Partnering with the City: Overview of Funding Opportunities

Economic Development Department City Council Offices Commission for Arts and Culture





Overview

- Introductions
- General Requirements for City Funding
- Types of Funding Available
- Questions

The City of San Diego Strategic Plan

Mission

To effectively serve and support our communities

Vision

A world-class city for all

The City of San Diego Strategic Plan

Values

Integrity
Service
People
Excellence

Goals and Objectives

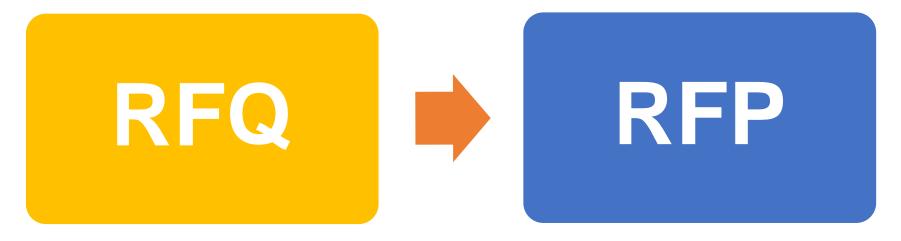
Goal 1: Provide high-quality public services

Goal 2: Work in partnership with all of our communities to achieve safe and livable neighborhoods

Goal 3: Create and sustain a resilient and economically prosperous City



Two-Phase Process: Part 1



Is the applicant organization ready to contract with the City of San Diego?

What programs and services are proposed?







Required General Information





Registration and Status Requirements

Articles of Incorporation (CA Secretary of State)

EIN Number (IRS)

DUNS Number & Registration at www.sam.gov

Federal Tax Determination Letter (IRS) State Tax Determination Letter (CA FTB) Proof of
Registration with
California
Attorney
General's
Registry of
Charitable Trusts



Insurance Requirements: ACORD Certificate

- Insurers with A.M. Best's rating of no less than A-VI
- > Types and coverage amounts:
 - ☐ Commercial General Liability with limits of at least \$1,000,000 per occurrence, subject to an annual aggregate of at least \$2,000,000;
 - Automobile Liability with a limit of at least \$1,000,000 per occurrence; insurance certificate should reflect coverage for Any Auto or Hired and Non-Owned Autos;
 - ☐ Worker's Compensation with Employer's Liability coverage with a limit of at least \$1,000,000, if organization has paid employees

Insurance Requirements: Endorsements

- Commercial General Liability Endorsements
 - Additional Insureds
 - □ Primary and Non-Contributory
- Workers Compensation Endorsement
 - Waiver of Subrogation

NOTE: Endorsements should cover "The City, its officers, officials, agents, employees, and volunteers" as additional insureds.



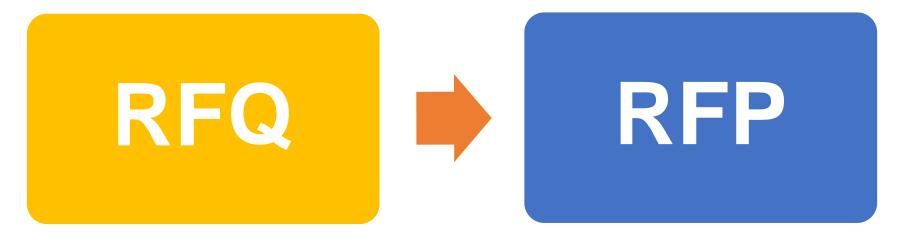
Eligibility Considerations

Your organization may **NOT** be eligible to submit an application for funding if:

- **FOR PROFIT:** Your organization is a commercial enterprise.
- **DOUBLE-DIPPING:** An organization can only apply to one TOT-funded program per fiscal year.
- FISCAL SPONSORS: You have secured a nonprofit organization to act as the parent organization of your project



