

Economic Development Department


*FY 2024 CDBG Agreement Execution  
Virtual Workshop*

May 2023

The City of

SAN  
DIEGO

1

 Partnering with the City

Agenda

- Introductions
- Draft Agreement Review & Revision
  - Scope
  - Budget
- Required Supporting Documents
- Agreement Execution Process
- ED Grants & Primary Representative
- Schedule

sandiego.gov

2


Partnering with the City

## Background


#	Activity	Amount
40	RFP responses received (35 organizations)	
31	FY 2024 CDBG projects awarded	\$7,079,491
17	Public Services	\$2,131,283
9	CED-Technical Assistance	\$1,839,702
5	Nonprofit Capital Improvement   Facilities	\$3,108,506

sandiego.gov

3

Partnering with the City

## CDBG Agreement Execution Handbook



COMMUNITY DEVELOPMENT BLOCK GRANT  
(CDBG) PROGRAM

FY 2024 CDBG AGREEMENT EXECUTION  
HANDBOOK

Economic Development Department  
Community Development Division  
May 2023

City of San Diego

FY 2024 CDBG Agreement Execution Handbook

TABLE OF CONTENTS

I. BACKGROUND & INTRODUCTION..... 1

II. ED GRANTS NAVIGATION & INSTRUCTIONS ..... 3

III. TIMELINESS & CONSEQUENCES ..... 5

IV. GENERAL SCHEDULE..... 6

V. DEFINITION OF TERMS..... 6

VI. SUPPORTING DOCUMENTS & CITY-PROVIDED FORMS..... 14

VII. ATTACHMENTS..... 16

1. Purchasing & Contracting Insurance Checklist..... 16

2. ED Grants Agreement Execution Guide..... 16

3. Index of Supporting Documents & City-Provided Forms..... 16

4. Sample Written Policies & Procedures/CDO Packet/Sample Board Authorizations..... 16

5. Acronyms & Initialisms..... 16

sandiego.gov

4

Economic Development Department

2

SD

Partnering with the City

Scope of Work Review

Search

Search...

All

Tasks

My Tasks

Pending Tasks

Completed Tasks

Activities

My Organization/Profile

Manage Organization Profile

View Users

Manage Profile

Recent Items

Technical Support

Contact Us

FAQs

Resources

Useful Links

Sandiego.gov

Economic Development Grants Management System

Community Portal

NOFAs

Applications

Projects

Post Awards

Version View

College Town - Expanded Services

Send to Grantor

View Agreement

Edit

Project ID

Version No.

Status

Agreement Term

CG-FY18-002

1

Pending Recipient Update

7/1/2017 To 6/30/2018

Created

Recipient Revision

Grantor Revision

Under Approval

Issued

Amended

Overview

Budget

Scope of Work

Scheduling

Reports

Agreement Checklist

Attachments

Certifications

Project Goals and Outcomes

Consolidated Plan Goal

Invest in community services and non-profit facilities that maximize impact by providing new or increased access to programs that serve highly vulnerable populations such as youth, seniors, and food insecure households.

Strategic Plan Goal

Goal 1: Objective 1

HUD Matrix Code

05D Youth Services

CDBG Citation

570.202

National Objective

LMC

Objective Category

Suitable Living Environment

Outcome Category

Availability/Accessibility

Outcome Indicator

People

Annual Units

100

YTD Target Accomplished

Programmatic Report (MPR)

PS & CG

Outcome Progress

0%

Project Details

sandiego.gov

5

SD

Partnering with the City

Scope of Work Review

Tasks

My Tasks

Pending Tasks

Completed Tasks

Activities

My Organization/Profile

Manage Organization Profile

View Users

Manage Profile

Recent Items

Technical Support

Contact Us

FAQs

Resources

Useful Links

Sandiego.gov

Economic Development Grants Management System

Community Portal

NOFAs

Applications

Projects

Post Awards

Version View

College Town - Expanded Services

Send to Grantor

View Agreement

Edit

Project ID

Version No.

Status

Agreement Term

CG-FY18-002

1

Pending Recipient Update

7/1/2017 To 6/30/2018

Created

Recipient Revision

Grantor Revision

Under Approval

Issued

Amended

Overview

Budget

Scope of Work

Scheduling

Reports

Agreement Checklist

Attachments

Certifications

Project Goals and Outcomes

Consolidated Plan Goal

Invest in community services and non-profit facilities that maximize impact by providing new or increased access to programs that serve highly vulnerable populations such as youth, seniors, and food insecure households.

