

This attachment identifies the supporting documents and City-provided forms that may be required before your CDBG agreement can be executed in ED Grants. Use this index to determine which documents apply to your project, whether a City form is available, and how files should be named when uploaded.

Review the ‘Applicability’ and ‘Applicable Project Type’ columns carefully. Some documents are required for all subrecipients, while others apply only to specific project types or circumstances. If you are unsure whether a document applies to your project, contact your assigned City project manager before uploading.

Some documents listed in this attachment were already collected during the RFQ or RFP phase. These documents generally do not need to be re-uploaded unless they are missing, outdated, expired, revised, or requested by City staff.

Applicability Definitions

- **Required:** Must be uploaded to ED Grants before the CDBG agreement can be executed.
- **If Applicable:** Must be uploaded only if the document applies to your project.
- **If Available:** Should be uploaded if the document is available for City reference.

Important Note: ED Grants may label some items as “Optional,” but subrecipients should use this attachment to confirm whether an item is required, conditionally required, or requested only if available. When in doubt, contact your assigned City project manager for guidance.

Applicable Project Type


Public Services (PS)

Community Economic Development (CED)

Nonprofit Capital Improvement Project – Facilities (NCIP-F)

City-Provided Forms Available in ED Grants

The following City-provided forms are available in ED Grants and may need to be downloaded, completed, and uploaded as part of the agreement execution process:

- Federal IRS Form W-9
- Auto Declaration Form, if applicable
- Workers’ Compensation No Employee Declaration & Addendum Form, if applicable
- Board of Directors Authorization of Staff
- Living Wage Ordinance Compliance forms
- Property certification forms, as applicable for NCIP projects

Upload and Naming Reminders

When uploading documents to ED Grants, use the naming conventions provided in this attachment. Avoid using ampersands, special symbols, or overly long file names. If spaces are needed, use underscores sparingly. Only upload documents that apply to your project or that have been requested by City staff. This will help avoid duplicate, outdated, or unnecessary files during City review.





#	Document	Description	Form Available	Applicability	Applicable Project Type			Naming Convention
					PS	CED	NCIP-F	
1	Organization Chart: Entire Subrecipient Agency	<p>What to upload: 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>Why it is needed: 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	Organization Chart: Implementation Team	<p>What to upload: 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>Why it is needed: 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	Federal IRS Form W-9	<p>What to upload: A completed and signed Federal IRS Form W-9 showing the subrecipient’s legal business name, address, and Taxpayer Identification Number (TIN).</p> <p>Why it is needed: 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
4	CGL Insurance Certificate	<p>What to upload: A Commercial General Liability (CGL) insurance certificate showing the insured entity name, policy number, coverage limits, effective dates, and required endorsements. The certificate must be signed by an authorized insurance representative, and the “Certificate Holder” must identify the City of San Diego. An ACORD™ certificate form is typically used. Refer to the “City of San Diego Purchasing & Contracting Insurance Checklist” for coverage requirements.</p> <p>Why it is needed: The City reviews this document to verify that the subrecipient maintains the minimum insurance coverage required before entering into a CDBG agreement.</p>	No	Required				[orgname]_cgl_insurancecert.pdf

