



# Commission for Arts and Culture

# Fiscal Year 2018 Application Guidelines

## CCSD: Creative Communities San Diego

### Funding for Projects

December 14, 2016

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## Questions?

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## **Section 1: About the Commission for Arts and Culture**

The City of San Diego Commission for Arts and Culture (Commission) was established by ordinance in 1988 to serve in an advisory capacity to the Mayor and City Council of The City of San Diego (City) on promoting, encouraging, and increasing support for San Diego's diverse artistic and cultural assets, integrating arts and culture into community life and showcasing San Diego as an international cultural tourist destination. The Commission is composed of 15 volunteers (Commissioners) appointed by the Mayor and confirmed by City Council to serve terms up to eight years. A staff of eight (Commission staff), headed by an Executive Director, administers the programs and services of the Commission under the oversight and direction of the Mayor and Deputy Chief Operating Officer for Neighborhood Services.

The duties and functions of the Commissioners and Commission staff are set forth in the San Diego Municipal Code and include developing, implementing, evaluating, and/or recommending changes to public policy, legislation, programs, services, and advocacy strategies; overseeing funding allocations in support of nonprofit arts and culture organizations, artists, neighborhood arts programs, festivals, and artworks in public development; ensuring the inclusion of art in private development; managing artworks owned and controlled by the City; supporting cultural tourism and innovative arts and culture programming; and undertaking other initiatives that contribute to the quality of life, economic vitality, and vibrancy of San Diego.

The Commission annually recommends to the Mayor and City Council the award of funding for general organizational support and project-specific support for San Diego's nonprofit arts and culture organizations. These funds are awarded through two competitive processes: Organizational Support Program (OSP) and Creative Communities San Diego Program (CCSD). The source of this funding is Transient Occupancy Tax (TOT), a tax levied on individuals who stay overnight in hotels, motels, and other lodging establishments. Council Policy 100-03 governs the use of TOT money and, in accordance with the policy, a portion of the City's TOT revenue is intended to be used as follows:

1. To enhance the economy;
  2. To contribute to San Diego's national and international reputation as a cultural destination;
  3. To provide access to excellence in culture and the arts for residents and visitors;
  4. To enrich the lives of the people of San Diego; and
  5. To build healthy, vital neighborhoods.
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## **Section 2: About the Creative Communities San Diego (CCSD)**

Creative Communities San Diego (CCSD) is the annual, Commission-administered process of accepting and evaluating applications from nonprofit, tax-exempt organizations requesting TOT funding to use for sponsoring community-based festivals, parades and celebrations with an emphasis on projects that promote neighborhood pride and community reinvestment, and on sponsoring projects that make arts and culture activities more available and accessible in San Diego neighborhoods and encourage people diverse backgrounds to share their heritage and culture. In Fiscal Year 2017, 49 nonprofit organizations received \$1.2 million in TOT funding through CCSD.

## **Section 3: Who is Eligible to Apply?**

Your organization is eligible to apply for a contract award if:

- NONPROFIT STATUS: Your organization holds tax-exempt nonprofit status under section 501(c)(3) or 501(c)(6) of the Internal Revenue Code; AND
- HISTORY OF OPERATIONS: Your organization has a three-year history of operating with its own independent governing board (not under a fiscal sponsor); AND
- SERVICE AREA: Your organization's project will take place within the limits of the city of San Diego and/or benefit San Diego residents; AND
- MISSION ALIGNMENT: Your project obviously aligns with the purpose of TOT funding which is
  - 1) To enhance the economy;
  - 2) To contribute to San Diego's national and international reputation as a cultural destination;
  - 3) To provide access to excellence in culture and the arts for residents and visitors; and
  - 4) To enrich the lives of the people of San Diego; and
  - 5) To build healthy, vital neighborhoods.

Your organization is NOT eligible to for a contract award if:

- GENERAL OPERATING SUPPORT: Your organization is seeking funding for general operating support. (The Commission offers a different funding program called Organizational Support Program [OSP] for general operating support. Guidelines to apply for OSP can be found on the Commission's website at [www.VibrantCultureVibrantCity.com](http://www.VibrantCultureVibrantCity.com))

- SCHOOLS: Your organization is a university, community college, school district, or private educational enterprise.
- REGRANTING: Your organization's primary purpose is grantmaking.
- MULTIPLE APPLICATIONS: Your organization has applied or will apply for Fiscal Year 2018 funds through another TOT category as defined in Council Policy 100-03.

#### **Section 4: How Much Funding is Available?**

The amount of money an applicant can be awarded is calculated with an algorithm and is dependent on several factors. CCSD applicants are typically awarded between 15%-28% of their project budgets.

In Fiscal Years 2014, 2015 and 2016:

- Projects with budgets under \$15,000 were awarded approximately 28% of the total project budget.
- Projects with budgets between \$15,000 and \$29,999 were awarded approximately 25% of the total project budget.
- Projects with budgets between \$30,000 and \$49,999 were awarded approximately 20% of the total project budget.
- Projects with budgets between \$50,000 and \$99,999 were awarded approximately 18% of the total project budget.
- Projects with budgets more than \$100,000 were awarded approximately 15% of the total project budget.

This information is not a guarantee of an award amount. It is offered to assist organizations in deciding whether to submit an application for funding and in estimating the cash match, which is required for all organizations that accept CCSD contracts from the Commission. An organization awarded CCSD funding for a project with expenses exceeding \$30,000 is required to provide a \$3 cash match for every \$1 awarded. An organization awarded CCSD funding for a project with expenses below \$30,000 is required to provide a \$2 cash match for every \$1 awarded and up to 50% of the match can come from in-kind donations.

#### **Section 5: How to Apply for a Contract Award**

1. TWO-STEP APPLICATION PROCESS: The application process includes two steps: Request for Qualifications (RFQ), then Request for Proposals (RFP).
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2. REQUEST FOR QUALIFICATIONS: Complete and submit the online Request for Qualifications (RFQ) form by the deadline. Connect to the online RFQ form through the Commission's website [www.VibrantCultureVibrantCity.com](http://www.VibrantCultureVibrantCity.com)
  3. RFQ EVALUATION: A team comprised of members (including City staff) who are trained in City contracting processes and nonprofit management practices evaluates the strength of each applicant's ability to manage a City contract using the information provided in the RFQ. This team uses a standard scoring system to evaluate Eligibility, Administrative Capacity; Financial Management; Governance Practices; and Past Performance on Commission Contracts (if applicable). Each applicant is assigned one of two grades: 1) Ready to Contract, or 2) Not Ready to Contract. Applicants deemed "Not Ready to Contract" will be given three (3) calendar days to cure any incorrect or missing RFQ components and reevaluated. Applicants deemed "Not Ready to Contract" will not advance, but will be given appropriate technical assistance to prepare to try again in the future.
  4. REQUEST FOR PROPOSALS: Applicants deemed "Ready to Contract" will be given access to the online Request for Proposals (RFP) form.
  5. RFP EVALUATION PANELS: Ad hoc panels composed of Commissioners mixed with additional diverse members of the San Diego community evaluate the degree to which each applicant's proposed project aligns with the City's goals for the use of TOT funds using information provided in the RFP. The panels use a standard scoring system to evaluate Proposed Project; Production Capacity; Budget and Spending Plan; Audience Reach; and Emphasis Areas and assign each proposal one of three grades: Very Aligned with City Goals (Ranks of 4); Aligned with City Goals (Ranks of 3); or Not Aligned with City Goals (Ranks of 2). The meetings where proposals are reviewed and graded are open to the public and will be advertised in advance.
  6. COMMISSION APPROVAL OF RANKS: The panels' recommendations of the rank to give each proposal, are forwarded to the Commission for ratification or adjustment. The meeting where the Commission receives and acts on the panels' recommendations is open to the public and will be advertised in advance. Proposals receiving ranks of 2+, 2, or 2- will be deemed "Not Aligned with City Goals" and will not be recommended to receive a contract award.
  7. APPEALS: Any applicant not recommended by the Commission to receive a contract award may submit a written appeal to Commission staff no later than 5:00 p.m. on the tenth calendar day following notification from Commission staff to the applicant that no award is being recommended. Commission staff will
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consider the appeal and make the final ruling. Upon request from an appellant, Commission staff will provide a summary of the panel's discussion about the applicant's proposal.