Strategic Plan Goal

Goal 1: Objective 1

HUD Matrix Code

05D Youth Services

CDBG Citation

570.202

National Objective

LMC

Objective Category

Suitable Living Environment

Outcome Category

Availability/Accessibility

Outcome Indicator

People

Annual Units

100

YTD Target Accomplished

Programmatic Report (MPR)

PS & CG

Outcome Progress

0%

Project Details

Project Description

Test

Target Population

Test

Project Outcome

Test

Project Activities

Test

Send to Grantor

View Agreement

Edit

sandiego.gov

6

Economic Development Department

3

sd

Partnering with the City

Scope of Work Review

Tasks

My Tasks

Pending Tasks

Completed Tasks

Activities

My Organization Profile

Manage Organization Profile

View Users

Manage

Revisions

Tools

Contact

FAQs

Resources

Useful Links

San Diego

Created

Recipient Revision

Grantor Revision

Under Approval

Issued

Amended

Overview

Budget

Scope of Work

Scheduling

Reports

Agreement Checklist

Attachments

Certifications

+

Project Goals and Outcomes

Consolidated Plan Goal

Invest in community services and non-profit facilities that maximize impact by providing new or increased access to programs that serve highly vulnerable populations such as youth, seniors, and food insecure households.

Strategic Plan Goal

Goal 1: Objective 1

Comments

Add Comment

SM

Stephen Maduli-Williams

Review scope and budget per instructions.

Commented 2 minutes ago

sandiego.gov

7

sd

Partnering with the City

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.***

sandiego.gov

8

Economic Development Department

4

sd

Partnering with the City

Budget Review

The City of  
SAN DIEGO

Economic Development Grants Management System

Community Portal

NOFAs

Applications

Projects

Post Awards

Search

Search...

All

Tasks

My Tasks

Pending Tasks

Completed Tasks

Activities

My Organization/Profile

Manage Organization Profile

View Users

Manage Profile

Recent Items

Technical Support

Contact Us

FAQs

Resources

Useful Links

Sandiego.gov

Version View:  
College Town - Expanded Services

Send to Grantor

View Agreement

Edit

Project ID  
CG-FY18-002

Version No. 1

Status  
Pending Recipient Update

Agreement Term  
7/1/2017 To 6/30/2018

Created

Recipient Revision

Grantor Revision

Under Approval

Issued

Amended

Overview

Budget

Scope of Work

Scheduling

Reports

Agreement Checklist

Attachments

Certifications

Project Financials

Prior Allocated Amount  
\$0

Allocated Amount this Action  
\$177,000

Total Allocated Amount  
\$177,000

YTD Reimbursement  
\$0

Remaining Amount  
\$177,000

Burn Rate  
0%

Total Project Budget Information by Funding Sources

New

Sequence	Funding Source Name	Amount Secured	Amount Unsecured	% Of Total Budget	City Total	Non City Total	Actions
1	City of San Diego FY 2018 ...	\$0.00	\$177,000.00	18.94	\$177,000.00	\$0.00	
2	AT&T	\$240,000.00	\$0.00	25.69	\$0.00	\$240,000.00	
3	The California Wellness Fo...	\$125,000.00	\$0.00	13.38	\$0.00	\$125,000.00	
4	King Philanthropies	\$75,000.00	\$0.00	8.03	\$0.00	\$75,000.00	
5	The Dammeier, Freund, an...	\$71,000.00	\$0.00	7.6	\$0.00	\$71,000.00	
6	The Blumkin, Dunn, and Sa...	\$30,281.00	\$0.00	3.24	\$0.00	\$30,281.00	

sandiego.gov

9

sd

Partnering with the City

Budget Review

The City of  
SAN DIEGO

Economic Development Grants Management System

Community Portal

NOFAs

Applications

Projects

Post Awards

Search

Search...

All

Tasks

My Tasks

Pending Tasks

Completed Tasks

Activities

My Organization/Profile

Manage Organization Profile

View Users

Manage Profile

Recent Items

Technical Support

Contact Us

FAQs

Resources

Useful Links

Sandiego.gov

Total records: 20

Total Project Funds

NOTE: Make sure you select the correct Budget Category for your project costs. If you need help determining the correct category to use - refer to the Resource link in Home Page

#	Budget Category	Proposed City Amount	Actual City Amount	Budget Difference	Non City Amount	Year To Date Spent	Remaining Budget	Actions
1	PE: Salary and Wages	\$177,000.00	\$177,000.00	\$0.00	\$356,854.00	\$0.00	\$177,000.00	
2	PE: Fringe Benefits	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
3	Total Personnel Bu...	\$177,000.00	\$177,000.00	\$0.00	\$356,854.00	\$0.00	\$177,000.00	
4	NPE: Direct Program...	\$0.00	\$0.00	\$0.00	\$345,850.00	\$0.00	\$0.00	
5	NPE: Supplies-Admi...	\$0.00	\$0.00	\$0.00	\$7,400.00	\$0.00	\$0.00	
6	NPE: Supplies-Client...	\$0.00	\$0.00	\$0.00	\$18,500.00	\$0.00	\$0.00	
7	NPE: Publications/Pr...	\$0.00	\$0.00	\$0.00	\$1,800.00	\$0.00	\$0.00	
8	NPE: Rent/Lease	\$0.00	\$0.00	\$0.00	\$17,424.00	\$0.00	\$0.00	
9	NPE: Maintenance/R...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
10	NPE: Utilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
11	NPE: Communications	\$0.00	\$0.00	\$0.00	\$400.00	\$0.00	\$0.00	
12	NPE: Equipment Re...	\$0.00	\$0.00	\$0.00	\$2,400.00	\$0.00	\$0.00	
13	NPE: Insurance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
14	NPE: Federally Appr...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
15	NPE: Construction/R...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
16	NPE: Construction M...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

