



Commission for Arts and Culture

INSTRUCTIONS

How to Complete a Contract Kit

For Nonprofit Organizations Awarded Arts and Culture Funding in Fiscal Year 2017

These instructions are for each nonprofit organization that has been approved for an award of funding in FY17 after submitting an application through The City of San Diego Commission for Arts and Culture's Organizational Support Program (OSP) or Creative Communities San Diego (CCSD).

QUICK START SUMMARY:

1. Read everything in the contract kit.
2. Sign the contract signature page, sign the duplicate signature page, review Exhibit A, sign Exhibit B, sign any applicable "Declaration in Lieu", and, if preferred, complete the optional Electronic Funds Transfer enrollment form.
3. Compile the necessary insurance documents. (See Article VII of the contract.)
4. Verify that your organization's status with state and federal agencies is "active"/"current." (See Section 5.5 in the contract.)
5. Deliver all these materials to Commission staff by **12:00 p.m./Noon on Friday, September 23, 2016.**
6. If you have read everything in the contract kit and followed the detailed instructions, but want more information, contact Whitney Roux, Arts and Culture Funding Programs Coordinator, at wroux@sanidiego.gov or (619) 236-6798.

Need the visuals shown at the Contract Technical Assistance Workshop?

Need a key for the abbreviations in this document?

Need a glossary?

Find it here: www.sandiego.gov/arts-culture/funding

DETAILED INSTRUCTIONS:

Why does my organization have to complete a contract kit?

Each nonprofit organization must possess two things before requesting reimbursement from the City:

1. A contract, signed by all the necessary parties and recorded by the City Clerk; and
2. A purchase order number issued by the City.

Completing and submitting a contract kit is each nonprofit organization's first step towards getting these two things.

What is included in the contract kit?

Each nonprofit organization is given a unique kit prepared and delivered by Commission staff. Each unique contract kit includes:

- ☐ One complete contract, unsigned
- ☐ One duplicate of the contract signature page, unsigned
- ☐ One Exhibit A: Scope of Services
- ☐ One Exhibit B: Public Records Act Acknowledgement, unsigned
- ☐ One "Declaration in Lieu" of Required Auto Insurance, unsigned
- ☐ One "Declaration in Lieu" of Required Workers' Compensation Insurance, unsigned
- ☐ One Electronic Funds Transfer (EFT) enrollment form, blank
- ☐ One set of instructions for completing a contract kit
- ☐ One contract kit completion checklist
- ☐ One cover letter from Commissioners

What should my organization do when it gets the contract kit?

1. Read everything in the contract kit.
2. Confirm that these unique details in the contract are accurate:
 - ☐ Section 1.1.1 Contractor's Mission
 - ☐ Section 2.2 Contract Information
 - ☐ Section 3.1 Total Contract Amount
 - ☐ Section 3.1.2 Matching Requirement Amount (A 2:1 match is required for CCSD contractors with project cash expenses of less than \$30,000 and a 3:1 match is required for CCSD contractors with project cash expenses of greater than \$30,000; a 3:1 match is required for all OSP contractors.)
 - ☐ Exhibit A: Scope of Services
3. If your organization agrees to the terms and conditions of the contract, then sign the contract signature page, sign the duplicate signature page, sign Exhibit B, sign any applicable "Declaration in Lieu", and, if preferred, complete the optional Electronic Funds Transfer enrollment form.
4. Compile the necessary insurance documents. (See Article VII of the contract.)
5. Verify that your organization's status with state and federal agencies is – and stays –

"active"/"current." (See Section 5.5 in the contract.)

6. Deliver all these materials to Commission staff by **12:00 p.m./Noon on Friday, September 23, 2016.**

When is the contract kit due back to the Commission?

Completed contract kits are due back to the Commission by **12:00 p.m./Noon on Friday, September 23, 2016.**

Need a 1-page Contract Kit Completion Checklist?
Find it at the end of these instructions or
Find it here: www.sandiego.gov/arts-culture/funding

Where to deliver a complete and accurate contract kit:

Commission for Arts and Culture
Attn: Whitney Roux
1200 Third Avenue, Suite 924
San Diego, CA 92101
wroux@sandiego.gov

What happens after my nonprofit organization returns the contract kit?

After each nonprofit organization returns its contract kit to Commission staff, the following process starts:

1. Commission staff reviews each contract kit to verify that all the components are accurate and complete.
2. When inaccurate and/or incomplete components are found, Commission staff requests corrected materials from the nonprofit organization.
3. When a contract kit is deemed accurate and complete, Commission staff sends the contract kit to the City's Purchasing and Contracting Department for review and approval, then to the City Attorney for review and approval, and then to the City Clerk for official recording.
4. After a contract kit is approved by the City's Purchasing and Contracting Department, approved by the City Attorney, and recorded by the City Clerk, Commission staff sends a paper copy of the contract kit to the nonprofit organization and concurrently submits a purchase request to the City's Purchasing and Contracting Department for review and approval.
5. The City's Purchasing and Contracting Department approves the purchase request and issues a purchase order number, which Commission staff then gives to each

nonprofit organization.

6. A nonprofit organization that possesses both a contract that has been signed by all the parties and recorded by the City Clerk, and a purchase order number issued by the City can begin submitting invoices to Commission staff for reimbursement.

How long does it take for the City to send back a signed contract and a purchase order number?

It typically takes 90 days from the date that a nonprofit organization submits a complete and accurate contract kit to Commission staff for the City to send back a signed contract and a purchase order number. **Turnaround times are largely dependent on the accuracy and completeness of each nonprofit organization's submission and each organization's response time for follow-up requests from Commission staff.**

Top 3 Things Your Organization Can Do to Expedite Processing

1. **Send complete and accurate insurance documents and keep the documents fresh throughout the year.** Expired insurance policies are a common factor in longer processing times for organizations' contracts and reimbursement payments. If your organization's insurance policies are scheduled to expire in the next 90 days, obtain current policies as soon as possible. Set reminders on your calendar.
2. **Verify that your organization's status with state and federal agencies is – and stays – “active”/“current”.** Delinquent registrations are a common factor in longer processing times for organizations' contracts and reimbursement payments. Your organization's registrations must be refreshed each year. Set reminders on your calendar.
3. **Designate one person in your organization to be the point of contact for Commission staff.** Communications from Commission staff that are lost in an organization or directed to the wrong person in an organization are a common factor in longer processing times for organizations' contracts and reimbursement payments.

Tips for Getting the Insurance Right

- ☐ Carefully read Article VII of the contract.
- ☐ Review the visuals from the Contract Technical Assistance Workshop.
- ☐ Share the insurance requirements found in Article VII of the contract and the visuals from the Contract Technical Assistance Workshop with your organization's insurance broker.
- ☐ Verify that your organization's insurance policies will not expire in the next 90 days.
- ☐ If your organization's insurance policies are scheduled to expire in the next 90 days,

obtain current policies as soon as possible. Set reminders on your calendar.

