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# FY2027 CDBG Agreement Execution Virtual Workshop

# Agenda

1. Overview
  2. Agreement Execution Process
  3. Timeline
  4. ED Grants Overview
  5. Scope of Work Review
  6. Budget Review
  7. Required Supporting Documents
  8. Living Wage Ordinance Overview
  9. Common Issues to Avoid
  10. Next Steps
  11. Questions
-

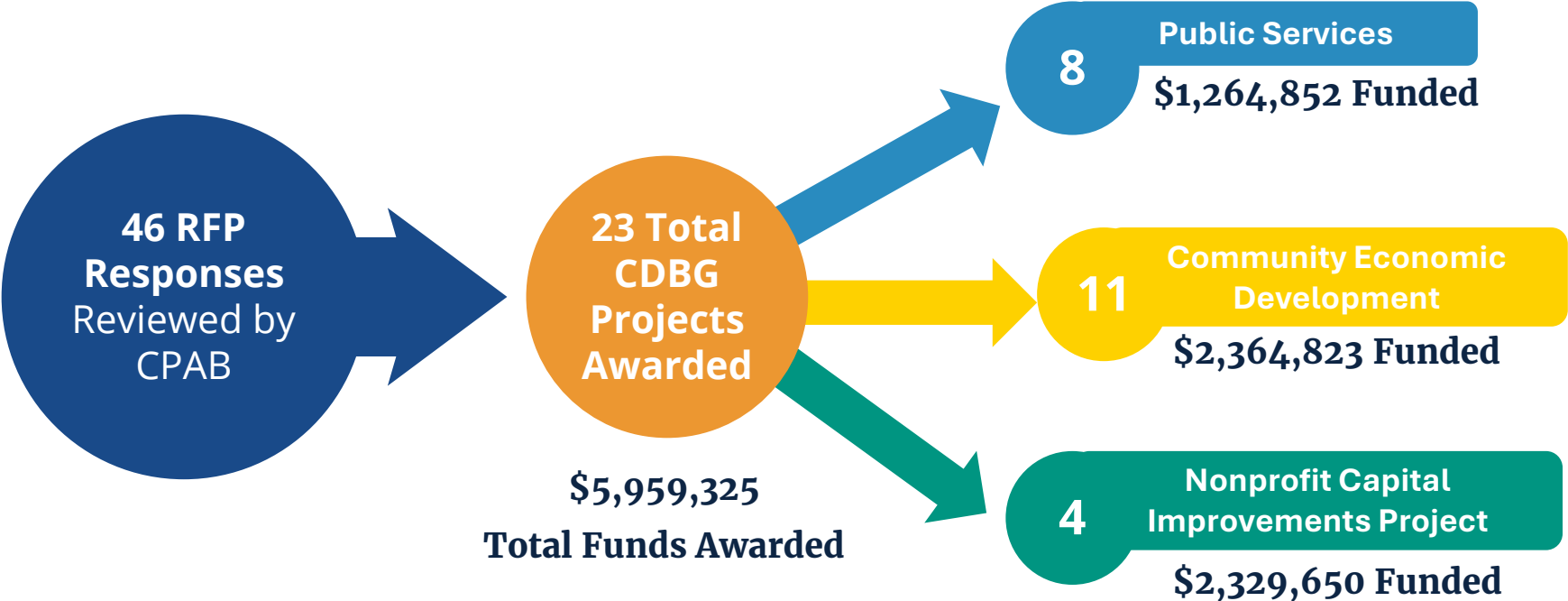
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# Overview



- CDBG is a federal **HUD program** that helps the City invest in community services, economic opportunity, neighborhood improvements, and facilities that benefit low- and moderate-income communities.
- The **Subrecipient Agreement** is the formal document that allows the City to reimburse eligible CDBG costs.
- The Agreement establishes the approved scope, budget, performance targets, reporting requirements, and compliance obligations.