8. CALCULATING AWARD AMOUNTS: Following the Commission's ratification or adjustment, the ranks are converted into a monetary award amount using an algorithm.
9. AUTHORIZING AWARDS: The monetary award amount for each applicant that results from the Commission's application evaluation process is forwarded to the Mayor and City Council. Only the Mayor and City Council can authorize awards. Therefore, award amounts are not final until authorized by the Mayor and City Council during the annual budget process. Applicants typically have a solid idea of what their contract award is likely to be in May.

## **Section 6: Conditions for Submission**

1. The City reserves the right to reject, in whole or in part, any responses to this RFQ, to not accept a proposal recommended by any of the evaluation panels, to initiate an alternate process, to reissue the RFQ and/or cancel this RFQ, in whole or in part, at any time without prior notice and makes no representation that any agreement will be awarded to any organization. Additionally, the City expressly reserves the right to postpone opening responses to this RFQ for its own convenience, and/or to waive minor informalities or irregularities in the responses received.
2. The City reserves the right to revise this RFQ by addendum. The City is bound only by what is expressly stated in this RFQ and any authorized written addenda thereto. Addenda will be posted on the City's website at [www.VibrantCultureVibrantCity.com](http://www.VibrantCultureVibrantCity.com) It shall be the organization's responsibility to check the website up to the final submission date for any possible addenda.
3. The City accepts no financial responsibility for any costs incurred by applicants. The City reserves the right to propose modifications to the scope of services during the contract negotiation phase between the City and the contract awardee. The City is not responsible for the loss or damage of any materials submitted.
4. The submission of a response to this RFQ does not guarantee funding.

5. Funds awarded to an organization are paid on a reimbursement basis only. Expenses must be incurred by an organization between July 1, 2017 and June 30, 2018 before the City will reimburse.
6. Any organization awarded OSP funding is required to provide a \$3 cash match for every \$1 awarded.
7. Each organization awarded funding must receive an executed contract from the City before submitting invoices for reimbursement and it can take 6-9 months from July 1 for the City to provide an executed contract.
8. Each organization awarded funding is required to provide proof of Commercial General Liability Insurance, Automobile Liability Insurance, and Workers' Compensation Insurance. (Some exceptions may apply.)
9. Each organization awarded funding is required to comply with all required state and federal registrations including but not limited to California Attorney General Registrar of Charitable Trusts, California Secretary of State Business Registry, System for Awards Management and Department of Industrial Relations DSLE Debarments. All registrations must be current during the contract period.
10. An organization receiving funding in excess of \$10,000 must provide true, accurate and complete financial disclosure documentation evidencing the financial status of the organization's last completed fiscal year within 90 days of the end of that fiscal year.
11. An organization receiving funding in the amount of \$75,000 or greater must submit audited financial statements prepared in accordance with generally accepted accounting principles (GAAP) and audited by an independent Certified Public Accountant, in accordance with generally accepted auditing standards (GAAS).
12. An organization receiving funding in the amount of \$500,000 or greater, when that funding represents more than 10% of the organization's annual budget, must provide salary and wage ranges for each of their job classifications, including actual executive salaries and benefits packages applicable for the contract period.
13. Each organization awarded funding is required to deliver a final performance report detailing the extent to which the scope of services was met during the period of performance. Final reports are due within 90 days after the contract closing date.

14. City funds may not be used for alcoholic beverages, travel, meals, lodging, entertainment, capital or equipment outlay, buildup of reserves, or the purchase of awards, trophies, gifts or uniforms.
15. City funds may not be used for lobbying, religious activities or political activities.
16. City funds will not be provided to any organization found to discriminate, in the conduct of its activities and affairs, against any person because of sex, race, color, creed, national origin, physical handicaps, age or sexual orientation.
17. Any organization found to have 1) provided false information to the City, or 2) submitted more than one application for TOT funds in a single fiscal year may be immediately disqualified from receiving funding for one year.

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## Appendix 1

### Request for Qualifications (RFQ) Tear Sheet

#### Fiscal Year 2018 Creative Communities San Diego (CCSD)

#### SECTION 1: APPLICANT PROFILE

1. Legal Name of Organization
2. DBA Name of Organization, if applicable
3. Provide your organization's mission statement. **NARRATIVE: 500 CHARACTERS**
4. Briefly describe the project for which your organization seeks funding. **NARRATIVE: 500 CHARACTERS**
5. Indicate the history of the project. **CHECKBOXES: THE PROJECT IS NEW, THE PROJECT HAS BEEN PRODUCED BEFORE**
6. Provide the date(s) of the project. **NARRATIVE: 75 CHARACTERS**
7. Provide the total estimated budget for the project. **CHECKBOXES: \$5,000 - \$75,000, greater than \$75,000**
8. Is your organization acting as a fiscal sponsor for the purposes of seeking funding for a project? **CHECKBOXES: YES, NO**
9. If applicable, can your organization provide proof of a formalized fiscal sponsorship agreement? **CHECKBOXES: YES, NO, NOT APPLICABLE**
10. Which month and day does your organization's fiscal year end?
11. Organization's Twitter handle, if applicable
12. Contact Information
  - Director of Organization First Name
  - Director of Organization Last Name
  - Director of Organization Title
  - Director of Organization Email
  - Director of Organization Phone
  - Primary Contact First Name
  - Primary Contact Last Name
  - Primary Contact Title
  - Primary Contact Email
  - Primary Contact Phone

## SECTION 2: ELIGIBILITY SURVEY

1. Can your organization produce proof of its tax-exempt nonprofit status under section 501(c)(3) or 501(c)(6) of the Internal Revenue Code? **CHECKBOXES: YES, NO**
2. Can your organization produce proof that it has a three-year history of operating with its own independent governing board (not under a fiscal sponsor)? **CHECKBOXES: YES, NO**
3. Can your organization produce proof that the project for which your organization is seeking funding will take place within [the limits of the City of San Diego](#) and/or benefit San Diego residents? **CHECKBOXES: YES, NO**
4. Does the project obviously align with the purpose of TOT funding, which is: to enhance the economy; to contribute to San Diego's national and international reputation as a cultural destination; to provide access to excellence in culture and the arts for residents and visitors; and to enrich the lives of the people of San Diego; and to build healthy, vital neighborhoods? **CHECKBOXES: YES, NO**
5. Has/will your organization applied/apply for Fiscal Year 2018 TOT funding through Organizational Support Program (OSP), or Economic Development and Tourism Support (EDTS), or Citywide Economic Development Support (CEDS)? **CHECKBOXES: YES-OSP, YES-EDTS, YES-CEDS, NO**
6. Is your organization seeking funding for lobbying, religious or political activities? **CHECKBOXES: YES, NO**
7. Is your organization seeking funding for a project that would not be open to the public? **CHECKBOXES: YES, NO**
8. Is your organization a university, community college, school district, or private educational enterprise? **CHECKBOXES: YES, NO**
9. Is your organization seeking funding to give out as grants? **CHECKBOXES: YES, NO**