sandiego.gov

10

Economic Development Department

5

# Partnering with the City

## Budget Review

**Budget Category: PE: Salary and Wages**


Title	Narrative	Cost Type	Proposed Cost(\$)	Sub Total - City	Sub Total - Non City	City Proportion	Non City - Proportion	Total	Actions
Director of College T...	A Program Director T...	Annual Budget	\$55,000.00	\$0.00	\$55,000.00	0%	100%	\$55,000.00	
Volunteer Coordinator	A coordinator to dire...	Annual Budget	\$40,000.00	\$0.00	\$40,000.00	0%	100%	\$40,000.00	
Parent Coordinator	A staff to help educa...	Annual Budget	\$16,000.00	\$0.00	\$16,000.00	0%	100%	\$16,000.00	
Site Director, Friday	A site director for Re...	Annual Budget	\$20,000.00	\$0.00	\$20,000.00	0%	100%	\$20,000.00	
Achievement Coach...	A Coach to help stu...	Annual Budget	\$18,000.00	\$0.00	\$18,000.00	0%	100%	\$18,000.00	
Achievement Coach 4	A Coach to help stu...	Annual Budget	\$40,000.00	\$0.00	\$40,000.00	0%	100%	\$40,000.00	
Achievement Coach 3	A Coach to help stu...	Annual Budget	\$40,000.00	\$0.00	\$40,000.00	0%	100%	\$40,000.00	
Achievement Coach 2	A Coach to help stu...	Annual Budget	\$40,000.00	\$0.00	\$40,000.00	0%	100%	\$40,000.00	
Achievement Coach 1	A Coach to help stu...	Annual Budget	\$40,000.00	\$0.00	\$40,000.00	0%	100%	\$40,000.00	
Lead Achievement ...	A coach to lead the ...	Annual Budget	\$50,000.00	\$50,000.00	\$0.00	100%	0%	\$50,000.00	
College Town Health...	Medical and Dental I...	Annual Budget	\$64,854.00	\$17,000.00	\$47,854.00	26.21%	73.79%	\$64,854.00	
Coordinator of Com...	Coach to maximize r...	Annual Budget	\$40,000.00	\$40,000.00	\$0.00	100%	0%	\$40,000.00	
Bonus Room Coach	Coach to ensure stu...	Annual Budget	\$20,000.00	\$20,000.00	\$0.00	100%	0%	\$20,000.00	
Lead Achievement ...	A Lead Achievement...	Annual Budget	\$50,000.00	\$50,000.00	\$0.00	100%	0%	\$50,000.00	

**Total** **Actions**

\$345,850.00

sandiego.gov

11


Partnering with the City

# Budget Review

My Tasks

Pending Tasks

Completed Tasks

Activities

My Organization/Profile

Manage Organization Profile

View Users

Manage Profile

Recent Items

Technical Support

Contact Us

FAQs

Resources

Useful Links

Total Project's Secured Funding Information

Note: This value is automatically computed

Leverage of secured funding percentage

81.06%

Send to Grantor

View Agreement

Edit

Comments

Add Comment

SM

Stephen Maduli-Williams


Review scope and budget per instructions.

Commented 2 minutes ago

Sandiego.gov

GovGrants

Sandiego.gov | Privacy Policy | Disclaimers | Accessibility



12

sd

Partnering with the City

Budget Review

The City of  
SAN DIEGO

Economic Development Grants Management System

Community Portal

NOFAs

Applications

Projects

Post Awards



Q Search

Total records: 20

Edit

Budget Category: NPE: Direct Program Delivery Expenses

New

Title	Narrative	Cost Type	Proposed Cost(\$)	Sub Total - City	Sub Total - Non City	City Proportion	Non City - Proportion	Total	Actions
Direct Program Deliv...	General prog...	General program delivery costs such as mileage, event supplies, food and beverage, Leadership Camp, College Residential program, ACT/SAT test preparation, student support scholarships, and transportation to and from program activities.						\$345,850.00	 

Total records: 1

Useful Links

Sandiego.gov

14 NPE: Federally Appr...

15 NPE: Construction/R...

16 NPE: Construction M...

sandiego.gov

13

sd

Partnering with the City

Budget Review

The City of  
SAN DIEGO

Economic Development Grants Management System

Community Portal

NOFAs

Applications

Projects

Post Awards

Q Search

Total records: 20

Search...

