



Economic Development Funding Programs Fiscal Year 2025 Guidelines





Economic Development Funding Program

Fiscal Year 2025 Guidelines

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Questions?
Call: 619-236-6700
Email: sdbusiness@sanidiego.gov
www.sanidiego.gov/economic-development-funding
This document is available in alternative formats upon request.





PART I: INTRODUCTION
Economic Development Funding Programs
Fiscal Year 2025 Guidelines



PART I: INTRODUCTION

What is Economic Development Funding?

Economic Development Funding Programs are intended to support the City of San Diego's Mission, Vision, Strategic Plan and Economic Development Strategy to foster economic prosperity throughout the City. Funding opportunities are available to local nonprofits that launch, expand, attract, or retain businesses in the City and advance San Diego as a leading innovation hub and a visitor destination.

The Economic Development Funding Program covers economic development, tourism and small business support. The Economic Development Funding Program allocates Transient Occupancy Tax (TOT) revenue to promote San Diego as a place for business and tourism destination; and utilizes the Small Business Enhancement Program (SBEP) to support small business efforts Citywide and in Microdistricts.

The City's Fiscal Year (FY) runs from July 1 to June 30. Annually, recommendations are provided to the City Council for the award of TOT and SBEP funding to nonprofit Economic Development Organizations that provide services or benefits to targeted businesses through specific Programs/Projects. These recommendations are developed through a combined competitive process for TOT and SBEP funds.

Broadly, TOT funds are to be used for significant programs, services or events that enhance San Diego's economic health and base-sector businesses, and SBEP funds are to be used to create, retain and/or expand non-base sector small businesses on a Citywide basis or neighborhood-basis.



Transient Occupancy Tax

Transient Occupancy Tax funds are derived from a tax levied on individuals who stay overnight in hotels, motels and other lodging establishments. Use of TOT funds is guided by City Council Policy 100-03. A copy of Council Policy 100-03 is available online at: http://docs.sandiego.gov/councilpolicies/cpd_100-03.pdf



Small Business Enhancement Program

Small Business Enhancement Program funds are general funds allocated for small business programs based on \$20 per small business registered within the City's Business Tax Certificate Program. Use of SBEP funds is guided by City Council Policy 900-15. A copy of Council Policy 900-15 is available online at: http://docs.sandiego.gov/councilpolicies/cpd_900-15.pdf



What are the Goals of the Program?

Proposals submitted must be consistent with the intent of the funding sources. Further, each organization's mission must be aligned with one or more of the four goals for the Economic Development Funding Programs as described below. Within each Goal, there are specific Objectives, one of which must be the stated Objective of a Proposal and will be the Outcome that is measured. Therefore, each Proposal must also address one of the four Goals and an associated Objective/Outcome for that Goal (as listed below).

Goals	Objectives
Goal A: Create, retain and/or expand small businesses with a neighborhood-based focus, or located in an area not served by Business Improvement Districts (This Goal aligns with SBEP Microdistricts program)	<ul style="list-style-type: none"> • Increase the number of neighborhood-based businesses OR • Increase the volume or value of goods and/or services sold by neighborhood-based businesses
Goal B: Create, retain and/or expand non-base-sector small businesses by offering a program to small businesses Citywide, not focusing on specific commercial neighborhoods with BIDs or Microdistricts (This Goal aligns with SBEP Citywide program)	<ul style="list-style-type: none"> • Increase the number of non-base sector small businesses OR • Increase the volume or value of goods and/or services sold by non-base sector small businesses
Goal C: Promote the City of San Diego as a visitor destination, enhancing the Tourism base sector.	<ul style="list-style-type: none"> • Increase the number of City of San Diego hotel room night stays OR • Increase the sales tax value of goods sold by Tourism-related businesses
Goal D: Enhance San Diego's economic standing and reputation as a center for innovation, entrepreneurship, and technology development for base-sector businesses (Manufacturing and Innovation, International Trade and Logistics, or Defense).	<ul style="list-style-type: none"> • Increase the number of base-sector businesses OR • Increase the volume or value of goods and/or services sold by base-sector businesses OR • Increase the number of patents held by local businesses OR • Increase the volume or value of goods and/or services exported by businesses OR • Increase the number of exporting (overseas or external to San Diego) businesses OR • Increase the value of Foreign Direct Investment (FDI) in San Diego OR • Increase the number of middle-income or higher income jobs in businesses assisted



How Much Funding is Available?

Final funding amounts are not known until the City's FY2025 Budget is adopted by the City Council. However, for the purpose of the application phase, the preliminary funding estimates are \$1,000,000 in TOT - Economic Development and \$80,000 in SBEP Citywide and Microdistricts funding. These funding amounts are refined based on the applications received and as part of the budget process. Preliminary estimates of total funding will be available with the release of the Proposed Budget in mid-April. Individual recommended amounts are generally available in May. Please note that a prior-year budget amount does not guarantee a future budget amount.

The minimum and maximum amounts of funding that can be requested by funding source are as follows:

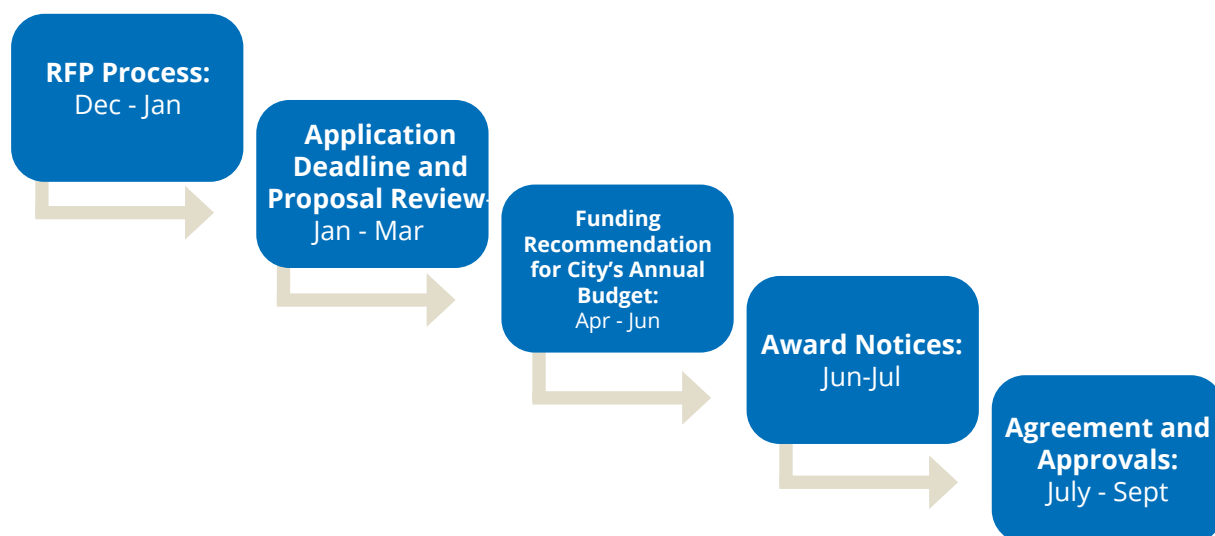
- TOT - Economic Development: \$20,000 to \$60,000
- SBEP - Citywide: \$10,000 to \$30,000
- SBEP - Microdistricts: \$5,000 to \$15,000

The Economic Development Funding Programs are a competitive process. Only applications received by the deadline will be considered and scored. In addition, the City reserves the right to adjust funding to an Organization. A variety of factors, including overall availability of funds, will be considered when evaluating any potential modification of amounts. For example, funding may be limited based on responses scored for similar scopes, as a percent of an organization's annual operating income and other City of San Diego awarded funding. For more information on funding amounts, see Part II below (Calculating Recommended Funding Amounts).

The schedule for the annual review of proposals and allocation of funding for the Economic Development Funding Process is approximately six -to seven-months beginning in December. Any updates or changes to the schedule will be posted on the Economic Development Department webpage: <https://www.sandiego.gov/economic-development/about/funding>. Please check back frequently for updates as all dates are subject to change.

How to Apply for Economic Development Funding

The following diagram shows the process and approximate timeline. Applicants and staff from the Economic Development Department are involved at each phase.