#	Document	Description	Form Available	Applicability	Applicable Project Type			Naming Convention
					PS	CED	NCIP-F	
5	CGL Endorsement for Additionally Insured	<p>What to upload: The endorsement page of the Commercial General Liability insurance policy identifying the City of San Diego, its officers, officials, employees, and volunteers as additional insureds. The related policy number must appear on the endorsement page. Refer to the “City of San Diego Purchasing & Contracting Insurance Checklist” for additional guidance.</p> <p>Why it is needed: The City reviews this endorsement to confirm that the subrecipient’s insurance policy has been modified to extend additional insured coverage to the City of San Diego as required under the agreement.</p>	No	Required				[orgname]_cgl_addinsureds.pdf
6	CGL Primary and Non-Contributory Language	<p>What to upload: The endorsement page of the Commercial General Liability insurance policy containing primary and non-contributory language stating that the subrecipient’s insurance coverage is primary and will not seek contribution from other insurance available to the additional insured. Refer to the “City of San Diego Purchasing & Contracting Insurance Checklist” for additional guidance.</p> <p>Why it is needed: The City reviews this endorsement to verify that the insurance policy meets the City’s primary and non-contributory coverage requirements.</p>	No	Required				[orgname]_cgl_prim-noncontrib.pdf
7	Commercial Auto Liability Insurance Certificate	<p>What to upload: A Commercial Auto Liability insurance certificate showing the insured entity name, policy number, coverage limits, effective dates, covered automobile types, and required endorsements. The certificate must be signed by an authorized insurance representative, and the “Certificate Holder” must identify the City of San Diego. An ACORD™ certificate form is typically used. Refer to the “City of San Diego Purchasing & Contracting Insurance Checklist” for coverage requirements.</p> <p>Why it is needed: The City reviews this document to verify that the subrecipient maintains the minimum automobile liability insurance coverage required before entering into a CDBG agreement.</p>	No	Required				[orgname]_auto_insurancecert.pdf
8	Auto Declaration Form	<p>What to upload: A completed and signed City-provided Auto Declaration Form if the subrecipient does not own, lease, rent, or operate vehicles for organizational or project-related activities and therefore does not carry Commercial Auto Liability insurance. By signing the form, the subrecipient agrees to obtain the required automobile liability insurance if vehicles are acquired or used in the future.</p> <p>Why it is needed: The City uses this form to document that the subrecipient currently does not require Commercial Auto Liability insurance and acknowledges its responsibility to obtain coverage if circumstances change.</p>	Yes	If Applicable				[orgname]_auto_declaration.pdf



#	Document	Description	Form Available	Applicability	Applicable Project Type			Naming Convention
					PS	CED	NCIP-F	
9	WC Insurance Certificate	<p>What to upload: A Workers' Compensation insurance certificate showing the insured entity name, policy number, coverage limits, effective dates, and required endorsements. The certificate must be signed by an authorized insurance representative, identify the City of San Diego as the certificate holder, and indicate that subrogation is waived where required. An ACORD™ certificate form is typically used. Refer to the "City of San Diego Purchasing & Contracting Insurance Checklist" for coverage requirements.</p> <p>Why it is needed: The City reviews this document to verify that the subrecipient maintains the minimum Workers' Compensation insurance coverage required before entering into a CDBG agreement.</p>	No	Required				[orgname]_wc_insurancecert.pdf
10	WC Waiver of Subrogation	<p>What to upload: The endorsement page of the Workers' Compensation insurance policy containing waiver of subrogation language. The endorsement must include the effective date, policy number, insured entity name, insurance carrier name, and the signature or authorization of the insurance provider or representative. Refer to the "City of San Diego Purchasing & Contracting Insurance Checklist" for additional guidance.</p> <p>Why it is needed: The City reviews this endorsement to confirm that the subrecipient's Workers' Compensation policy meets the City's waiver of subrogation requirements.</p>	No	Required				[orgname]_wc_subrogation.pdf
11	WC No Employee Declaration & Addendum Form	<p>What to upload: A completed and signed City-provided Workers' Compensation No Employee Declaration & Addendum Form if the subrecipient does not have employees and therefore does not carry Workers' Compensation insurance. By signing the form, the subrecipient agrees to obtain Workers' Compensation insurance if it hires employees or other covered workers in the future.</p> <p>Why it is needed: The City uses this form to document that the subrecipient currently does not require Workers' Compensation insurance and acknowledges its responsibility to obtain coverage if staffing circumstances change.</p>	Yes	If Applicable				[orgname]_wc_noemployee.pdf
12	Board of Directors Authorization of Staff	<p>What to upload: A completed and signed Board of Directors Authorization of Staff form identifying the staff and management personnel authorized by the organization's governing board to act on behalf of the subrecipient in ED Grants, including serving as the Primary Representative.</p> <p>Why it is needed: The City uses this form to verify which individuals are authorized to approve, sign, and manage agreement-related actions and updates within ED Grants.</p>	Yes	Required				[orgname]_bod_authorization.pdf

