



FY 2026 CDBG Agreement Execution Virtual Workshop

Agenda

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

Background

#	Activity	Amount
46	RFP responses forwarded to CPAB for review	
23	FY 2026 CDBG projects proposed to be awarded	\$4,340,491
9	Public Services	\$1,340,024
10	CED - Technical Assistance	\$2,071,520
4	Nonprofit Capital Improvement - Facilities	\$928,947

CDBG Agreement Execution Handbook



City of San Diego FY 2026 CDBG Agreement Execution Handbook

TABLE OF CONTENTS

I. BACKGROUND & INTRODUCTION	1
II. ED GRANTS NAVIGATION & INSTRUCTIONS	2
III. TIMELINESS & CONSEQUENCES	6
IV. GENERAL SCHEDULE	6
V. DEFINITION OF TERMS	6
VI. SUPPORTING DOCUMENTS & CITY-PROVIDED FORMS	34
VII. ATTACHMENTS	36
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, LRO Packet/Sample Board Authorizations	16
5. Acronyms & Abbreviations	16

Scope of Work Review

The City of **SAN DIEGO** Economic Development Grants Management System

Community Portal

NOFAs Applications **Projects** Post Awards

Search

Search... Q

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

San Diego.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 Goals and Outcomes

Consolidated Plan Goal	Strategic 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.	Goal 1: Objective 1
HUD Matrix Code	CDBG Citation
DSO Youth Services	\$70,202
National Objective	Objective Category
LMC	Suitable Living Environment
Outcome Category	Outcome Indicator
Availability/Accessibility	People
Annual Units	YTD Target Accomplished
100	
Programmatic Report (MPR)	Outcome Progress
PS & CG	0%

Project Details

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

Progress Bar: Created → **Recipient Review** → Grantor Review → Under Approval → Issued → Amended

Tabs: Overview | Budget | **Scope of Work** | Scheduling | Reports | Agreement Checklist | Attachments | Certifications | +

Project Goals and Outcomes

Project Details

- Project Description
Test
- Target Population
Test
- Project Outcome
Test
- Project Activities
Test

Buttons: Send to Grantor | View Agreement | Edit

Scope of Work Review

The screenshot displays a web application interface for reviewing a project's scope of work. On the left is a sidebar with navigation links: Tasks, My Tasks, Pending Tasks, Completed Tasks, Activities, My Organization/Profile, Manage Organization Profile, View User, Manage P, and a section with icons for Rec, Tech, Contact U, FAQs, Resource, and a Usefi link. The main content area features a top progress bar with stages: Created, Recipient Review (active), Grants Review, Under Approval, Issued, and Amended. Below the progress bar are tabs: Overview, Budget, Scope of Work (selected), Scheduling, Reports, Agreement Checklist, Attachments, and Certifications. The 'Scope of Work' tab shows 'Project Goals and Outcomes' with a '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...) and a 'Strategic Plan Goal' (Goal 1: Objective 1). At the bottom, a 'Comments' section contains a text input field, an 'Add Comment' button, and a comment from Stephen Maduli-Williams (SM) stating 'Review scope and budget per instructions.' and 'Commented 2 minutes ago'.

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.

Budget Review

The City of **SAN DIEGO** Economic Development Grants Management System

Community Portal

Navigation: NCOAs 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-PY18-002 Version No.: 1 Status: Pending Recipient Update Agreement Term: 7/1/2017 To 6/30/2018

Workflow: Creation (2) Recipient Revision (2) Director Revision (0) Under Approval (0) Issued (0) Amended (0)

Overview **Budget** Scope of Work Scheduling Reports Agreement Checklist Attachments Certifications +

Project Financials

Prior Allocated Amount	Allocated Amount this Action	Total Allocated Amount
\$0	\$177,000	\$177,000
YTD Reimbursement	Remaining Amount	Burn Rate
\$0	\$177,000	0%

Total Project Budget Information by Funding Sources

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 Vietnam 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 Cammyer, 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	🔍

Budget Review

The City of **SAN DIEGO** Economic Development Grants Management System Community Portal

NOFAs Applications **Projects** Post Awards

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	\$1,500.00	\$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	

Budget Review

Edit

Budget Category: NPE: Dir...





