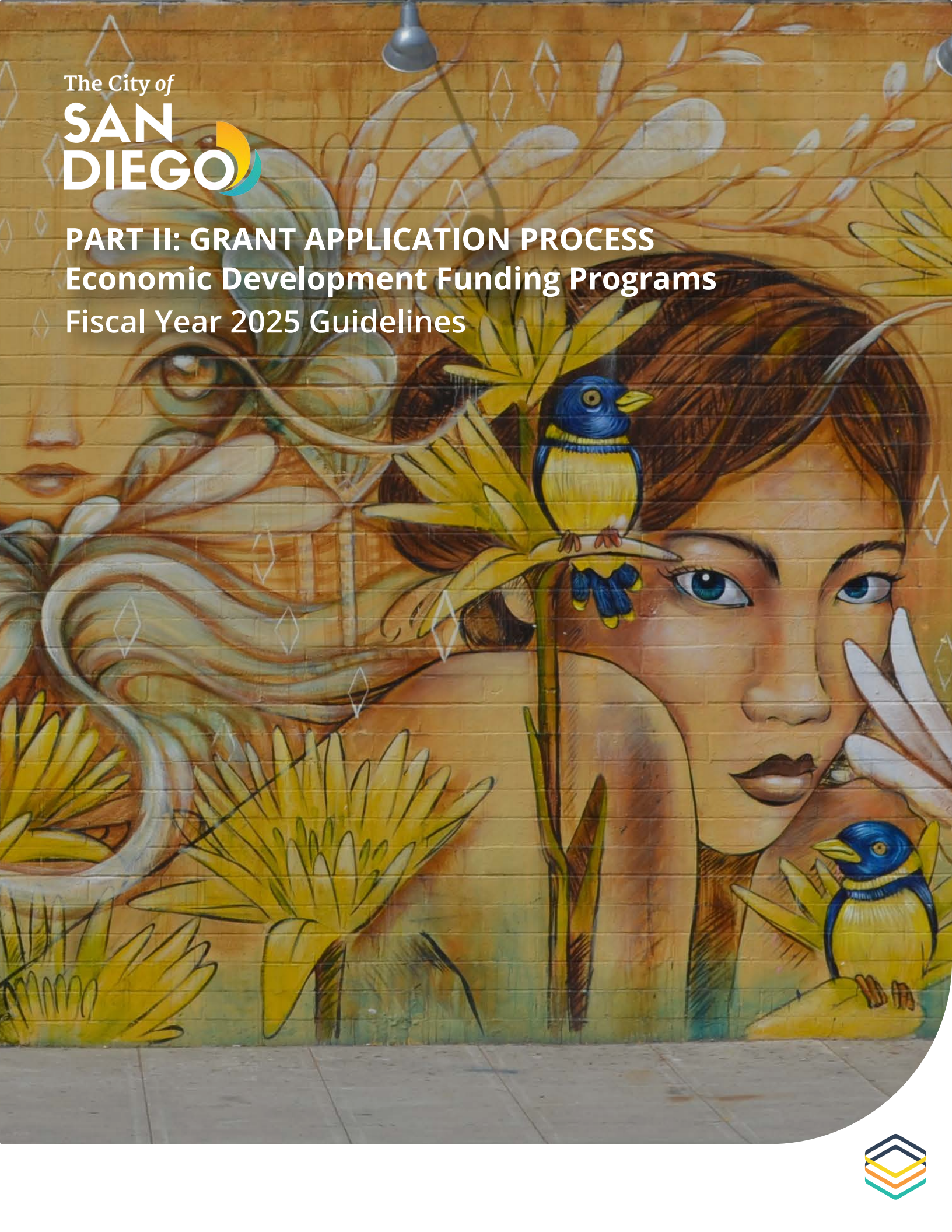




PART II: GRANT APPLICATION PROCESS

Economic Development Funding Programs

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PART II: GRANT APPLICATION PROCESS

Who is Eligible to Apply for Economic Development Funding?

Your Organization is eligible to apply by submitting a response if:

- ✓ **CALIFORNIA CORPORATION***: Your Organization is incorporated within the United States and is registered with the California Secretary of State; AND
- ✓ **NONPROFIT STATUS***: Your Organization holds tax-exempt nonprofit status under Sections 501(c)(3), 501(c)(6), or 115 of the Internal Revenue Code and can also demonstrate its tax-exempt status under the State of California Revenue and Taxation Code; AND
- ✓ **HISTORY OF OPERATIONS**: Your Organization has a three-year history of operating with its own independent governing board AND
- ✓ **GRANT AND FINANCIAL MANAGEMENT**: Your organization and/or a key staff person has experience with a contract or has received funding from a government agency in the past five years; AND
- ✓ **SERVICE AREA**: Your Organization's Program/Project will take place within the limits of the county of San Diego and funds will be used to only benefit City of San Diego businesses; AND
- ✓ **MISSION ALIGNMENT**: Your project aligns with the purpose of TOT or SBEP funding in providing a program, services or benefits to City of San Diego businesses to fulfill a Goal and Objective/Outcome as described in Part 1 above.

* Please note that incorporated nonprofit status is not required for Microdistrict Organizations to apply for in-kind services under Goal A

An eligible nonprofit is an organization with a mission that closely aligns with one of the program goals.

***Goal A** proposals must be focused on serving businesses within a single commercial neighborhood not served by a BID.*

***Goal B** proposals must be directed to small businesses on a CITYWIDE basis (NOT restricted to one or a few neighborhoods). Also, must ensure that Organization's mission reflects a broad approach to providing services and not targeted to a specific geographic area.*

***Goal C** proposals must be directed to generating increased tourism from outside the region resulting in benefits (increased room nights or sales) to tourism base sector businesses within the City.*

***Goal D** proposals MUST be directed to attracting or supporting base-sector businesses (Manufacturing & Innovation, International Trade/Logistics, or Defense) such that San Diego's reputation outside the region as a Smart Innovative city is enhanced.*



Your Organization is NOT eligible for Economic Development Funding if any of the following apply:

- **FISCAL SPONSORS:** Fiscal sponsors cannot apply on behalf of a Program/Project producer.
- **GENERAL OPERATING SUPPORT:** Your Organization is seeking funding for general operating support.
- **REGRANTING:** Your Organization's primary purpose is grantmaking.
- **SPECIAL EVENT:** Your Organization is seeking funding for a festival or event that is typically funded through the City of San Diego's Commission for Arts and Culture.
- **MULTIPLE APPLICATIONS:** Your Organization has applied or will apply for FY2025 funds through another TOT category as defined in Council Policy 100-03. **

** Please note that Organizations that also apply for and are awarded funding from another City of San Diego source, such as Community Development Block Grant (CDBG) or Tourism Marketing District (TMD) funding through the San Diego Tourism Marketing District Corp., may have any recommended funding amount for EDF reduced or eliminated. A variety of factors, including overall availability of funds, will be considered when evaluating any potential modification of recommended amounts.

Applicant Overview

The Economic Development Funding online application available through SeamlessDocs. It is highly recommended that you follow the steps below, including preparing a Sample Application and attachments in advance. Please plan ahead: whoever completes and submits this form must be authorized to electronically sign and to create a legally binding submission between the applying Organization and the City of San Diego.

Please refer to **Part IV** for the application instructions to meet the
FY2025 application deadline:

January 19, 2024 at 5:00 p.m.



Review Period

As an applicant, below is what you can expect after submitting a Proposal:

- **EVALUATION:** A review panel composed of Economic Development staff evaluates the responses to the application. They assess the degree to which each Proposal aligns with a City Goal for the use of TOT/SBEP funds; the anticipated effectiveness in meeting the selected Goal; and the merits of the Proposal responses. City staff may consider performance on past or current City agreements (if applicable) and any completeness of documentation and responses. The review panel uses a standard scoring system to evaluate each Organization's Proposal and scores are not assigned on a curve but reflect the quality of each Proposal.
- **SCORES:** A score will be calculated for each Proposal based on the average of scores from review panel members. Proposals will be considered within each funding source and ranked by score with a priority to first fund the highest scored. Remaining Proposals may be considered dependent on available funding. Proposals not receiving the minimum required score will not be considered for funding.
- **CALCULATING RECOMMENDED FUNDING AMOUNTS:** The recommended funding amount for each Proposal is calculated by City staff and is dependent on several factors including each Proposal budget, the score given to the Organization's Proposal, the total amount of funds available for distribution per funding source, and the number of Proposals to be funded by priority. Funding to a single Organization may be limited so as not to exceed 5 percent of total available funds. Funding may be limited as a percentage of Organizational Annual Operating Income. Funding may be adjusted so that Organization responses scored similarly receive similar amounts for similar scopes. A single award for an Organization may not be less than the limits stated in these Guidelines. Organizations recommended to receive Economic Development Funding for the first time may have the award amount reduced to 50-75 percent of the computed allocation. Organizations that also apply for and are awarded funding from another City of San Diego source, such as Community Development Block Grant (CDBG) or Tourism Marketing District (TMD) funding through the San Diego Tourism Marketing District Corp., may have any recommended funding amount developed under this process, reduced or eliminated. Other funding adjustments may be applied as noted above. A variety of factors, including overall availability of funds, will be considered when evaluating any potential modification of amounts. The City reserves the right to reassign applications from one Goal to another with a comparable Objective/Outcome and adjust for the associated funding limits.
- **AUTHORIZING FUNDING AMOUNTS:** Recommended TOT funding amounts are provided to the City Council. Recommended SBEP funding amounts are provided to the Mayor's office. However, all funding amounts are not final until authorized by the Mayor and City Council during the City's annual budget process. Tentative recommended amounts for Organizations have historically been available in May, and final amounts in June/July.



