



# Commission for Arts and Culture



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## Arts and Culture Funding Program

*Creative Communities San Diego*

*Fiscal Year 2023 Guidelines*

Dear CCSD Applicants,

On behalf of the City of San Diego, Mayor Todd Gloria and City Council, and the Commission for Arts and Culture, *welcome* to the 2023 Creative Communities San Diego (CCSD) guidelines.

If your organization is an existing CCSD recipient, congratulations on your continued work and successes during the past 18 months. We all seem to overuse the word “pivot” these days, but in the case of San Diego’s cultural sector, it certainly applies. If you are new to applying for or receiving CCSD funds, welcome, you’re applying at a very good time.

Last year I shared that we were conducting a review of our funding program based on recommendations from a recent equity assessment. In these guidelines you will see reductions in some of the obligations, including elimination of the insurance requirement, lower audit requirements, and the opportunity for partial advance on payments.

All this work is part of our continued efforts to reduce barriers, invite new applicants, and extend the reach of arts and culture funding deeply and authentically throughout our city’s many communities.

On behalf of all of us at the Commission, we look forward to working with you during the fiscal year 2023 application period and coming out on the other side of COVID-19 a more resilient, creative, and inclusive sector.



*Jonathon Glus*

*Executive Director, Commission for Arts and Culture*



# Commission for Arts and Culture

## Fiscal Year 2023 Application Guidelines

### CCSD: Creative Communities San Diego

#### Funding for Projects

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Questions?

City arts and culture staff

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

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A translation of these guidelines is available in Spanish upon request; however, only applications in English will be accepted. Una traducción de esta aplicación está disponible en español a petición; sin embargo, solo se aceptarán solicitudes en inglés.

## **Section 1: Introduction**

The City advances and drives an equitable and inclusive creative economy and cultural ecosystem by investing in the work of artists and creatives, and the institutions and systems that amplify creative work and experiences; cultivating local participation and access; and advancing San Diego as a global city. Committed to equitable economic development, City arts and culture staff, facilitate the City's investments in organizations, artists, and neighborhoods. Programs, partnerships, and initiatives range from funding and public art to cross-sector and creative industries.

The City annually awards funding for general operating support and project-specific support to San Diego nonprofit organizations operating in the field of arts and culture. These funds, awarded to nonprofits through two application processes Organizational Support Program (OSP) and Creative Communities San Diego (CCSD), generate meaningful impacts in communities and expand access to arts and culture in every City Council district. The source of the funding for OSP and CCSD is Transient Occupancy Tax (TOT), a tax levied on individuals who stay overnight in hotels, motels, and other lodging establishments. A portion of the City's TOT revenue is intended to be used to: enhance the economy and strengthen the arts, cultural and creative sectors; contribute to San Diego's national and international reputation as a creative, cultural destination; provide access to excellence in culture and the arts for residents and visitors; enrich the lives of the people of San Diego; and build healthy, vital neighborhoods.

The City of San Diego Commission for Arts and Culture (Commission) serves in an advisory capacity to the 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 destination. Annually, the Commission recommends to the City the award of funding for OSP and CCSD.

## **Section 2: About Creative Communities San Diego (CCSD)**

Creative Communities San Diego centralizes arts and culture in neighborhoods across San Diego. CCSD provides project support for tax-exempt nonprofit organizations to deliver dynamic projects in San Diego neighborhoods that: engage diverse communities in arts, culture, and creativity; and contribute to a more accessible and sustainable creative ecosystem. Projects can take a variety of artistic and cultural forms, from film and video screenings, art exhibitions and performances to festivals, parades, and other activities in a similar vein. Projects must occur within Fiscal Year 2023 (July 1, 2022 – June 30, 2023). Projects produced by organizations that do not hold tax-exempt nonprofit status under section 501(c)(3) or 501(c)(6) of the Internal Revenue Code may be eligible for funding via a nonprofit fiscal sponsor.

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

Your organization is eligible to apply for CCSD funding if:

- **NONPROFIT STATUS:** Your organization holds tax-exempt nonprofit status under section 501(c)(3) or 501(c)(6) of the Internal Revenue Code at the time of application; AND
- **PUBLIC BENEFIT:** Your organization's project must have a clear presentation that is open to the public, or meaningful and accessible engagement component within the performance period. While presentations and participation must be open to the public generally, they may reach specific audiences or charge a fee as long as such restrictions do not discriminate on the bases as described in Section 6; AND
- **HISTORY OF OPERATIONS:** Your organization has at least two full and consecutive years of operating with its own independent governing board (not under a fiscal sponsor); AND
- **SERVICE AREA:** Your organization maintains principal offices in San Diego county, with an exception for arts service organizations with offices in San Diego county and primary headquarters in California; AND
- **PROJECT LOCATION:** Your project must take place within the city of San Diego; AND
- **MISSION ALIGNMENT:** Your project aligns with the purpose of TOT funding:
  1. To enhance the economy and strengthen arts, cultural, and creative sectors;
  2. To contribute to San Diego's national and international reputation as a creative, 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.

**FISCAL SPONSORS:** An organization conducting not-for profit work without federal tax-exempt nonprofit status under section 501(c)(3) or 501(c)(6) of the Internal Revenue Code, or with less than two full and consecutive years of operating with its own independent governing board, may be eligible to apply for CCSD funding for a not-for profit project using a fiscal sponsor. The applicant organization—not the fiscal sponsor— will be considered by the City as the applicant. If funding is awarded, the applicant organization and the fiscal sponsor will enter into an agreement with the City. Applicants using fiscal sponsors must submit all required materials for the fiscal sponsor at the time of application, including a letter of agreement. See FY23 Fiscal Sponsorship Requirements on the use of fiscal sponsors for CCSD funding as well as a resource list of fiscal

sponsors. FY23 Fiscal Sponsorship Requirements and resources are listed under “Resources” – “Request for Qualifications” dropdown here: <https://www.sandiego.gov/arts-culture/funding/ccsdapplying>.

Your organization is NOT eligible for a CCSD award if:

- **GENERAL OPERATING SUPPORT:** Your organization is seeking funding for general operating support (the City offers a different funding category called Organizational Support Program [OSP] for general operating support. Guidelines for OSP can be found at <http://www.sandiego.gov/arts-culture/funding>).
- **ORGANIZATIONAL TYPE:** Your organization is an elementary or secondary school, school district, college, university, or other government entity.
- **FINANCES:** Your organization has outstanding financial obligations or debts of any kind to the City.
- **RE-GRANTING:** Your organization’s primary purpose is grantmaking.
- **MULTIPLE APPLICATIONS:** Your organization has applied or will apply for Fiscal Year 2023 funds through any of the following TOT categories: Organizational Support Program (OSP) or Economic Development as defined in Council Policy 100-03. Your organization must determine which one TOT category is the best match for your organization.

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

The amount of money an applicant can be awarded is calculated using an algorithm and is dependent on several factors including the organization’s submitted project budget, the rank given to the organization’s proposal, the total amount of funds available for distribution, and the number of organizations receiving awards. In FY22, CCSD applicants were awarded between 5%-43% of their project budgets. The minimum award amount an applicant can receive is \$5,000.

In Fiscal Year 2022:

- Projects with budgets between \$15,000 and \$29,999 were awarded on average 27% of the total project budget.
- Projects with budgets between \$30,000 and \$99,999 were awarded on average 10% of the total project budget.
- Projects with budgets over \$100,000 were awarded on average 5% of the total project budget.

**Matching Income Requirement for Applicants:** The matching requirement for all CCSD awards is 1:1. CCSD funded projects with project budgets of \$29,999 or less may use in-kind contributions to fulfill up to 50% of their match. The applicant must receive all

matching income during the period of performance.

### **Section 5: How to Apply**

1. **TWO-STEP APPLICATION PROCESS:** The application process includes two steps: Request for Qualifications (RFQ), then Request for Proposals (RFP). Applications are accepted via the online platform [GoSmart](#). Only applications submitted via the GoSmart platform will be accepted. Online resources and technical assistance opportunities are listed under “Resources” – “Request for Qualifications” dropdown [here](#). (Accommodations may be made upon request for those with disabilities).
2. **REQUEST FOR QUALIFICATIONS:** Complete and submit the online Request for Qualifications (RFQ) form by the deadline (Appendix 5).
3. **RFQ EVALUATION:** Through a contract with the University of San Diego, an outside team of nonprofit financial experts along with City staff, trained specifically in City contracting and procurement processes, evaluate the strength of each applicant’s ability to deliver the obligations of a City award using the information provided in response to the RFQ. This team uses a standard scoring system to evaluate Eligibility; Administrative Capacity & Governance Practices; Financial Management; and Past Performance on City Agreements (if applicable). Each applicant is assigned either: 1) Qualified; or 2) Not Qualified.
4. **RFQ CURE PERIOD:** Applicants deemed “Not Qualified” will be given five (5) days to address any incorrect or missing RFQ components. The RFQ will then be reevaluated. Applicants deemed “Not Qualified” after the reevaluation will not advance but will be offered technical assistance to prepare for future funding cycles.
5. **REQUEST FOR PROPOSALS (RFP):** Applicants deemed “Qualified” will be given access to the online Request for Proposals (RFP) form, and the form must be completed and submitted by the deadline (Appendix 5). Some applicants may be eligible to request the “Option to Renew” in lieu of submitting an RFP. (Learn more about the Option to Renew in Section 7 of these guidelines)
6. **RFP EVALUATION PANELS:** Peer advisory panels composed of artists, cultural practitioners, and arts field professionals from all disciplines and backgrounds throughout San Diego, North America, and Baja California, evaluate the proposals and the degree to which each applicant’s proposed activities align with the City’s goals for the use of TOT funds. The advisory panels use a standard scoring system to evaluate each section of the proposal - Proposed Project; Community Engagement; Production Capacity; Project Budget & Spending Plan; and Achievement in Emphasis Areas - and assign a rank to each proposal: Very Aligned with scoring criteria (Ranks in the 4 range); Aligned with scoring criteria (Ranks in