#	Document	Description	Form Available	Applicability	Applicable Project Type			Naming Convention
					PS	CED	NCIP-F	
13	Living Wage Ordinance Compliance	<p>What to upload: Either a completed Living Wage Ordinance (LWO) Certification of Compliance form or a completed Application for Exemption packet, as applicable, demonstrating compliance with the City of San Diego Living Wage Ordinance (SDMC §22.4200 et seq.). One of these submissions is required for each CDBG-funded agreement.</p> <p>Why it is needed: The City's Living Wage Ordinance staff reviews these documents to determine whether the project is compliant with LWO requirements or qualifies for an exemption before agreement execution.</p>	Yes	Required				[orgname]_lwocompliance.pdf
14	Client Grievance Policy & Procedures	<p>What to upload: A Board-approved policy and procedures document describing how clients or program participants may submit grievances, complaints, or concerns related to services provided by the organization. The document should include the grievance process, response procedures, escalation steps, and relevant contact information.</p> <p>Why it is needed: Federal regulations require organizations receiving federal funds to maintain procedures for addressing client grievances and ensuring concerns are reviewed and resolved in a fair and timely manner.</p>	No (see sample)	Required				[orgname]_polpro_clientgrievance.pdf
15	Subcontractor/Vendor Grievance Policy & Procedures	<p>What to upload: A Board-approved policy and procedures document describing how subcontractors or vendors may submit grievances, complaints, or disputes related to their work with the organization. The document should include reporting procedures, response timelines, escalation steps, and relevant contact information.</p> <p>Why it is needed: Federal regulations require organizations receiving federal funds to maintain procedures for addressing subcontractor and vendor grievances and ensuring procurement-related concerns are handled fairly and appropriately.</p>	No (see sample)	Required				[orgname]_polpro_subvendorgrievance.pdf
16	Financial Management Policy & Procedures	<p>What to upload: A Board-approved financial management policy and procedures document describing the organization's financial controls, accounting practices, cash management procedures, internal oversight, and fiscal responsibilities. The document must comply with applicable federal requirements under 2 CFR 200.</p> <p>Why it is needed: Federal regulations require organizations receiving federal funds to maintain financial management systems and internal controls that ensure federal funds are administered properly, accurately tracked, and protected from misuse.</p>	No (see sample)	Required				[orgname]_polpro_financialmgt.pdf

#	Document	Description	Form Available	Applicability	Applicable Project Type			Naming Convention
					PS	CED	NCIP-F	
17	Procurement Policy & Procedures	<p>What to upload: A Board-approved procurement policy and procedures document describing how the organization purchases goods and services, including procurement methods, competitive bidding procedures, conflict-of-interest standards, contractor selection practices, and purchasing controls. The document must comply with applicable federal procurement requirements under 2 CFR 200.</p> <p>Why it is needed: Federal regulations require organizations receiving federal funds to maintain procurement procedures that ensure purchases are conducted fairly, competitively, ethically, and in compliance with federal requirements.</p>	No (see sample)	Required				[orgname]_polpro_procurement.pdf
18	LMI Verification & CDBG Eligibility Procedures	<p>What to upload: A Board-approved policy and procedures document describing how the organization determines participant eligibility for CDBG-funded services and verifies low- and moderate-income (LMI) status, as applicable. The document should describe intake procedures, income verification methods, documentation standards, and collection of required demographic and household data.</p> <p>Why it is needed: The City reviews these procedures to ensure the organization has appropriate controls in place to verify beneficiary eligibility, document compliance with CDBG national objective requirements, and collect data required for HUD reporting.</p>	No (see sample)	Required				[orgname]_polpro_lmiverification.pdf
19	Executed Subcontract Agreement(s)	<p>What to upload: Fully executed agreements between the subrecipient and any subcontractors, partner organizations, consultants, or service providers involved in implementing the CDBG-funded project, as described in the approved scope of work. Agreements should include applicable federal compliance provisions and clearly identify roles and responsibilities.</p> <p>Why it is needed: The City reviews these agreements to verify that partner organizations participating in the project are subject to applicable federal requirements and understand their responsibilities related to CDBG-funded activities.</p>	No	If Applicable				[orgname]_subcontract_[subname].pdf
20	Vehicle Registration	<p>What to upload: Current California vehicle registration documentation for any organization-owned vehicles included in the CDBG project budget for vehicle maintenance, mileage, fuel, or related transportation expenses.</p> <p>Why it is needed: The City reviews these documents to verify that vehicles charged to the CDBG project are owned or operated by the subrecipient and are used for eligible CDBG-funded activities.</p>	No	If Applicable				[orgname]_vehiclereg.pdf