## SECTION 3: ADMINISTRATIVE CAPACITY

1. Provide an organizational chart showing names and titles of your organization's staff. **ATTACH PDF**
2. Provide the name, title and qualifications of the primary person who will administer the contract between your organization and the City should a contract be awarded. Indicate whether this person is an employee, a contractor or a volunteer. **NARRATIVE: 500 CHARACTERS**
3. Each organization awarded funding will be offered a contract for services. A requirement of the contract is that your organization must provide proof of a Commercial General Liability insurance policy. Will your organization be able to provide this proof at the time the contract is issued? **CHECKBOXES: YES, NO**

4. Each organization awarded funding will be offered a contract for services. A requirement of the contract is that your organization must provide proof of an Automobile Liability insurance policy. Each organization is required to maintain a minimum of "Hired and Non-Owned" Automobile Liability insurance while under contract. Will your organization be able to provide this proof at the time the contract is issued? **CHECKBOXES: YES, NO**
5. Each organization awarded funding will be offered a contract for services. A requirement of the contract is that your organization must provide proof of a Workers' Compensation insurance policy if your organization has at least one paid employee. Will your organization be able to provide this proof at the time the contract is issued? **CHECKBOXES: YES, NO, NOT APPLICABLE – OUR ORGANIZATION HAS NO PAID EMPLOYEES**

## **SECTION 4: GOVERNANCE PRACTICES**

1. How often does the board of your organization formally meet to conduct the business of the organization? **CHECKBOXES: MONTHLY, QUARTERLY, ANNUALLY**
2. Does the board of your organization approve annual budgets for the organization? **CHECKBOXES: YES, NO**
3. Are compensation arrangements for officers, directors, trustees, and key employees approved by the board? **CHECKBOXES: YES, NO, NOT APPLICABLE – NO COMPENSATION PROVIDED/OUR ORGANIZATION HAS NO PAID EMPLOYEES**
4. Does the board of your organization conduct an annual performance evaluation of the organization's top executive? **CHECKBOXES: YES, NO**
5. How often is the board provided with financial statements that include budgeted vs. actual revenues and expenses? **CHECKBOXES: MONTHLY, QUARTERLY, ANNUALLY**
6. Can your organization provide proof of having a conflict of interest policy? **CHECKBOXES: YES, NO**
7. Do officers, directors, or trustees, and key employees sign a conflict of interest policy at least annually? **CHECKBOXES: YES, NO**
8. Are officers, directors, or trustees, and key employees required to annually disclose interests that could give rise to conflicts? **CHECKBOXES: YES, NO**
9. Does your organization's conflict of interest policy contain specific language to prevent self-dealing? **CHECKBOXES: YES, NO**
10. Can your organization provide proof of regularly and consistently monitoring and enforcing compliance with its conflict of interest policy? **CHECKBOXES: YES, NO**
11. Describe any other significant measures the board takes to perform its governance responsibilities. **NARRATIVE: 1000 CHARACTERS**

## SECTION 5: FINANCIAL MANAGEMENT

1. Using your organization's fiscal year-end financial statements, compute your Liquid Unrestricted Net Assets (LUNA) for each of your organization's last three complete fiscal years. [INTERACTIVE CALCULATOR](#)
2. How many months of liquidity did your organization have at the beginning of its current budget year? [INTERACTIVE CALCULATOR](#)
3. If the calculation shows that your organization has less than two months of liquidity, provide relevant information for funding any cash shortfall(s) your organization may experience during the year (e.g. board designated reserves, line of credit, etc.) [NARRATIVE: 500 CHARACTERS](#)
4. Provide your organization's current board-approved annual operating budget, which shows the projected revenue and expenses for your organization's current fiscal year. [ATTACH PDF](#)
5. Does your organization have a bank line of credit? [CHECKBOXES: YES, NO](#)
6. Provide the name, title, responsibilities, experience, education and other qualifications of the primary person responsible for your organization's financial management. Indicate whether this person is an employee, a contractor or a volunteer. [NARRATIVE: 500 CHARACTERS](#)
7. Provide any other relevant details to give an accurate picture of your organization's financial position. [NARRATIVE: 1000 CHARACTERS](#)

## SECTION 6: PAST PERFORMANCE ON COMMISSION CONTRACTS

Responses in this section will be provided by Commission staff using data collected from past performance on Commission contracts from FY16 forward.

1. Organization submitted late contract kit in FY17
2. Organization did not perform the agreed upon scope of services in FY16
3. Organization withdrew from contracting after award allocation in FY16 & FY17
4. Organization did not claim full award amount in FY16
5. Organization submitted late final performance report in FY16
6. Organization did not submit final performance report in FY16
7. City terminated contract with organization for cause in FY17

## SECTION 7: CONDITIONS FOR SUBMISSION

WITH THE SUBMISSION OF A RESPONSE TO THIS RFQ, THE ORGANIZATION I REPRESENT ACKNOWLEDGES, UNDERSTANDS, AND ACCEPTS THE FOLLOWING CONDITIONS:

1. The City reserves the right to reject, in whole or in part, any responses to this RFQ, to not accept a proposal recommended by any of the evaluation panels, to initiate an alternate process, to reissue the RFQ and/or cancel this RFQ, in whole or in part, at any time without prior notice and makes no representation that any agreement will be awarded to any organization. Additionally, the City expressly reserves the right to postpone opening responses to this RFQ for its own convenience, and/or to waive minor informalities or irregularities in the responses received.
2. The City reserves the right to revise this RFQ by addendum. The City is bound only by what is expressly stated in this RFQ and any authorized written addenda thereto. Addenda will be posted on the City's website at [www.VibrantCultureVibrantCity.com](http://www.VibrantCultureVibrantCity.com). It shall be the organization's responsibility to check the website up to the final submission date for any possible addenda.
3. The City accepts no financial responsibility for any costs incurred by applicants. The City reserves the right to propose modifications to the scope of services during the contract negotiation phase between the City and the contract awardee. The City is not responsible for the loss or damage of any materials submitted.
4. The submission of a response to this RFQ does not guarantee funding.
5. Funds awarded to an organization are paid on a reimbursement basis only. Expenses must be incurred by an organization between July 1, 2017 and June 30, 2018 before the City will reimburse.
6. An organization awarded CCSD funding for a project with expenses exceeding \$30,000 is required to provide a \$3 cash match for every \$1 awarded. An organization awarded CCSD funding for a project with expenses below \$30,000 is required to provide a \$2 cash match for every \$1 awarded and up to 50% of the match can come from in-kind donations.
7. Each organization awarded funding must receive an executed contract from the City before submitting invoices for reimbursement and it can take 6-9 months from July 1 for the City to provide an executed contract.
8. Each organization awarded funding is required to provide proof of Commercial General Liability Insurance, Automobile Liability Insurance, and Workers' Compensation Insurance. (Some exceptions may apply.)
9. Each organization awarded funding is required to comply with all required state and federal registrations including but not limited to California Attorney General Registrar of Charitable Trusts, California Secretary of State Business Registry, System for Awards Management and Department of Industrial Relations DSLE Debarments. All registrations must be current during the contract period.