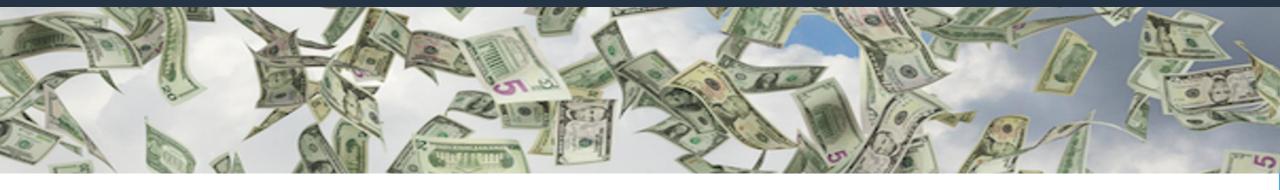
Two-Phase Process: Part 2



Once an applicant is "qualified" during the RFQ phase...

...it is eligible to submit project-specific proposals during the RFP phase.





Funding Opportunities





Types of City Grants

- ☐ Community Development Block Grant
- ☐ Economic Development & Tourism Support
- ☐ Small Business Enhancement Program
- Citywide Transient Occupancy Tax
- Community Projects, Programs & Services
- Arts, Culture & Community Festivals
- ☐ Commission for Arts and Culture Funding



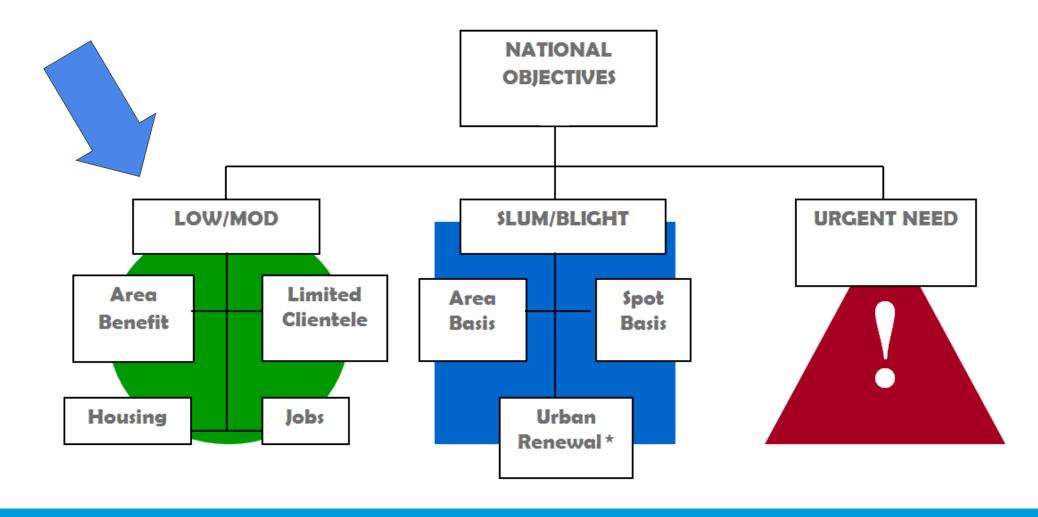
Community Development Block Grants (CDBG)

Primary Objective: Improve living environment, expand economic opportunities, and provide decent housing for <u>low- and moderate-income residents and areas</u>

- Federal entitlement program established by Housing & Community Development Act of 1974
- Regulations found in 24 CFR Part 570



Eligibility and National Objectives





Public Services

Minimum Allocation	\$50,000	
Eligible Activities	 Employment training Senior services* Health Services Homeless services Disability services* Domestic violence services 	 Tenant/landlord counseling Substance abuse services Mental health services Housing counseling Food banks/meal distribution Youth services
Outcome Measure	Low/moderate-income clientele	
		*Presumed LMI possible



Public Services



Left: Mama's Kitchen Meal Service Below: Reality Changers Youth College Prep Services