#	Document	Description	Form Available	Applicability	Applicable Project Type			Naming Convention
					PS	CED	NCIP-F	
21	Construction Permits & Approvals	<p>What to upload: Copies of permits, approvals, plan checks, or other documentation issued by the City's Development Services Department or other applicable agencies confirming that required development and construction approvals have been obtained for the project. If approvals are still pending at the time of agreement execution, provide available status updates or supporting documentation showing progress toward obtaining them.</p> <p>Why it is needed: The City reviews these documents to monitor project readiness, identify potential construction delays, and confirm that required approvals are being secured prior to project implementation.</p>	No	If Applicable				[orgname]_constructpermitsapps.pdf
22	Accessibility Survey/ADA Needs Assessment Reports	<p>What to upload: Accessibility surveys, ADA evaluations, transition plans, or other assessments evaluating whether the facility or multifamily housing property complies with applicable accessibility requirements, including the Americans with Disabilities Act (ADA) and other federal accessibility standards. If the property is already compliant, provide supporting documentation demonstrating compliance.</p> <p>Why it is needed: The City reviews these documents to verify that CDBG-funded facilities and housing projects meet required accessibility standards or will be brought into compliance through the proposed rehabilitation work.</p>	No	If Available				[orgname]_access-ada-assessment.pdf
23	Property Inspection & Needs Assessment Reports	<p>What to upload: Property inspections, facility condition assessments, capital needs assessments, or similar reports evaluating the condition of the property or facility to be rehabilitated or improved with CDBG funds.</p> <p>Why it is needed: The City reviews these documents to understand and verify the physical needs being addressed through the CDBG-funded project and to support the justification for proposed rehabilitation or improvement activities.</p>	No	If Available				[orgname]_propertyinspec_needs.pdf
24	Lead Hazard & Asbestos Documentation	<p>What to upload: Lead-based paint assessments, asbestos surveys, abatement reports, clearance documentation, or other records related to the identification, evaluation, or remediation of lead hazards or asbestos at the project site.</p> <p>Why it is needed: The City reviews these documents to determine whether lead hazard reduction, asbestos remediation, or other environmental health and safety measures are required as part of the project.</p>	No	If Available				[orgname]_lead-asbestos.pdf

#	Document	Description	Form Available	Applicability	Applicable Project Type			Naming Convention
					PS	CED	NCIP-F	
25	Environmental Documents & Reports	<p>What to upload: Environmental assessments, technical studies, site investigations, or other environmental reports prepared for the property or project site to be rehabilitated or improved with CDBG funds.</p> <p>Why it is needed: The City may reference these documents when conducting or supporting environmental review requirements under the National Environmental Policy Act (NEPA), California Environmental Quality Act (CEQA), or other applicable environmental regulations.</p>	No	If Available				[orgname]_enviro_rpts.pdf
26	Records Retention Policy & Procedures	<p>What to upload: A Board-approved policy and procedures document describing how the organization maintains, stores, protects, and retains physical and electronic records, including records containing sensitive or personally identifiable information. The policy may be a standalone document or incorporated into the organization's financial management policies and procedures and must comply with applicable federal requirements under 2 CFR 200.</p> <p>Why it is needed: Federal regulations require organizations receiving federal funds to maintain records retention procedures and preserve project records for the required retention period following project closeout.</p>	No	Required				[orgname]_polpro_records.pdf
<p>For the following NCIP-F documents, only complete and upload the appropriate property certification form applicable to your project site. You do not need to submit all three items.</p>								
27	Certification Regarding Property Owner Authorization	<p>What to upload: A completed and signed certification form documenting the property owner's authorization for the subrecipient to implement CDBG-funded construction or improvement activities on the subject property. The form also confirms that the property and CDBG-funded improvements will continue to serve low- and moderate-income (LMI) individuals or households for at least five years following project closeout.</p> <p>Why it is needed: The City uses this form to verify that the property owner is aware of and authorizes the proposed CDBG-funded improvements and acknowledges the ongoing LMI-benefit requirements associated with the project.</p>	Yes	Required				[orgname]_propertyownercert.pdf