All

Tasks

My Tasks

Pending Tasks

Completed Tasks

Activities

My Organization/Profile

Manage Organization Profile

View Users

Manage Profile

Recent Items

Technical Support

Contact Us

FAQs
















Resources

Useful Links

Sandiego.gov

Total Project Funds

NOTE: Make sure you select the correct Budget Category for your project costs. If you need help determining the correct category to use - refer to the Resource link in Home Page

#	Budget Category	Proposed City Amount	Actual City Amount	Budget Difference	Non City Amount	Year To Date Spent	Remaining Budget	Actions
1	PE: Salary and Wages	\$177,000.00	\$177,000.00	\$0.00	\$356,854.00	\$0.00	\$177,000.00	
2	PE: Fringe Benefits	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
3	Total Personnel Bu...	\$ 177,000.00	\$ 177,000.00	\$ 0.00	\$ 356,854.00	\$ 0.00	\$ 177,000.00	
4	NPE: Direct Program...	\$0.00	\$0.00	\$0.00	\$345,850.00	\$0.00	\$0.00	
5	NPE: Supplies-Admi...	\$0.00	\$0.00	\$0.00	\$7,400.00	\$0.00	\$0.00	
6	NPE: Supplies-Client...	\$0.00	\$0.00	\$0.00	\$18,500.00	\$0.00	\$0.00	
7	NPE: Publications/Pr...	\$0.00	\$0.00	\$0.00	\$1,800.00	\$0.00	\$0.00	
8	NPE: Rent/Lease	\$0.00	\$0.00	\$0.00	\$17,424.00	\$0.00	\$0.00	
9	NPE: Maintenance/R...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
10	NPE: Utilities	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
11	NPE: Communications	\$0.00	\$0.00	\$0.00	\$400.00	\$0.00	\$0.00	
12	NPE: Equipment Re...	\$0.00	\$0.00	\$0.00	\$2,400.00	\$0.00	\$0.00	
13	NPE: Insurance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
14	NPE: Federally Appr...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
15	NPE: Construction/R...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
16	NPE: Construction M...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

sandiego.gov

14

Economic Development Department

7

SD

Partnering with the City

Budget Review

17

NPE: Loans

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

18

NPE: Consultant Ser...

\$0.00

\$0.00

\$0.00

\$7,000.00

\$0.00

\$0.00

19

NPE: Direct Loans to...

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

\$0.00

20

Total Non-Personne...

\$ 0.00

\$ 0.00

\$ 0.00

\$ 400,474.00

\$ 0.00

\$ 0.00

21

Total Budget

\$ 177,000.00

\$ 177,000.00

\$ 0.00

\$ 757,328.00

\$ 0.00

\$ 177,000.00

Total Project's Secured Funding Information ⓘ

Note: This value is automatically computed

sandiego.gov

15

SD

Partnering with the City

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.*

sandiego.gov

16




Partnering with the City

## 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)

sandiego.gov

17

Partnering with the City

## Supporting Documents: Index

INDEX OF SUPPORTING DOCUMENTS & CITY-PROVIDED FORMS

Attachment 3

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 to 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.

#	Document	Description	Form Available	Applicability <sup>1</sup>	Applicable RFP Category			Naming Convention <sup>2</sup>
					PS	HCIP-F	CEC	
1	Organization Chart: Entire Subrecipient Agency	Shows the organization's general structure in terms of span of control and chain of command. If a subrecipient has offices in different locations, the chart for the office administering the CDBG-funded project should be provided. The chart needs only list the position titles (the Incumbents' names are not necessary). <b>PURPOSE:</b> City staff will be looking to see that the subrecipient has capacity to successfully implement the CDBG-funded project and that there is sufficient separation of duties to implement proper procurement accounting controls (e.g., the same person does not create and approve a purchase order).	No	Required	X	X	X	[orgname]_orgchart_agency.pdf
2	Organization Chart: Implementation Team	Shows the specific programmatic and fiscal groups within the organization charged with implementing the CDBG-funded project. The chart needs only list the position titles (the Incumbents' names are not necessary). <b>PURPOSE:</b> City staff will be looking to see that the subrecipient has capacity to successfully implement the CDBG-funded project and that there is sufficient separation of duties to implement proper procurement accounting controls (e.g., the same person does not create and approve a purchase order).	No	Required	X	X	X	[orgname]_orgchart_div-sect.pdf

sandiego.gov

18

sd

Partnering with the City

Supporting Documents: ED Grants

The City of SAN DIEGO

Economic Development Grants Management System

As a Grantor

Planning

NCFAs

Applications

Projects

Post Awards

Closed

Search

Search...