the 3 range); or Not Aligned with scoring criteria (Ranks in the 2 range). The meetings where proposals are reviewed and ranked are open to the public. During the panel deliberation, applicants will be given an opportunity to give a brief, in-person/live introduction to their application and an opportunity to clarify any misreading of their application. Details, including dates, times, and specific conditions will be provided to applicants and to the public during the RFP phase.

7. RANKS: Proposals receiving ranks of 2+, 2, or 2- will be deemed “Not Aligned with scoring criteria” and will not be recommended to receive an award.
8. APPEALS: Any applicant not recommended to receive an award may submit a written appeal to staff no later than 5:00 p.m. on the tenth calendar day following notification from staff to the applicant that no award is being recommended. Staff will review the appeal and present it to the Commission for review and recommendation to the City. The City will make the final ruling. Upon request from an appellant, staff will provide written comments submitted by the Commission advisory panels, when available, to help the appellant prepare their response.
9. CALCULATING AWARD AMOUNTS: Ranks are converted into a monetary award amount using an algorithm that is dependent on several factors including the applicant’s project budget as submitted in the RFQ, the rank given to the applicant’s proposal, the total amount of funding available for the CCSD funding category for distribution, and the number of organizations receiving awards.
10. AUTHORIZING AWARDS: The Commission receives the ranks as recommended by the review panels for recommendation to the City. The role of the Commission is to confirm that the review process has been fair. The meeting where the Commission receives this information is open to the public and will be announced in advance. The monetary award amount for each applicant that results from the 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.

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

1. The City reserves the right to reject, in whole or in part, any responses to this RFQ/RFP, to not accept a response submitted after any applicable cut-off time or date, to not accept a proposal recommended by any of the Commission advisory panels or the Commission, to initiate an alternate process, to reissue this RFQ/RFP and/or cancel this RFQ/RFP, in whole or in part, at any time without prior notice and makes no representation that any agreement will be awarded to any

applicant. Additionally, the City expressly reserves the right to postpone opening responses to this RFQ/RFP 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/RFP and fiscal sponsorship requirements by addendum. The City is bound only by what is expressly stated in this RFQ/RFP and any authorized written addenda thereto. Addenda will be posted on the City's website at <https://www.sandiego.gov/arts-culture/funding>. It is the applicant'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 is not responsible for the loss or damage of any materials submitted.
4. The submission of a response to this RFQ/RFP does not guarantee funding.
5. The applicant is solely responsible for responding to any required or optional updates related to this RFQ/RFP or related to the award that is a result of this process.
6. Funds awarded to an applicant may be paid in advance of activities and on a reimbursement basis pursuant to awarded agreement. Eligible expenses must be incurred by an applicant during the FY23 period of performance between July 1, 2022, and June 30, 2023 for the City to advance and reimburse pursuant to an awarded agreement.
7. Any applicant awarded CCSD funding is required to provide a \$1 cash match for every \$1 awarded. The minimum award amount is \$5,000. Match income must be received by the applicant during the period of performance (between July 1, 2022, and June 30, 2023). CCSD funded projects with project budgets of \$29,999 or less may use in-kind contributions to fulfill up to 50% of their match. The project budget submitted in the RFQ will be used to determine eligibility for use of in-kind as a portion of the match.
8. Each applicant awarded funding must receive an executed agreement from the City before any funds are released. It can take a minimum of 5 months from July 1 for the City to provide an executed agreement, dependent on the awardee's expediency in submitting required documentation and information and the City's contracting review process.
9. Each applicant 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, and evidence of non-debarment via the System for Award Management (SAM). All registrations must be current and active during the period of performance.
10. All applicants receiving funding of \$10,000 or more must submit required financial

disclosure documentation evidencing the financial status of the organization's last completed fiscal year with final performance report pursuant to an awarded agreement.

11. An applicant receiving funding equaling \$75,000 or more must also submit the following: applicants with an operating budget under \$2 million must submit a financial review of the organization's most recently completed fiscal year conducted by an independent certified public accountant within 150 days of the end of that fiscal year; applicants with an operating budget of \$2 million or more must submit audited financial statements of the organization's most recently completed fiscal year conducted by an independent certified public accountant within 150 days of the end of that fiscal year.
12. An applicant receiving funding in the amount of \$500,000 or more, when that funding represents more than 10% of the organization's annual budget, must also submit salary and wage ranges for each of its job classifications, including actual executive salaries and benefits packages.
13. The award of funds does not imply that the City will produce, exhibit, promote or present the CCSD project. It is the sole responsibility of the applicant to secure a venue or site and any required permit(s), approval(s) and/or permissions(s). It is the responsibility of the applicant to build this process into their project plan, budget and timeline which should be reflected in the response to the RFQ/RFP.
14. Each applicant awarded funding is required to deliver a progress report and a final performance report in a format requested by City staff.
15. The applicant acknowledges that information submitted as part of their application for this opportunity may be disclosed to the public pursuant to a request under the California Public Records Act.
16. City funds may NOT be used for:
  - Inherently religious activities: worship, instruction, or proselytization.
  - Lobbying, including activities in lobbying, including activities intended to influence the outcome of elections or influence government officials regarding pending legislation, either directly or through specific lobbying appeals to the public.
  - Voter registration drives and related activities.
  - Re-granting.
  - Tuition for academic study.
  - Capital outlay for construction, purchase, or improvement of facilities (including artwork installation on City property), or capital outlay for purchase of equipment.
  - Contests and competitions including gifts, prizes, and awards.
  - Travel, lodging, and transportation costs.

- Food, alcohol, or beverages for hospitality or entertainment functions.
  - Projects where fundraising is the primary purpose of the project.
  - Contributions and donations to other individuals or entities.
  - Cash reserves and endowments.
  - Fines and penalties, accumulated deficits, and debt reductions.
17. City funds will not be provided to any applicants or activities that discriminate against any person on the basis of race, gender, gender expression, gender identity, religion, national origin, ethnicity, sexual orientation, age, or disability.
18. The applicant is solely responsible for the accuracy and truth of the information they submit to the City. Any applicant 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, at any point, be immediately disqualified from receiving funding.

### **Section 7: Option to Renew for Returning Applicants**

An applicant that has been awarded a Fiscal Year 2022 agreement or agreement renewal, is seeking a Fiscal Year 2023 agreement and meets eligibility requirements is considered a “returning applicant.” All applicants, returning and new, must submit a response to the FY23 RFQ. A returning applicant whose response to the RFQ is deemed qualified may indicate one of the following preferences:

1. Request the option to renew its agreement; or
2. Submit a response to the RFP.

**Requesting the Option to Renew:** Returning applicants may request the City execute the option to renew their agreement. If the request is granted by the City, the returning applicant will not have to submit a response to the FY23 RFP for panel evaluation, and their most recent panel issued rank will carry over to calculate the FY23 award amount. The City may, at its sole discretion and at any time, direct an applicant to submit a response to the RFP for panel evaluation.

The City will only exercise the option to renew for up to two separate but consecutive one-year periods, for a total of three years. For example, if an applicant held an agreement for the FY21 funding cycle, and it was renewed in FY22, the applicant could request a second option to renew for the FY23 funding cycle. If that option was granted the applicant would not be eligible for an agreement renewal for the FY24 funding cycle.

If an applicant organization applied through a fiscal sponsor and was awarded a FY22 agreement or agreement renewal, the applicant organization may be eligible to request the option to renew for FY23, if using the same returning fiscal sponsor for the same project. The agreement renewal would be updated to include both the applicant organization and fiscal sponsor.