- ☐ If your organization meets both of the following two conditions, then sign and return a “Declaration in Lieu” of Commercial Automobile Liability insurance:
 - Your organization does not currently own any vehicles, and
 - Your organization carries Commercial General Liability insurance for “hired” and “non-owned” autos.
- ☐ If your organization meets both of the following two conditions, then sign and return a “Declaration in Lieu” of Workers’ Compensation insurance:
 - Your organization has no paid employees, and
 - All work to be performed under the contract will be done by solely by volunteers.

Tips for Getting the State and Federal Registrations Right

- ☐ Ensure your organization’s status is “Active” or “Results Not Found” on **System for Awards Management**: www.sam.gov
- ☐ Ensure your organization’s status is “Active” on **California Secretary of State - Business Listing**: <http://kepler.sos.ca.gov/>
- ☐ Ensure your organization’s status is “Current” on **California Department of Justice - Charity Registration**: <http://rct.doj.ca.gov>
- ☐ Confirm that your organization is not included on the **Federal Department of Industrial Relations- Federal Debarment List**: www.dir.ca.gov/dlse/debar.html
- ☐ Keep these registrations fresh by updating them each annually. Set reminders on your calendar.

Tips for Getting Questions Answered Quickly

- ☐ **Questions about what the “legalese” in the contract means?** Consult your organization’s attorney. Commission staff is prohibited from interpreting the meaning of the contract contents.
- ☐ **Questions about the insurance requirements?** Consult your organization’s insurance broker. Insurance brokers are experts on insurance.
- ☐ **Questions about invoicing and payments?** First, check whether your organization is in possession of both a contract, signed by all the necessary parties and recorded by the City Clerk, and a purchase order number issued by the City. Second, check your bank account to see whether an electronic payment has been deposited. After doing these two checks, then contact Commission staff with questions.

FY17 ARTS AND CULTURE CONTRACT KIT COMPLETION CHECKLIST

REQUIRED CONTRACT MATERIALS

- ☐ One complete contract, **signed**
- ☐ One duplicate of the contract's signature page isolated, **signed**
- ☐ Exhibit A: Scope of Services
- ☐ Exhibit B: Public Records Act Acknowledgement, **signed**

REQUIRED INSURANCE INFORMATION

- ☐ Certificate of Insurance:
 - ☐ Commercial General Liability (CGL) insurance
 - ☐ Commercial Automobile Liability (AUTO) insurance
 - ☐ Workers' Compensation insurance, if applicable
- ☐ Additionally Insured Endorsements, with correct language:
 - ☐ CGL insurance
 - ☐ AUTO Insurance
- ☐ Proof of Primary/Non-Contributory Coverage:
 - ☐ CGL insurance
 - ☐ AUTO insurance
- ☐ Proof of Severability Coverage:
 - ☐ CGL insurance
 - ☐ AUTO insurance
- ☐ Proof of 30-Day Notice of Cancellation
- ☐ Waiver of Subrogation for Workers' Compensation, with correct language, if applicable

IF APPLICABLE

- ☐ "Declaration in Lieu" of required Commercial Automobile Liability insurance, **signed**
- ☐ "Declaration in Lieu" of required Workers' Compensation insurance, **signed**

OPTIONAL, IF PREFERRED

- ☐ Electronic Funds Transfer (EFT) enrollment form, **completed** (If your organization already uses EFT for payments from the City, there is no need to complete the form again.)



Commission for Arts and Culture

KEY

Key to Abbreviations

CCSD = Creative Communities San Diego, 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 of diverse backgrounds to share their heritage and culture.

City = The City of San Diego

Commission = Commission for Arts and Culture, one of many departments inside the City

FY17 = Fiscal Year 2017 (July 1, 2016 – June 30, 2017)

OSP = Organizational Support Program, the annual, Commission-administered process of accepting and evaluating applications from nonprofit, tax-exempt organizations requesting TOT funding to use for general operating support with an emphasis on the delivery of programs and services that impact San Diego's quality of life and tourism.

TOT = Transient Occupancy Tax



Glossary of Useful Terms

APPLICANT

An applicant is a nonprofit organization that has submitted an application to receive funding from The City of San Diego.

ANNUAL OPERATING INCOME (AOI)

An organization's AOI is generally calculated by subtracting in-kind income from unrestricted operating income. The application will include specific instructions as to how to calculate AOI. The calculated AOI is used for two purposes. First, the AOI is used to group applications for the evaluation process so that panelists are evaluating organizations of similar sizes. Second, the AOI is used as a variable in the award calculation logarithm. Smaller organizations generally receive a larger percentage of their AOI while larger organizations generally receive a smaller portion of their AOI. The final calculation of an organization's AOI will be completed in the online application form.

ARTIST

An individual generally recognized by critics and peers as a professional practitioner of the visual, performing, or language arts, or a combination thereof, based on that professional practitioner's body of work, educational background, experience, past commissions, exhibition/performance record, publications, and production of artworks.

ARTS

In this context, the arts encompass visual genres (i.e. painting, sculpture, design, photography, printing, mosaic, video, film, mixed-media, textiles, etc.), performing genres (i.e. music, theater, dance, spoken word, etc.) and literary genres (i.e. poetry, fiction, non-fiction, etc.).

AWARD

An award is the amount of money that The City of San Diego decides upon and intends to give an applicant. An award is a recommendation, not a guarantee of funding.

BOARD OF DIRECTORS/GOVERNANCE

The board of a nonprofit organization acts as a collective trustee of the organization's assets and ensures that the nonprofit is well managed and remains fiscally sound. In doing so, the board must exercise oversight of the organization's operations and maintain the legal and ethical accountability of its staff and volunteers. According to nonprofit corporation law, each board member must meet certain standards of conduct. These standards are typically described as the following: 1) Duty of Care; 2) Duty of Loyalty; and 3) Duty of Obedience. "Duty of Care": Board members must exercise ordinary and reasonable care in the performance of their duties, exhibiting honesty, independent judgment, and good faith. Board members must act in a manner in which such care, including reasonable inquiry, as an ordinarily reasonable and prudent person in a like position would use under similar circumstances. "Duty of Loyalty": When acting on behalf of the organization, board members must put the interests of the nonprofit before any personal or professional concerns and avoid any conflicts of interest. This means a board member can not use information obtained as a board member for personal gain (self-dealing), but must always act in the best interests of the organization. "Duty of Obedience": Board members must ensure that the organization complies with all applicable, federal, state, and local laws and regulations, and that it remains committed to the organization's declared mission. As fiduciaries of the organization, the board members maintains oversight of the organization's finances. Board members must evaluate financial policies, approve the annual budget, and review periodic reports to ensure that the organization has the necessary resources to carry out its mission and remains accountable to its donors and the public.

CITY

The City of San Diego.