10. An organization receiving funding in excess of \$10,000 must provide true, accurate and complete financial disclosure documentation evidencing the financial status of the organization's last completed fiscal year within 90 days of the end of that fiscal year.
11. An organization receiving funding in the amount of \$75,000 or greater must submit audited financial statements prepared in accordance with generally accepted accounting principles (GAAP) and audited by an independent Certified Public Accountant, in accordance with generally accepted auditing standards (GAAS).
12. An organization receiving funding in the amount of \$500,000 or greater, when that funding represents more than 10% of the organization's annual budget, must provide salary and wage ranges for each of their job classifications, including actual executive salaries and benefits packages applicable for the contract period.
13. Each organization awarded funding is required to deliver a final performance report detailing the extent to which the scope of services was met during the period of performance. Final reports are due within 90 days after the contract closing date.
14. City funds may not be used for alcoholic beverages, travel, meals, lodging, entertainment, capital or equipment outlay, buildup of reserves, or the purchase of awards, trophies, gifts or uniforms.
15. City funds may not be used for lobbying, religious activities or political activities.
16. City funds will not be provided to any organization found to discriminate, in the conduct of its activities and affairs, against any person because of sex, race, color, creed, national origin, physical handicaps, age or sexual orientation.
17. Any organization found to have 1) provided false information to the City, or 2) submitted more than one application for TOT funds in a single fiscal year may be immediately disqualified from receiving funding for one year.

CHECKBOXES: I ACCEPT THESE CONDITIONS, I DO NOT ACCEPT THESE CONDITIONS

Issued December 19, 2016

**Addendum 1 – Fiscal Year 2018 Application Guidelines**

**CCSD: Creative Communities San Diego**

The City of San Diego Commission for Arts and Culture

1. The enclosed RFQ scoring tool is incorporated into the Application Guidelines as Appendix 3.
2. The Conditions for Submission are amended to include the following statement: "An applicant deemed "Ready to Contract" in the RFQ phase is not guaranteed a contract nor funding. For the purpose of the FY18 CCSD funding process, the term "Ready to Contract" means "qualified to contract" and enables the applicant to proceed to the second phase of the competitive application process, Request for Proposals (RFP)."
3. In the online RFQ form, Section 5 – Financial Management, Question #3, the allowed character count is 1000.
4. The minimum award amount for FY18 CCSD is \$5,000. In other words, the smallest amount any applicant can be awarded is \$5,000. Therefore, this is the smallest amount an applicant would be required to match 3:1 or 2:1 depending on the amount of the project expenses.

Issued December 30, 2016

**Addendum 2 – Fiscal Year 2018 Application Guidelines**

**CCSD: Creative Communities San Diego**

The City of San Diego Commission for Arts and Culture

1. The new cut off for questions from applicants for Commission staff has been changed to January 5, 2017, at 5:00 p.m. Appendix 2 has been updated to reflect this new date.
2. In the online RFQ form, Section 4 – Governance Practices, questions 1 and 5, *Bi Monthly* has been added as a response. The RFQ scoring tool has been updated to reflect this option.
3. Commission Advisory Panels for the Request for Proposals (RFP), step two in the funding process, are scheduled to take place from March 13 – March 24, 2017. Appendix 2 has been updated to reflect new dates.

FISCAL YEAR 2018 CCSD  
RFQ SCORING SHEET

FISCAL YEAR 2018 CREATIVE COMMUNITIES SAN DIEGO (CCSD)		RUBRIC	RATIONALE
CATEGORY	APPLICATION QUESTION		
<b>Section 1: APPLICANT PROFILE</b>	1. Is the entire section complete?	Yes = Ready to Contract (RTC) No = Not Ready to Contract (NRTC)	
<b>Section 2: ELIGIBILITY SURVEY</b>			
	1. Can your organization produce proof of its tax-exempt nonprofit status under section 501(c)(3) or 501(c)(6) of the Internal Revenue Code? CHECKBOXES: YES, NO	Yes = RTC No = NRTC	Required by Council Policy 100-03
	2. Can your organization produce proof that it has a three-year history of operating with its own independent governing board (not under a fiscal sponsor)? CHECKBOXES: YES, NO	Yes = RTC No = NRTC	Required by Council Policy 100-03
(This question varies from OSP.)	3. Can your organization produce proof that the project for which your organization is seeking funding will take place within the limits of the City of San Diego and/or benefit San Diego residents? CHECKBOXES: YES, NO	Yes = RTC No = NRTC	Required by Council Policy 100-03
(This question varies from OSP.)	4. Does the project obviously align with the purpose of TOT funding, which is: to enhance the economy; to contribute to San Diego's national and international reputation as a cultural destination; to provide access to excellence in culture and the arts for residents and visitors; and to enrich the lives of the people of San Diego; and to build healthy, vital neighborhoods? CHECKBOXES: YES, NO	Yes = RTC No = NRTC	Required by Council Policy 100-03
(This question varies from OSP.)	5. Has/will your organization applied/apply for Fiscal Year 2018 TOT funding through Organizational Support Program (OSP), or Economic Development and Tourism Support (EDTS), or Citywide Economic Development Support (CEDS)? CHECKBOXES: YES-OSP, YES-EDTS, YES-CEDS, NO	Yes = NRTC No = RTC	Required by Council Policy 100-03
	6. Is your organization seeking funding for lobbying, religious or political activities? CHECKBOXES: YES, NO	Yes = NRTC No = RTC	Required by Council Policy 100-03
	7. Is your organization seeking funding for a project that would not be open to the public? CHECKBOXES: YES, NO	Yes = NRTC No = RTC	Required by Council Policy 100-03
	8. Is your organization a university, community college, school district, or private educational enterprise? CHECKBOXES: YES, NO	Yes = NRTC No = RTC	Required by Council Policy 100-03
	9. Is your organization seeking funding to give out as grants? CHECKBOXES: YES, NO	Yes = NRTC No = RTC	Required by Council Policy 100-03

FISCAL YEAR 2018 CCSD  
RFQ SCORING SHEET

FISCAL YEAR 2018 CREATIVE COMMUNITIES SAN DIEGO (CCSD)		RUBRIC	RATIONALE
CATEGORY	APPLICATION QUESTION		
<b>Section 3: ADMINISTRATIVE CAPACITY</b>			
	1. Provide an organizational chart showing names and titles of your organization's staff. ATTACH PDF	Attached = RTC Not Attached = NRTC	Evidence of organizational structure and management systems in place.
	2. Provide the name, title and qualifications of the primary person who will administer the contract between your organization and the City should a contract be awarded. Indicate whether this person is an employee, a contractor or a volunteer.  NARRATIVE: 500 CHARACTERS	Strong Quals = RTC Basic Quals = RTC Weak Quals = NRTC	[STRONG] = Managed more than one contract or grant in past + BASIC qual.  [BASIC] = Managed at least one contract or grant in past and has qualifications such as legal expertise, decision-making authority or access to the organization's top decision-makers, access to legal expertise and/or reasonably transferable qualifications.  [WEAK] = No contract or grant management experience and no reasonably transferable qualifications. [ ]
	3. Each organization awarded funding will be offered a contract for services. A requirement of the contract is that your organization must provide proof of a Commercial General Liability insurance policy. Will your organization be able to provide this proof at the time the contract is issued? CHECKBOXES: YES, NO	Yes = RTC No = NRTC	Required by City procurement authorities
	4. Each organization awarded funding will be offered a contract for services. A requirement of the contract is that your organization must provide proof of an Automobile Liability insurance policy. Each organization is required to maintain a minimum of "Hired and Non-Owned" Automobile Liability insurance while under contract. Will your organization be able to provide this proof at the time the contract is issued? CHECKBOXES: YES, NO	Yes = RTC No = NRTC	Required by City procurement authorities
	5. Each organization awarded funding will be offered a contract for services. A requirement of the contract is that your organization must provide proof of a Workers' Compensation insurance policy if your organization has at least one paid employee. Will your organization be able to provide this proof at the time the contract is issued? CHECKBOXES: YES, NO, NOT APPLICABLE – OUR ORGANIZATION HAS NO PAID EMPLOYEES	Yes = RTC N/A = RTC No = NRTC	Required by City procurement authorities