All

Tasks

My Tasks

Pending Tasks

Completed Tasks

Activities

Manage Projects

Manage Directed Projects

Drafted Versions

Issued Versions

Carotaled Projects

Closed Projects

Closed Directed Projects

Useful Links

Recent Items

Version View

Microlending Program

Project ID CED-PY24-008

Version No. 1

Status Created

Agreement Term

View Agreement

Edit

Notify Fiscal Reviewer

Send to Subrecipient

Created

Recipient Revision

Grantor Revision

Overview

Budget

Roles

Scope of Work

Scheduling

Reports

Agreement Checklist

Attachments

Please go to the Attachments tab and download the City Forms.

Agreement Checklist

#	City Form Download	City Form Description	Required	Subrec Document
1	Download	1. Organization Chart, Entire Agency	Mandatory	Yes
2	Download	2. Organization Chart, Implementation Team	Mandatory	Yes
3	Download	3. Federal IRS Form W-9	Mandatory	Yes
4	Download	4. CGL Insurance Certificate	Mandatory	Yes
5	Download	5. CGL Endorsement for Additionally Insured	Mandatory	Yes
6	Download	6. CGL Primary and Non-Contributory Language	Mandatory	Yes
7	Download	7. Commercial Auto Liability Insurance Certificate	Mandatory	Yes

Attached

N/A

Comments

Save

19

sd

Partnering with the City

Supporting Documents: ED Grants

The City of SAN DIEGO

Economic Development Grants Management System

Community Portal

NCFAs

Applications

Projects

Post Awards

Search

Search...

All

Tasks

My Tasks

Pending Tasks

Completed Tasks

Activities

My Organization/Profile

Manage Organization Profile

View Users

Manage Profile

Recent Items

Technical Support

Contact Us

FAQs

Resources

Useful Links

Version View

College Town - Expanded Services

Project ID CG-PY18-002

Version No. 1

Status Pending Recipient Update

Agreement Term 7/1/2017 To 6/30/2018

Created

Recipient Revision

Grantor Revision

Under Approval

Issues

Amended

Overview

Budget

Scope of Work

Scheduling

Reports

Agreement Checklist

Attachments

Certifications

Attachments

Add

Attachment Name	Type	Description	Last Modified	Owner	Action
Org Chart - College Town 2017-01...	Updated Org Chart-Divisi...	Division Chart	04/06/2018 2:00AM	EDGrants Admin	<div><div></div><div></div><div></div></div>
2a.FY 2018 Certification Regardin...	FY 2018 Certification Reg...	RFP Submission	04/06/2018 2:00AM	EDGrants Admin	<div><div></div><div></div><div></div></div>
Org Chart-Entire Agency 2017-01...	Updated Org Chart-Entire...	Entire agency	04/06/2018 2:00AM	EDGrants Admin	<div><div></div><div></div><div></div></div>
1.FY 2018 Certification Regarding...	FY 2018 Certification Reg...	Secured Funding	04/06/2018 2:00AM	EDGrants Admin	<div><div></div><div></div><div></div></div>
3. FY 2018 Questionnaire Regard...	FY 2018 Questionnaire R...	Conflict of Interest	04/06/2018 2:00AM	EDGrants Admin	<div><div></div><div></div><div></div></div>

Send to Grantor

View Agreement

Edit

Comments

20

Economic Development Department

10

## Supporting Documents: Insurance



This checklist is for reference only. It does not reflect all insurance requirements. Actual contractual requirements may vary.

Certificate of Insurance	
1.	The full name of the party to the contract must be listed as the Insured.
2.	All policies must be current.
3.	All coverage limits required in the contract must be reflected on the Certificate of Insurance.
4.	Commercial General Liability with a current policy limit of \$1 million must be included in the Certificate of Insurance. In the event of the contract, The City's minimum limits are \$1 million per occurrence and \$2 million General Aggregate. However, be sure to confirm that coverage limits reflected below the contract requirements.
5.	For Commercial General Liability, the occurrence box must be (X) marked.
6.	Automobile Liability with a current policy limit of \$1 million Combined Single Limit. Coverage must reflect what is stated in the General Terms and Provisions of your contract.
7.	Commercial Compensation and Supplemental Benefits with a \$1 million. Coverage must reflect what is stated in the General Terms and Provisions of your contract.
8.	<p>If Workers Compensation, the subrogation box must be (X) marked.</p> <p>Professional Liability (Errors &amp; Omissions) for Consultant contracts, Certificate of Insurance appropriate for Contractor's work with a minimum limit of \$5 million per occurrence and \$1 million General Aggregate. Coverage must reflect what is stated in the General Terms and Provisions of your contract.</p>
9.	The contract must be the Actual Certificate of Insurance must have an Authorized Representative's signature.
10.	Certificate Holder must be: City of San Diego and the corresponding contract number or just the contract number.