What are the Conditions for Submission?

Subsection headings or captions used for various paragraphs shall not be held to define, limit, augment, or describe the scope, content, or intent of any or all parts of the application and are provided only for convenience.

Application Process

1. APPLICATION: The City of San Diego reserves the right to reject, in whole or in part, any responses to this application, to initiate an alternate process, to reissue the application and/or cancel this application, in whole or in part, at any time without prior notice and makes no representation that any agreement will be awarded to any applying Organization. Additionally, the City expressly reserves the right to postpone opening responses to this application for its own convenience, and/or to waive minor informalities or irregularities in the responses received.
2. ADDENDUM: The City reserves the right to revise the Guidelines and/or application by addendum. The City is bound only by what is expressly stated in these Guidelines and/or application and any authorized written addenda thereto. Addenda will be posted on the City's website: <https://www.sandiego.gov/economic-development-funding>. It shall be the applying Organization's responsibility to check the website up to the final submission date for any possible addenda.
3. UPDATES: The applying Organization is solely responsible for responding to any required or optional updates related to EDF.
4. ATTACHMENTS: Organizations are required to submit attachments (as applicable) as noted in the instructions and failure to submit such applicable and required attachments will result in points deduction or potential disqualification for the funding.

Funding Adjustments

5. ADJUSTMENTS: The City reserves the right to adjust funding to an Organization, for example:
 - Funding to a single Organization may be limited so as not to exceed 5 percent of total available funds
 - Funding may be limited as a percentage of Organizational Annual Operating Income
 - Funding may be adjusted so that organizations scored similarly receive similar amounts for similar scopes
 - Funding to new Applicants may be limited to 50-75 percent of a computed allocation
 - A single allocation for an Applicant may not be less than the limits stated in the Application
 - Organizations that also apply for and are awarded funding by another City of San Diego source, such as Community Development Block Grant (CDBG) or Tourism Marketing District (TMD) funding through the San Diego Tourism Marketing District Corp., may have any recommended funding amount awarded under the EDF process, reduced or eliminated.



- A variety of factors, including overall availability of funds, will be considered when evaluating any potential modification of amounts.
 - The City reserves the right to reassign applications from one Goal to an appropriate or more appropriate Goal with a comparable Objective/Outcome and adjust for the associated funding limits.
6. **NO GUARANTEE:** The submission of a response to the application does not guarantee funding, even if minimum requirements are met or a minimum score is achieved.

Funding Limitations

7. **INELIGIBLE EXPENSES:** The following expenses are NOT permitted with Economic Development Funding Programs and may NOT be included in the Program/Project Budget Detail.
- Any activities already completed by July 1, 2024
 - Proposal expenses incurred before July 1, 2024 or after June 30, 2025
 - Travel or mileage
 - Capital outlay for improvements and construction of buildings or facilities, or capital outlay for purchase of equipment
 - Religious or political activity
 - Programs in facilities not accessible to persons with disabilities
 - Tuition assistance
 - Hospitality, e.g., alcoholic beverages, meals/refreshments, or entertainment expenses
 - Lodging
 - Contributions to trusts or endowment funds, or gifts or donations
 - Profit making Organizations or ventures
 - Replacement of deficit funds
 - Ticket subsidy programs
 - Penalties, fines, late fees, overdraft fees/finance fees
 - Salary bonuses
 - Organization Fundraising (e.g., galas, golf tournaments, fundraiser mailers, etc.)
 - Job placement activities
 - Indirect cost recovery (unless already permitted under another City Agreement)
 - Lobbying



8. **NON-DISCRIMINATION:** City funds will not be provided to any Organization found to discriminate, in the conduct of its activities and affairs, against any person because of sex, race, color, creed, national origin, physical disabilities, age or sexual orientation.
9. **COSTS INCURRED:** The City accepts no financial responsibility for any costs incurred by applying Organizations. The City is not responsible for the loss or damage of any materials submitted.

Funded Organization Requirements:

10. **REQUIRED DOCUMENTATION:** Each Organization awarded funding must submit all required documentation in a timely manner, in accordance with the deadlines as provided by Economic Development Department staff, to receive an executed agreement and purchase order from the City. Execution of an agreement and issuance of a purchase order can take up to 60 days after receipt by the City of all required documentation.
11. **REIMBURSEMENT:** Each Organization awarded funding will only be paid on a reimbursement basis and only once an agreement is fully executed and the purchase order issued. Expenses must be incurred by the Organization during the FY2025 agreement period (July 1, 2024 through June 30, 2025) before the City will reimburse. Organizations may not submit a request for reimbursement for the entire grant amount at any one time.
12. **TERMS AND CONDITIONS:** Each Organization awarded funding is required to comply with the terms and conditions of the agreement including but not limited to: Council Policy 100-04 (Americans with Disabilities Act/City Contractors), Equal Opportunity (Non-Discrimination Clause), Equal Benefits Ordinance, Council Policy 100-07 (Drug Free Work Place), Living Wage Ordinance and Prevailing Wage Ordinance.
13. **RESOLUTION:** If funding is awarded, the Organization must have a formal resolution of its Board of Directors approving the agreement with the City of San Diego. The resolution shall state that the Board of Directors understands and will comply with the terms and conditions of the agreement, including maintaining the required insurance coverage and performing the Scope of Services within the amount of the allocated budget. This resolution must be signed by the Board President or designated officer.
14. **INSURANCE:** Each Organization awarded funding is required to provide proof of specified insurance coverage at required amounts and with required endorsements for Commercial General Liability Insurance, Automobile Liability Insurance and Workers Compensation Insurance. It is not necessary to have the required insurance coverage at the time of the application.
 - Generally, Organizations must maintain Commercial General Liability (CGL) and automobile insurance providing minimum liability coverage of \$1 million per occurrence and \$2 million aggregate and shall provide proof/endorsements to the City that such insurance coverage is primary and non-contributory and for completed and ongoing operations and that the City is named as an additional insured. Organizations must also maintain \$1 million workers compensation insurance coverage (even if no paid employees) and must provide an endorsement that the insurer waives the right of subrogation against the City. It is highly recommended to include the incremental cost associated with the City-required insurance coverage in the Project/Program Budget.



15. **REPORTING:** Each Organization awarded funding is required to deliver quarterly performance and financial reports and final performance and financial reports in a format provided by City staff along with other certifications and acknowledgements.
16. **REGISTRATIONS:** Each Organization awarded funding is required to comply with all required state and federal registrations including but not limited to California Attorney General Registrar of Charitable Trusts, California Secretary of State Business Registry, System for Awards Management and Department of Industrial Relations DSLE Debarments. All registrations must be current during the agreement period.
17. **ACKNOWLEDGMENT OF CITY FUNDING:** A credit line must be included in any printed, visual or recorded matter that credits the City for its support. The following is an example of a credit line that might be utilized: "This project is funded in part by the City of San Diego."
18. **PUBLIC INFORMATION:** The applying Organization acknowledges that information submitted as part of their application process may be subject to disclosure under the California Public Records Act.



PART III: INFORMATION ON AGREEMENTS FOR FUNDED PROJECTS

What is the timing of the Agreement, Scope and Final Budget?

The Agreement details how City money will be spent via the scope and budget derived from the application, subject to the requirements of the Economic Development Funding Programs. As noted in the timeline in Part II, the process to obtain an executed agreement can take several months.

Many of the materials submitted during the application and budget review process will be used to create a formal, signed agreement. There will be additional materials and documents requested of funded organizations. Economic Development Department staff will coordinate with Organizations recommended to receive funding. They will work with Organization staff to confirm or update proposed budgets and scopes, as applicable, to request required documentation for Agreement execution, and to provide a final Agreement for execution.

The Agreement will also include compliance with certain requirements by the Organization (terms and conditions) including but not limited to: Council Policy 100-04 (Americans with Disabilities Act/City Contractors), Equal Opportunity (Non-Discrimination Clause), Equal Benefits Ordinance, Council Policy 100-07 (Drug Free Work Place), Living Wage Ordinance, Prevailing Wage Ordinance, Insurance coverage, quarterly performance and financial reports and final performance and financial reports. Please see the Glossary for more detail as to these terms. The Agreement will be effective from July 1, 2024 through June 30, 2025.

Economic Development staff will also provide deadlines for this Agreement execution process in June along with a Funding Acknowledgment form. Failure to comply with these deadlines may result in forfeiture of funds allocated for FY2025.