CITY COUNCIL DISTRICT

There are nine (9) Council Districts in The City of San Diego. Your project or event must occur in one or more Council District(s). Refer to the San Diego City Council District maps online to determine the Council District: <http://www.sandiego.gov/citycouncil/>

COMMISSION

The City of San Diego Commission for Arts and Culture.

COMMISSIONER

A volunteer appointed by the Mayor and confirmed by City Council to serve in an advisory capacity to the Mayor and City Council of The City of San Diego 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.

COMMISSION STAFF

Full time employees of The City of San Diego assigned to administer the programs and services of the Commission under the oversight and direction of the Mayor and Deputy Chief Operating Officer for Neighborhood Services.

COMMUNITY

Community describes a unit of social organization based on some distinguishing characteristic of affinity: proximity (the North Park community), belief (the Jewish community), ethnicity (the Latino community), profession (the medical community) or orientation (the gay community).

CONTRACT

A contract is a legally binding document that establishes the relationship between The City of San Diego and a nonprofit organization and outlines the duties of each party. The contract is the tool that enables The City of San Diego to pay out an award to an organization. A contract is considered executed after all the requisite departments within The City of San Diego including The Commission for Arts and Culture, Purchasing and Contracting; City Attorney and City Clerk have verified and/or signed the contract.

CONTRACTOR

A contractor is an applicant who has successfully entered into a contract with The City of San Diego and is performing duties under the terms of the contract.

CULTURAL DATA PROFILE (CDP) and CDP FUNDER REPORT

The City of San Diego subcontracts with an organization called DataArts to collect standardized data for the arts and culture sector and to convert that data into uniform reports customized for the Commission.

CULTURE GRANTS ONLINE (CGO)

Culture Grants Online (CGO) is the name of the web-based software system that The City of San Diego uses to collect applications for the Organizational Support Program. This system is also referred to as the Online Application Portal. Each applicant confirmed by Commission staff as eligible to apply for Fiscal Year 2017 OSP funding will be granted access to the Online Application Form in the Online Application Portal. CGO is a product created and managed by The Western States Arts Federation (WESTAF). The City of San Diego holds a licensing agreement with WESTAF to use CGO.

CULTURAL TOURISM

Travel with a primary purpose to experience the arts, heritage, cultures, or the special character of a place.

CULTURE

In this context, culture refers to fine arts, humanities and the broad aspects of a science as distinguished from the vocational, recreational and technical aspects. Art, architecture, science and history are considered cultural in this context.

DATAARTS

See Cultural Data Profile.

ENTERTAINMENT EXPENSES

Funds used to recruit, secure, compensate and supply amusements including but not limited to fireworks, caricature drawings, balloon animals, mascots, face painting, animal rides, petting zoos, or carnival games. (Contrast with Artistic Expenses).

FISCAL SPONSOR

A nonprofit, tax-exempt organization that chooses to support a project by receiving funds from a private foundation, a government agency, or tax-deductible donation and passing them on to the project. The fiscal sponsor assumes the liabilities, legal and tax reporting requirements associated with accepting funding. For more specific instruction, fiscal sponsors and their sponsored applicant are strongly encouraged to seek professional legal and accounting counsel to determine how best to structure their business relationship. In this context:

- Legal: The fiscal sponsor would be the applicant, and if awarded funding, would become the contractor. The fiscal sponsor must comply with The City of San Diego's contractual requirements.
- Location: The fiscal sponsor must be based in San Diego County.
- Relationship: The sponsored applicant must become employees or volunteers of the fiscal sponsor for the duration of the project. Project expenses must be paid directly by the fiscal sponsor to vendors and suppliers. All activities performed by the project personnel, including writing grant proposals or requesting donations, will be done so on behalf of the fiscal sponsor. All funds raised are the property of the fiscal sponsor.
- Liabilities: Because the project is being conducted on behalf of the fiscal sponsor, the project activities create the same liabilities for the fiscal sponsor as would any other program. The fiscal sponsor is liable for the actions and omissions of the project personnel – whether employees or volunteers - within the scope of their project work. If the project has unpaid bills, borrows money, injures someone,

damages property, infringes someone's copyright, or undertakes the obligation to supply goods or services to others – all these are the fiscal sponsor's liabilities.

- Tax Reporting: Depending on the commitments made to grantors and donors, the fiscal sponsor may be required to designate money for the project as a restricted fund on its financial records and on its Form 990 return. Payroll tax returns must also be filed for employee compensation.

IN-KIND CONTRIBUTIONS

In-kind contributions are the value of goods or services donated to an organization either as volunteer staff time or goods donated by vendors at no cash expense to the organization.

IN-REACH

The attendance by groups of people coming to any venue owned, rented or otherwise controlled by an organization from any of the City's Council Districts.

LOCAL AUDIENCES

Those people living within fifty (50) miles of an event site and attending the event as spectators (as opposed to participants).

MATCHING REQUIREMENT or CASH MATCH

Contractors with project cash expenses over \$30,000 must be able to match City funding at a 3:1 ratio: for every \$1 the City invests, the applicant must match that support with \$3 in cash funding. Cash match funding may come from any number of sources including earned or contributed income, but cannot come from The City of San Diego. Contractors with project cash expenses of \$30,000 or less must match City funding at a 2:1 ratio and up to 50% of the match may consist of in-kind donations.

NEIGHBORHOOD

The geographically defined area within The City of San Diego where programs and services are provided and outreach activities are targeted. The boundaries of neighborhoods are sometimes better defined by neighborhood residents than by police or city maps.

ONLINE APPLICATION FORM

See Culture Grants Online.

ONLINE APPLICATION PORTAL

See Culture Grants Online.

OUTREACH

Programs and services implemented at locations other than an organization's primary location, including those locations that are owned or rented and those that are not owned or rented by the applicant.

PARTICIPANTS

The direct recipients and users of the event (e.g. youth and their parents, seniors, the homeless, apprentice artists, etc.). Participants should not be confused with "audiences" or "visitors" - people who may attend an event as guests, but are not actively engaged in the project.

PROJECT

The arts and culture event or activity proposed by the applicant for funding. Eligible projects are typically one or a series of events united by a single theme or purpose and typically of limited duration.

PROJECT-SPECIFIC COSTS

Costs which can be identified and assigned to a specific project activity. These include expenses for personnel directly assigned to the project such as artistic/entertainment, administrative/professional, technical production, etc. Direct costs may also include operating costs specifically associated with the project such as the rental of outside facilities, postage, materials and supplies.

TOURIST

A person who travels more than fifty (50) miles or is traveling from Mexico to visit San Diego and/or someone who stays overnight in a hotel/motel.

VENDOR

A vendor is a person or an organization that provides goods or services to the general public as a feature of your project. For example, the business that sells popcorn at your festival is a vendor for the purposes of this application, but the business that sells you signage for the event is not.

WESTAF

See Culture Grants Online.



Contracting with The City of San Diego Commission for Arts and Culture

FY17 OSP and CCSD Contracts



Welcome





Who do I go to for what?