Only those returning applicants (and applicant organizations using returning fiscal sponsors as specified above) that meet the following conditions are eligible to request the option to renew:

- The returning applicant's response to the FY23 RFQ is deemed qualified.
- The returning applicant has had no significant changes in scope of funded project from last submitted RFP response.
- The returning applicant has not ended the past two fiscal years in a deficit.
- The returning applicant was recommended for funding and successfully executed an agreement in FY22 (July 1, 2021- June 30, 2022). If the returning applicant's FY22 agreement is not executed and/or fulfilled, the returning applicant will not be eligible to receive an agreement renewal for FY23.
- The returning applicant has had no significant changes in operations since last submitted RFP, including but not limited to: A) changes in the organization's mission; B) changes in the majority of the membership of the board of directors; or C) changes in financial status such that fulfilling the terms of the FY23 agreement, including the matching funds requirement, are at risk of not being met.
- The returning applicant acknowledges, understands, and accepts that any FY23 award amount will be calculated using the project budget submitted in response to the FY23 RFQ.
- The returning applicant acknowledges, understands, and accepts that their prior rank will carry over and be used as a factor to calculate the FY23 award amount.
- The returning applicant acknowledges, understands, and accepts that the FY23 award amount may not be the same as the FY22 award amount due to the variable factors in the award calculation.
- At the City's sole discretion, if the returning applicant's annual operating budget and/or project budget has fluctuated more than 10% from the previous fiscal year, the returning applicant may be required to submit a response to the FY23 RFP and go through the panel evaluation process.

**Submitting a Response to the RFP:** Returning applicants (and applicant organizations that applied through a fiscal sponsor and were awarded a FY22 agreement or agreement renewal) may elect to submit a response to the FY23 RFP for panel evaluation. The rank given to the returning applicant's response to the FY23 RFP will be used to calculate the FY23 award amount. Returning applicants that elect to submit a response to the FY23 RFP are not guaranteed to receive the same rank as their prior-year rank.

Only those returning applicants (and applicant organizations using returning fiscal sponsors as specified above) that meet the following conditions are eligible to submit a

response to the FY23 RFP:

- The returning applicant's response to the FY23 RFQ is deemed qualified.
- The returning applicant acknowledges, understands, and accepts that any FY23 award amount will be calculated using the project budget submitted in response to the FY23 RFQ.
- Returning applicants that elect to submit a response to the FY23 RFP are not guaranteed to receive the same rank as their prior-year rank.
- The returning applicant acknowledges, understands, and accepts that the rank given during the FY23 RFP evaluation will be used as a factor to calculate the FY23 award amount.
- The returning applicant acknowledges, understands, and accepts that the FY23 award amount may not be the same as the FY22 award amount due to the variable factors in the award calculation.

**Appendix 1**  
**Request for Qualifications (RFQ) Tear Sheet**  
**Fiscal Year 2023 Creative Communities San Diego (CCSD)**

**SECTION 1: APPLICANT PROFILE**

1. Legal Name of Organization.
2. DBA Name of Organization, if applicable.
3. Address of Organization (provide a street address, PO Box or mailboxes will not be accepted).
4. San Diego City Council District where organization is located. (To identify your organization's district search your organization's principal office address on [this map](#) and include the district it is part of). (Select NONE OF THE ABOVE if your organization principal office is not within a San Diego City Council District). **SELECT ONE**
5. Organization Category. **SELECT ALL THAT APPLY**
6. Organization's mission statement (not fiscal sponsor). **NARRATIVE: 500 CHARACTERS**
7. Are you a new applicant to the City's CCSD funding category? (If you have applied in the past to a different City's arts and culture funding category, but are new to the CCSD category, please select YES) **CHECKBOXES: YES, NO**
8. Workforce Report: Download the City's Equal Opportunity Contracting Workforce Report, complete pages 1 & 2, save and upload here. The Workforce Report can be found [here](#). (this data is for informational purposes only and will not be a factor in award eligibility.) **ATTACH PDF**
9. Contact Information:
  - o Director of Organization First and Last Name
  - o Director of Organization Title
  - o Director of Organization Email
  - o Director of Organization PhoneContact information of the primary person who will administer the agreement between your organization and the City should funding be awarded:
  - o Primary Contact First and Last Name
  - o Primary Contact Title
  - o Primary Contact Email
  - o Primary Contact Phone
  - o Primary Contact Type (Employee, Contractor, Volunteer)
  - o Primary Contact Brief Bio (please include qualifications and past experiences managing agreements)
10. Briefly describe the project for which your organization seeks funding. Please specify if the project is free to the public. **NARRATIVE: 500 CHARACTERS**
11. Indicate the history of the project. **CHECKBOXES: THE PROJECT IS NEW; THE PROJECT HAS BEEN PRODUCED BEFORE**
12. Project Category **SELECT ONE**
13. Project Discipline **SELECT ONE**

14. Provide the date(s) for the project.
15. Provide the San Diego City Council District(s) where the project will occur (To identify the districts search the venues/addresses where your project will take place on [this map](#) and include all of the results). **CHECKBOXES: SELECT ALL THAT APPLY**
16. Which month and day does your organization's fiscal year end?
17. Provide the total budget for the project. NOTE: if your organization is deemed qualified to receive a FY23 funding award, this total budget will be used as a factor in the award calculation.
18. Attach a project budget that reflects the total income and expenses for the project. The project budget should match the number in question 17. Include budget notes for all applicable line items. Please use the template provided by the City. This template is titled "Required CCSD Project Budget Template" and is located here: <https://www.sandiego.gov/arts-culture/funding/ccsdapplying> under "Resources" – "Key Terms and Templates" dropdown. **ATTACH PDF**
19. Is your organization using a fiscal sponsor to apply for funding? **CHECKBOXES: YES, NO**
20. If your organization is using a fiscal sponsor to apply for funding, provide the required Letter of Agreement between your organization and your fiscal sponsor. The Letter of Agreement requirements are outlined in the FY23 Fiscal Sponsorship Requirements located here: <https://www.sandiego.gov/arts-culture/funding/ccsdapplying> under "Resources" – "Request for Qualifications" dropdown. **ATTACH PDF**

## SECTION 2: ELIGIBILITY SURVEY

1. Your organization must have tax-exempt nonprofit status under section 501(c)(3) or 501(c)(6) of the Internal Revenue Code at the time of application to be eligible for funding. Upload a copy of your IRS letter of determination. (If using a fiscal sponsor, upload their IRS letter of determination). **ATTACH PDF**
2. Can your organization produce proof that it has at least two full and consecutive years of operating with its own independent governing board (not under a fiscal sponsor)? **CHECKBOXES: YES, NO**
3. If your organization is using a fiscal sponsor to apply for funding, can your organization produce proof that your fiscal sponsor has at least two full and consecutive years of operating with its own independent governing board? **CHECKBOXES: YES, NO, NOT APPLICABLE**
4. Does your organization maintain principal offices in San Diego county (or if an arts services organization, maintain offices in San Diego county and primary headquarters in California)? **CHECKBOXES: YES, NO**
5. Submit evidence of principal offices within county of San Diego limits (or if an arts organization, offices in San Diego county and primary headquarters in California). Accepted documents for proof of address include: utility or municipality bills that are in your organization's name (*bills for water, electricity, gas*), bank documents (*current account statements*), a signed copy of a lease/rental agreement, an official tax document, a telephone account for a physical landline. **ATTACH PDF**
6. Can your organization provide proof that the project for which it's seeking funding will

take place within the city of San Diego? [CHECKBOXES: YES, NO](#)

7. With which of the TOT funding purposes does your organization align? To enhance the economy and strengthen the arts, cultural, and creative sectors; to contribute to San Diego's national and international reputation as a creative, cultural destination; to provide access to excellence in culture and the arts for residents and visitors; to enrich the lives of the people of San Diego; and to build healthy, vital neighborhoods?

[CHECKBOXES: SELECT ALL THAT APPLY](#)

8. Understanding that your organization may only receive TOT funding through one funding category, has/will your organization applied/apply for Fiscal Year 2023 TOT funding through any of the following: Organizational Support Program (OSP) or Economic Development TOT support? [CHECKBOXES: YES-OSP, YES-ED, NO](#)

9. Is your organization seeking funding for any of the following?

- Inherently religious activities: worship, instruction, or proselytization.
- Lobbying, including activities in lobbying, including activities intended to influence the outcome of elections or influence government officials regarding pending legislation, either directly or through specific lobbying appeals to the public.
- Voter registration drives and related activities.
- Re-granting.
- Tuition for academic study.
- Capital outlay for construction, purchase, or improvement of facilities (including artwork installation on City property), or capital outlay for purchase of equipment.
- Contests and competitions including gifts, prizes, and awards.
- Travel, lodging, and transportation costs.
- Food, alcohol, or beverages for hospitality or entertainment functions.
- Projects where fundraising is the primary purpose of the project.
- Contributions and donations to other individuals or entities.
- Cash reserves and endowments.
- Fines and penalties, accumulated deficits, and debt reductions.

