FY 2023 CDBG Agreement Execution Virtual Workshop

May 2022

Partnering with the City

Agenda

• Introductions
• Draft Agreement Review & Revision
  o Scope
  o Budget
• Required Supporting Documents
• Agreement Execution Process
• ED Grants & Primary Representative
• Schedule
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#### Background

<table>
<thead>
<tr>
<th>#</th>
<th>Activity</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>44</td>
<td>RFP responses received (42 organizations)</td>
<td></td>
</tr>
<tr>
<td>24</td>
<td>FY 2023 CDBG projects awarded</td>
<td>$3,432,820</td>
</tr>
<tr>
<td>15</td>
<td>Public Services</td>
<td>$1,774,322</td>
</tr>
<tr>
<td>6</td>
<td>CED-Technical Assistance</td>
<td>$1,083,147</td>
</tr>
<tr>
<td>3</td>
<td>Nonprofit Capital Improvement</td>
<td>Facilities</td>
</tr>
</tbody>
</table>

#### Background

- **COVID-19 Impacts and Considerations**
  - Small Business Administration PPP | Duplication of Benefits
  - Performance Indicators
  - CARES Act Funded Projects
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CDBG Agreement Execution Handbook

The City of SAN DIEGO

COMMUNITY DEVELOPMENT BLOCK GRANT (CDBG) PROGRAM

FY 2023 CDBG AGREEMENT EXECUTION HANDBOOK

Economic Development Department
Community Development Division
May 2023

Scope of Work Review

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Scope of Work Review

• Ensure target population is accurate and complete
• Ensure ‘Annual Target’ field is correct (how many individuals, households, housing units, businesses, etc. targeted during implementation period)

Only minor revisions or refinements to the scope can be made.

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Budget Review
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Budget Review

15

16
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Budget Review

- Review instructions in ‘Comments’ field
- Refer to Execution Handbook for sample narratives
- Ensure budget narratives are accurate and complete
- Ensure each position is its own line in PE budget
- Ensure each fringe benefit type included in PE budget narrative
- Reallocate monies for identified ineligible expenditures to other eligible expenditures

*Only minor revisions to budget can be made.*

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Supporting Documents

- Index (Attachment 3)
- Upload to ED Grants
- Execution cannot proceed without documents
- Special Attention Needed:
  - Insurance (#4–11)
  - Board of Directors Authorization of Staff (#12)
  - Living Wage Ordinance (#13)
  - Policies & Procedures (#14–18)
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Supporting Documents: Index

Refer to the table below for a listing and description of the attachments to be uploaded to ED Grants for the CDBG agreement to be executed between the subrecipient and the City of San Diego. Note that some attachments are required only for certain project types. Some attachments consist of a City-provided form that can be downloaded, completed and then uploaded. These forms may be downloaded from ED Grants from the ‘Agreement Checklist’ tab. Contact the assigned City project manager for questions.

<table>
<thead>
<tr>
<th>#</th>
<th>Document Description</th>
<th>Form Available</th>
<th>Applicability</th>
<th>Applicable ED Category</th>
<th>Numbering Convention</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Organization Chart: Enter Subrecipient Agency</td>
<td>No</td>
<td>Required</td>
<td>X</td>
<td>X X</td>
</tr>
<tr>
<td>2</td>
<td>Organization Chart: Implementation Teams</td>
<td>No</td>
<td>Required</td>
<td>X</td>
<td>X X</td>
</tr>
</tbody>
</table>

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Supporting Documents: ED Grants

Economic Development Department
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Supporting Documents: Insurance

- Refer to P&C Insurance Checklist carefully
- Ensure proper expiration dates are at least past July 31
- Ensure endorsements have correct ‘Additional Insured’ language and policy numbers
- If particular type of insurance not applicable, fill out proper forms

- **TIP:** Start working with your insurance carrier immediately → insurance documents take time to obtain

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Supporting Documents: Board of Directors Authorization

- Use City template for Board authorization
- Authorized staff can serve as Primary Representative
- Execution cannot be completed unless Primary Representative is authorized

- **TIP:** Work with your Board as soon as possible
- **TIP:** Have Board authorize as many staff as possible
- **TIP:** Update Primary Representative as soon as possible
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Supporting Documents: Board of Directors Authorization

