

FIRST AMENDMENT TO LONG BEACH RECOVERY ACT SERVICES

AGREEMENT NO. 36219

36219

THIS FIRST AMENDMENT TO LONG BEACH RECOVERY ACT SERVICES AGREEMENT NO. 36219 ("First Amendment") is made and entered into, as of June 29, 2022, for reference purposes only, by and between the CITY OF LONG BEACH ("City"), a municipal corporation, with its principal place of business at 411 West Ocean Blvd., Long Beach, California 90802, and GEOCKO, INC. DBA LIVESTORIES ("Contractor"), a Washington corporation, with its principal place of business at 4338 Latona Ave NE, Seattle, WA 98102.

WHEREAS, City selected Contractor to serve as the third-party grants administrator for multiple small business grant and non-profit grant programs as part of the Long Beach Recovery Act ("Recovery Act"); and

WHEREAS, City and the Contractor (together, the "Parties") entered into Agreement No. 36219 (the "Agreement"), with a reference date of March 7, 2022, in the amount of Six Hundred Ninety Thousand Dollars (\$690,000) for Contractor to perform the services outlined in Contractor's Proposal attached to the Agreement as Exhibit "A," and

WHEREAS, the Parties now desire to specify the Recovery Act programs for which Contractor is providing third-party administrator support services, which services are outlined in Exhibit "A" to the Agreement;

NOW, THEREFORE, in consideration of the mutual terms, covenants, and conditions herein contained, the Parties agree as follows:

1. Section 1 of the Agreement is hereby amended to read as follows:

"1. PROGRAM. The City agrees to provide funding to the Contractor for the development and implementation of the Third-Party Grants Administration Support Services Program ("Program"). The anticipated scope of work for the Program is set forth in Contractor's Proposal attached to the Agreement as Exhibit "A" and incorporated by this reference. The anticipated Recovery Act grant programs, for which Contractor will provide

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the services outlined in Exhibit "A", are listed in Exhibit "B", attached to this First Amendment and incorporated by this reference. The list of programs may be amended during the term of this Agreement by City's Director of Economic Development."

IN WITNESS WHEREOF, the Parties have caused this document to be duly executed with all formalities required by law as of the date first stated above.

GEOCKO, INC., a Washington corporation,
DBA LIVESTORIES

July 5th

2022

By

Name

Adnan Mahmud

Title

CEO

DocuSigned by:



B9E8BCA5096B4C5

By

Name

Title

"Contractor"

CITY OF LONG BEACH, a municipal
corporation

July 12

2022

By

Linda F. Jakub

City Manager

"City"

EXECUTED PURSUANT
TO SECTION 301 OF
THE CITY CHARTER.

This First Amendment is approved as to form on July 7, 2022.

CHARLES PARKIN, City Attorney

By


Lauren Misajon, Deputy

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EXHIBIT "A"

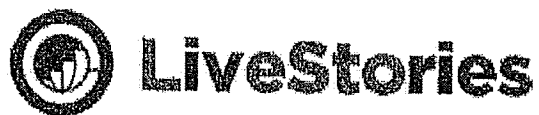
**CITY OF
LONG BEACH**

Narrative Proposal for
**#ED21-068 THIRD-PARTY GRANTS ADMINISTRATION
SUPPORT**

presented to

City of Long Beach

By



Gecko, Inc. (dba: LiveStories)

In partnership with



August 2, 2021

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1. EXECUTIVE SUMMARY

Geocko, Inc. dba LiveStories along with partners Downtown Long Beach Alliance and REDF (collectively referred as "Vendor") is submitting this proposal to the City of Long Beach (referred as "City") to administer multiple small business grant and non-profit grant programs. Our Long Beach FORWARD solution integrates a team of expert service providers and a comprehensive technology stack to deliver unmatched capabilities with regards to creating and collecting applications, providing technical assistance to applicants, screening for eligibility, monitoring and evaluation, and developing related materials.

Specifically, Long Beach FORWARD will carry out the following tasks to deliver this program:

- Support the City designing the grant programs
- Formulate and implement a city-wide outreach strategy
- Design marketing materials (e.g., flyers, brochures, ads) in multiple languages
- Work with local partners to conduct outreach and provide technical assistance
- Build and host an online application portal
- Collect digital and paper applications
- Provide continuous training and support to local partners
- Provide direct technical assistance to applicants through phone and email
- Review applications and select grant awardees based on program criteria
- Quickly distribute grant funds directly to businesses and non-profits
- Monitor real-time trends and share insights with the City along with recommendations to optimize performance of the program
- Maintain accurate recordkeeping and meet established reporting requirements
- Leverage this infrastructure to roll out future programs quickly and efficiently.