[CHECKBOXES: YES, NO](#)

10. Is your organization seeking funding for a project that would not be open to the public?

[CHECKBOXES: YES, NO](#)

11. Is your organization an elementary or secondary school, school district, college, university, or other government entity? [CHECKBOXES: YES, NO](#)

12. Does your organization have outstanding financial obligations or debts of any kind to the City? [CHECKBOXES: YES, N](#)

### **SECTION 3: ADMINISTRATIVE CAPACITY & GOVERNANCE PRACTICES**

1. Provide an organizational chart showing names and titles of your organization's staff. Gender and race/ethnicity information is requested but optional. [ATTACH PDF](#)
2. Does your organization have a diversity, equity, and inclusion statement or policy? [CHECKBOXES: YES, NO](#)
3. Provide a list with names, titles, and brief biographies of each board member of your organization. Gender and race/ethnicity information is requested, but optional. [ATTACH](#)

[PDF](#)

4. How often does the board of your organization formally meet to conduct the business of the organization? [CHECKBOXES: MONTHLY, BI-MONTHLY, QUARTERLY, ANNUALLY](#)
5. Does the board of your organization approve annual budgets for the organization? [CHECKBOXES: YES, NO](#)
6. 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](#)
7. Does the board of your organization conduct an annual performance evaluation of the organization's top executive? [CHECKBOXES: YES, NO, NOT APPLICABLE-OUR ORGANIZATION HAS NO PAID EMPLOYEES](#)
8. How often is the board provided with financial statements that include budgeted vs. actual revenues and expenses? [CHECKBOXES: MONTHLY, BI-MONTHLY, QUARTERLY, ANNUALLY](#)
9. Can your organization provide proof of having a conflict of interest policy that: 1) is signed annually by officers, directors, trustees, and key employees; and 2) has specific language to prevent self-dealing? [CHECKBOXES: YES, NO](#)
10. Does your organization require officers, directors, trustees, and key employees to sign a conflict of interest disclosure annually? [CHECKBOXES: YES, NO](#)

(If your organization is using a fiscal sponsor, please complete the Administrative Capacity & Governance Practices section above using fiscal sponsor's information).

#### **SECTION 4: FINANCIAL MANAGEMENT**

1. 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](#)
2. Attach your organization's balance sheet and a profit and loss statement or complete financial statements for your organization's last two completed fiscal years. If available, submit the audited version of these documents. If you do not have these documents, please use the template provided by the City. This template is titled "Optional - Financial Statement Template" and is located here: <https://www.sandiego.gov/arts-culture/funding/ccsdapplying> under "Resources" - "Key Terms and Templates" dropdown. Use the last completed fiscal year's document to calculate your organization's Liquid Unrestricted Net Assets (LUNA) in the next question. [ATTACH PDF](#)
3. Using your organization's fiscal year-end financial statements attached above, compute the LUNA for your organization's last completed fiscal year. [INTERACTIVE CALCULATOR](#) [Need help with LUNA? Check out the handy tutorial video located here: <https://www.sandiego.gov/arts-culture/funding/ccsdapplying> under "Resources" - "Requests for Qualifications" dropdown]
4. How many months of liquidity did your organization have at the beginning of its current fiscal year? [INTERACTIVE CALCULATOR](#)
5. If the calculations show that your organization has less than one month of liquidity, provide relevant information for funding any cash shortfall your organization may

experience during the year (e.g. board designated reserves, line of credit, etc.) Describe the forms of proof your organization could provide for these funding sources.

**NARRATIVE: 1000 CHARACTERS**

6. Does your organization have a bank line of credit? **CHECKBOXES: YES, NO**
7. 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: 1000 CHARACTERS**
8. If your organization shows a deficit on its balance sheet, profit, and loss statement, or on a complete financial statement for your last completed fiscal year, please explain. **NARRATIVE: 1000 CHARACTERS**
9. If your organization's current budget has fluctuated by 10% or more from its previous year's budget, please explain why. **NARRATIVE: 1000 CHARACTERS**
10. Provide any other relevant details to give an accurate picture of your organization's financial position. **NARRATIVE: 1000 CHARACTERS**

(If your organization is using a fiscal sponsor, please complete the Financial Management section above using fiscal sponsor's information).

## **SECTION 5: PAST PERFORMANCE ON CITY AGREEMENTS**

Responses in this section will be provided by City staff using data collected from past performance on City agreements from FY20 forward.

1. Organization submitted late agreement kit in FY20 and/or FY21 and/or FY22.
2. Organization did not perform the agreed upon scope of funded project in FY21.
3. Organization withdrew from contracting after award allocation in FY20 and/or FY21.
4. Organization did not claim full award amount in FY21
5. Organization submitted late or incomplete final performance report in FY20 and/or FY21.
6. Organization did not submit the final performance report in FY20 and/or FY21.
7. City terminated agreement with organization for cause in FY20 and/or FY21 and/or FY22.

## **SECTION 6: CONDITIONS FOR SUBMISSION**

WITH THE SUBMISSION OF A RESPONSE TO THIS RFQ/RFP, THE ORGANIZATION 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/RFP, to not accept a proposal recommended by any of the Commission advisory panels or the Commission, to initiate an alternate process, to reissue this RFQ/RFP, and/or cancel this RFQ/RFP, in whole or in part, at any time without prior notice and makes no representation that any agreement will be awarded to any applicant. Additionally, the City expressly reserves the right to postpone opening responses to this RFQ/RFP 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/RFP and FY23 fiscal sponsorship requirements by

addendum. The City is bound only by what is expressly stated in this RFQ/RFP and any authorized written addenda thereto. Addenda will be posted on the City's website at [www.sandiego.gov/arts-culture/funding](http://www.sandiego.gov/arts-culture/funding). It is the applicant'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 is not responsible for the loss or damage of any materials submitted.
4. The submission of a response to this RFQ/RFP does not guarantee funding.
5. The applicant is solely responsible for responding to any required or optional updates related to this RFQ/RFP or related to the award that is a result of this process.
6. Funds awarded to an applicant may be paid in advance of activities and on a reimbursement basis pursuant to awarded agreement. Eligible expenses must be incurred by an applicant during the FY23 period of performance between July 1, 2022, and June 30, 2023, for the City to advance and reimburse pursuant to an awarded agreement.
7. Any applicant awarded CCSD funding is required to provide a \$1 cash match for every \$1 awarded. The minimum award amount is \$5,000. Match income must be received by the applicant during the period of performance (between July 1, 2022, and June 30, 2023). CCSD funded projects with project budgets of \$29,999 or less may use in-kind contributions to fulfill up to 50% of their match. The project budget submitted in the RFQ will be used to determine eligibility for use of in-kind as a portion of the match.
8. Each applicant awarded funding must receive an executed agreement from the City before any funds are released. It can take a minimum of 5 months from July 1 for the City to provide an executed agreement, dependent on the awardee's expediency in submitting required documentation and information and the City's contracting review process.
9. Each applicant 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, and evidence of non-debarment via The System for Award Management (SAM). All registrations must be current during the period of performance. (If using a fiscal sponsor, applicant organization must ensure that their fiscal sponsor complies).
10. An applicant receiving funding of \$10,000 or more must submit required financial disclosure documentation evidencing the financial status of the organization's last completed fiscal year with final performance report pursuant to an awarded agreement.
11. An applicant receiving funding equaling \$75,000 or more must also submit the following: applicants with an operating budget under \$2 million must submit a financial review of the organization's most recently completed fiscal year conducted by an independent certified public accountant within 150 days of the end of that fiscal year; applicants with an operating budget of \$2 million or more must submit audited financial statements of the organization's most recently completed fiscal year conducted by an independent certified public accountant within 150 days of the end of that fiscal year.
12. An applicant receiving funding in the amount of \$500,000 or more, when that funding represents more than 10% of the organization's annual budget, must also submit salary and wage ranges for each of its job classifications, including actual executive salaries and benefits packages.
13. The award of funds does not imply that the City will produce, exhibit, promote or present

the CCSD project. It is the sole responsibility of the applicant to secure a venue or site and any required permit(s), approval(s) and/or permissions(s). It is the responsibility of the applicant to build this process into their project plan, budget and timeline which should be reflected in the response to the RFQ/RFP.

14. Each applicant awarded funding is required to deliver a progress report, and a final performance report in a format requested by City staff.
15. The applicant acknowledges that information submitted as part of their application for this opportunity may be disclosed to the public pursuant to a request under the California Public Records Act.
16. City funds may not be used for:
  - Inherently religious activities: worship, instruction, or proselytization. Lobbying, including activities in lobbying, including activities intended to influence the outcome of elections or influence government officials regarding pending legislation, either directly or through specific lobbying appeals to the public.
  - Voter registration drives and related activities.
  - Re-granting.
  - Tuition for academic study.
  - Capital outlay for construction, purchase, or improvement of facilities (including artwork installation on City property), or capital outlay for purchase of equipment.
  - Contests and competitions including gifts, prizes, and awards.
  - Travel, lodging, and transportation costs.
  - Food, alcohol, or beverages for hospitality or entertainment functions.
  - Projects where fundraising is the primary purpose of the project.
  - Contributions and donations to other individuals or entities.
  - Cash reserves and endowments.
  - Fines and penalties, accumulated deficits, and debt reductions.
17. City funds will not be provided to any applicant or activities that discriminate against any person on the basis of race, gender, gender expression, gender identity, religion, national origin, ethnicity, sexual orientation, age, or disability.
18. The applicant applying is solely responsible for the accuracy and truth of the information they submit to the City. Any applicant 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, at any point, be immediately disqualified from receiving funding. [CHECKBOXES: I ACCEPT THESE CONDITIONS, I DO NOT ACCEPT THESE CONDITIONS](#)

## **SECTION 7: OPTION TO RENEW FOR RETURNING APPLICANTS**

An applicant that has been awarded a Fiscal Year 2022 agreement or agreement renewal, is seeking a Fiscal Year 2023 agreement and meets eligibility requirements is considered a "returning applicant." All applicants, returning and new, must submit a response to the FY23 RFQ. A returning applicant whose response to the RFQ is deemed qualified may be eligible to select either the option to renew its agreement, or the option to submit a response to the RFP.