# FY 2027 NOFA Results



# Agreement Execution Process

## Confirm Contacts

Who needs access and approval authority

## Review Agreement

Scope, budget, and project details

## Final Approval

Agreement signed before project start

## Prepare Documents

Required forms and supporting materials

## Submit Revisions

Upload documents and respond to comments

Project Start by July 1

# Timeline

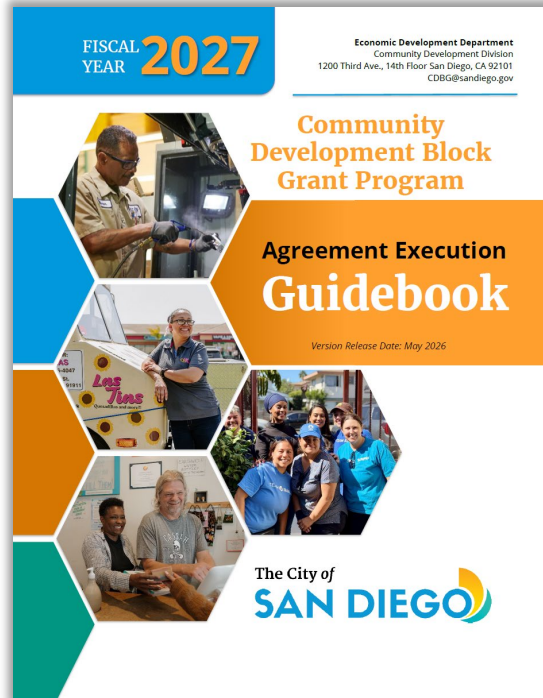
Date	Activity
May 19	Virtual CDBG Agreement Execution Workshop
May - June	Environmental review, City staff only
May 26 - June 12	Subrecipients review scope/budget and upload required documents
June 15 - June 22	City review, comments, and corrections
June 23 - June 30	Agreements are finalized and routed through ED Grants for signature
July 1	Target project start date
Early August	Virtual CDBG Reporting Workshop




**Important:** Agreement execution should be completed before July 1 whenever possible.

Delays may affect project start, reimbursement eligibility, and HUD timeliness.

# CDBG Agreement Execution Guidebook



Fiscal Year 2027 CDBG Agreement Execution Guidebook 

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5. Sample Written Policies & Procedures	
6. Living Wage Ordinance Packet	
7. Sample Board Authorizations	

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# **ED Grants Overview**

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# Accessing ED Grants

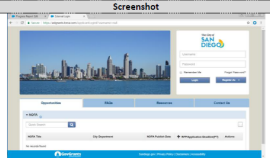
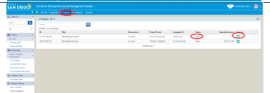
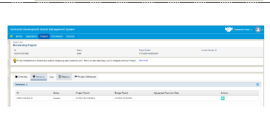


The City of  
**SAN DIEGO**

## 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 <a href="#">ED Grants</a> using the credentials for either the Primary Representative or Secondary Representative of your organization. <b>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.</b>	
2	Go to the 'Projects' tab. Look for the project containing 'Draft' in the 'Status' column. Click on the corresponding eyeball icon (👁️) under the 'Actions' column to open it.	
3	Go to the 'Versions' tab. Look for the project containing 'Created' in the 'Status' column. Click on the corresponding eyeball icon (👁️) under the 'Actions' column to open it.	

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## Community Development Block Grant Program

CDBG Home

General Information

Grant Application Process and Regulations

Consolidated Plan Advisory Board

Fair Housing

The Nonprofit Academy

### Community Development Block Grant Application Process

*(updated May 5, 2026)*

**Community Development Block Grant (CDBG)**

The **Community Development Block Grant (CDBG)** is a U.S. Department of Housing and Urban Development (HUD) Entitlement Grant that the City receives to develop viable urban communities by providing decent housing and a suitable living environment, and by expanding economic opportunities, principally for low- and moderate-income persons. The City of San Diego Economic Development Department administers these funds to partner organizations to support projects and programs that serve City of San Diego communities. Interested organizations can apply for this funding on an annual basis via the CDBG Annual NOFA process.

Click below to access:

[ED Grants](#)

The **Community Development Block Grant (CDBG)** is a U.S. Department of Housing and Urban Development (HUD) Entitlement Grant that the City receives to develop viable urban communities by providing decent housing and a suitable living environment, and by expanding economic opportunities, principally for low- and moderate-income persons. The City of San Diego Economic Development Department administers these funds to partner organizations to support projects and programs that serve City of San Diego communities. Interested organizations can apply for this funding on an annual basis via the CDBG Annual NOFA process.