Public Services: Small/Emerging Organizations

Preset Allocation	\$50,000	
Eligible Activities	 Employment training Senior services* Health Services Homeless services Disability services* Domestic violence services Tenant/landlord counseling Substance abuse services Mental health services Housing counseling Food banks/meal distribution 	
Outcome Measure	Low/moderate-income clientele	
Requirements	Implement public services project; obtain audited financial statements; attend mandatory nonprofit accelerator program *Presumed LMI possible*	

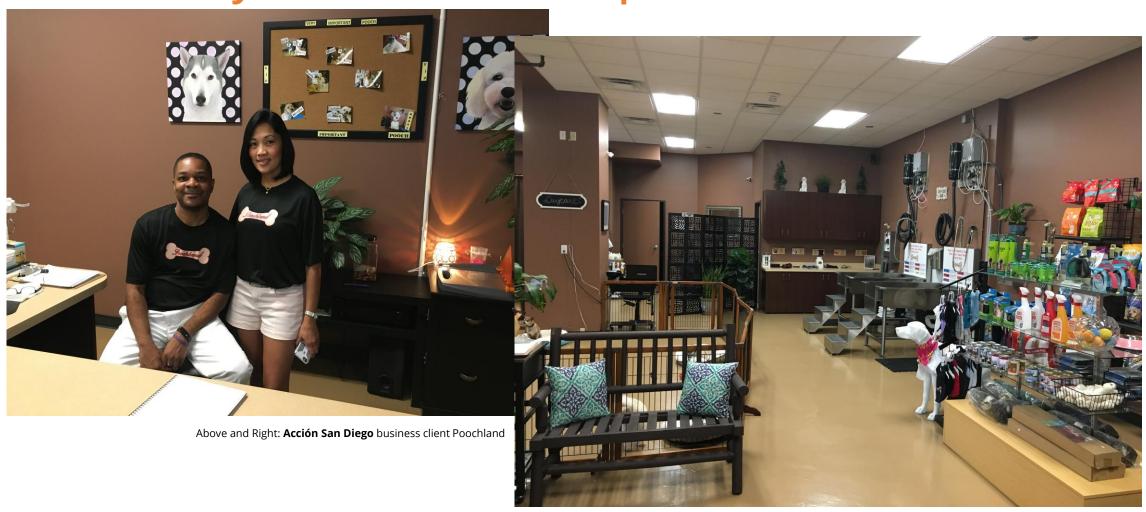


Community/Economic Development

Minimum Allocation	\$50,000
Eligible Activities	 Microenterprise technical assistance Business financial assistance (grants/loans) Commercial façade improvements
Outcome Measures	 Low/moderate-income clientele Businesses established or expanded



Community/Economic Development





Nonprofit CIP & Multifamily Housing Rehabilitation

Minimum Allocation	\$100,000
Eligible Activities	 New construction or rehabilitation of public facilities ➤ ADA improvements ➤ Health/safety hazards Examples: Senior and youth centers; homeless facilities; neighborhood facilities; health facilities; child care centers; handicapped centers Multi-unit residential rehab ➤ Rental housing ➤ Non-sustainability scope
Outcome Measures	 Low/moderate-income clientele Low/moderate-income households Low/moderate-income area (if primarily residential and benefitting all residents)