1. If your organization's response to the RFQ is deemed qualified, which one option does your organization prefer? [CHECKBOXES: THE ORGANIZATION IS NOT A RETURNING APPLICANT, THE ORGANIZATION REQUESTS THE OPTION TO RENEW, THE ORGANIZATION PREFERS TO SUBMIT A RESPONSE TO THE RFP](#)

2. In the last two fiscal years, has your organization ended in a deficit? Organizations who have ended the last two fiscal years with a deficit may not be eligible to exercise the option to renew. **CHECKBOXES: YES, NO**
3. Does your organization's current budget show a 10% variance or higher from its previous fiscal year's budget? If yes, at the City's sole discretion the returning applicant may be required to submit a response to the FY23 RFP and go through the panel evaluation process. **CHECKBOXES: YES, NO**
4. Have there been significant changes to your project scope since your last submitted RFP. If yes, please explain. (To answer this question, please review your project scope from your last executed full agreement, are you proposing to fulfill the project scope as is for FY23? If not, what will be different from the original scope?) **NARRATIVE 500 CHARACTERS**
5. The returning applicant was recommended for funding and successfully executed an agreement in FY22 (July 1, 2021- June 30, 2022). (If the returning applicant's FY22 agreement is not executed and/or fulfilled, the returning applicant will not be eligible to receive an agreement renewal for FY23). **CHECKBOXES: YES, NO**
6. Have there been significant changes in your organization's operations since your last submitted RFP, including but not limited to: A) changes in the organization's mission; B) changes in the majority of the membership of the board of directors; or C) changes in financial status such that fulfilling the terms of the FY23 agreement, including the matching fund requirement, are at risk of not being met? **YES or NO- If yes, please explain. NARRATIVE 500 CHARACTERS**
7. The returning applicant acknowledges, understands, and accepts:
  - that any FY23 award amount will be calculated using the project budget submitted in response to the FY23 RFQ
  - that their prior rank will carry over and be used as a factor to calculate the FY23 award amount
  - that the FY23 award amount may not be the same as the FY22 award amount due to the variable factors in the award calculation

(Fiscal sponsorship: if your organization is using the same fiscal sponsor who applied on your behalf and was awarded a Fiscal Year 2022 agreement or agreement renewal, please complete the section above with fiscal sponsor's information).

**CHECKBOXES: I ACCEPT THESE CONDITIONS; I DO NOT ACCEPT THESE CONDITIONS**

RFQ  
SCORING SHEET

FISCAL YEAR 2023 CREATIVE COMMUNITIES SAN DIEGO (CCSD)		
RFQ APPLICATION QUESTION	GRADING	RATIONALE
<b>RFQ SECTION 1: APPLICANT PROFILE</b>		
1. Is the entire section complete?	Yes = Qualified No = Not Qualified	
<b>RFQ SECTION 2: ELIGIBILITY SURVEY</b>		
1. Your organization must have tax-exempt nonprofit status under section 501(c)(3) or 501(c)(6) of the Internal Revenue Code at the time of application to be eligible for funding. Upload a copy of your IRS letter of determination. (If using a fiscal sponsor, upload their IRS letter of determination).	Attached = Qualified Not Attached = Not Qualified	Required by Council Policy 100-03
2. Can your organization produce proof that it has at least two full and consecutive years of operating with its own independent governing board (not under a fiscal sponsor)?	Yes = Qualified No = Not Qualified	Required by Council Policy 100-03
3. If your organization is using a fiscal sponsor to apply for funding, can your organization produce proof that your fiscal sponsor has at least two full and consecutive years of operating with its own independent governing board?	Yes = Qualified N/A = Qualified No = Not Qualified	Required by Council Policy 100-03
4. Does your organization maintain principal offices in San Diego county (or if an arts services organization, maintain offices in San Diego county and primary headquarters in California)?	Yes = Qualified No = Not Qualified	Required by Council Policy 100-03
5. Submit evidence of principal offices within county of San Diego limits (or if an arts organization, offices in San Diego county and primary headquarters in California). Accepted documents for proof of address include: utility or municipality bills that are in your organization's name ( <i>bills for water, electricity, gas</i> ), bank documents ( <i>current account statements</i> ), a signed copy of a lease/rental agreement, an official tax document, a telephone account for a physical landline.	Yes = Qualified No = Not Qualified	Required by Council Policy 100-03
6. Can your organization produce proof that the project for which it's seeking funding will take place within the city of San Diego?	Yes = Qualified No = Not Qualified	Required by Council Policy 100-03
7. With which of the TOT funding purposes does your project align? To enhance the economy and strengthen the arts, cultural, and creative sectors; to contribute to San Diego's national and international reputation as a creative, cultural destination; to provide access to excellence in culture and the arts for residents and visitors; to enrich the lives of the people of San Diego; and to build healthy, vital neighborhoods?	At least one selected = Qualified None selected = Not Qualified	Required by Council Policy 100-03
8. Understanding that your organization may only receive TOT funding through one funding category, has/will your organization applied/apply for Fiscal Year 2023 TOT funding through any of the following: Organizational Support Program (OSP) or Economic Development TOT support?	Yes = Not Qualified No = Qualified	Required by Council Policy 100-03
9. Is your organization seeking funding for any of the following? <ul style="list-style-type: none"> <li>Inherently religious activities: worship, instruction, or proselytization.</li> <li>Lobbying, including activities in lobbying, including activities intended to influence the outcome of elections or influence government officials regarding pending legislation, either directly or through specific lobbying appeals to the public.</li> <li>Voter registration drives and related activities.</li> <li>Re-granting.</li> <li>Tuition for academic study.</li> <li>Capital outlay for construction, purchase, or improvement of facilities (including artwork installation on City property), or capital outlay for purchase of equipment.</li> <li>Contests and competitions including gifts, prizes, and awards.</li> <li>Travel, lodging, and transportation costs.</li> <li>Food, alcohol, or beverages for hospitality or entertainment functions.</li> <li>Projects where fundraising is the primary purpose of the project.</li> <li>Contributions and donations to other individuals or entities.</li> <li>Cash reserves and endowments.</li> <li>Fines and penalties, accumulated deficits, and debt reductions.</li> </ul>	Yes = Not Qualified No = Qualified	Required by Council Policy 100-03
10. Is your organization seeking funding for a project that would not be open to the public?	Yes = Not Qualified No = Qualified	Required by Council Policy 100-03