**CDBG Annual NOFA**

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**Step 1:**








**Confirm Contacts and  
Authorized Signers**

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# Confirm Contacts and Authorized Signers

The screenshot displays the 'Economic Development Grants Management System' interface for 'The City of SAN DIEGO'. The main content area shows details for the organization 'Reality Changers', including its code (RG-000220), registered date (01/23/2017 05:11 PM), organization type (Non-Profit), and DUNS number (830411604). The 'Overview' tab is selected in the navigation menu. A red circle highlights the 'Overview' tab, and another red circle highlights the 'Manage Organization Profile' link in the left sidebar.

The 'Contacts' section is expanded, showing a table of users associated with the organization. The table has the following columns: Full Name, User Role, Email, Business Phone, Status, Is User, KeyContact, and Actions.

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

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**Step 2:**

**Verify Board of Directors**

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# Verify Board of Directors

The screenshot displays the 'Economic Development Grants Management System' interface for 'The City of SAN DIEGO'. The main content area shows details for the organization 'Realty Changers', including its Code (RG-002220), Registered Date (01/23/2017 05:11 PM), Organization Type (Non-Profit), and DUNS number (830411604). Below this, there are tabs for 'Overview', 'Related', and 'Board of Directors', with the latter being selected and circled in red. The 'Board of Directors' section contains a table with the following data:

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

On the left sidebar, the 'My Organization Profile' and 'Manage Organization Profile' links are also circled in red.

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**Step 3:**  
**Review Scope of Work**

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# Scope of Work Review

## Your approved Scope of Work determines:

- Who may be served
- What activities may be reimbursed
- What outcomes will be tracked
- What documentation must be maintained
- How the City will review monthly reports and monitoring files



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

# Revision Examples



## Generally Acceptable Refinements

Clarifying target population language

Clarifying service/activity descriptions for consistency

Aligning wording with the approved RFP proposal

Adjusting budget narratives to better describe eligible costs

Reallocating ineligible costs to eligible approved line items, if approved by City staff



## Generally Not Acceptable

Changing the core project model

Serving a materially different population

Adding major activities not included in the RFP

Moving funds into unrelated cost categories

Reducing or changing approved outcomes without City approval

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# Other Scope of Work Notes

## NCIP Projects

- HUD procurement and labor standards apply
- No work can start until City approval
- Project registration with the Department of Industrial Relations must be completed
- Certified Payroll is required

## Subcontractors/ Consultants

- Coordinate with Project Manger before executing agreements
- Confirm costs are eligible before claiming reimbursement

# Review Scope of Work

The screenshot displays the 'Economic Development Grants Management System' interface for the City of San Diego. The main content area is titled 'College Town - Expanded Services' and shows a project ID of CG-FY18-002, version 1, with a status of 'Pending Recipient Update' and an agreement term from 7/1/2017 to 6/30/2018. A progress bar indicates the current stage is 'Recipient Revision'. The 'Scope of Work' tab is active, showing project goals and outcomes. The 'Consolidated Plan Goal' is '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.' The 'Strategic Plan Goal' is 'Goal 1: Objective 1'. The HUD Matrix Code is 'DD Youth Services', the CDBG Citation is '\$70,202', the National Objective is 'LMC', the Objective Category is 'Suitable Living Environment', the Outcome Category is 'Availability/Accessibility', the Outcome Indicator is 'People', the Annual Units are '100', the YTD Target Accomplished is '0%', the Programmatic Report (MPR) is 'PS & CG', and the Outcome Progress is '0%'. The left sidebar contains navigation options like 'Tasks', 'My Tasks', 'Activities', 'My Organization Profile', 'Recent Items', and 'Technical Support'. The top navigation bar includes 'NOFAs', 'Applications', 'Projects', and 'Post Awards'.

# Review Scope of Work

The screenshot displays the 'Economic Development Grants Management System' interface for the City of San Diego. The main content area is titled 'College Town - Expanded Services' and shows a project ID of CG-FY18-002. The status is 'Pending Recipient Update' and the agreement term is from 7/1/2017 to 6/30/2018. A progress bar indicates the current stage is 'Recipient Revision'. The 'Scope of Work' tab is active, showing project goals and outcomes. The consolidated plan goal is to invest in community services and non-profit facilities. The HUD Matrix Code is DSD Youth Services, and the national objective is LMC. The outcome category is Availability/Accessibility, with 100 annual units and a programmatic report (MPR) of PS & CG. The strategic plan goal is Goal 1: Objective 1, with a CDBG citation of \$70,202, objective category of Suitable Living Environment, and outcome indicator of People. The YTD target accomplished is 0%.