[Continued on following page]
Supporting Documents: Policies & Procedures

Board-approved documents outlining how subrecipient ensures best practices, proper controls, and adherence to applicable federal regulations when implementing project:

- Client Grievance
- Subcontractor/Vendor Grievance
- Financial Management
- Procurement
- LMI Verification & CDBG Eligibility
- Records Retention Policy

* May be a standalone document or as part of the Financial Management Policies and Procedures
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Supporting Documents: Policies & Procedures

• Work with your management and Board as soon as possible to prepare/establish policies and procedures
• Refer to samples attached to Execution Handbook
• Consult with your assigned City project manager
• Provided no later than by Sept. 30
• Monitoring will look for these documents in your files

Compliance Department –
Office of Labor Standards Enforcement
Living Wage Ordinance
Office of Labor Standards Enforcement

Living Wage Ordinance [LWO]

- Adopted by the City Council in 2005 to create jobs that keep workers and their families out of poverty.
- Applies to service contracts, facility agreements, and financial assistance agreements:
  - Economic Development financial assistance agreements with a combined value over a period of five years of $500,000 or more
- Requires living wage benefits for employment activities or non-managerial/non-supervisory services:
  - i.e. child care, on-site food preparation/service, office/clerical, right of way maintenance (includes other service types consistent with intent of ordinance)

Office of Labor Standards Enforcement

LWO Employer Requirements

**Pay Required Living Wage Rate**
- $17.91 ($15.00 + $2.91 per hour in health benefits) for all hours worked on contract

**Provide Leave Time**
- 80 compensated leave hours for full time employees; 1 hour for every 25 hours worked for part time employees
- 80 uncompensated leave hours for illness (after compensated leave exhausted)

**Notify Employees**
- Distribution to all covered employees at start of contract and with first paycheck on or after July 1st (for multi-year contracts)

**Reporting Requirements**
- Electronic weekly Certified Payroll Reporting via PRISM ©
- Certification of Compliance
- Annual Compliance Report

**Job-Site Postings**
- Post LWO rates & notices at workplace
Office of Labor Standards Enforcement

Living Wage Ordinance Exemptions
Contractor Exemption Bases

• SDMC §22.4215(c)(1-2)
  • Business with 12 or fewer employees (including subcontractors)
  • Businesses organized under 501(c)(3) and highest officer’s salary, when calculated on an hourly basis, is less than eight times the hourly wage rate of the lowest paid covered employee
  • Business operating as sole proprietorship with no employees and will not utilize subcontractors
  • Collective Bargaining Agreement

Applicant must:
• Apply separately for each contract/agreement
• Provide required documentation for City verification
• Receive written approval from the City

Contact Information
City of San Diego
Living Wage Program
ContactLWO@sandiego.gov
sandiego.gov/livingwage
(619)236-6072
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Board of Directors Update

Project Contacts Update
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### Schedule

<table>
<thead>
<tr>
<th>Date</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>5/24</td>
<td>Virtual CDBG Agreement Execution Workshop</td>
</tr>
<tr>
<td>6/1 – 6/14</td>
<td>Review and provide scope of work and budget narratives/allocations (City staff only)</td>
</tr>
<tr>
<td>6/1 – 7/1</td>
<td>Conduct and complete environmental review (City staff only)</td>
</tr>
<tr>
<td>6/1 – 7/1</td>
<td>Collect and upload required documents to ED Grants</td>
</tr>
<tr>
<td>6/15 – 7/1</td>
<td>Review and revise scope of work and budget narratives/allocations</td>
</tr>
<tr>
<td>07/1</td>
<td>Project implementation effective date</td>
</tr>
<tr>
<td>7/1 – 8/1</td>
<td>Execute CDBG agreement via ED Grants</td>
</tr>
<tr>
<td>Early August</td>
<td>Virtual CDBG Reporting Workshop</td>
</tr>
</tbody>
</table>

The City’s Operating Principals

- Customer Service
- Empowerment & Engagement
- Equity & Inclusion
- Trust & Transparency

*We are here to serve and assist you.*
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CDBG Contact

Civic Center Plaza
1200 Third Avenue, Floor 14
San Diego, CA 92101

CDBG@sandiego.gov
(619) 236-6700

Q&A