FISCAL YEAR 2018 CCSD  
RFQ SCORING SHEET

FISCAL YEAR 2018 CREATIVE COMMUNITIES SAN DIEGO (CCSD)		RUBRIC	RATIONALE
CATEGORY	APPLICATION QUESTION		
<b>SECTION 4: GOVERNANCE PRACTICES</b>			
	1. How often does the board of your organization formally meet to conduct the business of the organization? CHECKBOXES: MONTHLY, BIMONTHLY QUARTERLY, ANNUALLY	Monthly = RTC Bi Monthly = RTC Quarterly = RTC Annually = NRTC	To ensure good stewardship and public confidence in City contracts and to fulfill procurement requirements, a nonprofit board must meet at least quarterly.
	2. Does the board of your organization approve annual budgets for the organization? CHECKBOXES: YES, NO	Yes = RTC No = NRTC	Annual board approval of budgets is evidence of appropriate fiscal oversight and organizational accountability.
	3. Are compensation arrangements for officers, directors, trustees, and key employees approved by the board? CHECKBOXES: YES, NO, NOT APPLICABLE – NO COMPENSATION PROVIDED/OUR ORGANIZATION HAS NO PAID EMPLOYEES	Yes = RTC N/A = RTC No = NRTC	Ongoing evaluation of compensation arrangements supports proper stewardship of funds and organizational accountability.
	4. Does the board of your organization conduct an annual performance evaluation of the organization's top executive? CHECKBOXES: YES, NO	This question must be answered but is not scored	Ongoing evaluation of the organization's top executive on at least an annual basis promotes accountability.
	5. How often is the board provided with financial statements that include budgeted vs. actual revenues and expenses? CHECKBOXES: MONTHLY, BIMONTHLY, QUARTERLY, ANNUALLY	Monthly = RTC Bi Monthly = RTC Quarterly = RTC Annually = NRTC	To ensure good stewardship and public confidence in City contracts, nonprofit boards provide ongoing oversight of finances on at least a quarterly basis.
	6. Can your organization provide proof of having a conflict of interest policy? CHECKBOXES: YES, NO	Yes = RTC No = NRTC	To ensure good stewardship and public confidence in City contracts, conflict of interest policies are designed to prevent self-dealing and corruption.
	7. Do officers, directors, or trustees, and key employees sign a conflict of interest policy at least annually? CHECKBOXES: YES, NO	Yes = RTC No = NRTC	To ensure stewardship and public confidence in City contracts, conflict of interest policies are designed to prevent self-dealing and corruption.
	8. Are officers, directors, or trustees, and key employees required to annually disclose interests that could give rise to conflicts? CHECKBOXES: YES, NO	Yes = RTC No = NRTC	To ensure stewardship and public confidence in City contracts, conflict of interest policies are designed to prevent self-dealing and corruption.
	9. Does your organization's conflict of interest policy contain specific language to prevent self-dealing? CHECKBOXES: YES, NO	Yes = RTC No = NRTC	To ensure stewardship and public confidence in City contracts, conflict of interest policies are designed to prevent self-dealing and corruption.
	10. Can your organization provide proof of regularly and consistently monitoring and enforcing compliance with its conflict of interest policy? CHECKBOXES: YES, NO	Yes = RTC No = NRTC	To ensure stewardship and public confidence in City contracts, conflict of interest policies are designed to prevent self-dealing and corruption.

FISCAL YEAR 2018 CCSD  
RFQ SCORING SHEET

FISCAL YEAR 2018 CREATIVE COMMUNITIES SAN DIEGO (CCSD)		RUBRIC	RATIONALE
CATEGORY	APPLICATION QUESTION		
	11. Describe any other significant measures the board takes to perform its governance responsibilities. NARRATIVE: 1000 CHARACTERS	Answers to this question are not scored	
<b>Section 5: FINANCIAL MANAGEMENT</b> <i>(Section 5 varies from OSP.)</i>			
	1. Using your organization's fiscal year-end financial statements, compute your Liquid Unrestricted Net Assets (LUNA) for each of your organization's last three complete fiscal years. INTERACTIVE CALCULATOR	Complete = RTC Not Complete = NRTC	
	2. How many months of liquidity did your organization have at the beginning of its current budget year? INTERACTIVE CALCULATOR	Complete = RTC Not Complete = NRTC	
	3. If the calculation shows that your organization has less than two months of liquidity, provide relevant information for funding any cash shortfall(s) your organization may experience during the year (e.g. board designated reserves, line of credit, etc.) NARRATIVE: 1000 CHARACTERS	Strong Feasibility = RTC Basic Feasibility = RTC Weak Feasibility = NRTC	Organizations with less than two months of liquidity provide feasible plans for covering unexpected shortfalls.
	4. Provide your organization's current board-approved annual operating budget, which shows the projected revenue and expenses for your organization's current fiscal year. ATTACH PDF	Attached = RTC Not Attached = NRTC	
	5. Does your organization have a bank line of credit? CHECKBOXES: YES, NO	This question must be answered but is not scored	
	6. Provide the name, title, responsibilities, experience, education and other qualifications of the person responsible for your organization's financial management. Indicate whether this person is an employee, a contractor or a volunteer. NARRATIVE: 500 CHARACTERS	Strong Quals = RTC Basic Quals = RTC Weak Quals = NRTC	[STRONG] = 10+ yrs. + BASIC qual [BASIC] = 2-10 years of experience and any combo of the following: financial management experience; formal education in accounting, finances or related field; formal credentialing (CPA); and/or reasonably transferable qualifications. [WEAK] = Less than 2 years of financial management experience or no reasonably transferable qualifications.
	7. Provide any other relevant details to give an accurate picture of your organization's financial position. NARRATIVE: 1000 CHARACTERS	Answers to this question are not scored	

FISCAL YEAR 2018 CCSD  
RFQ SCORING SHEET

FISCAL YEAR 2018 CREATIVE COMMUNITIES SAN DIEGO (CCSD)			
CATEGORY	APPLICATION QUESTION	RUBRIC	RATIONALE
<b>Section 6: PAST PERFORMANCE ON COMMISSION CONTRACTS</b>			
(Responses to Section 6 will be provided by Commission staff)	1. FY17: Organization submitted late contract kit in FY17	YES or NO	
	2. FY16: Organization did not perform the agreed upon scope of services in FY16	YES or NO	
	3. FY16 and/or FY17: Organization withdrew from contracting after award allocation in FY16 and/or FY17	YES or NO	
	4. FY16: Organization did not claim full award amount in FY16	YES or NO	
	5. FY16: Organization submitted late final performance report in FY16	YES or NO	
	6. FY16: Organization did not submit final performance report in FY16	YES or NO	
	7. FY17: City terminated contract with organization for cause in FY17	YES or NO	
		1 or 2 deficiencies = RTC 3 or more deficiencies = NRTC	
<b>Section 7: CONDITIONS FOR SUBMISSION</b>			
	1. Is the entire section complete?	Yes = RTC No = NRTC	

Issued January 31, 2017

**Addendum 3 – Fiscal Year 2018 Application Guidelines**

**CCSD: Creative Communities San Diego**

The City of San Diego Commission for Arts and Culture

1. Creative Communities San Diego Program Application Guidelines- Appendix 2- Timeline has been updated.
2. The FY18 CCSD Request for Proposals (RFP) Tear Sheet has been added to the FY18 Creative Communities San Diego Program Application Guidelines as Appendix 3.