Field	Value
Project ID	CG-FY18-002
Version No.	1
Status	Pending Recipient Update
Agreement Term	7/1/2017 To 6/30/2018

**Project Goals and Outcomes**

Field	Value
Consolidated Plan Goal	Invest in community services and non-profit facilities that maximize impact by providing new or increased access to programs that serve highly vulnerable populations such as youth, seniors, and food insecure households.
Strategic Plan Goal	Goal 1: Objective 1
HUD Matrix Code	DSD Youth Services
CDBG Citation	\$70,202
National Objective	LMC
Objective Category	Suitable Living Environment
Outcome Category	Availability/Accessibility
Outcome Indicator	People
Annual Units	100
YTD Target Accomplished	
Programmatic Report (MPR)	PS & CG
Outcome Progress	0%

# Review Scope of Work

The screenshot displays a project management interface. At the top, a horizontal progress bar shows the workflow stages: Created, Recipient Review (highlighted in green), Grantor Review, Under Approval, Issued, and Amended. Below the progress bar is a navigation menu with tabs for Overview, Budget, Scope of Work (selected), Scheduling, Reports, Agreement Checklist, Attachments, and Certifications. A dropdown menu is open, showing 'Project Goals and Outcomes' and 'Project Details'. The 'Project Details' section contains the following information:

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

At the bottom right of the modal, there are three buttons: 'Send to Grantor', 'View Agreement', and 'Edit'. On the left side of the interface, a sidebar menu includes sections for 'Tasks', 'My Tasks', 'Activities', 'My Organization Profile', 'Recent Items', 'Technical Support', and 'Useful Links'.

# Review Scope of Work

The screenshot displays a project management interface. At the top, a progress bar shows the workflow stages: Created, Recipient Review (current), Grantor Review, Under Approval, Issued, and Amended. Below the progress bar, a navigation menu includes Overview, Budget, Scope of Work (selected), Scheduling, Reports, Agreement Checklist, Attachments, and Certifications. The main content area is titled 'Project Goals and Outcomes' and lists 'Consolidated Plan Goal' and 'Strategic Plan Goal'. A 'Comments' section is overlaid on the bottom, showing a comment from Stephen Maduli-Williams: 'Review scope and budget per instructions. Commented 2 minutes ago'. The interface also features a sidebar with navigation options like 'Tasks', 'My Tasks', 'Activities', and 'My Organization/Profile'.

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**Step 4:**  
**Review Budget**

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# Budget Review: What to Check

## During budget review, confirm that:

- Budget line items align with the approved RFP budget and project scope.
- Budget narratives clearly explain how each cost supports the project.
- Personnel expenses list each position separately.
- Fringe benefits are identified by benefit type.
- Ineligible costs are removed or reallocated with City approval.
- City comments are reviewed and addressed.



***Only minor revisions or refinements to the budget can be made.***

# Open the Budget Tab

The screenshot displays the 'Economic Development Grants Management System' interface for 'College Town - Expanded Services'. The 'Budget' tab is highlighted with a red circle. The interface includes a navigation menu on the left, a search bar, and a main content area with various tabs and data sections.

**Project Information:**

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

**Project Financials:**

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

**Total Project Budget Information by Funding Sources:**

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	[Icon]
2	AT&T	\$240,000.00	\$0.00	25.69	\$0.00	\$240,000.00	[Icon]
3	The California Wellness Fo...	\$125,000.00	\$0.00	13.38	\$0.00	\$125,000.00	[Icon]
4	King Philanthropies	\$75,000.00	\$0.00	8.03	\$0.00	\$75,000.00	[Icon]
5	The Dammeyer Found. an...	\$71,000.00	\$0.00	7.6	\$0.00	\$71,000.00	[Icon]
6	The Blumkin, Dunn, and Sa...	\$30,281.00	\$0.00	3.24	\$0.00	\$30,281.00	[Icon]

# Review Budget Line Items

The City of SAN DIEGO Economic Development Grants Management System

Community Portal

NOFAs Applications **Projects** Post Awards

Search

Total records: 20

▲ Total Project Funds

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





























#	Budget Category	Proposed City Amount	Actual City Amount	Budget Difference	Non City Amount	Year To Date Spent	Remaining Budget	Actions
1	PE: Salary and Wages	\$177,000.00	\$177,000.00	\$0.00	\$356,854.00	\$0.00	\$177,000.00	
2	PE: Fringe Benefits	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
3	<b>Total Personnel Bu...</b>	<b>\$ 177,000.00</b>	<b>\$ 177,000.00</b>	<b>\$ 0.00</b>	<b>\$ 356,854.00</b>	<b>\$ 0.00</b>	<b>\$ 177,000.00</b>	
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	

