

# Scaling & Optimization Services (SOS) The Technical Assistance Division of Felton Institute

Offering Proven Business Systems for Replication to Strengthen Partner Organizations



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*My vision is for Felton Institute to excel as a **community innovation engine** working with partners to drive positive and sustainable **community-led change**, thus ensuring access to **innovative, high-quality, evidence-informed services**.*

Al Gilbert, CEO

## Our Services

Back-office support to keep business running smoothly.



### Financial Services

Accounting, Bookkeeping, Payroll



### Human Resources

Onboarding, Off-boarding, Payroll, Regulatory Compliance



### Program & Operations

Performance metrics, cross function team coordination.



### IT & Data Collection

Cloud based Software and data collection systems to support operations and record keeping.



### Organizational Growth

Fund raising, donor engagement, professional development and training

## Our Services

Executive Leadership Support Solving Hard “Community Problems” Providing additional assurance to funders.



### Fiscal Management

Review of financial records and record keeping practices to identify and mitigate potential cash flow challenges and contractual risks.



### Operational Improvements for Compliance

System reviews to identify and mitigate potential areas of payroll, human resources and occupational safety and health grievances.



### Quality Assurance & Compliance

Retool systems and implement changes to ensure ongoing financial health as small businesses grow to scale.



### Governance & Strategic Planning

Change management support to engage and align leaders and teams with executive leadership strategic vision.

## Community Innovation Engine



### Strategic Replication of Service Systems

Market existing service systems for replication to grow other organizations.



### Leveraging Our Legacy of Community Solutions

Build upon our history of solving hard "Community Problems" and provide additional assurance to funders.



### Expanding Our Community Impact

Expands the reach of CBOs to impact more of the communities we serve.



### Current Partnerships

Current partners include, Being Well, NAMI-SF, Tenderloin Neighborhood Development Corporation (TNDC), Mackey's Korner, Keystone Therapies, Bay Area One Health Coalition, Museum of Children's Art.

## Innovation Incubator Packages

Innovation Incubator Packages are Fiscal Sponsorship relationships to include more comprehensive resources.

### Package Options Could Include:



Office Space



Back Room Business System Support

*Bookkeeping, Budgeting, Payroll, Human Resources and other business development services.*

## Innovation Incubator Packages Available in San Francisco and Alameda Counties



**San Francisco Location**

1170 Market Street



**Alameda Location**

1005 Atlantic Avenue



**\*Oakland Location**

401 Grand Avenue

*\*coming soon*

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