Title

Direct Program Deliv...

Edit

Budget Category: PE: Salary and Wages



New

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

50.00

New

Budget Review

The screenshot displays the 'Budget Review' section of the GovGrants portal. On the left is a navigation sidebar with categories: 'My Tasks' (containing 'Pending Tasks' and 'Completed Tasks'), 'Activities' (highlighted), 'My Organization/Profile' (containing 'Manage Organization Profile', 'View Users', and 'Manage Profile'), 'Recent Items', 'Technical Support' (containing 'Contact Us', 'FAQs', and 'Resources'), and 'Useful Links'. The main content area is titled 'Total Project's Secured Funding Information' and includes a note: 'Note: This value is automatically computed'. Below this, it shows 'Leverage of secured funding percentage' as '81.06%'. Action buttons 'Send to Grantor', 'View Agreement', and 'Edit' are located on the right. A 'Comments' section follows, featuring a text input field and an 'Add Comment' button. A comment from 'Stephen Maduli-Williams' (initials SM) is shown, stating 'Review scope and budget per instructions.' and 'Commented 2 minutes ago'. The footer contains the 'GovGrants' logo, the text 'Sandiego.gov | Privacy Policy | Disclaimers | Accessibility', and an orange arrow icon.

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'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](#)

Stephen Maduli-Williams
Review scope and budget per instructions.
Commented 2 minutes ago


GovGrants
SANDIEGO GOVT. GRANTS

Sandiego.gov | [Privacy Policy](#) | [Disclaimers](#) | [Accessibility](#)

Budget Review



The City of **SAN DIEGO** Economic Development Grants Management System  Community Portal 


[NOFAs](#) [Applications](#) [Projects](#) [Post Awards](#)


Search  Total records: 30




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 


San Diego gov 


14	NPE: Federally Appr...	\$0.00	\$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	\$0.00	
16	NPE: Construction M...	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	


Budget Review


The City of **SAN DIEGO** Economic Development Grants Management System  Community Portal 


[NCFAs](#) [Applications](#) [Projects](#) [Post Awards](#)

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 

San Diego 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	\$345,890.00	\$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	\$18,900.00	\$0.00	\$0.00	
7	NPE: Publications/Pr...	\$0.00	\$0.00	\$0.00	\$1,500.00	\$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	

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

Budget Review

- Review instructions in 'Comments' field
- Utilize the Execution Handbook for narrative format
- 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 or refinements to the budget can be made.

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)

Supporting Documents: Index

Refer to the table below for a listing and description of the attachments to be uploaded to ED Grants for the CDBG agreement to be executed between the subrecipient and the City of San Diego. Note that some attachments are required only for certain project types. Some attachments consist of a City-provided form 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 ¹	Applicable RFP Category			Naming Convention ²
					IS	ISPS	CU	
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). PURPOSE: 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). PURPOSE: 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

Supporting Documents: ED Grants

The screenshot displays the 'Economic Development Grants Management System' interface. The main content area shows the 'Microlending Program' with a project ID of 'CED-PY24-008'. A red circle highlights the 'Agreement Checklist' tab in the navigation bar. An 'Attach' modal window is open, showing the 'Overview' tab with options to 'Upload file from Computer' or 'Upload file from Workspace'. The modal includes a dropdown menu for 'Attached' (set to 'N/A') and a text area for 'Comments'. A 'Save' button is located at the bottom right of the modal.