Nonprofit CIP & Multifamily Housing Rehabilitation





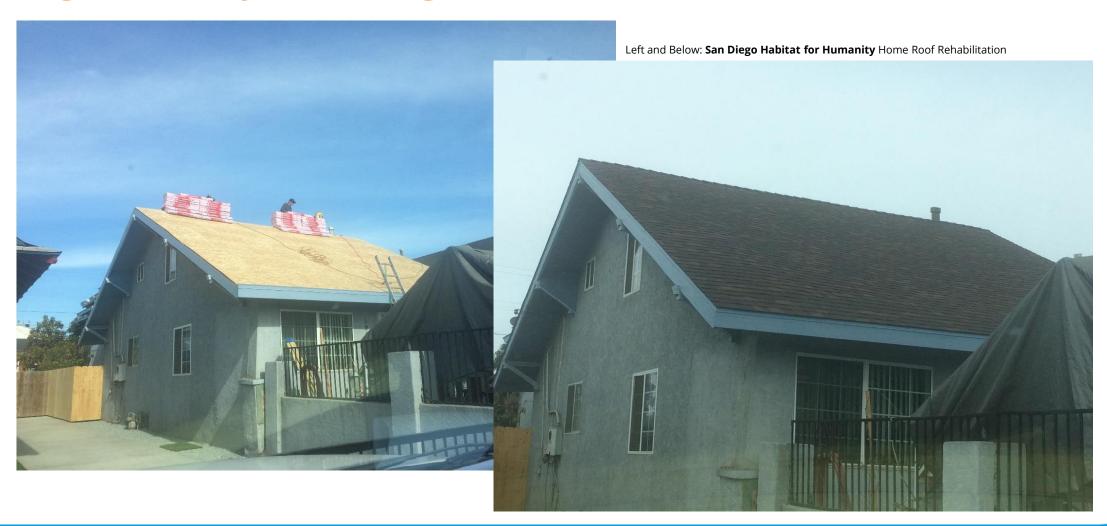


Single-Family Housing Rehabilitation

Minimum Allocation	\$100,000	
Eligible Activity	 Single-unit residential rehab ➤ Owner-occupied ➤ Address substandard housing conditions ➤ Sustainability improvements 	
Outcome Measure	Low/moderate-income households	



Single-Family Housing Rehabilitation





Sustainability

Minimum Allocation	\$100,000	
Eligible Activities	Multi-unit residential rental rehabilitation	 New Construction or Rehabilitation of public facilities
	 Examples: ✓ Solar installation ✓ Effective insulation systems ✓ High-performance windows and doors ✓ Water leak repairs 	 ✓ Tight construction and ducts ✓ Efficient heating and cooling ✓ Energy Star-certified lighting ✓ Water-wise faucets, shower heads, toilets
Outcome Measures	 Low/moderate-income clientele Low/moderate-income households Low/moderate-income area (if primarily residential and benefitting all residents) 	



Sustainability



GRID Alternatives Rooftop Solar Installation



Economic Development Funding: EDTS, SBEP and Citywide TOT

Business Expansion, Attraction and Retention Division (BEAR) Economic Development (ED) Funding

Economic Development Funding Program Objective:

Allocate funding to eligible nonprofits to effectively and efficiently further the goals of the City's Economic Development Strategy including the Economic Prosperity Element of the City's General Plan.



Funding Source

The **Small Business Enhancement Program (SBEP)** was established in 1995 with an annual General Fund appropriation equivalent to \$20 per small business (businesses with 12 or fewer employees) registered with the City. Its purpose is to provide continuing support to small businesses in recognition of their vital economic, employment, service, and cultural roles, and their importance in sustaining and revitalizing older commercial neighborhoods and adjoining residential areas.

The City's **Transient Occupancy Tax (TOT)** is paid by tourists and other visitors to San Diego and is allocated through the City's Special Promotional Fund to advance the City's economy by promoting the City of San Diego.





Economic Development Strategy

Economic Base Growth: Expansion or Retention of businesses within, or Attraction of businesses to, the City of San Diego in the City's four economic base sectors (industry):







Manufacturing & Innovation

International Trade & Logistics

Tourism

Military & Defense

Neighborhood Businesses: Increase the amount of neighborhood-based business activity, with a focus on underserved neighborhoods, in the City of San Diego.

Non-Base Sector: Encourage the development of small businesses



Organization Mission and Goal Alignment

An eligible nonprofit has a mission that closely aligns with one of the following:

- **Goal A:** Creates, retains and/or expands small businesses with a neighborhood-based focus.
- **Goal B:** Creates, retains and/or expands non-base sector small businesses by offering a program to small businesses Citywide, (not focusing on specific commercial neighborhoods with BIDs or microdistricts).
- **Goal C:** Promotes the City of San Diego as a visitor destination, enhancing the Tourism base sector.
- **Goal D:** Enhances San Diego's economic standing and reputation as a Smart City and a center for innovation, entrepreneurship and technology development for base-sector businesses (Manufacturing & Innovation, International Trade/Logistics, or Defense).