#	Document	Description	Form Available	Applicability	Applicable Project Type			Naming Convention
					PS	CED	NCIP-F	
28	Certification Regarding Use of City-Owned Real Property	<p>What to upload: A completed and signed certification form documenting the City of San Diego’s authorization for the subrecipient to implement CDBG-funded construction or improvement activities on City-owned property. The form confirms the intended public benefit use and ongoing maintenance responsibilities associated with the improvements.</p> <p>Why it is needed: The City uses this form to document authorization from the City’s Real Estate Assets Department and confirm that the property will continue to provide low- and moderate-income (LMI) benefit and maintain the CDBG-funded improvements for at least five years following project closeout.</p>	Yes	Required				[orgname]_cityownedrealpropcert.pdf
29	Certification Regarding Use of Non-City-Owned or Non-Applicant-Owned Real Property	<p>What to upload: A completed and signed certification form documenting the property owner’s authorization for the subrecipient to implement CDBG-funded construction or improvement activities on property that is not owned by either the City of San Diego or the subrecipient. The form confirms the intended public benefit use and ongoing maintenance responsibilities associated with the improvements.</p> <p>Why it is needed: The City uses this form to verify that the property owner authorizes the proposed CDBG-funded improvements and acknowledges the ongoing low- and moderate-income (LMI) benefit and maintenance requirements for at least five years following project closeout.</p>	Yes	Required				[orgname]_noncityownedrealpropcert.pdf

Documents Collected During RFP Phase

The documents below were generally collected during the RFP phase and do not need to be re-uploaded unless they were missing, outdated, or requested by City staff.

#	Document	Description	Form Available	Applicability	Applicable RFP Category			Naming Convention
					PS	CED	NCIP-F	
1	Federally Approved Indirect Cost (FAIC) Rate Agreement	A copy of the organization’s negotiated and federally approved indirect cost rate agreement issued by a cognizant federal agency. This document is required only if the project budget includes costs under the “Federally Approved Indirect Cost Rate” budget line item. Why it is needed: The City reviews this agreement to verify the approved indirect cost rate used to calculate indirect costs charged to the CDBG-funded project.	No	If Applicable				[orgname]_faic_agmt.pdf
2	Cost Allocation Plan	A written cost allocation plan describing the methodology used to distribute shared or indirect costs across the organization’s programs and funding sources. This document is required only if the subrecipient intends to charge indirect costs to the CDBG project without a federally approved indirect cost rate agreement. Why it is needed: The City reviews the plan to ensure indirect costs charged to the CDBG project are allocated reasonably, consistently, and in proportion to the benefit received by the CDBG-funded activity.	No	If Applicable				[orgname]_costallocationplan.pdf
3	Rental/Lease Agreement	A fully executed rental or lease agreement for the facility or office space associated with the CDBG-funded project, including the lease term, payment amount, and payment schedule. This document is required only if the project budget includes rent or lease expenses. Why it is needed: The City reviews the agreement to verify eligible rent or lease costs and determine the portion reasonably attributable to the CDBG-funded project or activity.	No	If Applicable				[orgname]_rent-lease_agmt.pdf
4	Proof of Property Ownership or Lease Agreement	Documentation demonstrating site control over the property to be rehabilitated or improved with CDBG funds. This may include proof of ownership, such as a grant deed or deed of trust, or a long-term lease agreement extending at least five years beyond the anticipated project completion date. Why it is needed: The City reviews this documentation to confirm that the subrecipient has sufficient legal control over the property and that the facility or housing structure will continue serving low- and moderate-income (LMI) individuals or households for the required affordability or benefit period.	No	Required				[orgname]_rent-lease_agmt.pdf (if lease agreement) -OR- [orgname]_propownership.pdf (if proof of property ownership)
5	Real Estate Legal Description	A copy of the legal property description identifying the real estate where the CDBG-funded improvements will occur. The legal description is typically found within a grant deed, deed of trust, or similar property record and may be provided in “lot and block” or “metes and bounds” format. Why it is needed: The City reviews this documentation to verify the exact location and legal identity of the property associated with the CDBG-funded project.	No	Required				[orgname]_proplegaldescription.pdf

#	Document	Description	Form Available	Applicability	Applicable RFP Category			Naming Convention
					PS	CED	NCIP-F	
6	Professional Construction Estimates	A professional construction cost estimate prepared and signed by a licensed contractor or Certified Professional Estimator (CPE) covering the full scope of the proposed rehabilitation or improvement project, including applicable prevailing wage requirements. Contractors preparing the estimate may not participate in the subsequent contractor procurement process for the project. Why it is needed: The City reviews the estimate to evaluate whether the proposed project costs and requested CDBG funding are reasonable and supported by an independent third-party assessment.	No	Required				[orgname]_constructionestimate.pdf
7	Color Photos	Representative color photographs of the proposed project site showing existing conditions and areas requiring rehabilitation or improvement. Include both wide-angle and detail photographs as appropriate. Submissions should generally not exceed two 8.5" x 11" pages unless otherwise requested by City staff. Why it is needed: The City and the Consolidated Plan Advisory Board use these photos to visually assess existing site conditions and better understand the need addressed by the proposed project improvements.	No	Required				[orgname]_photos.pdf

Documents Collected During RFQ Phase

The documents below were generally collected during the RFQ phase and do not need to be re-uploaded unless they were missing, outdated, expired, or requested by City staff.