# Review Budget Details and Narratives



**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** **Actions**

50.00  

# Attachments tab

The City of **SAN DIEGO** Economic Development Grants Management System As a Grantor

[Home](#) | [Planning](#) | [NOFAs](#) | [Applications](#) | [Projects](#) | [Post Awards](#) | [Closeout](#)

[Tasks](#) | [My Tasks](#) | [Activities](#) | [Post Award Activities](#) | [Manage RFR](#) | [Manage MPR](#) | [Amendment Requests](#) | [Manage Site Visit](#) | [Manage Closeout Report](#) | [Manage Year-End Report](#) | [Useful Links](#) | [Recent Items](#)

**Version View** View Agreement Edit Notify Fiscal Reviewer Submit for Approval

**FY 2026 LEAP Project**

Project ID: CED-FY26-002 | Version No.: 1 | Status: Issued | Agreement Term: 7/1/2025 To 6/30/2026

Created | Recipient Revision | Grantor Revision | Under Approval | Issued | Amended

[Overview](#) | [Budget](#) | [Roles](#) | [Scope of Work](#) | [Scheduling](#) | [Reports](#) | [Requests](#) | [Agreement Checklist](#) | [Attachments](#) | [History](#)

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

**Agreement Checklist**

#	City Form Download	City Form Description	Required	Subrecipient Document Attached?	Subrecipient Comments	Subrecipient Document Link	Actions
1	Download	1. Organization Chart: Entire Agency	Mandatory	Yes	This document is ...	Link	
2	Download	2. Organization Chart: Implementation Team	Mandatory	Yes	This document sh...	Link	
3	Download	3. Federal IRS Form W-9	Mandatory	Yes	This document is ...	Link	
4	Download	4. CGL Insurance Certificate	Mandatory	Yes	This document ve...	Link	
5	Download	5. CGL Endorsement for Additionally Insured	Mandatory	Yes	This document ve...	Link	
6	Download	6. CGL Primary and Non-Contributory Language	Mandatory	Yes	This document ve...	Link	

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# Review the Full Narrative

The City of SAN DIEGO Economic Development Grants Management System

Community Portal

NOFAs Applications **Projects** Post Awards



Search

Total records: 20

**Edit**




Budget Category: NPE: Direct Program Delivery Expenses

New

Title	Narrative	Cost Type	Proposed Cost(\$)	Sub Total - City	Sub Total - Non City	City Proportion	Non City - Proportion	Total	Actions	
Direct Program Deliv...	General prog	General program delivery costs such as mileage, event supplies, food and beverage, Leadership Camp, College Residential program, ACT/SAT test preparation, student support scholarships, and transportation to and from program activities.							\$345,850.00	 
Total records: 1										

Useful Links

SanDiego.gov

14	NPE: Federally Appr...	\$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	

# Check the Budget Difference Column

The City of SAN DIEGO Economic Development Grants Management System

Community Portal

NOFAs Applications **Projects** Post Awards

Search

Total records: 20

Total Project Funds

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

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

# Confirm the Budget Balances

17	NPE: Loans	\$0.00	\$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	\$0.00	
19	NPE: Direct Loans to...	\$0.00	\$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	\$ 0.00	
21	Total Budget	\$ 177,000.00	\$ 177,000.00	\$ 0.00	\$ 757,328.00	\$ 0.00	\$ 177,000.00	\$ 177,000.00	

**▲ Total Project's Secured Funding Information** ⓘ

Note: This value is automatically computed

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**Step 5:**  
**Upload Supporting  
Documents**

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# Supporting Documents: What to Upload

- Use the Agreement Execution Guidebook Attachment 4 to identify documents for your project type
- Upload all required documents in ED Grants

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# Start These First!

## Document

## Notes

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### **Insurance**

Contact your carrier early; corrections can delay execution.

### **Board Authorization of Staff**

Required to authorize staff to sign and submit documents in ED Grants.










### **Living Wage Ordinance (LWO) Forms**

Submit early to confirm applicability, compliance, or exemption.

### **Policies & Procedures**

Review existing policies early; updates may require Board approval.