Long Beach FORWARD will apply equity lens in every phase of the project. We will provide multi-lingual outreach, support paper and digital applications, and assist people in preparing their applications. We always remain open to additional equity improvements that can be made which is why we prioritize partnering with local stakeholders and organizations.

FORWARD has received 4.9 / 5 rating from users. The platform is easy-to-use and applicants receive best-in-class support with their applications.

In the remainder of this proposal, we describe in greater detail the key aspects of Long Beach FORWARD.

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VENDOR INFORMATION

Contractor's Legal Name:

Geocko, Inc. dba LiveStories

Contractor IDs:

EIN: 45-4960283

DUNS #: 078785488

Washington UBI: 603195346

Applicant Contact Information:

Adnan Mahmud

CEO, LiveStories

323-559-2591

adnan@livestories.com

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2. THE TEAM

This proposal is being submitted by LiveStories as the lead contractor with support from DLBA and REDF.

LiveStories will provide overall project administration including online portal design and hosting, application management, and payment processing.

DLBA (<http://dlba.org/>) has extensive experience and history supporting small businesses in downtown Long Beach area. They will assist in conducting outreach to that community and provide guidance for application submission. They will also help establish partnerships with other local Business Associations, Business Improvement Districts, and non-profits who can provide outreach to hard to reach communities.

REDF (<https://redf.org/>) has a rich history of supporting social enterprises and non-profits in Los Angeles, including managing Los Angeles County's \$46 million CARES Act grant to small businesses. For this project, they will play a strategic advisory role focused on outreach. They will share best practices from their program so that we can effectively run this program.

3. QUALIFICATIONS, EXPERIENCES, AND PERSONNEL

Highlights of the team's unique capabilities include the following:

- **Managing large-scale coronavirus related assistance programs.** We have experience deploying and managing multi-million dollar assistance programs in similar sized communities. We managed all aspects of the assistance program: connected businesses to resources collaborated with local partners to design programs, developed and collected applications, provided technical assistance, reviewed applications, distributed funds, provided ongoing reports to leadership, and followed all document retention requirements.
- **Administering assistance programs like Community Development Block Grant (CDBG), HOME, and ESG.** Our integrated approach uses a modern technology stack and a team of experts to provide end-to-end program management support, streamline and automate manual processes, and reduce program costs. Our extensive capacity incorporates training and coaching internal and external key personnel on all aspects of program management, including fiscal and programmatic reporting requirements, scope of services, terms, coordinate and participate in external funder audits, including preparation of review materials and outcome/benchmark reports, and other related activities.
- **Decreasing barriers to access for diverse ethnic backgrounds.** Our culturally and linguistically relevant outreach and simple and intuitive processes paired with customized technical assistance ensures target communities can effectively navigate the different programs.

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- **Monitoring and learning in real-time about the needs and impact on the ground.** Our monitoring and evaluation component provides real-time updates to the County leadership about the impact of the program and work with partners to make changes to the program.
- **Managing grant and technical assistance programs.** The DLBA has developed and managed several programs to assist in the support and recovery of downtown businesses. This has included all aspects of concept to implementation of programs including marketing and outreach, assistance in grant applications, distribution of funds and communication to relevant stakeholders and community partners.
- **Being a reliable community partner for the City of Long Beach.** The DLBA has a long history of being a reliable partner for the City and has assisted in the promotion and execution of several city-led grant programs and technical assistance resources. They are also well networked within the City and can secure other local partners to make this project a success.

3.1 Examples of project experiences

The following is a select list of examples of projects of a similar size and scope.