## Appendix 3

### Request for Proposals (RFP) Tear Sheet

#### Fiscal Year 2018 Creative Communities San Diego (CCSD)

The City of San Diego supports a vibrant arts and culture community through the Commission for Arts and Culture. The City, in Council Policy 100-03, has made support of Arts, Culture and Community Festivals a priority for reinvesting Transient Occupancy Tax (TOT) with the following focus:

*"To enhance and contribute to San Diego's reputation as a cultural destination by nurturing and maintaining art and culture institutions of national and international reputation; by supporting programs and projects that provide access to excellence in culture and the arts for residents and visitors; and by funding programs and events which will enrich the lives of the people of San Diego and build healthy, vital neighborhoods."*

Applicants should emphasize areas of alignment with these goals in their application.

#### **SECTION 1: APPLICANT PROFILE**

1. Legal Name of Organization
2. DBA Name of organization, if applicable
3. Provide your organization's mission statement. **NARRATIVE: 500 CHARACTERS**
4. Provide a brief description of the project for publication in the City's promotional materials. Include the name of the event(s), location(s), dates(s), a summary of what will happen at the event(s) and cost to participate (if any). **NARRATIVE: 500 CHARACTERS**
5. Indicate whether the project is new or has been produced before. **CHECKBOXES: THE PROJECT IS NEW, THE PROJECT HAS BEEN PRODUCED BEFORE**
6. Provide the date(s) of the project. **NARRATIVE: 75 CHARACTERS**
7. Provide the total estimated budget for the project. **NARRATIVE: 10 CHARACTERS**
8. Is your organization acting as a fiscal sponsor for the purposes of seeking funding for the project? **CHECKBOXES: YES, NO**
9. Provide up to three documents from sources not within your organization, including but not limited to, reviews, letters of recommendation or articles that reflect the quality of your organization's project. **ATTACH PDF**
10. Provide up to three work samples that are representative of the projects your organization produces and provide a current calendar of scheduled activities, if available. **ATTACH MULTIMEDIA FILES**

#### **SECTION 2: PROPOSED PROJECT**

1. What project does your organization propose to produce between July 1, 2017 and June 30, 2018? **NARRATIVE: 2500 CHARACTERS**

## Appendix 3

2. What are the goals and objectives of the project your organization is proposing? [NARRATIVE: 2500 CHARACTERS](#)
3. How will the project align with the City's goal of celebrating arts, culture and creativity in San Diego's neighborhoods? [NARRATIVE: 2500 CHARACTERS](#)
4. What are the measurable impacts of the project and how will the impacts achieve the stated goals and objectives? [NARRATIVE: 2500 CHARACTERS](#)

## SECTION 3: COMMUNITY ENGAGEMENT

1. What are your organization's outreach efforts that informed your decision to propose this project? [NARRATIVE: 1500 CHARACTERS](#)
2. The Commission is responsible for ensuring that the City's funds benefit San Diegans of diverse cultures, ethnicities, incomes, abilities, genders, ages, orientations and neighborhoods. What will your organization do to ensure that the project is accessible? [NARRATIVE: 2000 CHARACTERS](#)
3. What are the characteristics and size of the target audience(s) for the project? Include information about how the target audience was identified. [NARRATIVE: 2500 CHARACTERS](#)
4. Why will the project be relevant to this target audience(s) and how will they learn of, access and experience the proposed project? [NARRATIVE: 1500 CHARACTERS](#)

## SECTION 4: ORGANIZATIONAL CAPACITY

1. What is your organization's experience with producing projects of similar scale and complexity? [NARRATIVE: 1500 CHARACTERS](#)
2. What are the resources, including potential partners, your organization will access to facilitate the production of the project (e.g. rehearsal space, location, community partners etc.)? [NARRATIVE: 1500 CHARACTERS](#)
3. Provide the name, title, education, experience, and other qualifications of each key person responsible for designing and producing the project. Include information about the qualifications of each key person responsible for ensuring that the project is accessible and relevant to the target audience(s). [NARRATIVE: 1500 CHARACTERS](#)

## SECTION 5: PROJECT BUDGET & SPENDING PLAN

1. What is the proposed budget for the project? Provide the operating income and expenses for the two previous iterations of this project and the proposed project. In the table, include projected revenue, in-kind donations and expenses. Include the amount of funds your organization requests from the Commission as a part of the line item "Local government income". [INTERACTIVE CALCULATOR](#)
2. What amount of funds is your organization requesting from the Commission? [NARRATIVE: 10 CHARACTERS](#)

FY18

## **Appendix 3**

3. Provide details to describe any income or expense categorized as "Other." **NARRATIVE: 500**  
**CHARACTERS**

###

Issued February 1, 2017

**Addendum 4 – Fiscal Year 2018 Application Guidelines**

**CCSD: Creative Communities San Diego**

The City of San Diego Commission for Arts and Culture

1. The enclosed Request for Proposals (RFP) Scoring Tool is incorporated into the Creative Communities San Diego Application Guidelines as Appendix 5.
2. The Request for Proposals Tear Sheet has been established as Appendix 4 of the Creative Communities San Diego Application Guidelines.

FISCAL YEAR 2018 CCSD  
RFP SCORING SHEET

FISCAL YEAR 2018 CREATIVE COMMUNITIES SAN DIEGO (CCSD)		APPLICATION QUESTION	GUIDELINES	SCORING	POINTS
SECTION	CATEGORY	APPLICATION QUESTION	GUIDELINES	SCORING	POINTS
<b>Section 1: APPLICANT PROFILE</b>					
				Complete = 2 points Incomplete = 0 points	
<b>Section 2: PROPOSED PROJECT</b>					
	1. What project does your organization propose to produce between July 1, 2017 and June 30, 2018? NARRATIVE	Strong answers will provide a clear description of the project, key elements and the timeframe in which the project will occur.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points		
	2. What are the goals and objectives of the project your organization is proposing? NARRATIVE	The SMART principle is useful in evaluating goals and objectives - specific, measurable, attainable, relevant and timely. Strong answers will clearly describe the goals and objectives leading the reader to understand what the proposed project should achieve.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points		
	3. How will the project align with the City's goal of celebrating arts, culture and creativity in San Diego's neighborhoods? NARRATIVE	Strong answers will make clear links between the project and how it helps achieve the City's goal.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points		
	4. What are the measurable impacts of the project and how will the impacts achieve the stated goals and objectives? NARRATIVE	Strong answers will provide qualitative and/or quantitative data regarding the specific outcomes that achieve the project goals and objectives.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points		
<b>Section 3: COMMUNITY ENGAGEMENT</b>					
	1. What are your organization's outreach efforts that informed your decision to propose this project? NARRATIVE	Strong answers will provide specific outreach activities and the feedback that led to the project concept. Answers should demonstrate relevancy based upon feedback.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points		
	2. The Commission is responsible for ensuring that the City's funds benefit San Diegans of diverse cultures, ethnicities, incomes, abilities, genders, ages, orientations and neighborhoods. What will your organization do to ensure that the project is accessible? NARRATIVE	Strong answers will provide information on specific outreach activities, project design and other relevant elements that make the project broadly accessible to diverse populations.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points		
	3. What are the characteristics and size of the target audience(s) for the project? Include information about how the target audience was identified. NARRATIVE	Strong answers will provide specific information on the target audience and quantify its size. This may include, but is not limited to, geographic, cultural, gender identity, age, ethnicity, and educational characteristics. The method used to select the target audience for the project may also be relevant.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points		
	4. Why will the project be relevant to this target audience(s) and how will they learn of, access and experience the proposed project? NARRATIVE	Strong answers will make clear links between the target audience and the project outcomes. Specific activities to make the target audience aware of and experience the project are also important.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points		
<b>SECTION 4: ORGANIZATIONAL CAPACITY</b>					
	1. What is your organization's experience with producing projects of similar scale and complexity? NARRATIVE	Strong answers will provide relevant information regarding the organization's trackrecord of producing successful projects of similar scope, size and complexity. Current or historic examples may provide valuable evidence for evaluation.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points		
	2. What are the resources, including potential partners, your organization will access to facilitate the production of the project (e.g. rehearsal space, location, community partners etc.)? NARRATIVE	Strong answers will identify the key resources needed to produce the project and the availability of those resources. The roles partners will play should be identified including the type of partners and/or specific partners who will participate.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points		