# Use the Supporting Documents Index

#	Document	Description	Form Available	Applicability	Applicable Project Type			Naming Convention
					PS	CED	NCIP-F	
1	<b>Organization Chart: Entire Subrecipient Agency</b>	<p><b>What to upload:</b> An organization chart showing the overall structure of the subrecipient agency, including reporting relationships, span of control, and chain of command. If the organization operates multiple offices or locations, provide the chart for the office administering the CDBG-funded project. Include position titles only; employee names are not required.</p> <p><b>Why it is needed:</b> City staff will review the chart to assess the organization's administrative capacity to manage the CDBG-funded project and confirm that appropriate separation of duties exists for financial, procurement, and internal control functions.</p>	No	Required				[orgname]_orgchart_agency.pdf
2	<b>Organization Chart: Implementation Team</b>	<p><b>What to upload:</b> An organization chart showing the specific programmatic, fiscal, and administrative staff responsible for implementing and overseeing the CDBG-funded project. Include position titles only; employee names are not required.</p> <p><b>Why it is needed:</b> City staff will review the chart to confirm that the organization has sufficient staffing structure, oversight, and separation of duties to successfully administer the project and maintain appropriate financial and procurement controls.</p>	No	Required				[orgname]_orgchart_div-sect.pdf
3	<b>Federal IRS Form W-9</b>	<p><b>What to upload:</b> A completed and signed Federal IRS Form W-9 showing the subrecipient's legal business name, address, and Taxpayer Identification Number (TIN).</p> <p><b>Why it is needed:</b> The City uses this form to establish or verify the subrecipient's vendor record in the City's financial system so that CDBG reimbursements can be processed.</p>	Yes	Required				[orgname]_w9.pdf

# Use the Agreement Checklist

The screenshot displays the 'Economic Development Grants Management System' interface. The main content area shows the 'Microlending Program' details, including Project ID CED-FY24-008 and Version No. 1. A progress bar indicates the current stage is 'Created'. The navigation bar includes tabs for Overview, Budget, Roles, Scope of Work, Scheduling, Reports, Agreement Checklist (highlighted with a red circle), and Attachments. Below the navigation bar, a message states: 'Please go to the Attachments tab and download the City Forms.' The 'Agreement Checklist' table lists the following items:

#	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. COI Insurance Certificate	Mandatory	Yes
5	Download	5. COI Endorsement for Additionally Insured	Mandatory	Yes
6	Download	6. COI Primary and Non-Contributory Language	Mandatory	Yes
7	Download	7. Commercial Auto Liability Insurance Certificate	Mandatory	Yes

An 'Attach' dialog box is overlaid on the right side of the screen. It has tabs for 'Overview', 'Upload file from Computer', and 'Upload file from Workspace'. The 'Attached' field shows 'N/A' and the 'Comments' field is empty. A 'Save' button is located at the bottom right of the dialog box.

# Upload Documents in the Attachments Tab

The screenshot displays the 'Economic Development Grants Management System' interface for 'College Town - Expanded Services'. The project ID is CG-FY18-002, and the status is 'Pending Recipient Update'. A progress bar shows the current stage as 'Recipient Revision'. The 'Attachments' tab is highlighted with a red circle. Below the tab, a table lists several attachments, each with a name, type, description, last modified date, owner, and action icons.

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]

# Insurance (Start Early!)

The City of **SAN DIEGO** Purchasing & Contracting Insurance Checklist

**Endorsements for Commercial General Liability**

1. All endorsements must have the policy number(s) printed on them.
2. All endorsements are to cover The City, its officers, officials, employees, and volunteers as additional insureds on the CGL policy.
3. Additional Insured Coverage can be provided in the form of the following:
A. ISO Form CO 20 10 18 95 or if not available;
B. The addition of <u>ISO CO 20 10, CO 20 26, CO 20 31, or CO 20 28, and CO 30 31.</u>
C. A Blanket Additional Insured Endorsement is acceptable as
D. The page in the policy that provides Additional Insured coverage when required by contract.
4. Primary Coverage can be provided in the following form Endorsements:
A. At least as broad as ISO CO 20 68 01 11 or coverage at least as broad.
B. The page in the policy that provides Primary & Non-Contributory coverage when required by contract.

**Endorsements for Workers Compensation**

1. All endorsements must have the policy number(s) printed on them.
2. The following endorsement is required:
A. Worker of Subrogation Endorsement. Endorsement must be applicable in the state of California.