#	City Form Download	City Form Description	Required	Subscriber Document Attached
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

Supporting Documents: ED Grants

The screenshot displays the 'Economic Development Grants Management System' interface for 'The City of SAN DIEGO'. The main header includes the city logo, the system name, and a 'Community Portal' link. The navigation bar shows tabs for 'NOFAs', 'Applications', 'Projects', and 'Post Awards'. The left sidebar contains a search bar and various task and activity links. The main content area shows a 'Version View' for 'College Town - Expanded Services' with a project ID of 'CG-FY18-002'. A progress bar indicates the current stage is 'Recipient Revision'. Below the progress bar, a tabbed interface includes 'Overview', 'Budget', 'Scope of Work', 'Scheduling', 'Reports', 'Agreement Checklist', 'Attachments' (highlighted with a red circle), and 'Certifications'. The 'Attachments' tab displays a table of documents.

Attachment Name	Type	Description	Last Modified	Owner	Action
Org Chart - College Town 2017-01...	Updated Org Chart-Divisi...	Division Chart	04/06/2018 2:05AM	EDGrants Admin	[Icons]
2a FY 2018 Certification Regardin...	FY 2018 Certification Reg...	RFP Submission	04/06/2018 2:05AM	EDGrants Admin	[Icons]
Org Chart -Entire Agency 2017-01...	Updated Org Chart-Entire...	Entire agency	04/06/2018 2:05AM	EDGrants Admin	[Icons]
1 FY 2018 Certification Regarding...	FY 2018 Certification Reg...	Secured Funding	04/06/2018 2:05AM	EDGrants Admin	[Icons]
3 FY 2018 Questionnaire Regard...	FY 2018 Questionnaire R...	Conflict of Interest	04/06/2018 2:05AM	EDGrants Admin	[Icons]

Supporting Documents: Insurance

The City of
SAN DIEGO

Purchasing & Contracting Insurance Checklist

Endorsements for Commercial General Liability	
<input type="checkbox"/>	1. All Endorsements must have the policy number(s) printed on them.
<input type="checkbox"/>	2. All endorsements are to cover The City, its officers, officials, employees, and volunteers in addition to items on the CGL policy.
<input type="checkbox"/>	3. Additional Insured Coverage can be provided in the form of the following:
<input type="checkbox"/>	A. ISO Forms CO 20 10 is \$5 or if not available;
<input type="checkbox"/>	B. The addition of <u>both</u> CO 20 10, CO 20 26, CO 20 33, or CO 20 28, <u>and</u> CO 20 30.
<input type="checkbox"/>	C. A Blanket Additional Insured Endorsement is acceptable as
<input type="checkbox"/>	D. The page in the policy that provides Additional Insured coverage when required by contract.
<input type="checkbox"/>	4. Primary Coverage can be provided in the following form Endorsements:
<input type="checkbox"/>	A. At least as broad as ISO CO 20 03 01 11 or coverage at least as broad.
<input type="checkbox"/>	B. The page in the policy that provides Primary & Non-Contributory coverage when required by contract.

Endorsements for Workers Compensation	
<input type="checkbox"/>	1. All Endorsements must have the policy number(s) printed on them.
<input type="checkbox"/>	2. The following endorsement is required:
<input type="checkbox"/>	A. Worker of Subrogation Endorsement. Endorsement must be applicable in the state of California.

Acceptability of Insurers	
<input type="checkbox"/>	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 04, 2003