- **State of Washington Department of Agriculture:** The Department deployed FORWARD to distribute nearly \$15 million in business grants in less than 9 weeks. The grant was available to four sectors – shellfish farmers, breweries, farmer markets, and agritourism business – and each sector had a different application and eligibility criteria. We were responsible for creating, collecting, and reviewing applications as well as processing payments. We worked closely with sector partners to conduct outreach, especially targeting business owners, like shellfish farmers, who otherwise are hard to reach.
- **City of Spokane (Washington; 220,000 people):** The City leveraged the FORWARD platform to distribute \$2.5 million in less than 6 weeks to local businesses and non-profits in need of assistance. FORWARD team worked with the City staff to create the eligibility criteria for the grant. FORWARD was the end-to-end solution for doing outreach to the community, collecting applications, reviewing the applications, and distributing the funds. We worked with local business support organizations to run webinars and training events so that they can aid the business owners.

Currently, the City of Spokane is leveraging FORWARD to distribute over \$15 million of rental assistance. Again we are working with over 7 local By- and For- organizations to conduct local outreach.

- **COVID-19 Emergency Micro-Grant (1,600 business service area):** The DLBA administered and distributed \$30,000 in grants to small businesses in Downtown Long Beach over two weeks. Grant funding was coupled with services provided the Long Beach Small Business Development Center.

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- **Storefront Recovery Grant (1,600 business service area):** The DLBA administered and distributed \$40,000 in grants to small businesses in Downtown Long Beach over three weeks. Grants were made available to businesses impacted by damage from May 31st civil unrest.
- **Outdoor Dining Reimbursement Grant (1,600 business service area):** The DLBA administered and distributed \$250,000 in grants to restaurants, bars, and breweries in Downtown Long Beach over 10 weeks. The program provided \$10,000 in grants to reimburse costs incurred from the build of outdoor dining spaces such as parklets and sidewalk dining.
- **Personal Care Services & Health/Wellness Grant (1,600 business service area):** The DLBA administered and distributed \$90,000 in grants to small businesses in Downtown Long Beach over eight weeks. Grants were made available to personal care service establishments and independent gyms and fitness centers. The program provided \$1,250 to \$4,750 grants to businesses impacted by COVID-19 health orders
- **Bloomington-Normal Economic Development Council (Illinois; 171,000 people):** Deployed BN FORWARD to connect 3,500 businesses to loans, grants, and other Federal and State programs.
- **City of Decatur (Illinois; 71,000 people):** FORWARD was leveraged by the City to provide home improvement services to households. We collaborated with the local partner to create, collect, and review applications and the related documentation.

3.2 Key Personnel

We will assign a team of over 10 people to this project. The team will include case managers, business specialists, program administrators, and analyst. Below are the profiles of some of the key members of this project.

Tim Morones, VP Operations LiveStories – Project Director

Mr. Morones has overseen projects around the country that leveraged FORWARD to distribute assistance programs quickly, correctly, and cost-effectively. He will oversee this program.

Mr. Morones has over 25 years of experience in general management, customer operations, and financial management. During this time, he has worked primarily for high tech companies and has been successful in leading and scaling high growth companies. He has also served as a board member both non-profit and for-profit organizations. He was elected to Chairman of the Audit Committee for ITEX Corporation (OCQB: ITEX).



He earned his BS degree in Finance from California State University of Sacramento.

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Adnan Mahmud, LiveStories CEO – FORWARD Lead

Mr. Mahmud is extensively familiar with Southern California having graduated from the University of Southern California.

Mr. Mahmud is founder and CEO of LiveStories a venture-funded, private company, which provides data tools that help local governments to collect, explore, and present program and impact data. Mr. Mahmud is passionate about using data and technology to tackle the world's biggest challenges. LiveStories has worked with over 200 customers around the world and has been featured as a Gov100 company every year since 2016. Prior to founding LiveStories, Mr. Mahmud worked for over 8 years at Microsoft, where he managed the company's largest data pipelines and received multiple patents in data analysis, visualization, and management. In addition, Mr. Mahmud is co-founder of Jolkona, a non-profit that provides mentorship and training for social entrepreneurs.



Venessa Matros – Program Administrator

Venessa Matros has nearly 13 years of experience providing direct family service and program administration in her former role as the Family Self Sufficiency and Homeownership Coordinator at the Housing Authority of Island County. Her background is primarily in low-income housing, homeless housing for women and children, and self-sufficiency-based community programs. Additionally, Venessa has served as an elected school board director for the Coupeville School District since November 2013.