Endorsements are modifications to the policy. You must ensure you have the required coverage either through an actual endorsement (separate from the Certificate of Insurance) or the page on the policy that provides said coverage.

Purchasing & Contracting  
Insurance Checklist  
Rev. January 06, 2017



Endorsements for Commercial General Liability	
1.	All Endorsements must have the policy number(s) printed on them.
2.	All endorsements are to cover <b>The City</b> , its officers, officials, employees, and volunteers as additional insureds on the CGL policy.
3.	Additional Insured Coverage can be provided in the form of the following: <ul style="list-style-type: none"> <li>A. ISO Form CG 20 20 or 11 85 or if not available,               <ul style="list-style-type: none"> <li>B. The addition of <b>bodily</b> CG 20 26, CG 20 26, CG 20 33, or CG 20 37.</li> <li>C. A Blanket Additional Insured Endorsement is acceptable as</li> <li>D. The page in the policy that provides Additional Insured coverage when required by contract.</li> </ul> </li> </ul>
4.	Primary Coverage can be provided in the following form Endorsements: <ul style="list-style-type: none"> <li>A. At least as broad as ISO CG 20 01 01 or coverage at least as broad.</li> <li>B. The page in the policy that provides Primary &amp; Non-Contributory coverage when required by contract.</li> </ul>

Endorsements for Workers Compensation	
	1. All Endorsements must have the policy number(s) printed on them.
	2. The following endorsement is required:
	A. Waiver of Subrogation Endorment. Endorment must be applicable in the state of California.

Acceptability of Insurers	
1.	Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A- VI.

Purchasing & Contracting  
Insurance Checklist  
Rev. January 06, 2017

sandiego.gov


21

## 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**

**sandiego.gov**

22

Partnering with the City


## 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**

sandiego.gov

23

Partnering with the City

## Supporting Documents: Board of Directors Authorization

**CERTIFICATE OF SECRETARY OF  
[TO BE DETERMINED], INC.,  
a California corporation**

The undersigned, **[TO BE DETERMINED]**, being the Secretary of **[TO BE DETERMINED]**, Inc., a California non-profit public benefit corporation ("Corporation"), delivers this Certificate of Secretary ("Certificate") to induce the City of San Diego, a California municipal corporation ("City"), to both: (a) consider the Corporation's proposal for Community Development Block Grant ("CDBG") funding from the City for the City's 2019 fiscal year; and (b) if the Corporation is allocated CDBG funding from the City for the City's 2019 fiscal year, enter into that certain Fiscal Year 2019 City of San Diego Community Development Block Grant Program Subsequent Agreement, dated as of July 1, 2018, by and between the Corporation and the City ("Agreement").

The undersigned certifies to the City each of the following, with full knowledge that the City will rely upon each of the following certifications, and affirms that the City may conclusively rely on all of the following certifications:

1. The undersigned is the duly elected and acting Secretary of the Corporation;
2. Attached to this Certificate as **Exhibit A** is a true, correct and complete copy of the resolutions duly adopted by **[REDACTED]** the directors of the Corporation, **[REDACTED]** and authorizing: (a) submission to the City of the Corporation's proposal for CDBG funding from the City for the City's 2019 fiscal year; and (b) if the Corporation is allocated CDBG funding from the City for the City's 2019 fiscal year, the Corporation's entry into, delivery and performance of the Agreement (and any and all other documents, instruments and/or agreements referred to in the Agreement and/or to be made or entered into in connection with the Agreement and/or to the implementation of the Agreement), and the consummation of the transactions contemplated by the Agreement (and any and all such other documents, instruments and/or agreements), which resolutions: (i) are in full force and effect; (ii) have been duly adopted by **[REDACTED]** the directors of the Corporation **[REDACTED]** unanimous written consent in lieu of a meeting; and **[TO BE DETERMINED]**, as **attested** to by the undersigned on **[TO BE DETERMINED]** 2018, in exactly the form set forth in **Exhibit A** attached to this Certificate and in accordance with the laws of the Corporation's state of organization and the Bylaws of the Corporation; and (iii) have not been modified, amended, rescinded, amended or revoked since their adoption.