The City of
SAN DIEGO

Purchasing & Contracting Insurance Checklist

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

Certificate of Insurance	
<input type="checkbox"/>	1. The full name of the party to the contract must be listed as the insured.
<input type="checkbox"/>	2. All Policies must be current.
<input type="checkbox"/>	3. All coverage limits required in the contract must be reflected on the Certificate of Insurance.
<input type="checkbox"/>	A. Commercial General Liability with a current policy term and limits as stated in the General Contract Terms and Provisions of the contract. The City's minimum limits are \$5 million per Occurrence and \$1 million General Aggregate. However, be sure to confirm that coverage limits reflected below the contract requirements.
<input type="checkbox"/>	i. For Commercial General Liability, the occurrence limit must be (X) marked.
<input type="checkbox"/>	B. Automobile Liability with a current policy term and limit of \$5 million Combined Single Limit. Coverage must reflect what is stated in the General Terms and Provisions of your contract.
<input type="checkbox"/>	C. Workers Compensation with a current policy term and limits of \$1 million. Coverage must reflect what is stated in the General Terms and Provisions of your contract.
<input type="checkbox"/>	i. For Workers Compensation, the subrogation box must be (X) marked.
<input type="checkbox"/>	D. Professional Liability (Errors & Omissions) for Consultant contracts. Certificate of Insurance appropriate for Contractor's profession with a minimum limit of \$1 million per Occurrence or claim and \$1 million Aggregate.
<input type="checkbox"/>	4. The bottom part of the Actual Certificate of Insurance must have an Authorized Representative's signature.
<input type="checkbox"/>	5. Certificate Holder must be: City of San Diego and the corresponding department, or just the City of San Diego.

Endorsements are modifications to the policy. You must ensure you have the original 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 04, 2003

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.

Supporting Documents: Board of Directors Authorization

- Use **only** the 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

Approved at a Board Meeting

5. 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
_____	President/CEO	_____
_____	Secretary	_____
_____	Chief Financial Officer	_____

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 in the implementation of the Agreement are signed by or on behalf of the Corporation and/or any other parties 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

[Redacted]

1010542 2

**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 proposed first 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:

- The undersigned is the duly elected and acting Secretary of the Corporation;
- 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, **[by unanimous written consent in lieu of a meeting, as of [TO BE DETERMINED], 2018, at a meeting of the directors on [TO BE DETERMINED], 2018]**, 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 in 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 **[by unanimous written consent in lieu of a meeting, as of [TO BE DETERMINED], 2018, at a meeting of the directors on [TO BE DETERMINED], 2018]**; or exactly the terms 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, repealed, rescinded, amended or revoked since their adoption.

[Continued on following page]

1010542 1

Unanimous Written Consent

This [written consent may be signed in counterparts, resolution] is effective as of **[TO BE DETERMINED]**, 2013, and is made pursuant to California Corporations Code Section 7212(b), authorizing the taking of action by unanimous written consent of the Board of Directors of the Corporation without a meeting. [The undersigned members of the Board of Directors of the Corporation hereby ratify and affirm the actions taken and resolutions adopted by this written consent, whether provided by law or the Bylaws of the Corporation.] This [written consent resolution] shall be filed with the minutes of the Board of Directors of the Corporation.

Directors:

_____	_____
Typed Name	Typed Name
_____	_____
Typed Name	Typed Name
_____	_____
Typed Name	Typed Name

1010542

A-2

EXHIBIT A

[UNANIMOUS WRITTEN CONSENT - RESOLUTION] OF THE BOARD OF DIRECTORS OF [TO BE DETERMINED], INC.

The undersigned, being all of the members of the Board of Directors of **[TO BE DETERMINED], Inc.**, a California non-profit public benefit corporation ("Corporation"), by signing this written consent pursuant to California Corporations Code Section 5213(b), take the following actions and adopt the following resolutions:

WHEREAS, the Corporation intends to submit a proposal to the City of San Diego, a California municipal corporation ("City"), for Community Development Block Grant ("CDBG") funding from the City for the City's 2019 fiscal year; and

WHEREAS, if the Corporation is allocated CDBG funding from City for the City's 2019 fiscal year, the Corporation intends to enter into that certain Fiscal Year 2019 City of San Diego Community Development Block Grant Program Subsidized Agreement, dated as of July 1, 2018 ("Agreement"), with the City;

IT IS RESOLVED, by the Board of Directors of the Corporation, that the officers of the Corporation are authorized to submit a proposal on behalf of the Corporation to the City to obtain CDBG funding from the City for the City's 2019 fiscal year; and

IT IS RESOLVED FURTHER, by the Board of Directors of the Corporation, that if the Corporation is allocated CDBG funding from the City for the City's 2019 fiscal year, the Corporation entering into the Agreement is authorized, ratified and approved; and

IT IS RESOLVED FURTHER, by the Board of Directors of the Corporation, that if the Corporation is allocated CDBG funding from the City for the City's 2019 fiscal year, the officers of the Corporation are authorized to: (a) sign, enter into, and deliver the Agreement on behalf of the Corporation; and (b) take all actions necessary or reasonably desirable on behalf of the Corporation to perform the Corporation's obligations and duties under the Agreement and consummate the transactions contemplated in the Agreement.