James Fisher – Economic Development Specialist

James has extensive experience as an Economic Developer, providing technical assistance to applicants. He also has experience performing deep data analytics and presenting reports in a way that is easy to understand and share. He has direct experience working with the Yakima County (Washington) Development Association managing 14 grant programs. As an Economic Developer he has administered \$12 million in COVID relief grants to local businesses in Central Washington. In this James will be one of a team of people response for responding to questions received through the call center or online.



Kraig Kojian – DLBA President & CEO

Kraig Kojian has served as a member of the Downtown Long Beach Alliance (DLBA) staff since October 1996 when he was hired as Communications and Events Manager for the tenant-based improvement district. At that time the district consisted of an operating budget of approximately \$383,000. Today, Kojian directs the management of two improvement Districts, consisting of nearly 5,000 stakeholders and whose annual budgets exceeds \$4million. The



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DLBA operates on behalf of the property owners including residents and tenants of the Downtown Business Improvement Districts. It is dedicated to the management, marketing, security and maintenance, advocacy, and economic and community development of the assessment districts in cooperation with the City of Long Beach and the private sector. He is a graduate of San Diego State University where he earned BA degrees in Political Science and Journalism with an emphasis in Communications. Kojian resides in Long Beach with his wife and two children.

Austin Metoyer – DLBA Economic Development & Policy Manager

Austin Metoyer serves as the Economic Development & Policy Manager for the Downtown Long Beach Alliance. In his role, he oversees various initiatives and programs that shape public policy, planning, and economic development efforts to improve downtown's quality of life and economy. He has developed and administered several grant and recovery programs to assist small businesses in Downtown Long Beach. An Emerging Leaders Fellow alum, Austin has presented at both California Downtown Association and International Downtown Association conferences on data management, program support for entrepreneurs of color, and data collection for economic development activities. Austin completed his BS in International Business at Long Beach State University and a Masters in Urban Planning from the University of Southern California.



Alex Morrison – Program Researcher

Alex spent time at the Washington State legislature focused on novel research for three state legislatures. The research included, but not only, healthcare insurance plans and their economic impact on individual and small businesses, wildfire impact on Washington communities, especially small businesses.

His research identified programs to allocate hundreds of millions in the 2019 biennium capital projects fund for Washington state.



Sam Komo, MPA – Program Administrator

Sam Komo has a strong background in leadership, project management, and community engagement. His experience in economic development started with the Missouri legislature and continued as the Community Development Block Grant (CDBG) Manager for the state. As the Community Development Block Grant (CDBG) Manager for the state of Missouri, he managed the day-to-day operations of the \$23M annual allocation, \$42M COVID supplemental



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allocation, and \$130M Disaster Recovery/Mitigation supplemental allocation. This included community engagement/needs assessment, action plan development, revising policies/procedures in conjunction to the action plan, financial management of the federal grants, implementation of new programs, grant management/compliance, and the closeout process.

As the Labor Standards Manager for the state of Missouri, he worked directly with communities to assure state and federal compliance. This included program presentations, testifying in arbitration, and state budget hearings.

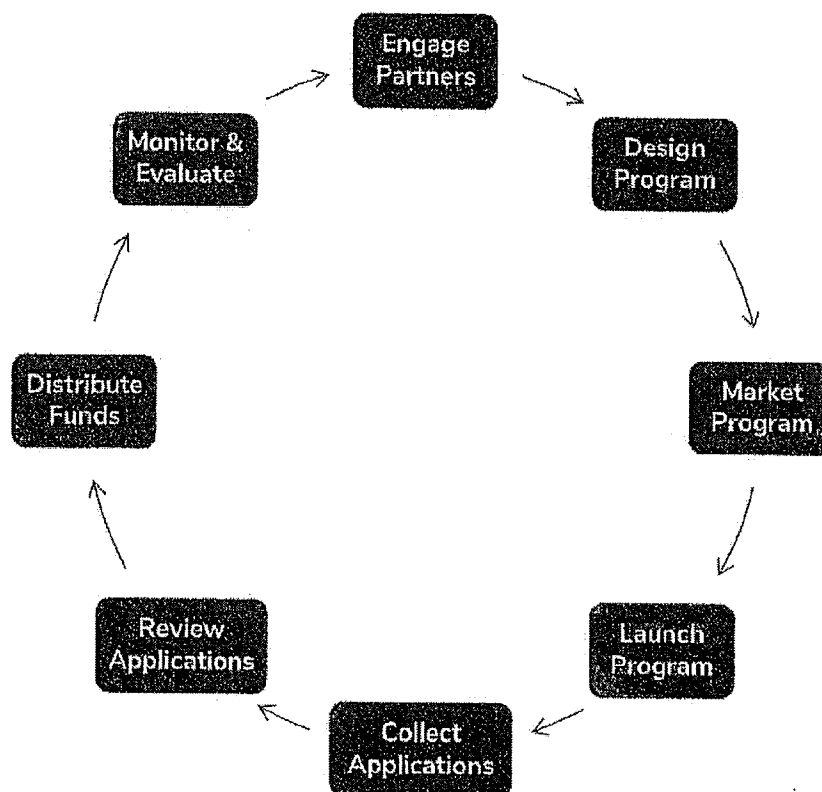
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4. OVERVIEW OF LONG BEACH FORWARD SOLUTION