FY17 Contracts and Requests for Payment:

Whitney Roux,
Arts and Culture Funding Programs
Coordinator

P: 619. 236. 6798

E: wroux@san Diego.gov



FY18 Guidelines and Application:

Anjanette Maraya-Ramey,
Senior Manager of Arts and Culture
Funding Programs

P: 619. 236. 6788

E: amarayaramey@san Diego.gov



www.sandiego.gov/arts-culture/funding

Organizational Support Program

- 98 Applications
- 86 Funded
- 12 Not recommended for funding
- **Allocated: \$10,633,602**

Creative Communities San Diego

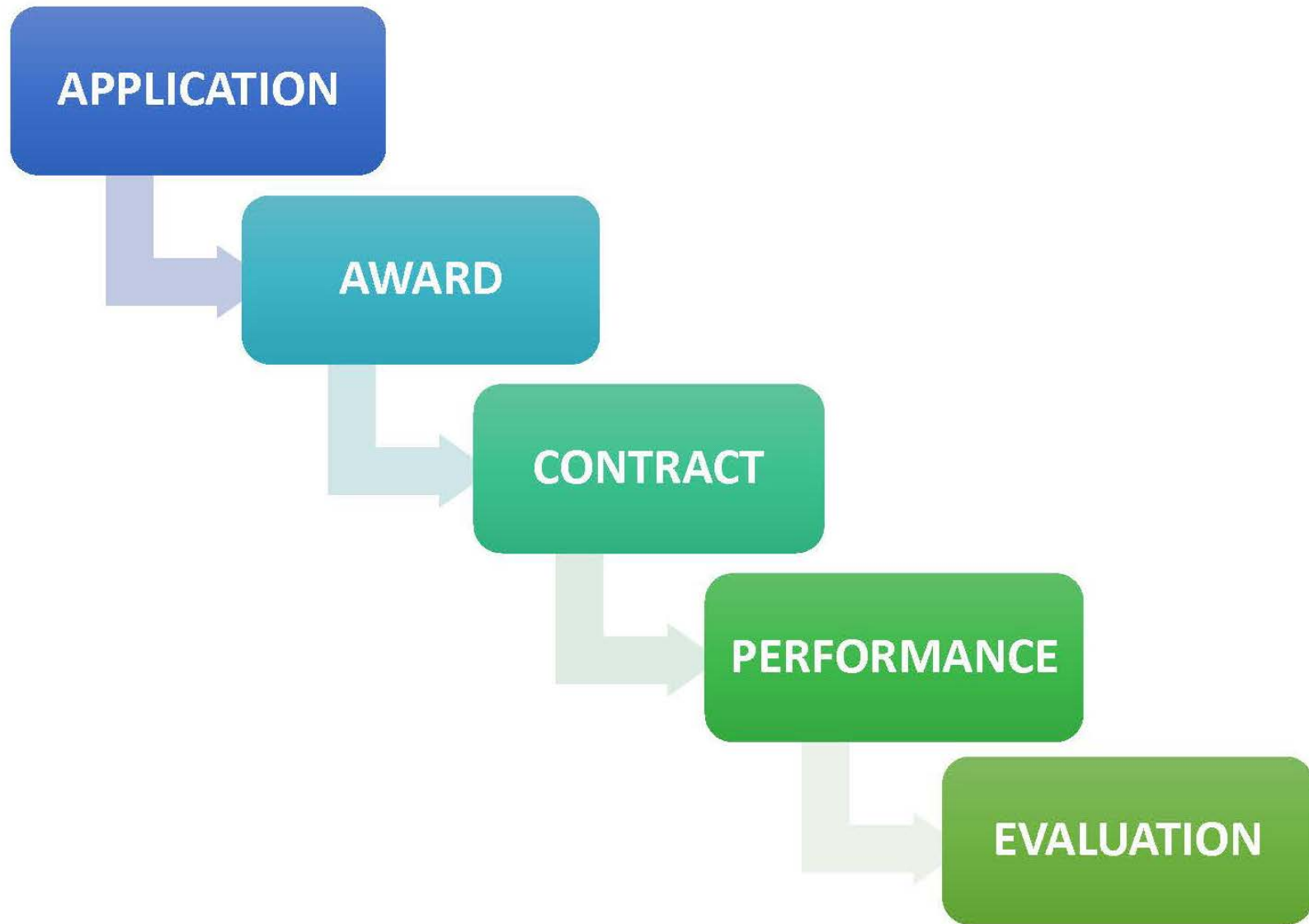
- 58 Applications
- 48 Funded
- 10 Not recommended for funding
- **Allocated: \$1,189,847**

Contract Period is from July 1, 2016 – June 30, 2017.