PART IV: FY 2025 APPLICATION INSTRUCTIONS

Economic Development Funding Programs

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PART IV: FISCAL YEAR 2025 APPLICATION INSTRUCTIONS

Step by Step Instructions

The Economic Development Funding online application is available through SeamlessDocs. **Applications must be completed in one session.** It is recommended for organizations to please plan ahead:

- Follow the steps below, including preparing a Sample Application and attachments in advance.
- Please allow at least one (1) hour for completing the online application and uploading the attachments.
- Whoever completes and submits this form must be authorized to electronically sign and to create a legally binding submission between the applying Organization and the City of San Diego.

Step 1: Carefully read these Fiscal Year 2025 Economic Development Funding Guidelines on this webpage: www.sandiego.gov/economic-development-funding.

Step 2: If you have questions, contact the Economic Development Department by emailing us at sdbusiness@sandiego.gov or by calling us at 619-236-6700. The last day to ask questions is January 16, 2024.

Step 3: Attend one (1) informational workshop - ATTENDANCE TO ONE INFORMATIONAL WORKSHOP IS MANDATORY. Responses may be rejected or potentially disqualify Organizations that do NOT attend a workshop. The link for each session will be posted in advance of the workshop on this webpage: www.sandiego.gov/economic-development-funding. At least one organization representative must attend a scheduled workshop session. Both Sessions will be held virtually on Zoom and will be recorded. Sessions will be held on:

- **December 13, 2023 from 1:00-2:30 p.m.**
- **January 10, 2024 from 1:00-2:30 p.m.**

Step 4: Review the Proposal (request for funding) with the Economic Development Program Goals (A-D) and determine funding request amount for Fiscal Year 2025 (July 1, 2024 – June 30, 2025).

Step 5: Download the Sample Application and prepare your responses in a format that you can use to cut and paste responses to the online Application. Sample documents are available on the Economic Development Funding web page in Microsoft Word (.doc) or Adobe (.pdf) formats. The online application available through SeamlessDocs contains narrative sections in which responses have character limits. It is highly recommended that you first complete a Sample Application to ensure that your complete responses conform to the character limits. Then you can cut and paste your responses into the online Application.

Agreement

The Economic Development Department of the City of San Diego enters into agreements with Organizations



Step 6. Save or print each of the worksheets individually as a PDF. Each PDF will be uploaded in Section 5 of the SeamlessDocs online Application Form.

*Note: It is highly recommended to include in the proposed Program/Project Budget, the proportional cost of insurance and the proportional cost associated with the preparation, and auditing as applicable, of City-required financial statements.

Step 7: If submitting optional attachments, gather those items and upload under Section 5.

Step 8: Determine the representative from the organization who will complete and submit the SeamlessDocs online Application. The representative must be authorized to electronically sign and to create a legally binding submission between the applying Organization and the City of San Diego.

Step 9: Complete the SeamlessDocs online Application. Answer all questions. You may use "N/A" where the question does not apply to your Organization.

Step 10: Submit your Application by the deadline of January 19, 2024 at 5:00 p.m. PST through the City of San Diego SeamlessDocs portal. Upon submission, you will be able to download the Application responses and/or email a copy of the submittal.





PART V: APPLICATION MATERIALS AND SAMPLES

PART VI: APPLICATION SCORING SHEET

Economic Development Funding Programs

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PART V: APPLICATION MATERIALS AND SAMPLES

According to step 5 of the Step by Step Instructions section, it is recommended that each applicant download and prepare an application in a format to cut and paste responses, such as Microsoft Word or Adobe, prior to completing the online Application. Reviewing the sample application along with the scoring process in Part VI below will provide the opportunity to familiarize applicants with the process and ask questions prior to the deadline.

The Application is lengthy and requires preparation of materials in advance. It is recommended that organizations do not wait until the deadline to submit. The required sections include: 1) information on the staffing and qualifications as well as organization eligibility; 2) the proposed program or project and the applicable program goal for funding, including the scope and strategy and the implementation activities; 3) details about the budget and funding request and other funding sources; (4) an acknowledgement and acceptance of the Conditions for Submission (also described above in Part II); and (5) an electronic signature for a legally binding submission of your organization and the City of San Diego.

The following page provides a sample and a general preview of the Application that will be available in the SeamlessDocs portal.

The City reserves the right to revise these Guidelines and/or Application by addendum. The City is bound only by what is expressly stated and any authorized written addenda thereto. Addenda will be posted on the City's website: <https://www.sandiego.gov/economic-development-funding>.

It shall be the applying Organization's responsibility to check the website up to the final submission date for any possible addenda.

PART VI: APPLICATION SCORING SHEET

The document serves as a general preview to familiarize applicant Organizations with the scoring process. Any minor informalities or irregularities in this preview will not invalidate the process.



Economic Development Funding Fiscal Year 2025 Application Sample

As described in the FY2025 Funding Guidelines, the online grant application available through SeamlessDocs must be completed in one session. For this reason, it is recommended that each organization prepare a sample application in advance to cut and paste responses into the online application. As a reminder, the online application contains narrative sections in which responses have word count limits.

SECTION 1: ORGANIZATION PROFILE

1.1A. Legal Name of Organization

Click or tap here to enter text.

1.1B. Alternate or DBA name of Organization

Click or tap here to enter text.

1.2. Organization address

<Address Line 1> Click or tap here to enter text.

<Address Line 2 Unit #>Click or tap here to enter text.

< City >< State >< Zip Code >

1.3. Organization 7-digit California Entity Number

Click or tap here to enter text.

1.4. Organization mission statement (300 character maximum, no more than 50 words)

Click or tap here to enter text.

1.5. Primary Contact for Application

<First Name> Click or tap here to enter. <Last Name>Click to enter text.

1.6. Primary Contact Email

Click or tap here to enter text.

1.7. Primary Contact Phone Number

Click or tap here to enter text.

1.8. Did your Organization attend one of the informational sessions?

- ☐ Yes, my organization attended the session on December 13, 2023.
- ☐ Yes, my organization attended the session on January 10, 2024.
- ☐ No, my organization did not attend one of the informational sessions.

SECTION 2: PROGRAM/PROJECT DETAILS

2.1. Program/Project Name

Click or tap here to enter text.

2.2. Provide a summary description of the Program/Project for which your organization seeks funding. (500 character maximum, approximately 50-75 words)

Click or tap here to enter text.

2.3. Is this application for the continuation or expansion of an existing Program/Project, or for implementation of a new or pilot Program/Project?

- ☐ Existing Program/Project
- ☐ New Program/Project

2.4A. Quarter 1 & 2 Implementation Plans - List the specific activities to be undertaken to implement the Program/Project in Quarters 1 & 2 (July through December 2024). Include who will be performing or providing these services (e.g., staff, consultant/contractor, board member, volunteer). Be sure to specify the number and types of activities. (1,300 character maximum, no more than 200 words)

Click or tap here to enter text.

2.4B. Quarter 3 Implementation Plans - List the specific activities to be undertaken to implement the Program/Project in Quarter 3 (January through March 2025). Include who will be performing or providing these services (e.g., staff, consultant/contractor, board member, volunteer). Be sure to specify the number and types of activities. IF THE RESPONSE IS THE SAME AS QUARTER 1 & 2, PLEASE ENTER "Same as Quarter 1 & 2" RATHER THAN REPEATING THE ENTIRE RESPONSE FROM QUESTION 2.4A. (1,300 character maximum, no more than 200 words)

Click or tap here to enter text.

2.4C. Quarter 4 Implementation Plans - List the specific activities to be undertaken to implement the Program/Project in Quarter 4 (April through June 2025). Include who will be performing or providing these services (e.g., staff, consultant/contractor, board member, volunteer). Be sure to specify the number and types of activities. IF THE RESPONSE IS THE SAME AS QUARTER 1 & 2, PLEASE ENTER "Same as Quarter 1 & 2" RATHER THAN REPEATING THE ENTIRE RESPONSE FROM QUESTION 2.4A. (1,300 character maximum, no more than 200 words)

Click or tap here to enter text.

2.5. Describe how grant funds would be spent by stating what would be purchased or paid for. (500 character maximum, approximately 50-75 words)

Click or tap here to enter text.

2.6. Provide the total estimated budget for the Program/Project (including all funding sources).

Click or tap here to enter currency.

2.7. What amount of funding is being requested through this application?

Click or tap here to enter currency.

2.8. Check all uses of grant funds that apply:

- ☐ Payroll
- ☐ Other Personnel Expenses
- ☐ Consultant(s)
- ☐ Accounting/Audit Services
- ☐ Insurance
- ☐ Facility/Space Rent
- ☐ Utilities, Phone/Computer, Internet
- ☐ Marketing, Outreach/PR, Printing
- ☐ Supplies
- ☐ Other

2.9A. Is there a fee for Program/Project participants?

- ☐ Yes
- ☐ No

2.9B. If yes, how much is the fee?