FISCAL YEAR 2018 CCSD  
RFP SCORING SHEET

FISCAL YEAR 2018 CREATIVE COMMUNITIES SAN DIEGO (CCSD)		GUIDELINES	SCORING	POINTS																						
CATEGORY	APPLICATION QUESTION																									
	3. Provide the name, title, education, experience, and other qualifications of each key person responsible for designing and producing the project. Include information about the qualifications of each key person responsible for ensuring that the project is accessible and relevant to the target audience(s). NARRATIVE	Strong answers will provide specific information on the key personnel responsible for producing the project and will describe how their skills and experience will lead to project success.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points																							
<b>SECTION 5: PROJECT BUDGET &amp; SPENDING PLAN</b>																										
	1. What is the proposed budget for the project? Provide the operating income and expenses for the two previous iterations of this project and the proposed project. In the table, include projected revenue, in-kind donations and expenses. Include the amount of funds your organization requests from the Commission as a part of the line item "Local government income". INTERACTIVE CALCULATOR		Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points																							
	2. What amount of funds is your organization requesting from the Commission? <b>NARRATIVE</b>		Not Scored																							
	3. Provide details to describe any income or expense categorized as "Other." <b>NARRATIVE</b>		Not Scored																							
			<b>POINTS TOTAL</b>																							
			<b>CAP's FINAL RANK</b>																							
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>RANK EQUIVALENT</th> <th>POINTS</th> </tr> </thead> <tbody> <tr><td>4</td><td>50.000</td></tr> <tr><td>4-</td><td>46.999</td></tr> <tr><td>3+</td><td>43.999</td></tr> <tr><td>3</td><td>40.999</td></tr> <tr><td>3-</td><td>37.999</td></tr> <tr><td>2+</td><td>34.999</td></tr> <tr><td>2</td><td>31.999</td></tr> <tr><td>2-</td><td>28.999</td></tr> <tr><td>1+</td><td>25.999</td></tr> <tr><td>1</td><td>22.999</td></tr> </tbody> </table>					RANK EQUIVALENT	POINTS	4	50.000	4-	46.999	3+	43.999	3	40.999	3-	37.999	2+	34.999	2	31.999	2-	28.999	1+	25.999	1	22.999
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Issued February 22, 2017

**Addendum 5 – Fiscal Year 2018 Application Guidelines**

**CCSD: Creative Communities San Diego**

The City of San Diego Commission for Arts and Culture

1. The deadline to ask questions has been extended until 5:00 p.m. on Friday, February 24, 2017. Appendix 2 has been updated to reflect this change.

2. In the online RFP form, Section 5 – Budget and Spending Plan, questions 3, 5 and 6 have been added. Appendix 3 and Appendix 4 has been updated to reflect these changes. The following questions were added:

- Provide relevant details regarding your local government income shown in Line D on the previous page. **NARRATIVE: 250 characters**
- Provide any details to annotate your projected budget from the previous page. **NARRATIVE: 500 Characters**
- Provide up to two budget vs actuals statements for previously completed projects of similar size and scope. Attach PDFs and provide any relevant details here. **NARRATIVE: 1500 Characters, ATTACH PDF (2)**

3. In the online RFP form, Section 5 – Budget and Spending Plan, question 4, the character count was changed to 1000 Characters, Appendix 3 has been updated to reflect this changes.

## **Appendix 2**

### **FY18 Funding Process Schedule**

#### **December 15, 2016**

Application guidelines and online Request for Qualifications (RFQ) form published

#### **December 20, 2016**

Technical assistance workshops re: How to Submit an Application (RFQ)

#### **December 29, 2016**

Last day for questions re: RFQ

#### **December 30, 2016**

RFQ addenda published, if necessary

#### **January 5, 2017, 11:59 p.m.**

Responses to RFQ due

#### **January 23, 2017**

- Announce results of RFQ evaluation
- Start of 3-day "cure" period for applicants deemed "Not Ready to Contract" due to missing or incomplete materials in RFQ
- Online Request for Proposals (RFP) form published

#### **February 2, 2017 – February 22, 2017**

Technical assistance workshops and office hours available re: How to Submit a Proposal (RFP)

#### **February 23, 2017**

RFP addenda published, if necessary

#### **February 24, 2017, 5:00 p.m.**

Last day for questions re: RFP

#### **February 26, 2017, 11:59 p.m.**

Responses to RFP due

#### **March 13 – March 24, 2017**

Panels convene to discuss and recommend scores/ranks for RFPs

#### **March 27, 2017**

Results of RFP evaluation announced

#### **March 28, 2017 – April 11, 2017**

Appeals process (10 working days)

#### **April 14, 2017**

Results of appeals announced

City's FY18 proposed budget announced

**April 21, 2017**

Tentative award amounts calculated and announced  
Policy & Funding Committee of Commission confirms tentative award amounts

**April 28, 2017**

Commission ratifies RFP rank recommendations from Policy & Funding Committee

**May 1 - May 5, 2017**

City budget hearings

**May 26, 2017**

Commission confirms adjusted tentative award amounts, if applicable

**June 30, 2017**

Final award amounts confirmed

**July 1, 2017**

Contracting process begins

## Appendix 3

### Request for Proposals (RFP) Tear Sheet

#### Fiscal Year 2018 Creative Communities San Diego (CCSD)

The City of San Diego supports a vibrant arts and culture community through the Commission for Arts and Culture. The City, in Council Policy 100-03, has made support of Arts, Culture and Community Festivals a priority for reinvesting Transient Occupancy Tax (TOT) with the following focus:

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Applicants should emphasize areas of alignment with these goals in their application.