[Continued on following page]

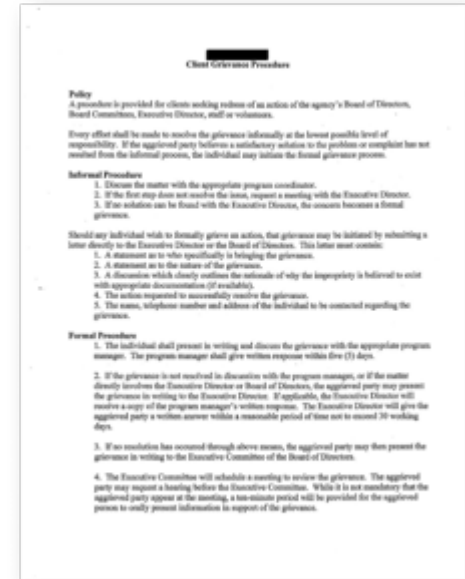
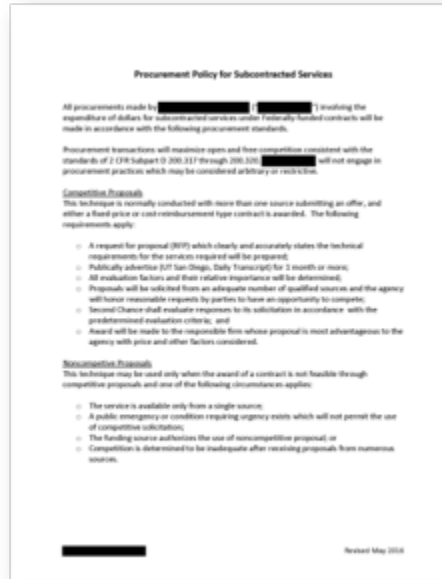
Supporting Documents: Policies & Procedures

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

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

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

Supporting Documents: Policies & Procedures



Supporting Documents: Policies & Procedures

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

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

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 5 years of \$500k or more
- Requires living wage benefits for employment activities or non-managerial/non-supervisory services:
 - i.e. childcare, janitorial services, on-site food preparation/service, office/clerical, right of way maintenance (includes other service types consistent with intent of ordinance)

LWO Employer Requirements

Pay LW Rates

- FY26: \$21.06 (\$17.67 hourly + \$3.39 health benefits)

Provide Leave Time

- 80 hours of compensated leave (PTO, vacation, sick)
- 80 hours of uncompensated leave (job protected, unpaid)

Notify Employees

- Written notice to all covered employees July 1st

Reports & Records

- Submit certified payrolls and provide records for compliance audits
- Certification of Compliance
- Annual compliance report

Job-Site Postings

- Post LWO rates and notices at workplace or where duties are conducted

LWO Exemptions – Contractor Exemption Basis

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

Contact Information

City of San Diego
Living Wage Program

ContactLWO@sandiego.gov

sandiego.gov/compliance/labor-standards-enforcement/living-wage

(619) 236-6084

Agreement Execution Process




ED Grants & Primary Representative

The City of
SAN DIEGO

Agreement Execution

You will learn:





































- How to review and edit a draft CDBG agreement in ED Grants
- How to add milestones/tasks and target dates to the project schedule of a draft CDBG agreement in ED Grants
- How to edit your organization's Board of Directors information in ED Grants
- How to approve (electronically sign) a CDBG agreement in ED Grants

Step	Description	Screenshot
1	Log into http://edgrants.force.com using the credentials for either the Primary Representative or Secondary Representative of your organization. NOTE: While both the Primary Representative and Secondary Representative are able to work on the draft CDBG agreement, only the Primary Representative will be able to officially approve it and send the draft back to the City. ED Grants is optimized to function using the Google Chrome browser.	