FORWARD was developed to help local governments and agencies streamline economic development, communication, and compliance during the COVID-19 pandemic and beyond. Our Eligibility Engine connects businesses to relevant, eligible federal, state, and local resources through an easy-to-use online experience. We pair our modern, streamlined FORWARD software platform with expert, customized technical assistance to ensure that the assistance program runs effectively and correctly. Through FORWARD, we administer specific economic and community development programs, including but not limited to: Microenterprise Grants, Economic Development Loans, Down Payment Assistance, Housing Rehabilitation, Affordable Housing Development, Tenant Based Rental Assistance, Meal Delivery Services, Rental Assistance, Utility Assistance, Disaster Recovery, and Public Facilities and Infrastructure.

In this proposal, we will create and customize the Long Beach FORWARD platform to provide grants to Long Beach small businesses and non-profit organizations.

The diagram below visualizes the key stages of our process and the activities we carry out in each stage:



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Stage	FORWARD Activities
1: Engage Partner	<ul style="list-style-type: none"> • Setup initial meeting(s) with the City. • Create project timeline. • Finalize contract with the City • Set up contracts with local partners.
2: Design Program	<ul style="list-style-type: none"> • Collaborate with the City to finalize program details. • Determine eligibility criteria. • Communicate program details to local partners and get feedback. • Start onboarding and training local partners.
3: Market Program	<ul style="list-style-type: none"> • Create marketing materials in digital and print format. • Translate materials into multiple languages. • Distribute materials to local partners. • Coordinate outreach with local partners, media, and other supporting organizations.
4. Launch Program	<ul style="list-style-type: none"> • Create business accounts from lists provided by the City and local partners. • Give businesses access to FORWARD before applications goes live • Assist businesses in preparing all the information and documents so that they can quickly submit application when it goes live.
5. Collect Applications	<ul style="list-style-type: none"> • Design and host applications in web-based and mobile format • Also support paper applications. • Provide direct technical assistance to applicants or support local partners. • Digitize paper applications.
6. Review Applications	<ul style="list-style-type: none"> • Own the full application vetting process. • Collaborate with the City and partners on application reviews, as necessary. • Deploy a 2-step review system. • Provide final objective review of applications based on criteria.
7. Distribute Funds	<ul style="list-style-type: none"> • Distribute approved grants to businesses. • Upon grant approval collect ACH information. • Transfer funds within 72 hours of receiving account information. • If business owner does not have a bank account, find a mutually convenient, secured transfer method
8. Monitor and Evaluate	<ul style="list-style-type: none"> • Provide regular updates to the City leadership and key stakeholders. • Share detailed breakdown by gender, ethnicity, industry, and revenue. • Make modifications to the program based on real-time data. • Securely archive applications and related documentations for auditing purposes. • Leverage the same infrastructure for future programs.

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As a unique aspect of this proposal, the FORWARD solution can be utilized to deploy other assistance programs in Long Beach, including future rounds of small business assistance programs.

5. MARKETING AND OUTREACH

Upon execution of the contract, LiveStories and DLBA will collaborate to identify local partners to help with outreach. Create Memorandum of Understanding (MoUs) with them listing out specific tasks and related fees for their services.