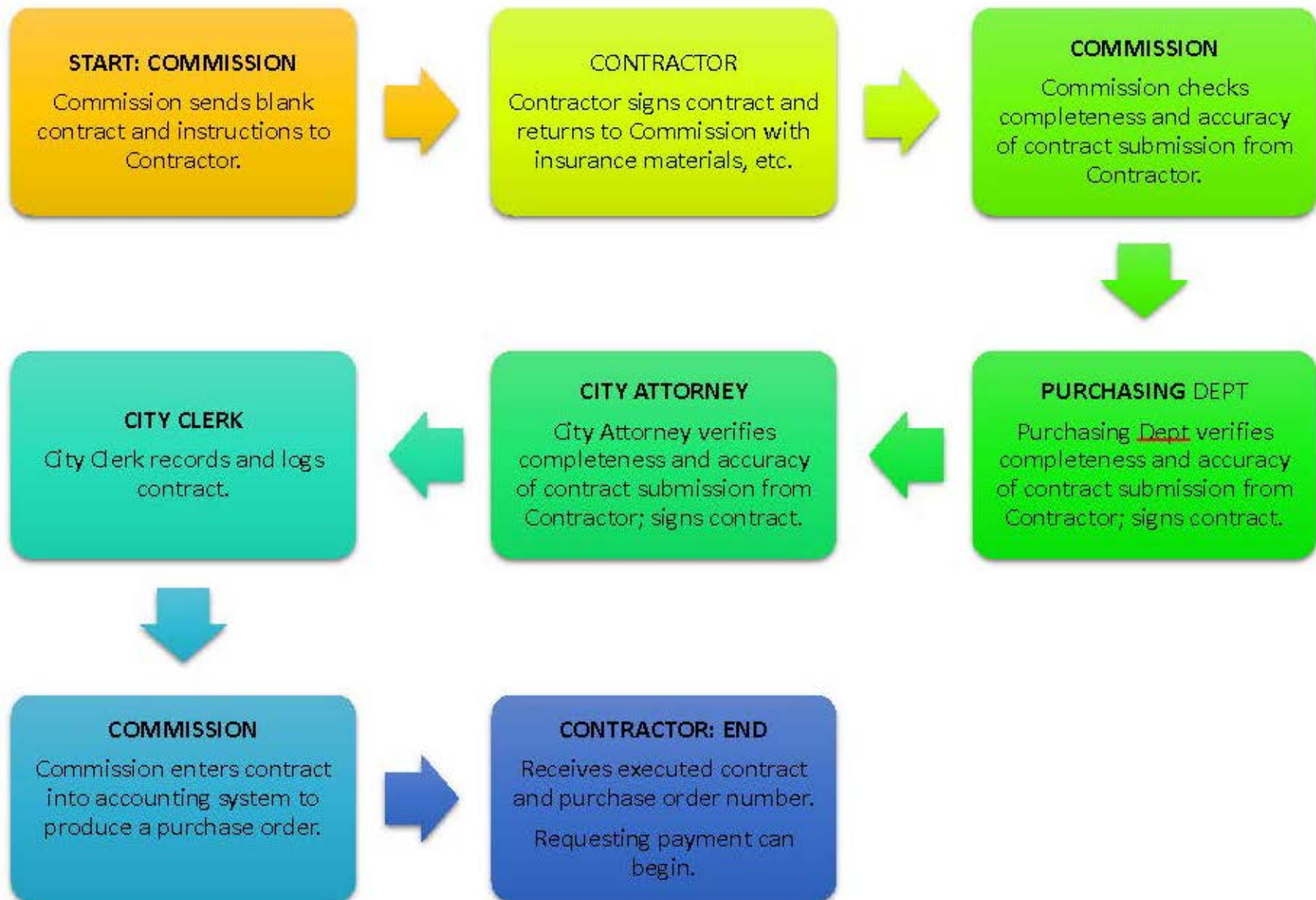




What is the funding process?



What is the contract process?





Where can I find all this info?

[www.sandiego.gov/
arts-culture/funding](http://www.sandiego.gov/arts-culture/funding)



Contract

Each nonprofit (Contractor) that is awarded funds from The City of San Diego (City) is required to enter into an agreement with the City to become City contractors.



What is included in the contract kit?

- One set of instructions for completing a contract kit
- One contract kit completion checklist
- One Electronic Funds Transfer (EFT) enrollment form
- One complete contract, unsigned
- One duplicate of the contract signature page
- One Exhibit A: Scope of Services
- One Exhibit B: Public Records Act Acknowledgement
- One “Declaration in Lieu” of Required Auto Insurance
- One “Declaration in Lieu” of Required Workers’ Compensation Insurance



Exhibit A – Scope of Services

Exhibit A is:

The scope of services that the Contractor is required to provide under this contract:

- The season highlights and goals and objectives stated in the submitted application.

All contractors should review Exhibit A and are expected to measure then report on the outcomes at the end of the contract period.



Exhibit B – Public Records Act

Exhibit B is an acknowledgement that:

- The contents of this contract and any documents pertaining to the performance of the contract are public records, and therefore subject to disclosure unless a specific exemption in the California Public Records Act applies.

For information about confidentiality and specific legal information pertaining to the Public Records Act, visit:
www.sandiego.gov/city-clerk/contact/requests



What are the insurance requirements?

Insurance Coverage Required

- Commercial General Liability (CGL),
- Commercial Auto Liability (Auto),
- Workers Compensation (WC).

ACORD®		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 12/2/2015		
<p>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</p> <p>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).</p>						
PRODUCER Alliant Insurance Services, Inc. 916-643-2700 2180 Harvard Street, Suite 460 Sacramento CA 95815			CONTACT NAME: PHONE (A/C, No, Ext): FAX (A/C, No): 916-643-2750 E-MAIL: ADDRESS:			
INSURED ABC Corporation 123 B Street Sacramento, CA 95816			INSURER(S) AFFORDING COVERAGE INSURER A: Indemnity Insurance Company of N A NAIC # 43575 INSURER B: Everest National Insurance Company 10120 INSURER C: ACE Fire Underwriters Insurance Com 20702 INSURER D: INSURER E: INSURER F:			
COVERAGES CERTIFICATE NUMBER: 239115308 REVISION NUMBER:						
<p>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</p>						
INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD, WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:		SAMPLE	1/1/2015	1/1/2016	EACH OCCURRENCE \$1,000,000 PREMISES (Ea occurrence) \$100,000 MED EXP (Any one person) \$5,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000
C	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS		SAMPLE	1/1/2015	1/1/2016	COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ EACH OCCURRENCE \$ AGGREGATE \$
	UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> RETENTION \$ <input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS-MADE					EACH OCCURRENCE \$ AGGREGATE \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N/A	SAMPLE	1/1/2015	1/1/2016	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)						
CERTIFICATE HOLDER The City of San Diego Purchasing and Contracting 1200 Third Avenue, 2 nd Floor San Diego, CA 92101				CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE		
© 1988-2014 ACORD CORPORATION. All rights reserved.						
ACORD 25 (2014/01)		The ACORD name and logo are registered marks of ACORD				



Insurance Documents Required

- Certificate of Insurance
- Additional Insured Endorsement
- Proof of:
 - Primary and Non-Contributory Coverage
 - 30-day Cancellation Notice
 - Severability Coverage
 - Waiver of Subrogation for WC

ACORD®		CERTIFICATE OF LIABILITY INSURANCE		DATE (MM/DD/YYYY) 12/2/2015	
<small>THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.</small>					
<small>IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).</small>					
PRODUCER Alliant Insurance Services, Inc. 916-643-2700 2180 Harvard Street, Suite 460 Sacramento CA 95815			CONTACT NAME: PHONE (A/C, No, Ext): E-MAIL: ADDRESS: FAX (A/C, No): 916-643-2750		
INSURED ABC Corporation 123 B Street Sacramento, CA 95816			INSURER(S) AFFORDING COVERAGE INSURER A: Indemnity Insurance Company of N A INSURER B: Everest National Insurance Company INSURER C: ACE Fire Underwriters Insurance Com INSURER D: INSURER E: INSURER F:		
			NAIC # 43575 10120 20702		
COVERAGES CERTIFICATE NUMBER: 239115308 REVISION NUMBER:					
<small>THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.</small>					
INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:		SAMPLE	1/1/2015	1/1/2016
					LIMITS EACH OCCURRENCE \$1,000,000 PREMISES (Ea occurrence) \$100,000 MED EXP (Any one person) \$5,000 PERSONAL & ADV INJURY \$1,000,000 GENERAL AGGREGATE \$2,000,000 PRODUCTS - COMP/OP AGG \$2,000,000
C	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input checked="" type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$		SAMPLE	1/1/2015	1/1/2016
					COMBINED SINGLE LIMIT (Ea accident) \$1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ EACH OCCURRENCE \$ AGGREGATE \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N/A	SAMPLE	1/1/2015	1/1/2016
					<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$1,000,000 E.L. DISEASE - EA EMPLOYEE \$1,000,000 E.L. DISEASE - POLICY LIMIT \$1,000,000
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)					
CERTIFICATE HOLDER The City of San Diego Purchasing and Contracting 1200 Third Avenue, 2 nd Floor San Diego, CA 92101			CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE		
ACORD 25 (2014/01) The ACORD name and logo are registered marks of ACORD					



Insurance Documents Required

- If CGL and Auto have two different policy numbers you need all of the above for each policy.
- Contracts and Payments can not be processed without current insurance in place.