RFQ  
SCORING SHEET

	11. Is your organization an elementary or secondary school, school district, college, university, or other government entity?	Yes = Not Qualified No = Qualified	Required by Council Policy 100-03
	12. Does your organization have outstanding financial obligations or debts of any kind to the City?	Yes = Not Qualified No = Qualified	Required by Council Policy 100-03
<b>RFQ SECTION 3: ADMINISTRATIVE CAPACITY &amp; GOVERNANCE PRACTICES</b>			
	1. Provide an organizational chart showing names and titles of your organization's staff. Gender and race/ethnicity information is requested but optional.	Attached = Qualified Not Attached = Not Qualified	Answers to this question are not graded
	2. Does your organization have a diversity, equity, and inclusion statement or policy?	This question must be answered but is not graded	Answers to this question are not graded
	3. Provide a list with names, titles, and brief biographies of each board member of your organization. Gender and race/ethnicity information is requested, but optional.	Attached = Qualified Not Attached = Not Qualified	Answers to this question are not graded
	4. How often does the board of your organization formally meet to conduct the business of the organization?	Monthly = Qualified Bi-Monthly = Qualified Quarterly = Qualified Annually = Not Qualified	To ensure good stewardship and public confidence in City agreements and to fulfill procurement requirements, a nonprofit board must meet at least quarterly.
	5. Does the board of your organization approve annual budgets for the organization?	Yes = Qualified No = Not Qualified	Annual board approval of budgets is evidence of appropriate fiscal oversight and organizational accountability.
	6. Are compensation arrangements for officers, directors, trustees, and key employees approved by the board?	Yes = Qualified N/A = Qualified No = Not Qualified	Ongoing evaluation of compensation arrangements supports proper stewardship of funds and organizational accountability.
	7. Does the board of your organization conduct an annual performance evaluation of the organization's top executive?	Yes = Qualified N/A = Qualified No = Not Qualified	Ongoing evaluation of the organization's top executive on at least an annual basis promotes accountability.
	8. How often is the board provided with financial statements that include budgeted vs. actual revenues and expenses?	Monthly = Qualified Bi-Monthly = Qualified Quarterly = Qualified Annually = Not Qualified	To ensure good stewardship and public confidence in City agreements, nonprofit boards provide ongoing oversight of finances on at least a quarterly basis.
	9. Can your organization provide proof of having a conflict of interest policy that 1) is signed annually by officers, directors, trustees, and key employees and 2) has specific language to prevent self-dealing?	Yes = Qualified No = Not Qualified	To ensure good stewardship and public confidence in City agreements, conflict of interest policy is designed to prevent self-dealing and corruption.
	10. Does your organization require officers, directors, trustees, and key employees to sign a conflict of interest disclosure annually?	Yes = Qualified No = Not Qualified	To ensure stewardship and public confidence in City agreements, conflict of interest policy is designed to prevent self-dealing and corruption. Proof can be provided in documents such as board minutes, conflict of interest disclosure forms, or other official documents.
	(If your organization is using a fiscal sponsor, please complete the Administrative Capacity & Governance Practices section above using fiscal sponsor's information).		
<b>RFQ SECTION 4: FINANCIAL MANAGEMENT</b>			
	1. Provide your organization's current board-approved annual operating budget, which shows the projected revenue and expenses for your organization's current fiscal year.	Attached = Qualified Not Attached = Not Qualified	Board-approved budgets demonstrate oversight in planning and monitoring the organization's income and expenditures.
	2. Attach your organization's balance sheet and a profit and loss statement or complete financial statements for your organization's last two completed fiscal years. If available, submit the audited version of these documents. If you do not have these documents, please use the template provided by the City. This template is titled "Optional Financial Statement Template" and is located here: <a href="https://www.sandiego.gov/arts-culture/funding/ccsdapplying">https://www.sandiego.gov/arts-culture/funding/ccsdapplying</a> under "Resources" - "Key Terms and Templates" dropdown. Use the last completed fiscal year's document to calculate your organization's Liquid Unrestricted Net Assets (LUNA) in the next question.	Attached = Qualified Not Attached = Not Qualified	Required to confirm accuracy of LUNA calculations.
	3. Using your organization's fiscal year-end financial statements attached above, compute the LUNA for your organization's last completed fiscal year.	Complete and correct = Qualified Not complete and/or incorrect = Not Qualified	To ensure good stewardship and public confidence in City contracts, positive liquidity demonstrates that an organization can operate programs/services under a reimbursement-based contract.

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	4. How many months of liquidity did your organization have at the beginning of its current fiscal year?	Complete, correct and has 1 month of liquidity or more = Qualified Not complete and/or incorrect and/or has less than 1 month of liquidity = Not Qualified	To ensure good stewardship and public confidence in City contracts, positive liquidity demonstrates that an organization can operate programs/services under a reimbursement-based contract.
	5. If the calculations show that your organization has less than one month 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.) Describe the forms of proof your organization could provide for these funding sources.	Strong Feasibility = Qualified Basic Feasibility = Qualified Weak Feasibility = Not Qualified	The average nonprofit in California has 1.5 months of liquidity available. Organizations with less than one month of liquidity provide feasible plans for covering unexpected shortfalls. Organizations should be able to provide proof, if requested.
	6. Does your organization have a bank line of credit?	This question must be answered but is not graded	
	7. 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.	Strong = Qualified Basic = Qualified Weak = Not Qualified	[STRONG] = 10+ yrs. + BASIC quals [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.
	8. If your organization shows a deficit on its balance sheet, profit, and loss statement, or on a complete financial statement for your last completed fiscal year, please explain.	Strong Answer= Qualified Basic Answer = Qualified Weak Answer= Not Qualified	
	9. If your organization's current budget has fluctuated by 10% or more from its previous fiscal year's budget, please explain why.	Strong Answer= Qualified Basic Answer = Qualified Weak Answer= Not Qualified	
	10. Provide any other relevant details to give an accurate picture of your organization's financial position.	Answers to this question are not graded	
	(If your organization is using a fiscal sponsor, please complete the Financial Management section above using fiscal sponsor's information).		

**FISCAL YEAR 2023 CCSD  
RFQ  
SCORING SHEET**

<b>FISCAL YEAR 2023 CREATIVE COMMUNITIES SAN DIEGO (CCSD)</b>		
<b>RFQ APPLICATION QUESTION</b>	<b>GRADING</b>	<b>RATIONALE</b>
<b>RFQ SECTION 5: PAST PERFORMANCE ON CITY AGREEMENTS</b>		
<b>Responses in this section will be provided by City staff using data collected from past performance on City agreements from FY20 forward.</b>		
1. Organization submitted late agreement kit in FY20 and/or FY21 and/or FY22.	YES or NO	To ensure appropriate use of City resources, organizations must demonstrate accountability.
2. Organization did not perform the agreed upon scope of funded project in FY21.	YES or NO	To ensure appropriate use of City resources, organizations must demonstrate accountability.
3. Organization withdrew from contracting after award allocation in FY20 and/or FY21.	YES or NO	To ensure appropriate use of City resources, organizations must demonstrate accountability.
4. Organization did not claim full award amount in FY21.	YES or NO	To ensure appropriate use of City resources, organizations must demonstrate accountability.
5. Organization submitted late or incomplete final performance report in FY20 and/or FY21.	YES or NO	To ensure appropriate use of City resources, organizations must demonstrate accountability.
6. Organization did not submit the final performance report in FY20 and/or FY21.	YES or NO	To ensure appropriate use of City resources, organizations must demonstrate accountability.
7. City terminated agreement with organization for cause in FY20 and/or FY21 and/or FY22.	YES or NO	To ensure appropriate use of City resources, organizations must demonstrate accountability.
	In the City's sole discretion, organizations with multiple deficiencies may not be qualified.	
<b>RFQ SECTION 6: CONDITIONS FOR SUBMISSION</b>		
1. Is the entire section complete?	Yes = Qualified No = Not Qualified	
<b>RFQ SECTION 7: OPTION TO RENEW FOR RETURNING APPLICANTS</b>		
1. If your organization's response to the RFQ is deemed qualified, which one option does your organization prefer?	This question must be answered but is not graded	
2. In the last two fiscal years, has your organization ended the year in a deficit? Organizations who have ended two of the last two fiscal years with a deficit may not be eligible to exercise the option to renew.	Organizations who have ended 2 of the last 2 fiscal years with a deficit may not be eligible to exercise the option to renew.	
3. Does your organization's current budget show a 10% variance or higher from its previous fiscal year's budget? If yes, at the City's sole discretion the returning applicant may be required to submit a response to the FY23 RFP and go through the panel evaluation process.	Organizations with a 10% variance may not be eligible to exercise the option to renew.	
4. Have there been significant changes to your project scope since your last submitted RFP. If yes, please explain. (To answer this question, please review your project scope from your last executed full contract, are you proposing to fulfill the project scope as is for FY23? If not, what will be different from the original scope?)	Organizations with significant changes may not be eligible to exercise the option to renew.	
5. The returning applicant was recommended for funding and successfully executed an agreement in FY22 (July 1, 2021- June 30, 2022). (If the returning applicant's FY22 agreement is not executed and/or fulfilled, the returning applicant will not be eligible to receive an agreement renewal for FY23).	Yes = Qualified No = Not Qualified	
6. Have there been significant changes in your organization's operations since your last submitted response to the RFP, including but not limited to: A) changes in the organization's mission; B) changes in the majority of the membership of the board of directors; or C) changes in financial status such that fulfilling the terms of the Fiscal Year 2023 agreement, including the matching fund requirement, are at risk of not being met?	Organizations with significant changes may not be eligible to exercise the option to renew.	
7. The returning applicant acknowledges, understands, and accepts: <ul style="list-style-type: none"> <li>• that any FY23 award amount will be calculated using the project budget submitted in response to the FY23 RFQ</li> <li>• that their prior rank will carry over and be used as a factor to calculate the FY23 award amount</li> <li>• that the FY23 award amount may not be the same as the FY22 award amount due to the variable factors in the award calculation</li> </ul>	Conditions accepted = Qualified Conditions not accepted = Not Qualified	
(Fiscal sponsorship: if your organization is using the same fiscal sponsor who applied on your behalf and was awarded a Fiscal Year 2022 agreement or agreement renewal, please complete the section above with fiscal sponsor's information).		