Board of Directors Update

The screenshot displays the 'Economic Development Grants Management System' interface for 'The City of SAN DIEGO'. The main header includes navigation tabs for 'MOFAs', 'Applications', 'Projects', and 'Post Awards'. The left sidebar contains a search bar and a list of navigation items: 'Tasks', 'My Tasks', 'Activities', 'My Organization Profile', 'Manage Organization Profile', 'Recent Items', 'Technical Support', and 'Useful Links'. The 'My Organization Profile' and 'Manage Organization Profile' items are circled in red. The main content area shows the 'Organization Reality Changers' details, including 'Code: RG-002220', 'Registered Date: 01/23/2017 05:11 PM', 'Organization Type: Non-Profit', and 'DUNS: 830411604'. Below this, there are tabs for 'Overview', 'Related', and 'Board of Directors', with the 'Board of Directors' tab circled in red. The 'Board of Directors' tab displays a table with the following data:

First Name	Last Name	Board Position	Profession/Affiliation	Membership Duration	Actions
Celia	Lanning	Member	Wells Fargo	3	  
Christopher	Yanov	Member	Founder & President	16	  
Dana	Saxen	Member	Long-time RC Supporter	1	  
Daniel	Noriega	Member	Reality Changers Graduate	1	  
Deanne	Arreola	Member	Community Representative	1	  
James	McElroy	Vice Chair/Vice President	Civil Rights Attorney	1	  
Karen	Cabello	Secretary	Parent Representative	1	  
Ken	Nwadike Jr.	Member	Founder of the Free Hugs Project	1	  
Kimberley	Phillips Boehm	Chair/President	Former Provost of Mills College	1	  
Lisa	Davidson	Member	Director of Customer Programs at ...	1	  
Marcia	Celorio	Member	Consul General of Mexico in San ...	1	  
Nicole	DeBerg	Treasurer	COO of the J. Craig Venter Institute	1	  

Project Contacts Update

The screenshot displays the 'Economic Development Grants Management System' interface. The left sidebar contains navigation options, with 'Manage Organization Profile' highlighted. The main content area shows the 'Organization Reality Changers' profile with tabs for 'Overview', 'Related Log', and 'Board of Directors'. Below this, the 'Contacts' section is visible, featuring a table of contact information.

Organization Profile: Reality Changers

Code	Registered Date	Organization Type	DUNS
RG-000220	01/23/2017 05:11 PM	Non-Profit	830411604

Contacts Table:

Full Name	User Role	Email	Business Phone	Status	Is User	KeyContact	Actions
Theresa Cunningham	Primary	sdrecipients@gmail.c...	(619) 516-2222	Active	✓	✓	[Icons]
Ashley Morgan	Secondary	ashley=realchanger...	(619) 516-2217	Active	✓	✗	[Icons]
Theresa Cunningham	Primary	sdrecipients@gmail.c...	(619) 516-2231	Active	✗	✗	[Icons]

Schedule

Date	Activity
5/29	Virtual CDBG Agreement Execution Workshop Recorded
5/30 – 7/1	Conduct and complete environmental review (City staff only)
5/30 – 7/1	Collect and upload required documents to ED Grants
5/30 – 6/6	City Staff provides scope of work and budget narratives/allocations for review
6/9 – 6/20	Review and revise scope of work and budget narratives/allocations
7/1	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

The City's Operating Principals

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

We are here to serve and assist you.

Contact Information

City of San Diego
Community Development
Block Grant Program

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

CDBG@sandiego.gov
(619) 236-6700



Questions?