

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
-  **Strategic Communications**
Digital marketing, brand alignment, messaging, and stakeholder engagement.

Our Services

Executive leadership support, solving hard “community problems”, and 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 collaborative 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*



[Felton.org/sos](https://felton.org/sos)

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