*[Continued on following page]*

3. The following named persons are the officers of the Corporation, duly elected, qualified, acting and incumbent in each of the respective capacities designated and set forth below, and the accompanying signatures of each of such officers set forth opposite their respective names are their genuine signatures, respectively, and may be accepted and relied upon by the City as such, pursuant to and in accordance with the resolutions of the Corporation referenced in numbered paragraph 2 above:

Name	Office(s)	Actual Signature
	<b>[President/CEO]</b>	
	<b>[Secretary]</b>	
	<b>[Chief Financial Officer]</b>	

Notwithstanding the date of this Certificate, the undersigned agrees, acknowledges, understands and affirms the continuing accuracy, truthfulness, and effectiveness of each of the matters certified in this Certificate on and as of the date(s) that: (a) the Corporation submits to the City the Corporation's proposal for CDBG funding from the City for the City's 2019 fiscal year; and (b) the Agreement and any and all other documents, instruments and/or agreements referred to in the Agreement and/or to be made or entered into in connection with the Agreement and/or to the implementation of the Agreement are signed by or on behalf of the Corporation and/or are otherwise given effect pursuant to the provisions of the Agreement. The certifications in this Certificate may be relied upon by the City, until the City receives written notice of any change in such certifications from the undersigned.

IN WITNESS WHEREOF, the undersigned makes this Certificate of Secretary on **[TO BE DETERMINED]** 2018.

**[Typed Name]**  
Secretary

[Signature]

16105421

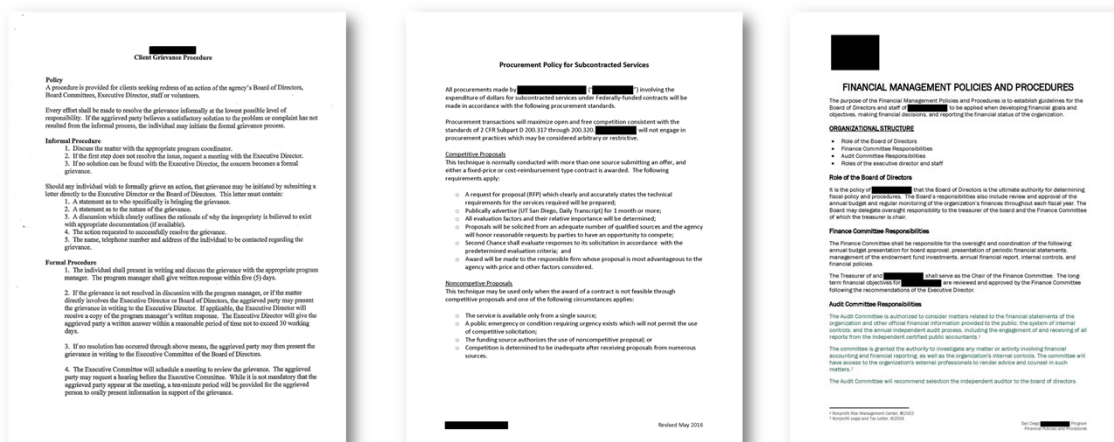
16105422

sandiego.gov

24



## Supporting Documents: Policies & Procedures



sandiego.gov

27

## 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

sandiego.gov

28

Compliance Department –  
Office of Labor Standards and Enforcement  
Living Wage Program

The City of

SAN  
DIEGO

29

sd


Office of Labor Standards and 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)

sandiego.gov

30

 Office of Labor Standards and Enforcement

## LWO Employer Requirements

Pay Required Living Wage Rate

- \$19.43 (\$16.30 + \$3.13 per hour in health benefits) for all hours worked on contract within the geographic boundaries of the City of San Diego
- \$19.29 (\$16.16 + \$3.13 per hour in health benefits) for all hours worked on a contract outside the geographic boundaries of the City of San Diego

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 1<sup>st</sup> (for multi-year contracts)

Reporting Requirements


- Electronic weekly Certified Payroll Reporting
- Certification of Compliance
- Annual Compliance Report

Job-Site Postings

- Post LWO rates & notices at workplace

sandiego.gov

31

 Office of Labor Standards and Enforcement

## Living Wage Ordinance Exemptions

### Contractor Exemption Bases

- SDMC §22.4215(c)(1-2)
  - Business with 12 or fewer employees (including subcontractors)
  - Business operating as a sole proprietorship with no employees and will not utilize 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
  - Collective Bargaining Agreement

Applicant must:

- Apply separately for each contract/agreement; not a blanket exemption
- Provide required documentation for City verification
- Receive written approval from the City