Click or tap here to enter currency.

2.9C. What do the fees cover? (500 character maximum, approximately 50-75 words)

Click or tap here to enter text.

2.10A. How many years of experience does your organization have with similar grant programs and financial management of agency grants?

- ☐ Less than 1 year of experience
- ☐ 1-5 years
- ☐ More than 5 years

2.10B. Please describe your organization and/or key personnel's experience with similar grant programs and financial management of agency grants? (1,000 character maximum, approximately 200 words)

Click or tap here to enter text.

2.11. Does your organization have at least 3 years of operating experience with its own independent governing board?

- ☐ Yes
- ☐ No

2.12. What is unique or innovative about this Program/Project? (500 character maximum, approximately 50-75 words)

[Click or tap here to enter text.](#)

2.13. What best describes the location of services and benefits for your Program/Project (not including out-of-area marketing or advertising):

- ☐ Limited to a specific area within the City of San Diego
- ☐ Limited to the City of San Diego
- ☐ Includes County of San Diego and grant funds will only be used within limits of City of San Diego
- ☐ Extends beyond the County of San Diego and grant funds will only be used within the City of San Diego
- ☐ Extends beyond the City of San Diego

2.14. Will the Program/Project provide services or benefits to targeted businesses only within the City of San Diego? (This does not include out-of-area marketing or advertising.)

- ☐ Yes
- ☐ No

2.15. How does the Program/Project support the City of San Diego Economic Development Strategy Objectives? Please reference one or more objectives under Support Families and Workers, Support Small and Local Businesses, Bolster Trade and Innovation, and Strengthen Neighborhoods on pages 20-24 of the City of San Diego EDS [here](#). (1,000 character maximum approximately 150-200 words)

[Click or tap here to enter text.](#)

SECTION 3: PROGRAM/PROJECT IMPACT

3.1. What businesses/base sectors are being targeted to receive services or otherwise benefit from this Program/Project? (250 character maximum, no more than 50 words)

[Click or tap here to enter text.](#)

3.2A. Where are the Program/Project's targeted businesses located? Your answer should be a neighborhood, city, or county. (100 character maximum, no more than 20 words)

[Click or tap here to enter text.](#)

3.2B. Do you track if your organization's clients are low income?

- ☐ Yes
- ☐ No

3.3A. Select, from the list below the Goal most closely aligned with your mission and that is the basis for the Program/Project:

- ☐ Goal A. Create, retain and/or expand small businesses with a neighborhood-based focus, or located in an area not served by Business Improvement Districts (This Goal aligns with SBEP Microdistricts)

- program)
- ☐ Goal B. Create, retain and/or expand non-base sector small businesses by offering a program to small businesses Citywide, not focusing on specific commercial neighborhoods with BIDs or Microdistricts (This Goal aligns with SBEP Citywide program)
 - ☐ Goal C. Promote the City of San Diego as a visitor destination, enhancing the Tourism base sector
 - ☐ Goal D. Enhance San Diego's economic standing and reputation as a center for innovation, entrepreneurship, and technology development for base-sector businesses (Manufacturing and Innovation, International Trade and Logistics, or Defense)

3.3B. How does the selected goal align with your mission? (1,000 character maximum, approximately 150-200 words)

Click or tap here to enter text.

3.4. Please describe how the Program/Project's primary objective meets the selected EDF goal and how it will achieve the projected outcome. A secondary objective/outcome may also be included if within the character limits. (1,000 character maximum, approximately 150-200 words)

Click or tap here to enter text.

3.5. How does your organization plan to track Program/Project outcomes? (1,000 character maximum, approximately 150-200 words)

Click or tap here to enter text.

3.6. Describe the method AND frequency of how you will measure Program/Project objectives and outcomes. (1,000 character maximum, approximately 150-200 words)

Click or tap here to enter text.

3.7. How does your organization plan to collaborate with other organizations or community groups to increase inclusion and program success? (1,000 character maximum, approximately 150-200 words)

SECTION 4: CERTIFICATION OF CONDITIONS

4.1. I certify Organization will have Commercial General Liability Insurance effective July 1, 2024 as required by the City of San Diego's insurance checklist.

(<https://www.sandiego.gov/sites/default/files/insurance-documents-checklist.pdf>)

- ☐ Yes
- ☐ No

4.2. I certify Organization will have Workers' Compensation Insurance effective July 1, 2024 as required by the City of San Diego's insurance checklist.

(<https://www.sandiego.gov/sites/default/files/insurance-documents-checklist.pdf>)

- ☐ Yes
- ☐ No

4.3. I certify Organization will have Automobile Liability Insurance effective July 1, 2024 as required by the City of San Diego's insurance checklist.

(<https://www.sandiego.gov/sites/default/files/insurance-documents-checklist.pdf>)

- ☐ Yes
- ☐ No

4.4. I certify Organization leadership has reviewed grant guidelines to ensure the Program/Project clearly aligns with one of the EDF Goals.

- ☐ Yes
- ☐ No

4.5. I certify grant funds will **NOT** be used for:

- ☐ Activities already completed by July 1, 2024
- ☐ Expenses incurred before July 1, 2024 or after June 30, 2025
- ☐ Travel or mileage
- ☐ Capital outlay for improvements and construction of buildings or facilities, or capital outlay for purchase of equipment
- ☐ Religious or political activity
- ☐ Programs in facilities not accessible to persons with disabilities
- ☐ Tuition assistance
- ☐ Hospitality, e.g., alcoholic beverages, meals/refreshments, or entertainment expenses
- ☐ Lodging
- ☐ Contributions to trusts or endowment funds, or gifts or donations
- ☐ Profit making Organizations or ventures
- ☐ Replacement of deficit funds
- ☐ Ticket subsidy programs
- ☐ Penalties, fines, late fees, overdraft fees/finance fees
- ☐ Salary bonuses
- ☐ Organization fundraising (e.g., galas, golf tournaments, fundraiser mailers, etc.)
- ☐ Job placement activities
- ☐ Indirect cost recovery (unless already permitted under another City Agreement)
- ☐ Lobbying

4.6. Funds for this grant are paid out through a reimbursement process only. I certify I understand Program/Project reimbursements can only be made for expenses incurred in FY2025 (July 1, 2024 through June 30, 2025).

- ☐ Yes
- ☐ No

4.7. I understand the Economic Development Department will conduct an online Business Search through the State of California – Secretary of State business search website to verify my organization has a current registration with the California Secretary of State as a "domestic nonprofit."

<https://www.sos.ca.gov/business-programs/business-entities>

☐ Yes

☐ No

4.8. I understand the Economic Development Department will conduct an online Entity search through the State of California Franchise Tax Board to verify my organization is a tax-exempt nonprofit in good standing. (https://www.ftb.ca.gov/online/self_serve_entity_status_letter/index.asp)

☐ Yes

☐ No

SECTION 5: CHECKLIST OF REQUIRED ATTACHMENTS (exceptions as noted)

5.1. Organizational chart showing names and titles of your Organization's staff

PDF is preferred.

Files must be less than 10 MB.

Allowed file types: .pdf, .xls, .xlsx.

5.2. Tax-Exempt Determination Letter from the IRS documenting tax-exempt nonprofit status under Sections 501(c)(3), 501(c)(6), or 115 of the Internal Revenue Code.

PDF is preferred.

Files must be less than 10 MB.

Allowed file types: .jpg, .jpeg, .png, .txt, .pdf, .doc, .docx.

5.3. Entity Status Letter from the State of California Franchise Tax Board with Boxes 1 and 3 checked from this site: https://www.ftb.ca.gov/online/self_serve_entity_status_letter/index.asp

Click on "Check Status", then search entity, click on the entity ID number and click "Generate Letter." PDF is preferred.

Files must be less than 10 MB.

Allowed file types: .jpg, .jpeg, .png, .txt, .pdf, .doc, .docx.

5.4. First Page of most recently filed IRS tax return

PDF is preferred.

Files must be less than 10 MB.

Allowed file types: .jpg, .jpeg, .png, .pdf, .doc, .docx.

5.5A. Optional

- ☐ Informational Materials (Create one PDF of these documents in this order):
 - 1) Program Information not included in other materials (Maximum 1 page);
 - 2) Current news clippings or online article links, critical reviews (Maximum 2 pages, no older than 2 years);
 - 3) Support Letters (Maximum 2 Letters. 1 page each); and
 - 4) Programs/Brochures (Maximum 2 items)

5.5B. Optional

- ☐ One audio-visual/multimedia file that showcases the Proposed Program/Project (Maximum 250 MB)

SECTION 6: CONDITIONS FOR SUBMISSION

IN SUBMITTING THIS APPLICATION, YOUR ORGANIZATION WILL BE ASKED TO AFFIRM ITS ACKNOWLEDGEMENT, UNDERSTANDING, AND ACCEPTANCE OF THE FOLLOWING CONDITIONS:

Subsection headings or captions used for various paragraphs shall not be held to define, limit, augment, or describe the scope, content, or intent of any or all parts of the application and are provided only for convenience.

