

Acceptable documentation for documenting compliance with an equity Plan

Pursuant to Section 3322(d)(7) et seq. of the San Francisco Health Code, a Medical Cannabis Dispensary (MCD) must demonstrate good faith compliance with its Equity Plan in order to renew their adult use authorization.

Equity Plans and related Progress Reports are submitted to, and reviewed by, the Office of Cannabis (OOC). The OOC works in collaboration with the Department of Public Health (DPH), the permitting authority for MCDs, regarding adult use authorization.

The OOC issues this bulletin to clarify **Equity Plan Progress Report requirements**.

Report Requirements

To demonstrate good faith compliance with its Equity Plan, an MCD must explain in writing and with documentation, how it supported activities to further each of the following:

1. San Francisco's broader equity goals
2. Equity Applicants in business development
3. A more equitable workforce

Timeline requirements:

MCDs must submit a complete Report **at least seven (7) business days prior to the expiration of its Adult Use authorization**. Providing incomplete or late reports may result in the expiration of the MCD's adult use authorization.

Activity Lists

The list below outlines activities that have satisfied each category in the past. Please note that this list is not inclusive. If you would like to submit other qualifying activities, please consult with the OOC in advance of your equity report submission.

Please note that donations or assistance made to organizations that members of the MCD own, or play a significant role in governing do not satisfy equity requirements.

In support of the City's Broader Equity Goals

- *Monetary donations to Local community organizations:* donations made to Local community organizations that supporting low-income youth or bring awareness to and support cultural sensitivity
- *Monetary donations to Local 501(c)(3) organizations:* donations made to Local 501(c)(3) organizations that that support the local cannabis industry
- *Staff time* donated to the organizations above

In support of Equity Applicants in Business Development

- *Purchase of Equity Brands and Products:* Buying equity brands and products for re-sale in each store

- *Mentorship and Technical Assistance for Verified Equity Applicants:* mentorship and/or technical assistance provided to Verified Equity Applicants (VEAs) who are interested in participating in the cannabis market, or to people seeking Verified Equity Applicant status
- *Marketing:* providing free marketing to equity brands and products, either in-store, via social media channels, online
- *Space:* providing space to verified equity operators to conduct activities related to establishing a cannabis business
- *Local, not-for-profit events:* participating in local, not-for-profit events for the purpose of providing technical assistance, and workforce assistance to the local cannabis community

In support of a More Equitable Workforce

- *Paid time-off:* Providing paid employee paid time-off to work with community organizations that serve equity purposes.
- *Prioritized hiring:* Prioritizing hiring individuals who meet the SF OOC's equity criteria.
- *Job training or workforce assistance:* Offering and providing job training or other workforce assistance to individuals who meet the SF OOC's equity criteria.

Acceptable Documentation

The section below outlines acceptable documentation for the activities listed above. Please note that after the date of the issuance of this Bulletin, documentation that does not meet the criteria below cannot be accepted.

In support of the City's Broader Equity Goals

- *Monetary donations:* MCDs must provide receipts which include:
 1. MCD business name (or the name of the individual submitting the report)
 2. the recipient organization
 3. the date of the donation
 4. the donation amount

In addition to the receipts, MCDs must provide active contact information for the community organization.

- *Staff time donations* MCDs must provide a document that includes:
 1. Description of services provided
 2. Description of the organization
 3. Dates claimed
 4. Estimate of the total number of hours of labor provided on each date
 5. Signature of confirmation from the recipient
 6. Active contact information for the recipient

In support of Equity Applicants in Business Development

- *Purchase of Equity Brands and Products:* MCDs must provide receipts that include:
 1. the MCD business name (or the name of the individual submitting the report)
 2. the equity brand

3. the date of purchase
4. the value of the purchase

Additionally, the MCD must provide active contact information for each of the equity brands claimed.

The value of the receipts provided must equal the total value of the donations claimed in the equity report.

- *Mentorship and Technical assistance:* MCDs must provide a document that includes:
 1. Description of services provided to the VEA or individuals seeking verification
 2. Relevant dates
 3. Estimate of the total number of hours of labor provided on each date
 4. Signature of confirmation from the recipient and recipient contact information
- *Marketing:* MCDs must provide a document that includes:
 1. Description of services provided to an equity applicant
 2. Relevant dates
 3. Relevant platforms
 4. If applicable, at least one sample screenshot with timestamp
 5. Signature of confirmation from recipient
- *Space:* MCDs must provide a document that includes:
 1. Description of space provided to the VEA or individuals seeking verification
 2. Relevant dates
 3. Signature of confirmation from the recipient and recipient contact information
- *Local, not-for-profit events:* MCDs must provide a document that includes:
 1. Description of event
 2. Description of organization hosting event
 3. Description of services provided
 4. Relevant dates
 5. Estimate of the total number of hours of labor provided on each date
 6. Signature of confirmation from the recipient of the donated labor
 7. Active contact information for the recipient

In support of a More Equitable Workforce

- **Paid time-off:** MCDs must provide a document that includes:
 1. Name of employees
 2. Name and description of organization
 3. Description of services provided by employee
 4. Relevant dates
 5. Estimate of the total number of hours of labor provided on each date
 6. Estimated value of the labor

7. Signature of confirmation from the recipient of the donated labor
 8. Active contact information for the recipient
- **Prioritized hiring:** MCDs must provide a document that includes:
 1. Number of employees that meet equity criteria
 2. Description of how each employee meets the equity criteria outlined [here](#)
 3. Start date and end date of employment for each employee
 4. Description of the MCD plans to continue to prioritize the hiring of individuals who meet the OOCs equity criteria
 - **Job training or workforce assistance:** MCDs must provide a document that includes:
 1. Description of services provided, including detailed descriptions of all the topics each individual is trained in
 2. Relevant dates
 3. Estimate of the total number of hours of labor provided on each date
 4. Description of how the recipient meet the equity criteria outlined [here](#)
 5. Signature of confirmation from the recipient of the training or workforce assistance, and active recipient contact information