#	Document	Description	Applicability	Naming Convention
1	Federal Tax-Exempt Status Affirmation Letter	A copy of the organization's federal tax-exempt determination letter issued by the Internal Revenue Service (IRS) recognizing the organization's nonprofit tax-exempt status under Section 501(c)(3) or other applicable designation. Why it is needed: The City reviews this document to verify the organization's nonprofit tax-exempt status and legal eligibility to enter into a CDBG agreement. The information may also be used to establish or verify the organization's vendor profile.	Required	[orgname]_federaltaxexemptltr.pdf
2	California Tax-Exempt Status Determination Letter	A copy of the organization's California tax-exempt determination letter issued by the California Franchise Tax Board recognizing the organization's state nonprofit tax-exempt status. An "Entity Status Letter" is not an acceptable substitute. Why it is needed: The City reviews this document to verify the organization's nonprofit tax-exempt status and standing within the State of California prior to agreement execution.	Required	[orgname]_statetaxexemptltr.pdf
3	Articles of Incorporation	A copy of the organization's Articles of Incorporation filed with the California Secretary of State or other applicable state filing agency. The document should identify the organization's legal name, corporate structure, organizational purpose, and formation information. Why it is needed: The City reviews this document to verify the legal existence of the organization and confirm that it meets applicable organizational eligibility and operational history requirements.	Required	[orgname]_incorporationarticles.pdf

#	Document	Description	Applicability	Naming Convention
4	Audited Financial Statements	The organization's most recent audited financial statements prepared by an independent certified public accountant (CPA), including all accompanying schedules, notes, and auditor opinions, as submitted during the RFQ phase. Why it is needed: The City reviews these documents to evaluate the organization's financial capacity, fiscal stability, and ability to administer CDBG funds on a reimbursement basis.	Required	[orgname]_auditedfinstatements.pdf
5	Single or Program-Specific Audit	The organization's most recent Single Audit or program-specific audit conducted in accordance with federal audit requirements under 2 CFR 200, if applicable based on federal expenditure thresholds. Why it is needed: The City reviews this audit to assess the organization's compliance with federal funding requirements and identify any audit findings, questioned costs, or compliance concerns related to federal awards.	If Applicable	[orgname]_single-progaudit.pdf
6	Federal Audit Clearinghouse Screenshot	Documentation or a screenshot confirming submission of the organization's required Single Audit or program-specific audit to the Federal Audit Clearinghouse, as required under 2 CFR 200, if applicable. Why it is needed: The City reviews this documentation to verify compliance with federal audit submission requirements for organizations receiving federal funds.	If Applicable	[orgname]_fedauditclearinghouse.pdf
7	System for Award Management Screenshot	A screenshot or documentation from SAM.gov showing that the organization's registration status is "Active," including the registration expiration date and Unique Entity ID (UEI), if available. Why it is needed: Federal regulations require all entities receiving federal funds to maintain an active registration in SAM.gov . The City reviews this documentation to verify compliance with federal registration requirements.	Required	[orgname]_samregistration.pdf
8	California Secretary of State Business Search Database Screenshot	A screenshot or documentation from the California Secretary of State Business Search database showing the organization's active registration status, registration date, entity type, and entity number. Why it is needed: The City reviews this documentation to verify that the organization is legally registered, active, and in good standing with the State of California.	Required	[orgname]_castateregistration.pdf
9	California Attorney General's Registry of Charitable Trusts Screenshot	A screenshot or documentation from the California Attorney General's Registry of Charitable Trusts showing the organization's current registration status, renewal due date, and registration or organization number. Why it is needed: The City reviews this documentation to verify that the organization is properly registered and in good standing with the California Attorney General's Registry of Charitable Trusts.	Required	[orgname]_caagcharityregistry.pdf