#### SECTION 1: APPLICANT PROFILE

1. Legal Name of Organization
2. DBA Name of organization, if applicable
3. Provide your organization's mission statement. **NARRATIVE: 500 CHARACTERS**
4. Provide a brief description of the project for publication in the City's promotional materials. Include the name of the event(s), location(s), dates(s), a summary of what will happen at the event(s) and cost to participate (if any). **NARRATIVE: 500 CHARACTERS**
5. Indicate whether the project is new or has been produced before. **CHECKBOXES: THE PROJECT IS NEW, THE PROJECT HAS BEEN PRODUCED BEFORE**
6. Provide the date(s) of the project. **NARRATIVE: 75 CHARACTERS**
7. Provide the total estimated budget for the project. **NARRATIVE: 10 CHARACTERS**
8. Is your organization acting as a fiscal sponsor for the purposes of seeking funding for the project? **CHECKBOXES: YES, NO**
9. Provide up to three documents from sources not within your organization, including but not limited to, reviews, letters of recommendation or articles that reflect the quality of your organization's project. **ATTACH PDF**
10. Provide up to three work samples that are representative of the projects your organization produces and provide a current calendar of scheduled activities, if available. **ATTACH MULTIMEDIA FILES**

#### SECTION 2: PROPOSED PROJECT

1. What project does your organization propose to produce between July 1, 2017 and June 30, 2018? **NARRATIVE: 2500 CHARACTERS**

## Appendix 3

2. What are the goals and objectives of the project your organization is proposing? **NARRATIVE: 2500 CHARACTERS**
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## SECTION 3: COMMUNITY ENGAGEMENT

1. What are your organization's outreach efforts that informed your decision to propose this project? **NARRATIVE: 1500 CHARACTERS**
2. The Commission is responsible for ensuring that the City's funds benefit San Diegans of diverse cultures, ethnicities, incomes, abilities, genders, ages, orientations and neighborhoods. What will your organization do to ensure that the project is accessible? **NARRATIVE: 2000 CHARACTERS**
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## SECTION 4: ORGANIZATIONAL CAPACITY

1. What is your organization's experience with producing projects of similar scale and complexity? **NARRATIVE: 1500 CHARACTERS**
2. What are the resources, including potential partners, your organization will access to facilitate the production of the project (e.g. rehearsal space, location, community partners etc.)? **NARRATIVE: 1500 CHARACTERS**
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## SECTION 5: PROJECT BUDGET & SPENDING PLAN

1. What is the proposed budget for the project? Provide the operating income and expenses for the two previous iterations of this project and the proposed project. In the table, include projected revenue, in-kind donations and expenses. Include the amount of funds your organization requests from the Commission as a part of the line item "Local government income". **INTERACTIVE CALCULATOR**
2. What amount of funds is your organization requesting from the Commission? **NARRATIVE: 10 CHARACTERS**

FY18

## **Appendix 3**

3. Provide relevant details regarding your local government income shown in Line D on the previous page. **NARRATIVE: 250 characters**
4. Provide details to describe any income or expense categorized as "Other." **NARRATIVE: 1000 CHARACTERS**
5. Provide any details to annotate your projected budget from the previous page. **NARRATIVE: 500 Characters**
6. Provide up to two budget vs actuals statements for previously completed projects of similar size and scope. Attach PDFs and provide any relevant details here. **NARRATIVE: 1500 Characters, ATTACH PDF (2)**

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FISCAL YEAR 2018 CCSD  
RFP SCORING SHEET

FISCAL YEAR 2018 CREATIVE COMMUNITIES SAN DIEGO (CCSD)		APPLICATION QUESTION	GUIDELINES	SCORING	POINTS
SECTION	CATEGORY	APPLICATION QUESTION	GUIDELINES	SCORING	POINTS
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	1. What project does your organization propose to produce between July 1, 2017 and June 30, 2018? NARRATIVE	Strong answers will provide a clear description of the project, key elements and the timeframe in which the project will occur.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points		
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<b>Section 3: COMMUNITY ENGAGEMENT</b>					
	1. What are your organization's outreach efforts that informed your decision to propose this project? NARRATIVE	Strong answers will provide specific outreach activities and the feedback that led to the project concept. Answers should demonstrate relevancy based upon feedback.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points		
	2. The Commission is responsible for ensuring that the City's funds benefit San Diegans of diverse cultures, ethnicities, incomes, abilities, genders, ages, orientations and neighborhoods. What will your organization do to ensure that the project is accessible? NARRATIVE	Strong answers will provide information on specific outreach activities, project design and other relevant elements that make the project broadly accessible to diverse populations.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points		
	3. What are the characteristics and size of the target audience(s) for the project? Include information about how the target audience was identified. NARRATIVE	Strong answers will provide specific information on the target audience and quantify its size. This may include, but is not limited to, geographic, cultural, gender identity, age, ethnicity, and educational characteristics. The method used to select the target audience for the project may also be relevant.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points		
	4. Why will the project be relevant to this target audience(s) and how will they learn of, access and experience the proposed project? NARRATIVE	Strong answers will make clear links between the target audience and the project outcomes. Specific activities to make the target audience aware of and experience the project are also important.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points		

FISCAL YEAR 2018 CCSD  
RFP SCORING SHEET

FISCAL YEAR 2018 CREATIVE COMMUNITIES SAN DIEGO (CCSD)		GUIDELINES	SCORING	POINTS																						
CATEGORY	APPLICATION QUESTION																									
<b>SECTION 4: ORGANIZATIONAL CAPACITY</b>																										
	1. What is your organization's experience with producing projects of similar scale and complexity? NARRATIVE	Strong answers will provide relevant information regarding the organization's trackrecord of producing successful projects of similar scope, size and complexity. Current or historic examples may provide valuable evidence for evaluation.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points																							
	2. What are the resources, including potential partners, your organization will access to facilitate the production of the project (e.g. rehearsal space, location, community partners etc.)? NARRATIVE	Strong answers will identify the key resources needed to produce the project and the availability of those resources. The roles partners will play should be identified including the type of partners and/or specific partners who will participate.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points																							
	3. Provide the name, title, education, experience, and other qualifications of each key person responsible for designing and producing the project. Include information about the qualifications of each key person responsible for ensuring that the project is accessible and relevant to the target audience(s). NARRATIVE	Strong answers will provide specific information on the key personnel responsible for producing the project and will describe how their skills and experience will lead to project success.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points																							
<b>SECTION 5: PROJECT BUDGET &amp; SPENDING PLAN</b>																										
	1. What is the proposed budget for the project? Provide the operating income and expenses for the two previous iterations of this project and the proposed project. In the table, include projected revenue, in-kind donations and expenses. Include the amount of funds your organization requests from the Commission as a part of the line item "Local government income". INTERACTIVE CALCULATOR	Strong answers demonstrate a project budget that is realistic and reasonable, with a plan for matching funds. Prior year(s) budget actuals may provide valuable evidence for evaluation.	Strong = 4 points Basic = 2-3 points Weak = 1 point Unresponsive = 0 points																							
	2. What amount of funds is your organization requesting from the Commission? NARRATIVE		Not Scored																							
	3. Provide relevant details regarding your local government income shown in Line D on the previous page. NARRATIVE		Not Scored																							
	4. Provide details to describe any income or expense categorized as "Other." NARRATIVE		Not Scored																							
	5. Provide any details to annotate your projected budget from the previous page. NARRATIVE		Not Scored																							
	6. Provide up to two budget vs actuals statements for previously completed projects of similar size and scope. Attach PDFs and provide any relevant details here. NARRATIVE and ATTACH PDF (2)		Not Scored																							
			<b>POINTS TOTAL</b>																							
			<b>CAP's FINAL RANK</b>																							
<table border="1" style="width: 100%; text-align: center;"> <thead> <tr> <th>RANK EQUIVALENT</th> <th>POINTS</th> </tr> </thead> <tbody> <tr><td>4</td><td>50.000</td></tr> <tr><td>4-</td><td>46.999</td></tr> <tr><td>3+</td><td>43.999</td></tr> <tr><td>3</td><td>40.999</td></tr> <tr><td>3-</td><td>37.999</td></tr> <tr><td>2+</td><td>34.999</td></tr> <tr><td>2</td><td>31.999</td></tr> <tr><td>2-</td><td>28.999</td></tr> <tr><td>1+</td><td>25.999</td></tr> <tr><td>1</td><td>22.999</td></tr> </tbody> </table>					RANK EQUIVALENT	POINTS	4	50.000	4-	46.999	3+	43.999	3	40.999	3-	37.999	2+	34.999	2	31.999	2-	28.999	1+	25.999	1	22.999
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