Application Process:

6.1. APPLICATION: The City of San Diego reserves the right to reject, in whole or in part, any responses to this application, to initiate an alternate process, to reissue the application and/or cancel this application, in whole or in part, at any time without prior notice and makes no representation that any agreement will be awarded to any applying Organization. Additionally, the City expressly reserves the right to postpone opening responses to this application for its own convenience, and/or to waive minor informalities or irregularities in the responses received.

6.2. ADDENDUM: The City reserves the right to revise this application by addendum. The City is bound only by what is expressly stated in this application and any authorized written addenda thereto.

Addenda will be posted on the City's website:

<https://www.sandiego.gov/economic-development-funding>. It shall be the applying Organization's responsibility to check the website up to the final submission date for any possible addenda.

6.3. UPDATES: The applying Organization is solely responsible for responding to any required or optional updates related to this application.

6.4. ATTACHMENTS: Organizations are required to submit attachments (as applicable) as noted in the instructions and failure to submit such applicable and required attachments will result in points deduction or potential disqualification for funding.

Funding Adjustments:

6.5. ADJUSTMENTS: The City reserves the right to adjust funding to an Organization, for example:

- Funding to a single Organization may be limited so as not to exceed 5 percent of total available funds
- Funding may be limited as a percentage of Organizational Annual Operating Income
- Funding may be adjusted so that organizations scored similarly receive similar amounts for similar scopes
- Funding to new Applicants may be limited to 50-75 percent of a computed allocation
- A single allocation for an Applicant may not be less than the limits stated in the Application, unless annual allocations are less than estimated grant budget
- Organizations that also apply for and are awarded funding by another City of San Diego source, such as Community Development Block Grant (CDBG) or Tourism Marketing District (TMD) funding through the San Diego Tourism Marketing District Corp., may have any recommended funding amount awarded under this Economic Development Funding process, reduced or eliminated.
- A variety of factors, including overall availability of funds, will be considered when evaluating any potential modification of amounts.
- The City reserves the right to reassign applications from one Goal to an appropriate or more appropriate Goal with a comparable Objective/Outcome and adjust for the associated funding limits.

6.6. NO GUARANTEE: The submission of a response to the application does not guarantee funding, even if minimum requirements are met or a minimum score is achieved.

Funding Limitations:

6.7. INELIGIBLE EXPENSES: The following expenses are NOT permitted with Economic Development Funding Programs and may NOT be included in the Program/Project Budget Detail.

- Any activities already completed by July 1, 2024
- Proposal expenses incurred before July 1, 2024 or after June 30, 2025
- Travel or mileage
- Capital outlay for improvements and construction of buildings or facilities, or capital outlay for purchase of equipment
- Religious or political activity
- Programs in facilities not accessible to persons with disabilities
- Tuition assistance

- Hospitality, e.g., alcoholic beverages, meals/refreshments, or entertainment expenses
- Lodging
- Contributions to trusts or endowment funds, or gifts or donations
- Profit making Organizations or ventures
- Replacement of deficit funds
- Ticket subsidy programs
- Penalties, fines, late fees, overdraft fees/finance fees
- Salary bonuses
- Organization Fundraising (e.g., galas, golf tournaments, fundraiser mailers, etc.)
- Job placement activities
- Indirect cost recovery (unless already permitted under another Agreement with the City of San Diego)
- Lobbying

6.8. NON-DISCRIMINATION: City funds will not be provided to any Organization found to discriminate, in the conduct of its activities and affairs, against any person because of sex, race, color, creed, national origin, physical disabilities, age or sexual orientation.

6.9. COSTS INCURRED: The City accepts no financial responsibility for any costs incurred by applying Organizations. The City is not responsible for the loss or damage of any materials submitted.

Funded Organization Requirements:

6.10. REQUIRED DOCUMENTATION: Each Organization awarded funding must submit all required documentation in a timely manner, in accordance with the deadlines as provided by Economic Development Department staff, to receive an executed agreement and purchase order from the City. Execution of an agreement and issuance of a purchase order can take up to 60 days after receipt by the City of all required documentation.

6.11. REIMBURSEMENT: Each Organization awarded funding will only be paid on a reimbursement basis and only once an agreement is fully executed and the purchase order issued. Expenses must be incurred by the Organization during the FY2025 agreement period (July 1, 2024 through June 30, 2025) before the City will reimburse. Organizations may not submit a request for reimbursement for the entire grant amount at any one time.

6.12. TERMS AND CONDITIONS: Each Organization awarded funding is required to comply with the terms and conditions of the agreement including but not limited to: Council Policy 100-04 (Americans with Disabilities Act/City Contractors), Equal Opportunity (Non-Discrimination Clause), Equal Benefits Ordinance, Council Policy 100-07 (Drug Free Work Place), Living Wage Ordinance and Prevailing Wage Ordinance.

6.13. RESOLUTION: If funding is awarded, the Organization must have a formal resolution of its Board of Directors approving the agreement with the City of San Diego. The resolution shall state that the Board of Directors understands and will comply with the terms and conditions of the agreement, including maintaining the required insurance coverage and performing the Scope of Services within the amount of the allocated budget. This resolution must be signed by the Board President or designated officer.

6.14. INSURANCE: Each Organization awarded funding is required to provide proof of specified insurance coverage at required amounts and with required endorsements for Commercial General Liability Insurance, Automobile Liability Insurance and Workers Compensation Insurance. It is not necessary to have the required insurance coverage at the time of the application.

Generally, Organizations must maintain Commercial General Liability (CGL) and automobile insurance providing minimum liability coverage of \$1 million per occurrence and \$2 million aggregate and shall provide proof/endorsements to the City that such insurance coverage is primary and non-contributory and for completed and ongoing operations and that the City is named as an additional insured. Organizations must also maintain \$1 million workers compensation insurance coverage (even if no paid employees) and must provide an endorsement that the insurer waives the right of subrogation against the City.

It is highly recommended to include the incremental cost associated with the City-required insurance coverage in the Program/Project Budget.

6.15. REPORTING: Each Organization awarded funding is required to deliver quarterly performance and financial reports and final performance and financial reports in a format provided by City staff along with other certifications and acknowledgements.

6.16. REGISTRATIONS: Each Organization awarded funding is required to comply with all required state and federal registrations including but not limited to California Attorney General Registrar of Charitable Trusts, California Secretary of State Business Registry, System for Awards Management and Department of Industrial Relations DSLE Debarments. All registrations must be current during the agreement period.

6.17. ACKNOWLEDGMENT OF CITY FUNDING: A credit line must be included in any printed, visual or recorded matter that credits the City for its support. The following is an example of a credit line that might be utilized: "This project is funded in part by the City of San Diego."

6.18. PUBLIC INFORMATION: The applying Organization acknowledges that information submitted as part of their application process may be subject to disclosure under the California Public Records Act.

ACCEPTANCE OF CONDITIONS:

- ☐ I acknowledge, understand and accept these conditions
- ☐ I do not acknowledge, understand and accept these conditions

Note: You must select "I acknowledge, understand and accept these conditions" for your Application to be considered.

SECTION 7: ELECTRONIC SIGNATURE AND SUBMISSION

SIGNATURE

Name

<First Name>Click or tap here to enter text. <Last Name>Enter text.

Title

Click or tap here to enter text.

Email

Click or tap here to enter text.

☐ I agree to electronically sign and to create a legally binding submission between the entity I am authorized to represent and the City of San Diego.

Submit

FY2025 Economic Development Funding Program Scoring Sheet

This document serves as a general preview to familiarize applicants with the application evaluation process. Any minor informalities or irregularities in this preview will not invalidate the application process.