When looking for local partners, we will prioritize the following:

- Preference for organizations based in Long Beach City. Nearby locations will also be considered
- Priority will be given to By- and For- organizations with a track record of working with minority and under-represented communities in Long Beach City
- Business Improvement Districts and Business Associations with proven history of working with local businesses within the City of Long Beach
- Community-based organizations with experience working with the hard to reach communities within the City
- Organizations with multiple cultural and language experiences, specifically Spanish, Tagalog, and Khmer like the United Cambodian Communities and CentrocCHA.
- Local chambers, non-profit support groups, and other organizations like Accelerate Uptown and Institute for Innovation and Entrepreneurship

We will work with the local partners to conduct the outreach activities, specifically targeting the northern, central, and western part of the City which are traditionally overlooked. Below is a sample of the activities we will undertake to reach these communities:

- Create a consolidated list of businesses and non-profits to target. This is created by combining lists from the City, DLBA and partners and our own online research.
- Send out series of emails to the master list inviting people to apply to the program.
- If feasible, send text messages to business owners about the program. FORWARD is already designed to work well on mobile phones.
- Conduct targeted social media campaigns on Facebook.
- Organize pop-ups around the City where business owners can receive in-person assistance with their application.
- For especially hard-to-reach communities, run door-to-door canvassing campaigns to get businesses to complete applications.

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- Implement a pay-for-performance program so our local partners receive compensation for successful applications they help to submit.
- Create FAQs and how-to videos for the web.
- Consider promotion through local media including local newspapers (Long Beach Post, Press Telegram, Grunton Gazette), neighborhood blogs, radio, TV, and digital.
- Conduct training webinar for local partners. Distribute marketing materials to local partners.
- Allocate a significant portion of the budget to fund marketing and outreach activities.

6. INTAKE AND CASE MANAGEMENT

Here are the steps we will take to ensure a smooth intake process (can be tweaked with the City's feedback):

- Allow applicants to set up their profile and documents few days before application goes live.
- Setup digital application.
- Prepare paper application and provide link to it from the program landing page.
- Make paper applications available through the City and local partners.
- Set up a call center with toll free phone number for this program. The phone number is 855-582-FWRD (3973).
- Have FORWARD staff answer the phone line from 8 AM PST to 6 PM PST on weekdays.
- Respond to messages left in the off hours within 12 business hours.
- Digitize submitted paper applications.
- Review applications for completeness.
- Follow up with applicants with incomplete applications and work with them to get the application completed.

We are meticulous in the steps we take to work with an applicant. For some cases, we have spent more than 3 hours with an applicant to help them get their application ready. Our team of case managers can be managed based on demand. The team is managed by a experienced program administrators.

We prioritize the following actions in our case management approach:

- Answer any question about program with 12 business hours.
- Perform initial eligibility and document review within 48 hours of receiving an application.

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- Use multiple channels to communicate. Don't be afraid to call business owners and not only depend on email.
- Empower local partners to work with business owners and submit applications. Engage local partners in follow up work.
- Maintain a roster of multi-lingual case managers who can be deployed based on program needs.

"You were able to support our mission and message in a way we can even begin to show you gratitude let alone repay you in a manner that seems fitting. Though we would love to ask for your address to show our appreciation and thankfulness for helping us move, shift, and build a strong foundation within our community, thanks to the grant we were rewarded. We think of you and the FORWARD organization on the daily and want you to know how blessed we feel to have had this opportunity to expand in ways we weren't in a position to do so."

- Carol K., Business owner who received a similar grant

7. APPLICATION REVIEW PROCESS

We will have a 2-step review process:

- Eligibility review
- Completeness review
- Decision review

Eligibility review

We will ensure that the applicant is eligible for the grant. This includes checking for the right industry, size, and revenue. It also includes verifying that the business is located within the City boundary.

If a business is eligible, we will notify them with a decline letter and include information on how they can reach us if our determination is incorrect.

Completeness review

During this review phase, we are looking to make sure the business has uploaded all the required documents based on the grant requirement. Examples of appropriate documentation include, but not limited to:

- o Loss of income
- o Eviction notice
- o Increased expenses
- o Loss of employment
- o Proof of rental or utility arrears

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We can work with the City to finalize the appropriate documentation for this program.

If documents are missing, we will reach out to the businesses and ask for the missing information. We will also communicate the deadline for sending us the missing information if they want to keep their place in line.

Decision review

Once a business is deemed eligible and all the required documentation have been received, the full review is done to determine if the business will be approved for the grant. During this phase we will also determine the grant amount for a business.