COVERAGES			CERTIFICATE NUMBER: 239115308				
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS							
INSR LTR	TYPE OF INSURANCE		ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)
A	<input checked="" type="checkbox"/>	COMMERCIAL GENERAL LIABILITY			SAMPLE	1/1/2015	1/1/2016
	<input type="checkbox"/>	CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR					
	GEN'L AGGREGATE LIMIT APPLIES PER:						
	<input type="checkbox"/>	POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC					
	OTHER:						
C	<input checked="" type="checkbox"/>	AUTOMOBILE LIABILITY			SAMPLE	1/1/2015	1/1/2016
	<input checked="" type="checkbox"/>	ANY AUTO					
	<input type="checkbox"/>	ALL OWNED AUTOS	<input type="checkbox"/>	SCHEDULED AUTOS			
	<input checked="" type="checkbox"/>	HIRED AUTOS	<input checked="" type="checkbox"/>	NON-OWNED AUTOS			
	<input type="checkbox"/>	UMBRELLA LIAB	<input type="checkbox"/>	OCCUR			
	<input type="checkbox"/>	EXCESS LIAB	<input type="checkbox"/>	CLAIMS-MADE			
	<input type="checkbox"/>	DED	<input type="checkbox"/>	RETENTION \$			
B	<input checked="" type="checkbox"/>	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY			SAMPLE	1/1/2015	1/1/2016
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)		<input type="checkbox"/>	Y / N			
	If yes, describe under DESCRIPTION OF OPERATIONS below		N / A				
DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)							



Additional Insured Endorsement

Required for:

- CGL
- Auto

Required to have:

- “City of San Diego and its respective elected officials, officers, employees, agents and representatives.”
- The Policy Number needs to be on top.

POLICY NUMBER:	2017CC201	COMMERCIAL GENERAL LIABILITY
THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.		
ADDITIONAL INSURED – OWNERS, LESSEES OR CONTRACTORS – (FORM B)		
This endorsement modifies insurance provided under the following:		
COMMERCIAL GENERAL LIABILITY COVERAGE PART.		
SCHEDULE		
Name of Person or Organization:		
City of San Diego and its respective elected officials, officers, employees, agents and representatives.		
(If no entry appears above, information required to complete this endorsement will be shown in the Declarations as applicable to this endorsement.)		
WHO IS AN INSURED (Section II) is amended to include as an insured the person or organization shown in the Schedule, but only with respect to liability arising out of "your work" for that insured by or for you.		



Additional Insured Endorsement

POLICY NUMBER: 2017CC201

COMMERCIAL GENERAL LIABILITY
CG 20 37 04 13

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

ADDITIONAL INSURED – OWNERS, LESSEES OR CONTRACTORS – COMPLETED OPERATIONS

This endorsement modifies insurance provided under the following:

COMMERCIAL GENERAL LIABILITY COVERAGE PART
PRODUCTS/COMPLETED OPERATIONS LIABILITY COVERAGE PART

SCHEDULE

Name Of Additional Insured Person(s) Or Organization(s)	Location And Description Of Completed Operations
City of San Diego and its respective elected officials, officers, employees, agents and representatives.	

Information required to complete this Schedule, if not shown above, will be shown in the Declarations.

A. Section II – Who Is An Insured is amended to include as an additional insured the person(s) or organization(s) shown in the Schedule, but only with respect to liability for "bodily injury" or "property damage" caused, in whole or in part, by "your work" at the location designated and described in the Schedule of this endorsement performed for that additional insured and included in the "products-completed operations hazard".

However:

1. The insurance afforded to such additional insured only applies to the extent permitted by law; and
2. If coverage provided to the additional insured is required by a contract or agreement, the insurance afforded to such additional insured will not be broader than that which you are required by the contract or agreement to provide for such additional insured.

B. With respect to the insurance afforded to these additional insureds, the following is added to Section III – Limits Of Insurance:

If coverage provided to the additional insured is required by a contract or agreement, the most we will pay on behalf of the additional insured is the amount of insurance:

1. Required by the contract or agreement; or
2. Available under the applicable Limits of Insurance shown in the Declarations;

whichever is less.

This endorsement shall not increase the applicable Limits of Insurance shown in the Declarations.



Insurance Samples – Policy Provisions

Primary/Non-Contributory, 30-Day Cancellation Notice and Severability (Separation of Insured)

Required for:

- CGL
- Auto

Can be an endorsement or a page from insurance policy document.

Required to have:

- The policy number needs to be on top.
- If you have two separate policies, you need one for each.

Policy #: 2017CC201		COMMERCIAL GENERAL LIABILITY CG 20 01 04 13
THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.		
PRIMARY AND NONCONTRIBUTORY – OTHER INSURANCE CONDITION		
This endorsement modifies insurance provided under the following:		
COMMERCIAL GENERAL LIABILITY COVERAGE PART PRODUCTS/COMPLETED OPERATIONS LIABILITY COVERAGE PART		
The following is added to the Other Insurance Condition and supersedes any provision to the contrary:	(2) You have agreed in writing in a contract or agreement that this insurance would be primary and would not seek contribution from any other insurance available to the additional insured.	
Primary And Noncontributory Insurance This insurance is primary to and will not seek contribution from any other insurance available to an additional insured under your policy provided that:		
(1) The additional insured is a Named Insured under such other insurance; and		



Insurance Samples – Policy Provisions

BUSINESS LIABILITY COVERAGE FORM Policy #: 2017CC201

This Paragraph f. applies separately to you and any additional insured.

3. Financial Responsibility Laws

a. When this policy is certified as proof of financial responsibility for the future under the provisions of any motor vehicle financial responsibility law, the insurance provided by the policy for "bodily injury" liability and "property damage" liability will comply with the provisions of the law to the extent of the coverage and limits of insurance required by that law.

b. With respect to "mobile equipment" to which this insurance applies, we will provide any liability, uninsured motorists, underinsured motorists, no-fault or other coverage required by any motor vehicle law. We will provide the required limits for those coverages.

4. Legal Action Against Us

No person or organization has a right under this Coverage Form:

a. To join us as a party or otherwise bring us into a "suit" asking for damages from an insured; or

b. To sue us on this Coverage Form unless all of its terms have been fully complied with.

A person or organization may sue us to recover on an agreed settlement or on a final judgment against an insured; but we will not be liable for damages that are not payable under the terms of this insurance or that are in excess of the applicable limit of insurance. An agreed settlement means a settlement and release of liability signed by us, the insured and the claimant or the claimant's legal representative.