APPLICATION QUESTION		PURPOSE	SCORING GUIDE
AUTOMATIC SCORING			
	Was the application submitted on time?	Application meets general requirements to be complete and meets deadline.	• 3 pts if organizations submits application by or before the deadline
2.3	Is this Program/Project already in operation?	Identify if program/project is new or existing	• 2 pts for existing Program/Project
2.11	Does the organization have three years experience?	Organizations must meet operational eligibility requirement of 2 yrs	• 2 pts for "yes"
2.14	Will benefits of the Program/Project stay in the City of San Diego?	The purpose of TOT or SBEP funding in providing a program, services or benefits to City of San Diego businesses.	• 5 pts if City of SD businesses benefit
3.2B	Are clients low-income?	Organization target audience includes businesses in under-resourced areas.	• 3 pts for Goal A and "yes"
4.1 - 4.3	Does the organization indicate they understand the 3 insurance requirements?	Acknowledgement of conditions	• 3 pts if all boxes checked • If less than 3 "yes" responses, count highlights in red
4.4	Did leadership read the EDF Guidelines?	Acknowledgement of conditions	• 1 pt for "yes"
4.5	All certification of funds uses boxes checked?	Acknowledgement of conditions	• 2 pts if all boxes checked • If anything less than ALL responses are selected, 0 pts
4.6	Organization understands grant fund period	Acknowledgement of conditions	• 1 pt for "yes"
4.7	Organization understands EDD will perform a CA SOS search	Acknowledgement of conditions	• 1 pt for "yes"
4.8	Organization understands EDD will perform a CA FTB search	Acknowledgement of conditions	• 1 pt for "yes"

UPLOADS			
5.1	Organizational chart upload	Required documents	• 1 pt for upload
5.2	IRS Tax Exempt Letter upload	Required documents	• 1 pt for upload
5.3	CA Entity Status Letter upload	Required documents	• 1 pt for upload
5.4	IRS Tax Return upload	Required documents	• 1 pt for upload
STAFF REVIEW			
1.4 & 3.3B	Does the mission align with the selected goal?	The goal should be an outcome or activity the organization is familiar with.	<ul style="list-style-type: none"> • 5 pts if the mission clearly supports economic development and is closely aligned with the goal. • Step down towards 0 points as alignment becomes unclear
2.2 & 2.4A - 2.4C & 2.15 & 3.1	Does the Program/Project focus on achieving the goal?	EDD can only fund activities that address one of the goals.	<ul style="list-style-type: none"> • 5 pts if the program/project is clearly directed towards achieving the goal.
2.5 - 2.9	Does the proposed budget seem like it matches the organization's outcome goals?	Programs/Projects should not still be in development stages in order to stay on track for implementation in the FY.	<ul style="list-style-type: none"> Strong = 3 pts Moderate = 1 pt Minimal/None = 0 pts
2.10 & org chart upload	Does the Agency/Staff have the experience to carry out the Program/Project?	Programs/Projects should not still be in development stages in order to stay on track for implementation in the FY.	<ul style="list-style-type: none"> • Strongly Qualified (3 pts) = Managed several grants for over 5 yrs • Qualified (1 pt) = Managed grants for at least 1 yr • Minimal/None (0 pts) = No contract or grant management experience
2.12 & optional uploads	What is unique or innovative about the Program/Project?	Programs/Projects meet needs and demands of businesses and demonstrate potential for long term results.	<ul style="list-style-type: none"> Strong = 3 pts Moderate = 1 pt Minimal/None = 0 pts
2.13 & 3.2A	Are the targeted businesses appropriate based on the goal selected?	Programs/Projects must have defined beneficiaries that match the target beneficiaries of the goal selected.	<ul style="list-style-type: none"> • 5 pts if targeted businesses are appropriate and clearly identified. • Step down points if beneficiaries are not defined, unclear and/or unrelated to project goals.

2.15 & 3.1 & 3.2B	Are the targeted businesses or base sectors also targets of EDD's Economic Development Strategy?	EDD programs must relate back to the Economic Development Strategy.	<ul style="list-style-type: none"> • 5 pts if targeted businesses are targets of EDS. • Step down points if beneficiaries are undefined, unclear and/or unrelated to EDS.
3.4	How will the Program/Project meet one or more objectives?	Organizations must be able to define specific beneficial outcomes.	<ul style="list-style-type: none"> • 5 pts if what participants will learn or gain is clear and related to objectives. • Step down points if unclear and/or unrelated.
3.5	How does the Organization track its beneficial outcomes?	Organizations must be able to define progress in quarterly performance reports.	Strong = 3 pts Moderate = 1 pt Minimal/None = 0 pts
2.4A - 2.4C & 3.6	Is the Organization's method(s) and frequency of how they measure outcomes realistic?	Organizations must be able to describe how they measure outcomes.	<ul style="list-style-type: none"> • 3 pts if org clearly describes how outcomes will be measured • 1 pt if org somewhat describes how outcomes will be measured • 0 pts if description of how outcomes will be measured is not provided or is unclear
3.7	Does the Organization plan to collaborate to increase inclusion and program success?	EDD's Economic Development Strategy requires programs to be inclusive.	Strong = 3 pts Moderate = 1 pt Minimal/None = 0 pts
4.5	If any of the certification of funds boxes are NOT checked, is the application still eligible to continue?	Funds cannot be used for certain purposes per the EDF Guidelines.	No points possible here but if an alert of unchecked items is displayed, please review.



PART VII: GLOSSARY OF TERMS

Economic Development Funding Programs

Fiscal Year 2025 Guidelines



PART VII: GLOSSARY OF TERMS

General Terms

for services, rather than grants. An agreement details which “services” Organizations are going to provide to benefit businesses within the City of San Diego.

Authorized Signer

Dependent on the type and size of the Organization, the designated representative is either the Board President, the Executive Director, Program Administrator or any person who has direct contact with management or administration of the Organization or program and who will be responsible for ALL requirements of the Agreement.

Base and Non-Base Sector Businesses

Businesses in San Diego’s economic base sectors are in the following industries:

- Manufacturing & innovation (generally manufacturing, including craft goods, or life science, communications, cleantech, software, internet of things, and other new technologies businesses – may overlap with businesses that fall under “defense sector” in areas such as maritime, aerospace, cybersecurity, and unmanned systems)
- International trade/logistics (generally businesses engaged in exporting or facilitating international trade and cross-border commerce)
- Defense-related (generally prime and sub-contractors within the supply chain that provide goods and/or services to the Department of Defense)
- Tourism base sector (generally lodging businesses and other tourism-oriented businesses that depend primarily on business or leisure visitation from outside the San Diego region to generate revenue).

Businesses in other industries are considered to be non-base sector businesses. Additionally, within the City of San Diego, a small business is typically defined as a business with 12 or fewer employees. Please see the City of San Diego’s Economic Development Strategy for additional information on base sector businesses: https://www.sandiego.gov/sites/default/files/focused_economic_development_strategy.pdf

Board of Directors/Governance

The board of a nonprofit organization acts as trustees of the organization’s assets and ensures that the nonprofit is well managed and remains fiscally sound. In doing so, the board must exercise oversight of the organization’s operations and maintain the legal and ethical accountability of its staff and volunteers. According to nonprofit corporation law, each board member must meet certain standards of conduct. These standards are typically described as the following: 1) Duty of Care, 2) Duty of Loyalty and 3) Duty of Obedience.



1. “Duty of Care”: Board members must exercise ordinary and reasonable care in the performance of their duties, exhibiting honesty, independent judgment, and good faith. Board members must act in a manner which such care, including reasonable inquiry, as an ordinarily reasonable, and prudent person in a like position would use under similar circumstances.
2. “Duty of Loyalty”: When acting on behalf of the organization, board members must put the interests of the nonprofit before any personal or professional concerns and avoid any potential conflicts of interest. This means the board member can never use information obtained as a member for personal gain (self-dealing), but always act in the best interests of the organization.
3. “Duty of Obedience”: Board members must ensure that the organization complies with all applicable, federal, state, and local laws and regulations, and it remains committed to its established mission.

As fiduciaries of the organization, the board maintains oversight of the organization’s finances. Board members must evaluate financial policies, approve the annual budget, and review periodic reports to ensure that the organization has the necessary resources to carry out its mission and remains accountable to its donors and the public.

Community

A unified body of individuals; people with common interests living in a particular area; the physical boundaries of an area; a group of people with a common characteristic or interest living together within a larger society; the society at large.

Cooperation

Cooperation is a shorter-term informal relation that exists without any clearly defined mission, structure or planning. Cooperative partners share information only about the subject at hand. Each Organization retains authority and keeps resources separate.

Coordination

Coordination is characterized by a more formal relationship and understanding of missions. People involved in a coordination effort focus their longer-term interaction around a specific effort or program. Coordination requires some planning and division of roles and opens communication channels between Organizations.

Council Policy 100-04 (Americans with Disabilities Act/City Contractors)

Organization acknowledges and agrees that it is aware of and will comply with Title 24 of the California Code of Regulations (Title 24) and Council Policy 100-04, adopted by Resolution No. 282153 relating to the federally mandated Americans with Disabilities Act (ADA). When a conflict exists between Title 24 and the ADA, the Organization shall comply with the most restrictive requirement (i.e., that which provides the most access). Organizations will be individually responsible for their own ADA program.

Council Policy 100-07 (Drug-Free Work Place)

Organizations shall comply with City’s Drug-Free Workplace requirements set forth in Council Policy 100-17.



Diversity and Inclusion

Diversity refers to differences in race, gender, ethnicity, age, socioeconomic class, religion, sexual orientation, skills and abilities, and politics among other qualities. A diversity commitment is not to be confused with “quota” systems, equal employment opportunity or affirmative action practices. Instead, it asks Organizations to embrace an ongoing process that values and facilitates the inclusion of people of all backgrounds in all phases of the Organization’s growth and development and where the inherent worth and dignity of all people are recognized.