Grant amounts can be determined in multiple ways – one set amount to each applicant or varying amounts based on the need. We recommend the latter.\

If an application is denied, we will share the appeal/grievance process with the applicant.

To ensure fairness and objectivity the team doing the decision review are not involved with the initial two reviews.

8. PAYMENT PROCESSING

Once an application is approved, we will quickly move to make the payment

- The approve / decline process will be done with the FORWARD platform. This will allow us to maintain a detailed audit log for every application.
- Paper applications will first be digitized and then reviewed in the FORWARD platform.
- Payments will be made using ACH to make it more secure, auditable, and fast.
- ACH Payments will be made within 72 hours of receiving bank details
- If a business is not able to receive ACH payments, we will work with them to find an alternative method of payment.

We will submit a list of businesses who have been approved for grant along with the appropriate documentation to the City. Once the City transfers the funds to LiveStories to match the requested amount, we will make payments to businesses immediately.

Regarding payment to the local partner for their services, we will follow a similar reimbursement model. Once the partner sends us an invoice for their service, we will include their costs in the reimbursement requests we submit to the City. Local partners will be required to submit documentation/proof along with their invoices.

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9. DISCUSSION ABOUT THE DIGITAL PLATFORM

Key aspects of the FORWARD platform relevant for this program:

- Cloud based platform running on the secure Amazon Web Services infrastructure.
- Business details and documents are stored in a **secure profile** that can **only** be accessed by the applicant and program admin/support staff.
- The applicant data is stored with top-tier security and is not shared/sold to other 3rd party entities.
- Since its launch, FORWARD service has delivered **99.999%** uptime – an industry best practice in terms of system reliability.
- The platform is available 24 hours a day, 7 days a week.
- FORWARD platform can handle over 10,000 concurrent sessions and the system can be scaled to handle bigger traffic volume.
- FORWARD sends automatic notification with application status to the applicant. Applicants can also log in to see their application status in real-time.
- **Secure 1-on-1 chat service** for people to ask questions to the FORWARD team.
- FORWARD platform can be **accessed from the desktop or mobile phones**. The experience is optimized for both environments.
- We will also support paper applications and digitize them promptly so all applications can be accessed from one central location.
- FORWARD includes pre-built reports that illustrate real-time stats and trends.
- FORWARD platform is supported by a team of trained technical advisors.
- FORWARD portal will be branded to match County's style and colors.

FORWARD platform can be extended to support additional funding sources and programs within days. For future programs, application process will be streamlined for returning businesses. **They do not have to fill out applications from scratch for future programs.**

9.1 Document Retention and Privacy

We take applicant security seriously., FORWARD business profiles are protected by top-tier cloud security. The information can only be accessed by the business and platform administrators. Application data will be retained for multiple years to meet the funder archiving requirements. At the end of the program, we will generate a copy of the data for the City and remove all data from the FORWARD platform. We do not share applicant information with any 3rd party entities.

9.2 Platform Support

We will take the following steps to resolve platform issues quickly:

- Issues can be reported by users or the City using phone or email.
- We have a ticketing system to track all reported issues all the way through resolution.

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- Our dedicated team of software engineers are available to resolve breaking issues immediately.
- We will keep track of all issues and provide regular resolution reports to the City.

9.3 Platform Design

The images below show how the web version of Long Beach FORWARD could look:

	<ul style="list-style-type: none">• Branded look and feel• Secure login for every business• Self service to set up accounts so that they can apply
	<ul style="list-style-type: none">• Can be embedded on the City website• Each grant shows up as a separate item• Each grant can have a separate application

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10. EQUITY

We will incorporate equity in every phase of Long Beach FORWARD program. Here are some examples:

- **Culturally and linguistically sensitive materials.** We have a track record of working with By- and For- organizations in other communities to create easy-to-understand, culturally sensitive program collaterals supporting similar programs.
- **Give lead time before application goes live.** FORWARD can allow business owners to set up their profile and upload needed documents a few days before the application goes live. Our call center will be available during the pre-launch period. This ensures that business owners are able to submit applications very quickly when application launches.
- **Fair access to application.** By supporting paper + digital applications, we will be able to reach those who are not comfortable with Internet/computer. We will take paper applications and digitize them on our end, making it easy for the business owners who are not tech savvy. We will work with the City and local partners to identify strategies that will drive fair access to all businesses and non-profits.
- **Cohort-based application review.** In other similar programs, we implemented a 2-weeks review window where we stack rank all applications received during a 2-weeks period, prioritizing the minority-owned businesses applying during that period. This allows us to push equity within every review cycle.
- **Representation matters.** We understand equity. We are a minority owned business based here in Seattle, Washington. Our founder/CEO comes from the minority community. Over 80% of our FORWARD team come from women/minority background.