5. Separation Of Insureds

Except with respect to the Limits of Insurance, and any rights or duties specifically assigned in this policy to the first Named Insured, this insurance applies:

a. As if each Named Insured were the only Named Insured; and

b. Separately to each insured against whom a claim is made or "suit" is brought.

6. Representations

a. **When You Accept This Policy**

By accepting this policy, you agree:

(1) The statements in the Declarations are accurate and complete;

(2) Those statements are based upon representations you made to us; and

(3) We have issued this policy in reliance upon your representations.

b. Unintentional Failure To Disclose Hazards

If unintentionally you should fail to disclose all hazards relating to the conduct of your business at the inception date of this Coverage Part, we shall not deny any coverage under this Coverage Part because of such failure.

7. Other Insurance

If other valid and collectible insurance is available for a loss we cover under this Coverage Part, our obligations are limited as follows:

a. **Primary Insurance**

This insurance is primary except when b. below applies. If other insurance is also primary, we will share with all that other insurance by the method described in c. below.

b. **Excess Insurance**

This insurance is excess over any of the other insurance, whether primary, excess, contingent or on any other basis:

(1) **Your Work**

That is Fire, Extended Coverage, Builder's Risk, Installation Risk or similar coverage for "your work";

(2) **Premises Rented To You**

That is fire, lightning or explosion insurance for premises rented to you or temporarily occupied by you with permission of the owner;

(3) **Tenant Liability**

That is insurance purchased by you to cover your liability as a tenant for "property damage" to premises rented to you or temporarily occupied by you with permission of the owner;

(4) **Aircraft, Auto Or Watercraft**

If the loss arises out of the maintenance or use of aircraft, "autos" or watercraft to the extent not subject to Exclusion g. of Section A. – Coverages.

(5) **Property Damage To Borrowed Equipment Or Use Of Elevators**

If the loss arises out of "property damage" to borrowed equipment or the use of elevators to the extent not subject to Exclusion k. of Section A. – Coverages.

Page 16 of 24 Form SS 00 08 04 05



Insurance Samples – Waiver of Subrogation

Required for:

- Workers Compensation Insurance

Required to have:

- “City of San Diego and its respective elected officials, officers, employees, agents and representatives.”
- The policy number needs to be on top.

WORKERS COMPENSATION AND EMPLOYERS LIABILITY INSURANCE POLICY		WC 99 04 02 C (Ed. 9-14)
Policy #: 2017CC201		
WAIVER OF OUR RIGHT TO RECOVER FROM OTHERS ENDORSEMENT - CALIFORNIA		
<p>We have the right to recover our payments from anyone liable for an injury covered by this policy. We will not enforce our right against the person or organization named in the Schedule. (This agreement applies only to the extent that you perform work under a written contract that requires you to obtain this agreement from us.)</p> <p>You must maintain payroll records accurately segregating the remuneration of your employees while engaged in the work described in the Schedule.</p> <p>The additional premium for this endorsement shall be 5% of the applicable manual premium otherwise due on such remuneration subject to a policy maximum charge for all such waivers of 5% of total manual premium.</p> <p>The minimum premium for this endorsement is .</p> <p>This agreement shall not operate directly or indirectly to benefit anyone not named in the Schedule.</p>		
Schedule		
Specific Waiver		
Person/Organization: City of San Diego and its respective elected officials, officers, employees, agents and representatives.		
Job Description:		
Waiver Premium:		
Class	State	Payroll Subject to Waiver
This endorsement changes the policy to which it is attached and is effective on the date issued unless otherwise stated. (The information below is required only when this endorsement is issued subsequent to preparation of the policy.)		
Endorsement Effective:	Policy No.:	Endorsement No.:
Insured:		Premium \$
Insurance Company:		
WC 99 04 02C (Ed. 9-14)	Countersigned by _____	



Insurance Samples – In Lieu Forms

Who should sign an **Declaration in Lieu - Auto Liability**?

- Your organization does not currently own any vehicles, and
- Your organization carries Commercial General Liability insurance for “hired” and “non-owned” autos.

		OTHER			
C	AUTOMOBILE LIABILITY				
	<input type="checkbox"/>	ANY AUTO		←	
		ALL OWNED AUTOS	<input type="checkbox"/>		SCHEDULED AUTOS
	X	HIRED AUTOS	X		NON-OWNED AUTOS
	UMBRELLA LIAB				
	EXCESS LIAB			OCCUR	
				CLAIMS-MADE	
	DED		RETENTION \$		




Insurance Samples – In Lieu Forms

Who should sign an **Declaration in Lieu - Workers Compensation?**

- Your organization has no paid employees, and
- All work to be performed under the contract will be done by solely by volunteers.

	DED	RETENTION
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	<div>Y / N <input type="checkbox"/></div> <div>N / A</div>





Tips for getting your insurance right.

- Carefully read Article VII of the contract.
- Review the visuals from the Contract Technical Assistance Workshop.
- Share the insurance requirements found in Article VII of the contract and the visuals from this workshop with your organization's insurance broker.
- Verify that your organization's insurance policies will not expire in the next 90 days.



State & Federal Registrations

CA Dept. of Justice Charity Registration

- <http://rct.doj.ca.gov>
- Status Needed: Current

Department of Industrial Relations

- <http://www.dir.ca.gov/dlse/debar.html>
- Organization is not listed as Debarred.

CA Secretary of State

- <http://kepler.sos.ca.gov/>
- Status Needed: ACTIVE

System for Awards Management

- www.sam.gov
- Status Needed: ACTIVE or No Results



Status Needed: ACTIVE

Secretary of State Main Website

Business Programs

Notary & Authentications

Elections

Campaign & Lobbying

Business Entities (BE)

Online Services

- E-File Statements of Information for Corporations
- Business Search
- Processing Times
- Disclosure Search

Main Page

Service Options

Name Availability

Forms, Samples & Fees

Statements of Information (annual/biennial reports)

Filing Tips

Information Requests (certificates, copies & status reports)

Service of Process

Business Search

This search provides access to domestic stock, domestic nonprofit and qualified foreign corporations, limited liability companies, and the names and addresses of the principals of the entity, order a copy of the last complete Statement of Information, ordering certificates, copies of documents and/or status reports or to request a more extensive search.

Please note: This search is not intended to serve as a name availability search. For information on checking or reserving a name, refer to [Name Availability](#).

To conduct a search:

- Select the applicable search type.
- Enter the entity name or number you wish to search. Note: If entering the entity number of a corporation, it must be the full number.
- Select the **Search** button.
- For help with searching an entity name or number, refer to [Search Tips](#).

Search Type:

- ☒ Corporation Name
- ☐ Limited Liability Company/Limited Partnership Name
- ☐ Entity Number

Entity Name:

Authentications

Elections

Campaign & Lobbying

State Archives

Business Search - Results

Data is updated to the California Business Search on Wednesday and Saturday mornings. Results reflect work processed as of the date and time the search was performed. Results provided is not a complete or certified record of an entity.