Equal Opportunity (Non-Discrimination Clause)

Organizations shall not discriminate on the basis of race, gender, gender identity, religion, national origin, ethnicity, sexual orientation, age or disability. Organizations shall comply with City’s Equal Opportunity Contracting Program (EOCP) Requirements. Organizations shall not discriminate against any employee or applicant for employment on any basis prohibited by law. Organizations shall provide equal opportunity in all employment practices. Organizations shall ensure that their subcontractors comply with this program.

Equal Benefits Ordinance

Organizations shall comply with the City’s Equal Benefits Ordinance (EBO) codified in the San Diego Municipal Code (SDMC), which requires employers to offer the same employment benefits to employees with spouses and employees with domestic partners.

Equal Pay Ordinance

Organizations shall comply with the City’s Equal Pay Ordinance codified in the San Diego Municipal Code (SDMC), requires employers to comply with the California Equal Pay Act and Fair Pay Act, codified in the California Labor Code section 1197.5. which states in pertinent part:

An employer shall not pay any of its employees at wage rates less than the rates paid to employees of the opposite sex or of another race or ethnicity for substantially similar work, when viewed as a composite of skill, effort, and responsibility, and performed under similar working conditions, except where the employer demonstrates the wage differential is based upon one or more of the following factors: a seniority system, a merit system, a system that measures earnings by quantity or quality of production, or a bona fide factor other than sex, such as education, training, or experience.

Financial Accounting Standard Board (FASB)

The Financial Accounting Standards Board (FASB) establishes standards of financial accounting and reporting for the private sector. These standards govern the preparation of financial reports and are officially recognized as authoritative by the Securities and Exchange Commission (Financial Reporting Release No. 1, Section 101) and the American Institute of Certified Public Accountants (Rule 203, Rules of Conduct, as amended May 1973 and May 1979).

Fiscal Sponsor

A Fiscal Sponsor or fiscal sponsorship is when a nonprofit organization provides fiduciary oversight, financial management, and other administrative services for a program or project. Fiscal sponsors cannot apply for Economic Development Funding Programs on behalf of a Program/Project.



General Operating Support

General Operating Support refers to the day-to-day operations of a nonprofit organization for the costs to sustain the organization's mission rather than specific projects or programs that meet the Goals of the Economic Development Funding Program. Proposals from organizations seeking funding for general operating support are not eligible for funding from the Economic Development Funding Programs.

Leveraging Funds

Using the City's Economic Development Funding Program as a means of attracting funds or grants from other sources and other types of financial support, such as private contributions, other local, state or federal government or earned income, is strongly recommended and encouraged.

Living Wage Ordinance

Organizations shall comply, and require each of its subcontractors to comply, with the provisions of the City's Living Wage Ordinance, codified in SDMC sections 22.4201 et seq., in performing its obligations and/or duties.

Organizational Support

Funding is restricted to the cost of implementing the Program/Project and associated administrative expenses and is not to be used for general organizational support.

Prevailing Wage Ordinance

Organizations shall comply, and require each of its subcontractors to comply, with the provisions of the City's Prevailing Wage Ordinance, codified in SDMC section 22.3019, in performing its obligations and/or duties.

Reimbursement

Funds are awarded on a cost reimbursable basis. All requests for reimbursement must be accompanied by copies of checks, invoices and bank statements/proof of payment as detailed in the Agreement. Funded Organizations are required to submit requests for reimbursement payments quarterly. One-twelfth (1/12) of the total award may be withheld until the Final Performance Report and any other required documents are submitted. Organizations may not submit a request for reimbursement for the entire grant amount at any one time.

Reports – Financial and Performance

Performance reports will be required quarterly detailing the funded Organization's performance of the Scope of Services, i.e., how Program/Project Objectives were met and measured, as outlined in the Agreement. Financial reports shall be provided to the City as required per the Agreement.

Note: Deficiencies in reporting, as required per a current Agreement, will be taken into consideration when scoring applications and will negatively impact application scores. Reporting deficiencies that carry over into a new Agreement will result in delayed or canceled payments.

Transient Occupancy Tax

The Transient Occupancy Tax (TOT) is a 10.5 percent City of San Diego tax on hotel/motel rooms and is governed by City Council Policy 100-03.



Budget Terms

The following definitions will assist you in completing the Program/Project Excel worksheets for the FY2025.

Program/Project Budget Revenue

1. – 4. Projected revenue from all sources including Contributions (grants and appropriations from public or private sources, individual monetary contributions/donations, membership dues, sponsorships, underwriting, other fundraising) and Earned Income (Fees, contracted services, sales/concessions, investment income, other) associated with the Program/Project and identified by source:

1. "This Application Funding Request"
2. "City – Other Sources Funding"
3. "Anticipated Fee Income"
4. "Non-City Funding".

Expenses

Personnel

Includes salaries, wages, taxes and benefits for employees. If requesting reimbursement for these expenses, the Organization must be able to document specific expenses and proof of payment.

5. Salaries/Wages - Limited to eligible work performed directly by executive directors, business managers, development staff, clerical, etc.
6. Taxes - Employer taxes, etc.
7. Benefits - Cost of dental, health insurance, 401(K), incentives, etc.

Program Contractual Services

8. Contract for service expenses such as consulting fees or other services provided to the Organization by a subcontractor for implementation of the Program/Project.

Accounting/Audit Services

9. Share of costs for professional services to appropriately account for Program/Project revenue and expenses and prepare City-required financial statements.

Space Rental

10. Rental of meeting space or facility fees for seminars, workshops or training, or proportional share of office space rent.

Utilities

11. Electricity/gas, water, or other charges associated with office occupancy.



Phone/Computer/Internet

12. Phone, computer, internet charges associated with an office or facility utilized for Program/project.

Printing

13. Costs for copies or printing required for Program/Project implementation. Does not include graphic design.

Outreach/PR/Advertising

14. Advertising, marketing, publicity and promotion and related items, includes postage but not payments to staff or consultants.

Supplies

15. Office and related supplies not promotional in nature.

Insurance

16. Share of premiums for City-required insurance

Other

17. Complete a schedule of expenses. Include miscellaneous expenses not covered above.

Statement of Activities Revenue

Revenue from all sources including Contributions (grants and appropriations from public or private sources, individual monetary contributions/donations, membership dues, sponsorships, underwriting, other fundraising) and Earned Income (Fees, contracted services, sales/concessions, investment income, other).

Contributions

Cash support from grants and/or appropriations from:

1. Federal Government;
2. State Government;
3. County;
4. Foundations (private, business or community);
5. City of San Diego Funding (other than Economic Development Funding);
6. Economic Development Funding.
7. Individual Contributions: Cash support from private individuals (i.e. donations from patrons, board, etc.)
8. Memberships: Cash support (usually dues) from customers who receive membership privileges.
9. Fund Raising: Include gross proceeds from benefits, or other special events. Include contributions



Budget Terms

from guilds and auxiliaries. Do not include revenue from bookstores, restaurants or other non-program related activities. These should be listed as earned revenue.

10. Other: Sponsorships, underwriting, funding from other cities, and any other contribution not mentioned above.

Earned Income

11. Fees: Revenue (usually from individuals) generated from the performance of services such as, workshops, consultations, event admissions, subscriptions, etc.
12. Contracted Services: Revenue (usually from an Organization) generated from the sale of services, such as training, workshop facilitation, etc.
13. Product Sales/Concessions: Revenue generated from the sale of materials or hard goods, such as gift store items, t-shirts, advertising space in programs, parking, etc.
14. Investment Income: Dividends, interest and other income, if and only if, utilized for operational support, including endowment funds if used for operations.
15. Other: Other sources, if any, such as net revenue from bookstores, restaurants, facilities rental or other non-program related activities.



FY2025 ED FUNDING PROGRAM APPLICATION SCHEDULE

Dec 11, 2023	Grant guidelines published and online application period open for FY2025 ED Funding cycle.
Dec 13, 2023 1:00 p.m. - 2:30 p.m.	*Virtual informational session to review grant guidelines and application
Jan 10, 2024 1:00 p.m. - 2:30 p.m.	*Virtual informational session to review grant guidelines and application
Jan 16, 2024 5:00 p.m.	Cut-off date for questions re: ED Funding Program application
Jan 19, 2024 5:00 p.m.	Applications due no later than 5:00 p.m. No late applications will be accepted.
Jan 2024 - Mar 2024	Review of qualified grant applications and selection process.
Jun 2024 - Jul 2024	Results announced to applicant organizations.
Jul 2024 - Sept 2024	Final awards confirmed and agreements sent out to organizations.

*A representative from the applicant organization is required to attend one (1) informational session to meet grant requirements.