## Appendix 3

### Request for Proposals (RFP) Tear Sheet

#### Fiscal Year 2023 Creative Communities San Diego (CCSD)

##### SECTION 1: APPLICANT PROFILE

1. Legal Name of Organization
2. DBA Name of Organization, if applicable
3. Organization's mission statement. [NARRATIVE: 1000 CHARACTERS](#)
4. Provide a brief description of the project for publication in the City's promotional materials. Include the name of the project(s), location(s), dates(s), a summary of what will happen at the project location(s) and cost to participate (if any). Indicate whether the event is free to the public. [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. If your organization is using a fiscal sponsor, briefly describe the relationship between your organization, the fiscal sponsor, and the project. [NARRATIVE: 1000 CHARACTERS](#)
8. 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 and impact of your project. [ATTACH PDF](#)
9. Provide a minimum of three and a maximum of five substantive work samples that are representative of the activities your organization produces, including but not limited to programmatic documents, collateral, images, or audio/video clips, and provide a current calendar of scheduled activities, if available. It is up to you to determine the materials that are most relevant to and best support your project. Consider the format most appropriate to the project of your organization. [ATTACH MULTI-MEDIA FILES](#)

##### SECTION 2: PROPOSED PROJECT

1. What is the project that your organization plans to produce between July 1, 2022 and June 30, 2023? Include information about when and where the project occurs, what the project entails, how many people are served/engaged and how they are engaged. [NARRATIVE: 2000 CHARACTERS](#)
2. Explain how your organization's project aligns with the purpose of TOT funding. Clearly specify with which City goals the project aligns. (Goal 1: To enhance the economy and strengthen the arts, cultural, and creative sectors; Goal 2: to contribute to San Diego's national and international reputation as a creative, cultural destination; Goal 3: to provide access to excellence in culture and the arts for residents and visitors; Goal 4: to enrich the lives of the people of San Diego; and Goal 5: to build healthy, vital neighborhoods). [CHECK BOX – SELECT ALL THAT APPLY + NARRATIVE: 2000 CHARACTERS](#)

##### SECTION 3: COMMUNITY ENGAGEMENT

1. Describe the proposed project's core community/audience in terms of geography, council district(s), age, cultural and economic characteristics, as applicable. Address if and how your

project engages the following: artists, neighborhoods, volunteers, spectators/public. If your organization is a service organization whose primary mission is to provide services to artists, arts and culture organizations, or other groups please address the groups served through the project. **NARRATIVE: 2000 CHARACTERS**

2. How is the core community/audience involved in the design of the project? How does your organization know that the project is relevant to this core community/audience? What is the impact of this project? Provide quantitative and qualitative data to show the impact of your organization's project. If your organization is a service organization whose primary mission is to provide services to artists, arts and culture organizations, or other groups please address the impact of your project to both your core audience as well as the benefit to the public. **NARRATIVE: 2000 CHARACTERS**
3. The City is responsible for ensuring that public funds benefit San Diegans of diverse cultures, ethnicities, incomes, abilities, genders, ages, orientations, and neighborhoods. How does your organization and its project contribute to diversity, equity, accessibility, and inclusivity?**NARRATIVE: 2000 CHARACTERS**
4. CCSD funds are meant to centralize arts and culture in San Diego neighborhoods. If your project contains virtual components, how will you engage the core community/audience described above? What tools will you use to track engagement? How will you track the success of your activities?**NARRATIVE: 2000 CHARACTERS**

#### **SECTION 4: PRODUCTION CAPACITY**

1. What is your organization's experience with producing projects of similar scale and complexity?**NARRATIVE: 2000 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: 2000 CHARACTERS**
3. Provide the name, title, applicable education, experience, and other qualifications of each key person responsible for designing and producing the project. How does each key person contribute to the impact of your project? (Include up to five people, such as designers, producers, project managers, implementers, etc.) **NARRATIVE: 2000 CHARACTERS**
4. How does your organization's staff, production team and/or board reflect the core community/audience you identified in Section 3? How does your organization evaluate the effectiveness of these efforts? Please use quantitative and qualitative data to answer this question. **NARRATIVE: 2000 CHARACTER**
5. If your project contains a virtual component, what experience does your organization have in virtual programming? What platforms will you use and how? How do you plan on integrating virtual efforts into your in-person project activities? **NARRATIVE: 1500 CHARACTERS**
6. How does your organization and its project activities decrease disparities and/or advance equitable outcomes for underserved/distinct communities or groups in the city of San Diego?**NARRATIVE: 1500 CHARACTERS**
7. What efforts has your organization made to create an inclusive workplace for its staff, contractors, and volunteers? What efforts has your organization undertaken in the past two years and/or is currently undertaking to diversify its board, staff, volunteers, and audiences? **NARRATIVE: 1500 CHARACTERS**

## SECTION 5: PROJECT BUDGET & SPENDING PLAN

1. Provide the total budget for the project (this number should match the project budget submitted in the RFQ) **\*\*This information will be provided during RFQ phase and transferred for use in panel review\*\***
2. Provide the "Required CCSD Project Budget" file that was submitted in response to RFQ. **\*\*This information will be provided during RFQ phase and transferred for use in panel review\*\***
3. Provide the operating income and expenses for the two previous iterations of this project. If this is a new project, enter 0 where it asks for "Previous" and "Current". For all projects, in the table, include revenue, in-kind donations, and expenses. [INTERACTIVE CALCULATOR](#)
4. Utilizing the project budget submitted in response to the RFQ: Describe the local government income included in budget. Does this include any other governmental agency's support? (County) If so, list support amount and sources [NARRATIVE: 250 CHARACTERS](#)
5. Utilizing the project budget submitted in response to the RFQ: Describe income and/or expenses categorized as "Other." [NARRATIVE: 1000 CHARACTERS](#)
6. Provide details to clarify line items in the project budget submitted in response to the RFQ. (breakdown of artistic expense, marketing expenses artistic expenses, marketing expenses, ADD OTHER LINE ITEMS). [NARRATIVE: 500 CHARACTERS](#)

## SECTION 6: ACHIEVEMENT IN EMPHASIS AREAS

Select and describe **two** areas of emphasis where your project has made significant achievements. (please select and address only TWO)

Option 1: Provide evidence that your project has received significant national or international recognition in the past three years. [NARRATIVE: 1500 CHARACTERS + ATTACH OPTIONAL PDF](#)

Option 2: Provide evidence that your project has made a significant investment in San Diego's professional artists. [NARRATIVE: 1500 CHARACTERS + ATTACH OPTIONAL PDF](#)

Option 3: Provide evidence that your project has made a significant investment in activities in the [San Diego Promise Zone](#) or in [San Diego Community\(ies\) of Concern](#). (Community of Concern means a census tract that has been identified as having very low or low access to opportunity as identified in the San Diego Climate Equity Index). [NARRATIVE: 1500 CHARACTERS + ATTACH OPTIONAL PDF](#)

Option 4: Provide evidence that your project has generated significant overnight hotel stays in the city of San Diego in the past three years. [NARRATIVE: 1500 CHARACTERS + ATTACH OPTIONAL PDF](#)

FISCAL YEAR 2023 CREATIVE COMMUNITIES SAN DIEGO (CCSD)			
RFQ APPLICATION QUESTION	EVALUATION CRITERIA FOR APPLICATION SECTION	QUALITIES OF A STRONG APPLICATION	SCORING
<b>RFP SECTION 1: APPLICANT PROFILE</b>			
<b>RFP SECTION 2: PROPOSED PROJECT</b>			
	<ul style="list-style-type: none"> <li>Degree to which the organization's project achieves at least one City goal</li> </ul>	<ul style="list-style-type: none"> <li>Project details are clearly described</li> <li>Project impacts are clearly linked to at least one City goal with quantitative and qualitative data</li> </ul>	Very Aligned = 4 points Aligned = 3 points Not Aligned= 2 points Unresponsive = 1 point
1. What is the project that your organization plans to produce between July 1, 2022 and June 30, 2023? Include information about when and where the project occurs, what the project entails, how many people are served/engaged and how they are engaged.			
2. Explain how your organization's project aligns with the purpose of TOT funding. Clearly specify with which City goals the project aligns. (Goal 1: To enhance the economy and strengthen the arts, cultural, and creative sectors; Goal 2: to contribute to San Diego's national and international reputation as a creative, cultural destination; Goal 3: to provide access to excellence in culture and the arts for residents and visitors; Goal 4: to enrich the lives of the people of San Diego; and Goal 5: to build healthy, vital neighborhoods).			
<b>RFP SECTION 3: COMMUNITY ENGAGEMENT</b>			
	<ul style="list-style-type: none"> <li>Degree to which the applicant thoughtfully and intentionally identifies its core community/audience</li> <li>Degree to which the applicant provides evidence that the project is relevant and impactful to its core community/audience</li> <li>Degree to which the applicant provides evidence that its project contributes to diversity, equity, accessibility, and inclusivity</li> <li>If applicable, degree to which the applicant provides evidence that its virtual component engages the core audience.</li> </ul>	<ul style="list-style-type: none"> <li>Evidence is provided to show that the applicant understands its core community/audience</li> <li>Evidence is provided to show how the project connects and is relevant to core community/audience</li> <li>Evidence is provided to show that the project has a positive impact for the core community/audience</li> <li>Evidence is provided to show that the project contributes to diversity, equity, accessibility, and inclusivity</li> <li>If applicable, evidence is provided to show that the virtual components of the project benefit and engage its intended San Diego audience.</li> </ul>	Very Aligned = 4 points Aligned = 3 points Not Aligned= 2 points Unresponsive = 1 point
1. Describe the proposed project's core community/audience in terms of geography, council district(s), age, cultural and economic characteristics, as applicable. Address if and how your project engages the following: artists, neighborhoods, volunteers, spectators/public. If your organization is a service organization whose primary mission is to provide services to artists, arts and culture organizations, or other groups please address the groups served through the project.			
2. How is the core community/audience involved in the design of the project? How does your organization know that the project is relevant to this core community/audience? What is the impact of this project? Provide quantitative and qualitative data to show the impact of your organization's project. If your organization is a service organization whose primary mission is to provide services to artists, arts and culture organizations, or other groups please address the impact of your project to both your core audience as well as the benefit to the public.			
3. The City is responsible for ensuring that public funds benefit San Diegans of diverse cultures, ethnicities, incomes, abilities, genders, ages, orientations, and neighborhoods. How does your organization and its project contribute to diversity, equity, accessibility, and inclusivity?			