Select an entity name below to view additional information. Results are listed alphabetically in ascending order by entity name. For information on checking or reserving a name, refer to [Name Availability](#).

For information on ordering certificates, copies of documents and/or status reports or to request a more extensive search, refer to [Search Tips](#).

For descriptions of the various fields and status types, refer to [Field Descriptions and Status Definitions](#).

Results for " OLD GLOBE THEATRE " returned 1 entity record.

Entity Number	Date Filed	Status	Entity Name	Agent for Service of Process
C0170125	02/03/1937	ACTIVE	OLD GLOBE THEATRE	MICHAEL G. MURPHY

[Modify Search](#) [New Search](#)

sandiego.gov



System for Awards Management

Status Needed: ACTIVE or NO RESULTS

SAM
SYSTEM FOR AWARD MANAGEMENT

HOME SEARCH RECORDS DATA ACCESS GENERAL INFO

Search Records

Search Tips to Get Started:

- Looking for entity registration records or entity exclusion records in SAM? Use **Quick** CAGE Code. Use **Advanced Search** to structure your search using multiple categories.
- Are you a Federal government employee? Create a SAM user account with your government information and registrants who chose to opt out of the public search.
- Conducting small business-focused research? In addition to what is contained in SAM, (SBA) supplemental information about themselves. Use the [SBA's Dynamic Small Business](#)
- Trying to find a contractor participating in the Disaster Response Registry? Use the [Disaster Response Registry](#) to provide debris removal, distribution of supplies, reconstruction, and other disaster or

QUICK SEARCH:

Enter your specific search term
(Example of search term includes the entity's name, etc.)

DUNS Number Search: Enter DUNS number ONLY

CAGE Code Search: Enter CAGE code ONLY

SEARCH Need Help?

Save PDF Export Results Print

Sort by Modified Date Order by Descending

Your search for "Old* Globe* Theatre*" returned the following results...

Entity	OLD GLOBE THEATRE	Status: Active +
DUNS: 073575052	CAGE Code: 4BoTo	View Details
Has Active Exclusion?: No	DoDAAC:	
Expiration Date: 01/14/2017	Delinquent Federal Debt? No	
Case of Registration: Federal Assistance		

Result page 0 of 0 Sort by Modified Date Order by Descending

FILTER RESULTS No records found for current search.

☒ Active
☒ Inactive

By Functional Area

☐ Entity Management
☐ Performance Information

Apply Filters

Note: Filters are case sensitive



Status Needed: CURRENT

State of California Department of Justice
Office of the Attorney General

Kamala D. Harris
Attorney General

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Search the Files of the Registry of Charitable Trusts

- Welcome to the search page of the Registry of Charitable Trusts (RCT). Here you are able to search for information on charities, charity fundraising professionals, and raffle registrants.
- This search page provides access to information about various types of entities that are registered with the Registry of Charitable Trusts. With a few exceptions, it does not currently provide access to electronic copies of documents filed with the Registry. Electronic copies of filings by certain registrants, such as the annual financial reports filed by commercial fundraisers for charitable purposes, are available elsewhere on the Charities website. Access to these reports is available at CFR search.
- Please enter search criteria below to start your search. Enter data in any field. Remember, the fewer your search criteria, the broader the range of the results that will be obtained by your search. For example, if you search using a name or federal employer identification number (FEIN) and leave the Registration Type or the Record Type fields blank, your results may return multiple registrations for the entity. It may be, for example, that the entity is registered both as a charity and as an organization conducting raffles.
- If you have partial information, you may use a wildcard search by placing an asterisk at the beginning or end of the search terms entered. For example, if you are not sure whether a name is spelled Alan or Allen, enter Al* to search.
- Searches by just Secretary of State or Franchise Tax Board Number or just FEIN can be slow. Searches using both of those numbers return results relatively quickly.
- For help using and interpreting the results from the Registry Search, please review [Registry Search Feature - Tips for use and definition of the codes.](#)

Record Type: All
Registration Type: All
Secretary of State or Franchise Tax Board Number:
Organization Name: Outside the Lens
State Charity Registration:
DBA:
FEIN (numbers only):
Registration Status: All
County:
City:
State: --All--
ZIP Code:
Search Clear

State of California Department of Justice
Office of the Attorney General

Kamala D. Harris
Attorney General

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For more detailed information on an organization's registration, click on the Organization Name from the alphabetical list below. If there are additional pages of the search results, there will be clickable page numbers at the bottom of the list. The maximum number of pages is 25 so if you do not find the organization for which you are searching, click the 'Search Again' button and change the search criteria.

Search Again

Organization Name	Registration Number	Record Type	Registration Status	City	State	Registration Type	Record Type
<u>OUTSIDE THE LENS</u>	CT0157511	Charity	Current	SAN DIEGO	CA	Charity Registration	Charity
1							



How can I expedite the process?

- Send complete and accurate insurance documents and keep the documents fresh throughout the year.
- Verify that your organization's status with state and federal agencies is – and stays – “active”/“current”.
- Designate one person in your organization to be the point of contact for Commission staff.



Commission for Arts and Culture

Contracting Process

Steps in the Contracting Process

1. Commission staff reviews the contract kit to check for inaccurate or incomplete components.
2. When a contract kit is deemed inaccurate and/or incomplete, Commission staff requests corrected materials from the nonprofit organization.
3. When a contract kit is deemed accurate and complete, Commission staff sends the contract kit to the City's Purchasing and Contracting Department for review and approval.
4. The City's Purchasing and Contracting Department verifies the completeness and accuracy of all the contract documents, all the insurance documents, and all the state/federal registration documents for each contract kit.
5. When a contract kit is deemed accurate and complete by the City's Purchasing and Contracting Department, the contract is signed and the kit is sent to the City Attorney for review and approval.
6. When a contract kit is deemed inaccurate and/or incomplete by the City's Purchasing and Contracting Department, the kit is sent back to Commission staff for troubleshooting until fixed.
7. The City Attorney verifies the completeness and accuracy of all the contract documents, all the insurance documents, and all the state/federal registration documents for each contract kit.
8. When a contract kit is deemed accurate and complete by the City Attorney, the contract is signed and the kit is sent to the City Clerk for recording.
9. When a contract kit is deemed inaccurate and/or incomplete by the City Attorney, the kit is sent back to Commission staff for troubleshooting until fixed.
10. After a contract kit is recorded by the City Clerk, Commission staff sends a paper copy of the contract kit to the nonprofit organization and attaches a digital copy of the contract kit to a purchase request in the City's accounting system.
11. Commission staff sends the purchase request to the City's Purchasing and Contracting Department for review and approval.
12. The City's Purchasing and Contracting Department approves the purchase request and issues a purchase order number, which Commission staff then gives to each nonprofit organization.
13. A nonprofit organization that possesses both a contract (signed by all the parties and recorded by the City Clerk) and a purchase order number issued by the City can begin submitting invoices to Commission staff for reimbursement.