genetic predisposition or carrier status, military status, veteran status and any other classification protected by law.

Twig & Arrow strives to provide the best hair and brow care possible for all, without regard to race, creed, color, religion, gender, sex, marital status, sexual orientation, national origin, age, physical or mental disability, genetic predisposition or carrier status, military status, veteran status and any other classification protected by law.

Diversity and equality remain key guideposts across the company, embraced by management and ownership.

# Twig & Arrow Salon Business Proposal for Diversity and Inclusion

At Twig & Arrow we strive to provide the best hair, brow, and makeup services possible for all, without regard to race, creed, color, religion, gender, sex, marital status, sexual orientation, national origin, age, physical or mental disability, genetic predisposition or carrier status, military status, veteran status and any other classification protected by law.

This grant will be used to provide education and training for our staff to better serve a part of our community that we believe is underserved. We will bring in educators to work with our staff directly to give them the very best skills and practices required to serve our community.

We will also work to market our services to the underserved community by working on our social media presence targeting the new services we wish to provide. As well as providing a discount to new customers to make it easier for them to come in our doors for an incredible experience.

# Twig & Arrow Salon

# **Profit & Loss Statement**

Feb-23

# **Income**

Service	\$ 4	42,022.00
Product	\$	4,426.00
Booth Rent	\$	3,100.00

\$ 49,548.00 Total

# **Expense**

Rent	\$	9,175.00
Color	\$	5,326.03
Uilities	\$	1,883.16
Marketing	\$	500.00
Accounting	\$	500.00
Misc	\$	500.00
Payroll	\$	31,296.86
Total	\$ 49,181.05	
<u>Profit</u>	\$	366.95

Exhibit B

# <u>City of San Luis Obispo</u> Grant Recipient Report Template

# Midyear Report Due: January 10, 2024 - Year-End Report Due: July 10, 2024

DEI SLO Business Grant			
FY 2022-2023			
Midyear Report (check box)		End-year Report (check box)	
			·
as described in Exhibit A (your grant application	on) us	sing the business grant provided, and any ch	hanges
is section should include 1) the metrics repor collected through the survey shared by the C	rted a ïty.)	ıs described in Exhibit A (your grant applica	rtion)
	FY 2022-2023 Midyear Report (check box)	FY 2022-2023 Midyear Report (check box)	FY 2022-2023         Midyear Report (check box)       End-year Report (check box)         Prt: (A brief synopsis of the activities of the reporting period, including a statement of the act as described in Exhibit A (your grant application) using the business grant provided, and any che reporting period. If operations or service provisions have changed, please disclose and e o changes here.

**Financial Report:** (A financial statement detailing how the City's grant funding has been or planned to be allocated.)

# **DEI SLO Business Grant Additional Metrics & Performance Outcomes Template**

Metrics/Performance Outcomes	Results
1. Number of individuals served.	
<ul> <li><u>Served</u> refers to individuals specifically receiving any of the following:</li> <li>Services directly provided by the grantee;</li> <li>Program/project applications, instructions, trainings, products, or concepts;</li> <li>Information (orally or in printed, in-person, virtually or over the phone);</li> <li>Any materials (flyers, brochures, etc.);</li> <li>Referrals</li> </ul>	
2. Number of service hours provided.	
<u>Service hours</u> refer to any amount of time that is directly linked or performed as part of the work defined within the scope of the agreement signed by the grantee.	
3. Number of activities.	
<ul> <li>Activities can be defined as gatherings either the grantee organizes or attends. In either case, grantee must specify if it attended or organized the activity. This can be events, workshops, panel discussions, roundtable discussions, presentations, etc.</li> <li>Activities refer to any gathering designed to <i>promote</i> programs, services, concepts related to the components within the scope of the agreement signed by the grantee.</li> <li>Activities also refer to any gathering designed to <i>create awareness</i> of the programs, services, or concepts related to the components as defined within the agreement signed by the grantee.</li> <li>Activities relate to any gathering designed to outreach, engage, and consult, and collaborate with the community as defined within the agreement signed by the grantee</li> </ul>	
<b>4. Estimated number of individuals attending activities.</b> Based on the scope of the agreement signed by the grantee, <b>please provide a rough number</b> or <b>best estimate</b> of individuals that 1) either attend a grantee led event or 2) approach the booth/table in which the grantee participates.	

5. Report perception of services provided and/or engaged activities.	
Survey individuals to <b>measure the impact</b> of the services provided and/or engaged activities as described within the scope of the agreement signed by the grantee. Report in percent and total number of individuals served. Sample questions will be provided to grantees for technical assistance.	
6. Demographic Questions Demographic questions are highly encouraged to be completed by individuals that fall within the grantee's scope of services. Grantees will be sent the City's current demographic survey and are highly encouraged to use such template to implement and report back.	To be reported by grantee in a separate page.

Name	Title	Phone
Signature	Date	

Once signed, please scan and e-mail to Nestor Veloz-Passalacqua, DEI Manager (nveloz@slocity.org)