Examples - SBEP

Microdistrict SBEP (Goal A) allocations assist and fund projects or programs in smaller, geographically based neighborhood business districts to benefit small businesses.

Citywide SBEP (Goal B) allocations expand economic opportunities for small businesses by supporting programs, projects or services offered citywide.







Examples - TOT

Citywide TOT (Goal C or D) allocations support programs that promote the City as a visitor destination, advance the City's economy by increasing tourism or attract industry on a citywide basis.

Economic Development & Tourism Support (EDTS) (Goal C or D) allocations support the production of regionally significant programs, services and events that generate tourism, attract business and create employment.







Application Process

Request for Qualifications (RFQ) (new): October 2019 (generally), with four (4) weeks to submit organization information

Request for Proposal (RFP): Application available in December 2019 or January 2020

Application Closing: Generally, four (4) weeks after Application opens

Online: Apply and submit online using portal on City's Economic Development Department website.

Samples: PDFs of the FY2019 Application, Guidelines, Financial Details, and FAQs can be found at www.sandiego.gov/economic-development/about/funding

Email direct questions to sdbusiness@sandiego.gov



Economic Development

Storefront Improvement Program (SIP)

18 Projects completed (FY18)

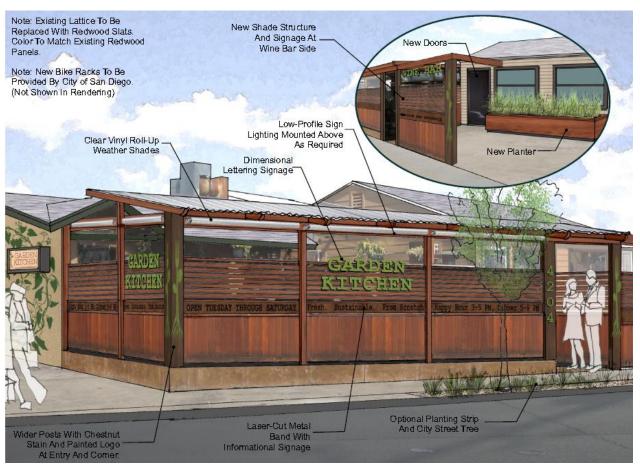
\$144,865 SIP incentives paid

\$521,742 Total project costs

\$2/\$7 Return on City investment

Project types:

- Single property
- Historic renovation
- Multiple-tenant property



Garden Kitchen, Rolando



Storefront Improvement Program (SIP)









Urban Agriculture Incentive Zone (UAIZ)

2,000+ parcels identified

Benefits:

- Property tax credit
- Contract for small-scale agriculture
- Utilization of vacant property
- Residents can grow, sell and eat locally grown produce



Photo: Don Kohlbauer, www.cityfarmer.info



Urban Agriculture Incentive Zone (UAIZ)





Photo: soromarket.com

Photo: bonnieplants.com



Placemaking

Private Property and Public Right of Way

Projects may include:

- Decorative lighting
- Shade structures
- Gathering areas
- Furniture
- Small retail kiosks
- Murals

- Bike racks/corrals
- Wayfinding
- Trash & Recycling



Manzanita Gathering Place, City Heights Photo: Circulate San Diego



Placemaking





Fair @ 44, City Heights

Photo Source: City Heights Community Development Corporation



Microdistrict Grant

Amount:

\$3,000 -10,000

Goals:

- Increase the number of neighborhoodbased businesses
- Increase the volume or value of goods and/or services sold by neighborhoodbased businesses



La Vuelta Summer Festival

Photo Source: Logan Avenue Consortium



Microdistrict Grant

Project Examples

- Business directories
- Business marketing
- Technical assistance workshops
- Entrepreneurship programs
- Commercial district banners

Ineligible Projects

- Job training or job placement
- Religious or political activity
- Capital for building construction and improvements
- Fundraising





Contact us!