**Acceptability of Insurers**

1. Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A- VI.
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Purchasing & Contracting Insurance Checklist  
Rev. January 04, 2013

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**

1. The full name of the party to the contract must be listed as the insured.
2. All policies must be current.
3. All coverage limits required in the contract must be reflected on the Certificate of Insurance:
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 follow the contract requirements.
i. For Commercial General Liability, the occurrence box must be (X) marked.
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.
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.
i. For Workers Compensation, the subrogation box must be (X) marked.
D. Professional Liability (Errors & Omissions) for Consultant contracts. Certificate of Insurance appropriate for Consultant's profession with a minimum limit of \$1 million per Occurrence or claim and \$1 million Aggregate.
4. The bottom part of the Actual Certificate of Insurance must have an Authorized Representative's signature.
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 required coverage either through an actual endorsement (separate from the Certificate of Insurance) or the page on the policy that provides said coverage.

Purchasing & Contracting Insurance Checklist  
Rev. January 04, 2013

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# Insurance: What to Check

- Review the Purchasing and Contracting Insurance Checklist carefully
- Confirm coverage extends at least past July 31
- Include required endorsements, policy numbers, and Additional Insurance language
- If coverage is not applicable, submit the required forms



**TIP:** *Start working with your insurance carrier immediately. Insurance documents take time to obtain.*

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# Board Authorization: What to Know

- Use **only** the City template for Board authorization
- Board must authorize staff to submit, certify, and sign in ED Grants
- Primary Representative must be Board-authorized before execution

***TIP: Authorize more than one staff to avoid delays in case one person is not available.***

# Option 1: Approved at a Board Meeting

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

Name	Office(s)	Actual Signature
_____	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 otherwise given effect pursuant to the provisions of the Agreement. The certifications in this Certificate may be relied upon by the City, until the City receives written notice of any change in such certifications from the undersigned.

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

\_\_\_\_\_  
 Typed Name: \_\_\_\_\_  
 Secretary

[Redacted]

10/04/2018 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 proposal for Community Development Block Grant ("CDBG") funding from the City for the City's 2019 fiscal year; and (b) if the Corporation is allocated CDBG funding from the City for the City's 2019 fiscal year, enter into that certain Fiscal Year 2019-City of San Diego Community Development Block Grant Program Subsequent Agreement, dated as of July 1, 2018, by and between the Corporation and the City ("Agreement").

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

- 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, as 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, as a meeting of the directors on [TO BE DETERMINED], 2018**; in exactly the form set forth in **Exhibit A**, attached to this Certificate and in accordance with the laws of the Corporation's state of organization and the Bylaws of the Corporation; and (iii) have not been modified, repealed, rescinded, amended or revoked since their adoption.

[Continued on following page]

10/04/2018 1

# Option 2: Unanimous Written Consent

This written consent may be signed in counterparts, "resolutions" is effective as of **[TO BE DETERMINED]**, 2019, and is made pursuant to California Corporation Code Section 5213(d) 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 waive any and all notice regarding 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: \_\_\_\_\_

HHS&C 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 Corporation Code Section 5213(d), 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 the 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 Subrecipient Agreement, dated as of July 1, 2018 ("Agreement"), with the City;

BE IT 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

BE IT 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

BE IT 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]

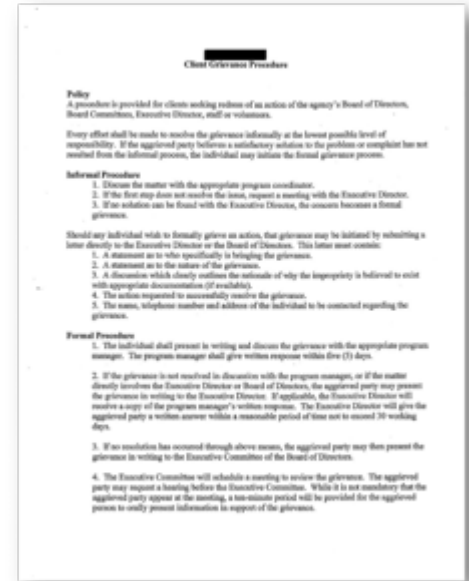
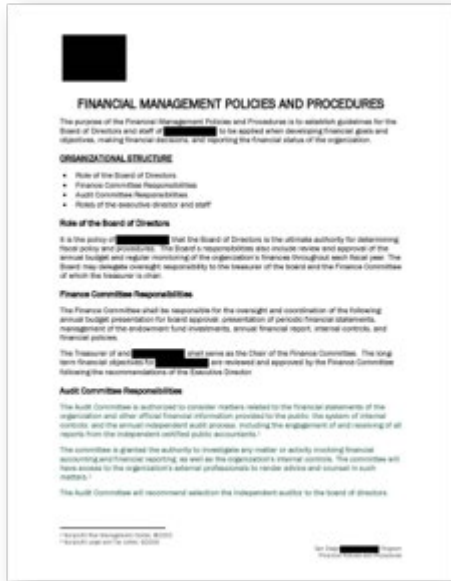
HHS&C A-1