During the Kickoff phase, we will work with the City to identify specific steps we will take to drive equity in this program.

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11. REPORTING AND DOCUMENTATION

The table below shows how our activities will drive the key metrics for this project:

Key Metric	Target	FORWARD Activities
1. Number of applications reviewed	100 percent of applications received	<ul style="list-style-type: none"> • Provide clear FAQ and guide • All users to complete profile before program launch • Provide technical assistance to applicants • Follow up with every applicant with missing information
2. Number of payments issued	100 percent of payments issued for approved applicants	<ul style="list-style-type: none"> • Encourage payments through ACH for fast and secure processing • Support check payments as necessary • Work with applicants to collect bank information.
3. Percentage of case issues resolved	100 percent of issues resolved/closed-out	<ul style="list-style-type: none"> • Respond to every query within 12 hours • Generate a formal grievance policy
4. Application completion rate	90 percent of applications started are submitted	<ul style="list-style-type: none"> • Follow up with regular emails to those who start but not submit application • Optimize applications for mobile
5. Demographic information of grant recipients	60% of grant funding distributed to minority-owned businesses	<ul style="list-style-type: none"> • Collect simple demographic information • Cohort based review process
6. Time it takes to complete application	75% of applicants complete application in one hour or less.	<ul style="list-style-type: none"> • Work with the City to create a simple application • Allow people to create profile and upload documents before application launch • Support paper applications for people who are not comfortable with Internet/computers

The reports will be available on demand, in real-time. If any additional reports need to be created, we will create those reports.

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Where possible, we will report the metrics by Council districts and zip codes, providing a detailed breakdown for City stakeholders and leaders.

We will set up a weekly status meeting with the City and share latest statistics during that meeting.

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12. WORKPLAN AND TENTATIVE TIMELINE

Below is a proposed timeline along with key deliverables:

- **Phase 1: Project Initiation and Application Setup – Duration: 2-3 weeks; Key tasks for LiveStories:**
 - Work with the City to finalize project scope and eligibility criteria
 - Finalize contract with the City
 - Finalize application design
 - Finalize agreements with local partners
 - *Key deliverables: Project scope document with timelines and goals; application portal launch*
- **Phase 2: Applications open – Duration: 16 Weeks (or until the funds run out); Key tasks for LiveStories:**
 - Drive continuous outreach about the program
 - Provide technical assistance through phone and email
 - Coordinate with local partners
 - Review applications based on established criteria
 - Provide real-time updates to stakeholders (e.g., applications received, approvals, amount distributed, amount by demographics, etc.)
 - Assist in preparing report to City leadership
 - *Key deliverables: Weekly reports to the City;*
- **Phase 3: Project Close – Duration: 3 Weeks; Key tasks for LiveStories:**
 - Prepare final report for the City
 - Determine feasibility of continuing to use FORWARD to connect businesses to other local/state/federal resources
 - Transfer application and program data to the City; deactivate Long Beach FORWARD portal
 - *Key deliverables: Final report to the City*

We will work with the City to finalize the timeline during Phase 1.

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13. CLOSING

We are pleased to present you with a proposal to work with you on this exciting project. Long Beach FORWARD will provide immediate relief for your small businesses by creating an easy-to-use application process, working with local partners, and following established federal, state, and local requirements. Over 95% of the allocated funds will go directly to the businesses and local partners. It gives us great pride to be able to submit this proposal for your consideration as we collectively work together to build resiliency in our community.

Please do not hesitate to call if you have questions.

Sincerely,



Adnan Mahmud
CEO
LiveStories

List of Long Beach Recovery Act Grant Programs Administered by LiveStories

1. Restaurant, Brewery, and Bar Relief Grant
2. Personal Services and Fitness Relief Grant
3. Small Business Relief Grant
4. Nonprofit Relief Grant
5. ActivateLB Grants
 - a. Neighborhood Activation Seed Grants
 - b. Business Activation Grants