Economic Development Department

e: <u>CDBG@sandiego.gov</u> | e: <u>SDBusiness@sandiego.gov</u> p: 619-236-6700

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LaTisha Thomas

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Partnering with the City: City Council Offices

CPPS / ACCF Funding Programs







Community Projects, Programs and Services (CPPS) Funding Program Background

- Funding available to non-profit organizations and public agencies for one-time community, social, environmental, cultural or recreational needs which serve a lawful public purpose.
- Funding awards are paid on a reimbursement basis only
- Funding awards are at the discretion of Council Offices
- The funding application program is a two-step process with deadlines.
- Allocation of CPPS funds is governed by <u>Council Policy 100-06</u>









Arts, Culture and Community Festivals (ACCF) Funding Program Background

- Funding available to private non-profit organizations and public agencies for the purpose of promoting local arts and culture.
- Funding awards are paid on a reimbursement basis only
- Funding awards are at the discretion of Council Offices
- Existing Arts & Culture OSP/CCSD contracts can be awarded by Council Office transfer memo
- Allocation of CPPS funds is governed by <u>Council Policy 100-23</u>









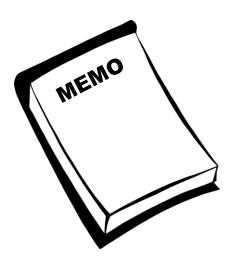
Council Office Funding Options

Apply for CPPS

Funding Program

Current FY20 Commission for Arts & Culture Contract? YES NO Options: Options: Apply for CPPS or Receive additional ACCF Funding funding by Council Program Office transfer memo

- Commission for Arts and Culture and ACCF funding come from the Discretionary
 Transient Occupancy Tax (TOT)
 *Organizations and agencies only allowed one TOT funding award per fiscal year
- CPPS Funding comes from Council Offices



CPPS/ACCF Funding Program

Fiscal Year 2020 Schedule

- Request for Qualifications (RFQ).....July 1– Sept. 27, 2019
- Recipient Announcement......Nov. 4 Nov. 8, 2019
- Request for Proposals (RFP).....Nov. 8 Nov. 22, 2019
- City Department Processing......Nov. 25, 2019 June 30, 2020
 - Contract creation
 - City Council Approval
 - Reimbursement Process
 - Payment √

^{*}Dates subject to change

Requests for Qualifications (RFQ)

July 1 – September 27, 2019

RFQ Documentation Requirements:

- ✓ CPPS/ACCF Funding Application
- ✓ Proof of Nonprofit Status
- ✓ Proof of *active* status from Secretary of State
- ✓ Proof of *current* registration with the Attorney General
- ✓ ACORD Certificate of Insurance

- July 1: FY 2019 CPPS/ACCF RFQ available online
- **Sept. 27:** RFQs due by 12:00p.m.

*Note: There will be a "cure" period for applicants deemed "Not Qualified"



- Items submitted to Council Administration
- CPPS RFQ: CPPS@SanDiego.gov
- ACCF RFQ: ACCF@SanDiego.gov



Requests for Proposals (RFP)

November 8 – November 22, 2019

RFP Documentation Requirements:

- Remaining insurance declarations & endorsements
- ✓ IRS Form 990 or 990EZ
- ✓ EOC Workforce Report
- ✓ Drug-free Workplace Certification
- ✓ Living Wage Ordinance Certification
- ✓ Maintain Good Standing
- Items submitted to Council Administration
- CPPS RFP: CPPS@SanDiego.gov
- ACCF RFP: ACCF@SanDiego.gov

- **Nov. 8:** Council Office allocations announced to applicants, invited to submit RFP
- **Nov. 22:** RFPs due by 12:00 p.m.