# Required Policies and Procedures

Policy/Procedure	What It Should Address
<b>Client Grievance</b>	How clients submit complaints and how they are resolved
<b>Subcontractor/Vendor Grievance</b>	How vendor/subcontractor complaints are handled
<b>Financial Management</b>	Internal controls, transactions, approvals, and documentation
<b>Procurement</b>	Competitive procurement, conflicts, documentation
<b>LMI Verification &amp; CDBG Eligibility</b>	Intake, income/eligibility documentation, demographics
<b>Records Retention*</b>	Storage, security, retention period, sensitive information

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

# Use the Sample Policies



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# Ensure Ample Time to Submit

## Required for agreement execution:

- Upload existing policies/procedures if available.
- Coordinate with your Project Manager if a policy is missing or needs updates.

## Required after execution:

Final compliant policies and procedures must be submitted no later than by September 30.



**Office of the City Treasurer  
Office of Labor Standards and Enforcement**

# **Living Wage Ordinance (LWO) Requirements**

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# LWO Overview and Applicability

- Adopted by City Council in 2005, the Living Wage Ordinance helps ensure covered City agreements support fair wages and benefits.
- LWO may apply to service contracts, and financial assistance agreements.
  - For Economic Development financial assistance agreements, LWO may apply when the combined value is more than \$500,000 over five years.
- It generally covers non-managerial and non-supervisory work performed under the agreement, such as childcare, janitorial, food service, office/clerical, right-of-way maintenance, and similar services.

# Covered Employer Requirements

## Pay Living Wage Rates

- FY 2027 City of San Diego Living Wage Rate: \$21.95 (\$18.43 hourly + \$3.52 health benefits)

## Provide Leave Time

- 80 hours of compensated leave for full-time covered employees
- Prorated compensated leave for part-time covered employees
- Up to 80 hours of unpaid, job-protected leave after compensated leave is exhausted

## Notify Employees

- Provide written notice of LWO rates and benefits
- Notify at agreement start and after July 1 rate update
- Post LWO rates and notices at the worksite or duty location

## Submit Reports & Records

- Submit certified payrolls, if applicable via the City's web-based compliance portal
- Submit Certificate of Compliance
- Maintain records for compliance review

---

# LWO Exemptions

## Possible exemption bases include:

- Business with 12 or fewer employees, including subcontractors.
- Sole proprietor with no employees and no subcontractors.
- Certain 501(c)(3) organizations that meet the officer wage test
  - Highest-paid officer earns less than 8 times the hourly wage of its lowest-paid covered employee
- Collective Bargaining Agreement

## Important Reminders:

- Exemptions are not automatic
- Apply separately for each agreement
- Submit required documentation for City review
- Receive written City approval before relying on an exemption

# Contact Information

City of San Diego  
Living Wage Program

[ContactLWO@sandiego.gov](mailto:ContactLWO@sandiego.gov)

[sandiego.gov/labor-and-  
wage/living-wage](https://sandiego.gov/labor-and-wage/living-wage)

(619) 236-6084

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# Common Issues to Avoid

**Outdated contacts in ED  
Grants**

**Delayed insurance review**

**Missing or incomplete  
documents**

**Unclear budget narratives**

**Uncoordinated scope,  
schedule, or budget changes**

**Waiting until the deadline**

---

# Next Steps

## Start now:

- Review the Agreement Execution Guidebook
- Confirm ED Grants contacts and Primary Representative
- Begin Board authorization
- Contact your insurance carrier
- Determine applicable supporting documents and start completing them

## When released in ED Grants:

- Review draft scope and budget
- Respond to City comments
- Upload required supporting documents

## Before execution:

- Watch for ED Grants notifications
- Sign the agreement electronically



**Questions?**

# 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](mailto:CDBG@sandiego.gov)  
(619) 236-6700