FISCAL YEAR 2023  
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FISCAL YEAR 2023 CREATIVE COMMUNITIES SAN DIEGO (CCSD)				
RFQ APPLICATION QUESTION	EVALUATION CRITERIA FOR APPLICATION SECTION	QUALITIES OF A STRONG APPLICATION	SCORING	
4. CCSD funds are meant to centralize arts and culture in San Diego neighborhoods. If your project contains virtual components, how will you engage the core community/audience described above? What tools will you use to track engagement? How will you track the success of your activities?				
<b>RFP SECTION 4: PRODUCTION CAPACITY</b>	<ul style="list-style-type: none"> <li>Degree to which the organization provides evidence that its qualifications and resources match the scale and complexity of the project</li> </ul>	<ul style="list-style-type: none"> <li>Evidence is provided to show that the applicant has a successful track record of producing projects of similar scale and impact</li> <li>Evidence is provided to show that the applicant has secured resources to secure the success of the project</li> <li>Evidence is provided to show how the qualifications of personnel result in project impacts</li> <li>Evidence is provided to show that the applicant has an understanding of and is working towards undertaking equity initiatives in its staff, production team and board.</li> <li>If applicable, evidence is provided to show that the applicant has experience in producing virtual programming.</li> </ul>	Very Aligned = 4 points Aligned = 3 points Not Aligned = 2 points Unresponsive = 1 point	
1. What is your organization's experience with producing projects of similar scale and complexity?				
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.)?				
3. Provide the name, title, applicable education, experience, and other qualifications of each key person responsible for designing and producing the project. How does each key person contribute to the impact of your project? (Include up to five people, such as designers, producers, project managers, implementers, etc.)				
4. How does your organization's staff, production team and/or board reflect the core community/audience you identified in Section 3? How does your organization evaluate the effectiveness of these efforts? Please use quantitative and qualitative data to answer this question.				
5. If your project contains a virtual component, what experience does your organization have in virtual programming? What platforms will you use and how? How do you plan on integrating virtual efforts into your in-person project activities?				
6. How does your organization and its project activities decrease disparities and/or advance equitable outcomes for underserved/distinct communities or groups in the city of San Diego?				
7. What efforts has your organization made to create an inclusive workplace for its staff, contractors, and volunteers? What efforts has your organization undertaken in the past two years and/or is currently undertaking to diversify its board, staff, volunteers, and audiences?				

FISCAL YEAR 2023  
CCSD RFP  
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FISCAL YEAR 2023 CREATIVE COMMUNITIES SAN DIEGO (CCSD)				
RFQ APPLICATION QUESTION		EVALUATION CRITERIA FOR APPLICATION SECTION	QUALITIES OF A STRONG APPLICATION	SCORING
<b>RFP SECTION 5: PROJECT BUDGET &amp; SPENDING PLAN</b>		<ul style="list-style-type: none"> <li>Degree to which the organization provides evidence that the project budget and spending plan support the scale and complexity of the project</li> </ul>	<ul style="list-style-type: none"> <li>The project budget and spending plan is clearly described and easy to understand</li> <li>Evidence is provided to show that the project budget supports the scale and complexity of the project</li> <li>The applicant provides ample detail on sources of income and expenses</li> </ul>	Very Aligned = 4 points Aligned = 3 points Not Aligned = 2 points Unresponsive = 1 point
	1. Provide the total budget for the project (this number should match the project budget submitted in the RFQ)			
	2. Provide the "Required CCSD Project Budget" file that was submitted in response to RFQ.			
	3. Provide the operating income and expenses for the two previous iterations of this project. If this is a new project, enter 0 where it asks for "Previous" and "Current". For all projects, in the table, include revenue, in-kind donations, and expenses.			
	4. Utilizing the project budget submitted in response to the RFQ: Describe the local government income included in budget. Does this include any other governmental agency's support? (County) If so, list support amount and sources			
	5. Utilizing the project budget submitted in response to the RFQ: Describe income and/or expenses categorized as "Other."			
	6. Provide details to clarify line items in the project budget submitted in response to the RFQ. (breakdown of artistic expense, marketing expenses artistic expenses, marketing expenses, ADD OTHER LINE ITEMS).			

FISCAL YEAR 2023  
CCSD RFP  
SCORING SHEET

FISCAL YEAR 2023 CREATIVE COMMUNITIES SAN DIEGO (CCSD)				
RFQ APPLICATION QUESTION		EVALUATION CRITERIA FOR APPLICATION SECTION	QUALITIES OF A STRONG APPLICATION	SCORING
<b>RFP SECTION 6: ACHIEVEMENT IN EMPHASIS AREAS</b>		<ul style="list-style-type: none"> <li>• Degree to which the organization expresses a clear point of view and distinction about what are significant achievements in the selected emphasis areas</li> <li>• Degree to which the organization provides evidence of intentional investment in the selected emphasis areas</li> <li>• Degree to which the organization provides evidence of intentional/sustained investment in the selected emphasis areas</li> <li>• Degree to which the organization provides evidence of significant achievements</li> </ul>	<ul style="list-style-type: none"> <li>• Clear and persuasive description of what significant achievement means in the selected emphasis areas</li> <li>• Quantitative evidence of intentional investment, sustained investment and significant achievements is provided</li> <li>• Qualitative evidence of intentional investment, sustained investment and significant achievements is provided</li> <li>• Third-party validation of intentional investment, sustained investment and significant achievements is provided</li> </ul>	Very Aligned = 4 points Aligned = 3 points Not Aligned= 2 points Unresponsive = 1 point
	1. Option: Provide evidence that your project has received significant national or international recognition in the past three years.			
	2. Option: Provide evidence that your project has made a significant investment in San Diego's professional artists.			
	3. Option: Provide evidence that your project has made a significant investment in activities in the <a href="#">San Diego Promise Zone</a> or in <a href="#">San Diego Community(ies) of Concern</a> . (Community of Concern means a census tract that has been identified as having very low or low access to opportunity as identified in the San Diego Climate Equity Index).			
	4. Option: Provide evidence that your project has generated significant overnight hotel stays in the city of San Diego in the past three years.			

## Appendix 5

### Fiscal Year 2023 Application Calendar\*

#### **September 27, 2021**

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

#### **September 28 – October 29, 2021**

Virtual technical assistance workshops and webinars, How to Apply (RFQ) Office hours available with staff (via videoconferencing or telephone). More information is available under the “Resources” – “Request for Qualifications” dropdown here: <https://www.sandiego.gov/arts-culture/funding/ccsdapplying>.

#### **October 29, 2021, 3:00 p.m.**

Last day for questions regarding the RFQ

#### **October 31, 2021, 11:59 p.m.**

RFQ submissions due

#### **November 1, 2021 – December 10, 2021**

RFQs evaluated for eligibility and compliance with City guidelines

\*\*Staff will have limited availability for questions from December 20, 2021 – January 2, 2022.

#### **December 13, 2021**

RFQ results announced

#### **December 13 – December 17, 2021**

5-day "cure" period for applicants deemed "Not Qualified" due to missing or incomplete materials in RFQ

#### **December 20, 2021**

Results of "cure" period announced

#### **January 10, 2022**

Online Request for Proposals (RFP) portal opens

#### **January 10, 2022 – February 4, 2022**

Virtual technical assistance workshop TBD (all dates posted on the City website and all successful RFQ applicants will receive email notification)

Flexible office hours available with staff (via teleconferencing or telephone)

#### **February 4, 2022, 3:00 p.m.**

Last day for questions regarding the RFP

**February 6, 2022, 11:59 p.m.**

Responses to RFP due

**March 14 – March 18, 2022**

Panels review and recommend scores/ranks responses to RFP

**March 21, 2022**

Results announced to applicants

**March 21 – March 31, 2022**

Appeals period (10 days)

**April 8, 2022**

Commission's Policy & Funding Committee review of panel recommendations

**April 22, 2022**

Commission reviews RFP ranks recommended by Policy & Funding Committee and recommends for inclusion in FY23 proposed City budget

**June 30, 2022**

Final award amounts confirmed through City's appropriation ordinance

**July 1, 2022 – June 30, 2023**

FY23 period of performance

**July 1 – August 31, 2022**

FY23 agreements awarded, signed, and returned

**August 31, 2023**

Final reports due

\* All dates are approximate and subject to change. All times are Pacific Time