*Note: There will be a "cure" period for applicants deemed "Not Qualified"





CPPS/ACCF Funding Program

Reimbursement Process

- Funds awarded are paid on a reimbursement basis only
 - Purchases must be made within the Fiscal Year
 - Fiscal Year 2020 → July 1, 2019 June 30, 2020







- Requirements
 - Proof of Purchase → Receipts, invoices, pay stubs, time sheets, etc.
 - Proof of Payment → Cleared checks, bank/credit card statements, etc.



To Learn More

- Council Offices → https://www.sandiego.gov/citycouncil
- CPPS Funding Program → https://www.sandiego.gov/citycouncil/cpps
- ACCF Funding Program → https://www.sandiego.gov/citycouncil/accf
- **Office Hours**→ By Appointment (*phone or in-person*)
 - 9:00a.m.-12:00p.m.

Contact Us

- Submit CPPS questions to <u>CPPS@sandiego.gov</u>
- Submit ACCF questions to <u>ACCF@sandiego.gov</u>
- For further assistance, please contact:

Courtney Thomson
Grants Coordinator/Contracts Administrator
ThomsonC@sandiego.gov
(619) 236-5918

Jasmine Mallen Grants & Contracts Analyst <u>Jmallen@sandiego.gov</u> (619) 533-4762



*Visit websites for RFQ & RFP forms, links, & instructions.

Partnering with the City: Commission for Arts and Culture





What we will cover today

- Funding opportunities available through the Commission
- Tips for applying for funding and contracting with the City





Mission:

Vitalize the community by integrating arts and culture into community life, supporting the region's cultural assets, and showcasing San Diego as an international cultural tourism destination

Vision:

Expanding our world by celebrating creativity in San Diego



Jean Isaacs San Diego Dance Theatre, Trolley Dances



Opportunities Available

Organizational Support Program (OSP) provides general operating support with an emphasis on the delivery of programs and services that impact San Diego's quality of life and tourism.

OSP allows for:

- General operating support for nonprofits
- Types of applicants: Theaters, Museums, Dance, Music, Heritage and Cultural, Arts Service Organization, etc.
- Delivery of arts and culture programs and services that engage residents and visitors
- Impact on San Diego's quality of life and tourism





Opportunities Available

Creative Communities San Diego (CCSD) provides sponsorship for projects, such as community-based festivals, parades, and celebrations. Projects promote neighborhood pride and community reinvestment; 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.

CCSD allows for:

- Project specific support for nonprofits
- Types of projects: Festivals, parades, and celebrations
- Promote neighborhood pride and community reinvestment
- Arts and culture activities more available and accessible in neighborhoods





Opportunities Available

Special Initiatives occur on a year-by-year basis in response to need and funding capacity. In recent years, they have included arts education enrichment, the Nonprofit Academy, among others. Visit our website for more information.

These initiatives allow for:

- Targeted art education project support for nonprofits
- Trainings to strengthen organizational capacity of nonprofits





Where do the funds come from?

The Commission receives a portion of the City's Transient Occupancy Tax (TOT) Special Promotional Program, paid by tourists and other visitors to San Diego.

- > **OSP** Funding Awards can range **\$5,000**–**\$600,000***
- > CCSD Funding Awards can range \$5,000-\$140,000*

*Depends on funding program, TOT revenue projections, Mayoral and City Council allocation, application rank, and organization's budget size.



Schedule of Opportunities

September-October

- OSP and CCSD Guidelines Released
- Request for Qualifications Due

November January

- Request for Qualifications Scored
- Request for Proposal Due

February-June

- Request for Proposals Evaluated and Scored
- Ranks and Award Recommendations Announced

July- August

Contracting and Performance Period Begin

The City of San Diego's fiscal year runs from July 1 to June 30.