sandiego.gov

32




 Office of Labor Standards Enforcement

### Contact Information

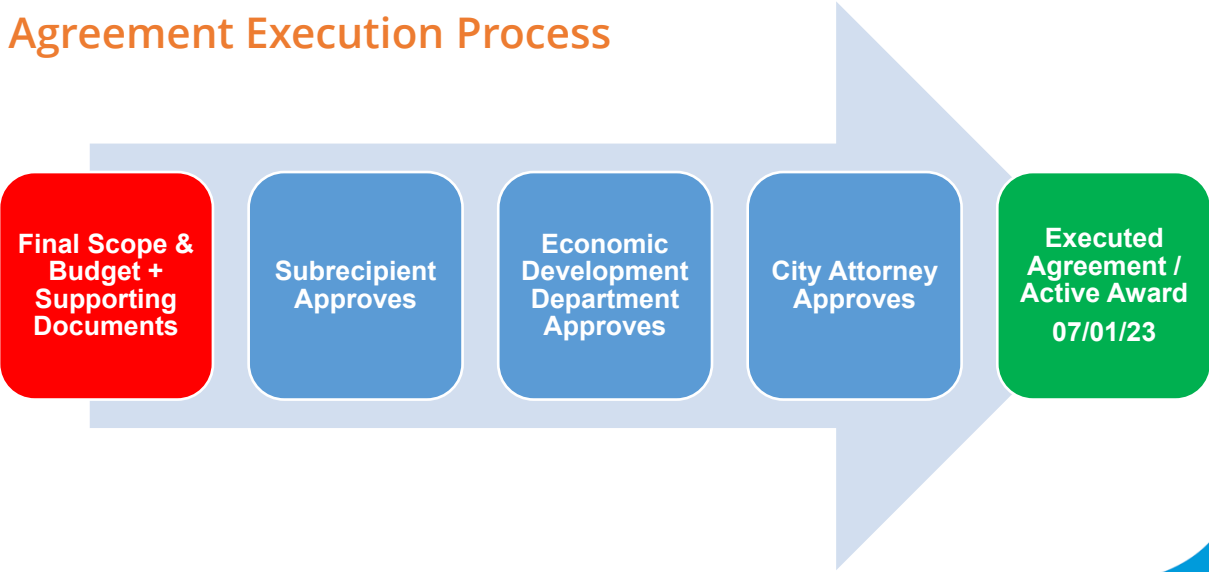
City of San Diego  
Living Wage Program  
[ContactLWO@sandiego.gov](mailto:ContactLWO@sandiego.gov)  
[sandiego.gov/livingwage](https://sandiego.gov/livingwage)  
(619)236-6084

[sandiego.gov](https://sandiego.gov)

33

 Partnering with the City

### Agreement Execution Process



```
graph LR; A[Final Scope & Budget + Supporting Documents] --> B[Subrecipient Approves]; B --> C[Economic Development Department Approves]; C --> D[City Attorney Approves]; D --> E[Executed Agreement / Active Award 07/01/23]
```

[sandiego.gov](https://sandiego.gov)

34

35

36

sd

Partnering with the City

Project Contacts Update

The City of  
SAN DIEGO

Economic Development Grants Management System

Community Portal

NOFAs

Applications

Projects

Post Awards

Search

Search...

All

Tasks

My Tasks

Pending Tasks

Completed Tasks

Activities

My Organization Profile

Manage Organization Profile

View Users

Manage Profile

Recent Items

Technical Support

Contact Us

FAQs

Resources

Useful Links

Sandiego.gov

Organization  
Reality Changers

Code

RG-000220

Registered Date

01/23/2017 05:11 PM

Organization Type

Non-Profit

DUNS

830411604

Overview

Related Log

Board of Directors

Overview

Contacts

Name

Reality Changers

City

San Diego

Country

USA

Additional Information

Organization Fiscal Year Start Date

07/01

# Grants

0

Agency Head Information

Title

Founder & President

Christopher

Yanov

Quick Search

Full Name

User Role

Email

Business Phone

Status

Is User

KeyContact

Actions

Theresa Cunningham

Primary

sdrecipients@gmail.c...

(619) 516-2222

Active

✓

✓

Theresa Cunningham

Secondary

ashley=realtychanger...

(619) 516-2217

Active

✓

✗

Theresa Cunningham

Primary

sdrecipients@gmail.c...

(619) 516-2231

Active

✗

✗

37

sd

Partnering with the City

Schedule


Date	Activity
5/23	Virtual CDBG Agreement Execution Workshop   Recorded
5/24 – 6/9	Review and provide scope of work and budget narratives/allocations (City staff only)
5/24 – 7/1	Conduct and complete environmental review (City staff only)
6/1 – 7/1	Collect and upload required documents to ED Grants
6/12 – 7/1	Review and revise scope of work and budget narratives/allocations
07/1	Project implementation effective date   Once agreement signed
7/1 – 8/1	Execute CDBG agreement via ED Grants
Early August	Virtual CDBG Reporting Workshop   MPRs, RFRs and Budget Amendments

sandiego.gov

38

Economic Development Department

19

Partnering with the City


## The City's Operating Principals

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

*We are here to serve and assist you.*

sandiego.gov

39

Partnering with the City

### CDBG Contact

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

**CDBG@sandiego.gov**  
**(619) 236-6700**

sandiego.gov

40

 Partnering with the City



??

Q&A

sandiego.gov