Guidelines and Materials

Guidelines are advertised online, via social media, and through email blasts

Arts and Culture Guidelines: www.sandiego.gov/arts-culture/funding



Arts and Culture Eligibility

MISSION ALIGNMENT: Your organization operates to fulfill a mission that aligns with the purpose of the Arts, Culture, and Community Festivals category of TOT funding, which is:

- 1. To enhance the economy;
- 2. To **contribute** to San Diego's international reputation as a cultural destination;
- 3. To **provide** access to excellence in culture and the arts for residents and visitors;
- 4. To enrich the lives of the people of San Diego; and
- 5. To build healthy, vital neighborhoods.



Step 2: Request for Proposals (RFP)

- Assess the proposed programs/services or projects provided for residents and visitors and how well they align with the City's goals.
- 2. Looks at programs/services or projects, community engagement, programming/production capacity, emphasis areas, and a project budget for CCSD.
- 3. Evaluated by Commission Advisory Panels of Commissioners and community leaders.



Contracting Requirements

- ✓ Comply with **Americans with Disabilities Act (ADA)** requirements set forth in Council Policy 100-04
- ✓ Comply with the City's **Drug-Free Workplace** requirements as stated in Council Policy 100-17
- ✓ Comply with City's **Equal Opportunity Contracting Program (EOCP)** and shall not discriminate against any employee or applicant for employment on any basis prohibited by law.
- ✓ Comply with City's Equal Benefits Ordinance.
- ★ NOTE: All subcontractors of recipients of City funds must also comply.
- ★ For more information about any of these and other requirements, contact City staff.



Contracting Tips

- ✓ Choose one person to be the lead contact at your organization.
- ✓ Also, keep your contact information up to date with your Program Manager!
- ✓ Read all instructions and provided documents before calling City staff with questions.
- ✓ But if you do have questions, call or email! We are here to help.
- ✓ Be patient. Internal City processes often take longer than you think.
- ✓ Keep detailed records; it makes reporting easier.
- ✓ Take advantage of opportunities for help, such as Technical Assistance, Office Hours, etc.
- ✓ Start the contract execution early and allow enough time to review the quality and accuracy of the required contract documents before submittal.



Contact us!

Commission for Arts and Culture Funding Programs

Gail Wingfield, Senior Arts and Culture Funding Manager

e: GWingfield@sandiego.gov

p: 619-236-6809

www.sandiego.gov/arts-culture/funding





Thank you!









Funding Opportunities

The City offers funding opportunities through annual Notice of Funding Availability (NOFA) processes, which consist of two phases: **Request for Qualifications** (RFQ) and **Request for Proposals** (RFP). During the RFQ phase, organizations present their qualifications to the City to demonstrate their capacity to successfully implement Cityfunded projects and meet applicable requirements. Organizations qualified via the RFQ phase are then invited to

RFQ

participate in the RFP phase by submitting project proposals for funding consideration. The annual NOFA cycles typically begins in the late summer/early fall.

RFQ
Summer/Fall

RFP
Late Fall/Winter

Review Process
Winter

Council
Spring

Checklist: What's Needed for Partnering With the City
\square A copy of organization's Articles of Incorporation as filed with the Secretary of State. Organization must have existed for at least two years from the date of incorporation
□ Valid organization EIN number
□ Valid organization DUNS number registered with www.sam.gov (CDBG funding only)
\square A copy of organization's Federal Tax Determination Letter: 501(c)(3) for CDBG funding; 501(c)(3) or 501(c)(6) for other funding
\square A copy of organization's State Tax Determination Letter or Franchise Tax Board-Entity Status Letter with Boxes 1(The entity is in good standing with the Franchise Tax Board) and 3 (The entity is currently exempt from tax under Revenue and Taxation Code (R&TC) Section 23701d) checked.
\square A copy of organization's Board-approved Financial Statements for the most recently completed fiscal year (<u>Audited</u> Financial Statement, Single or Program-Specific Audit, if applicable) to meet program requirements
\square A "Cash Balance" amount reflected in the financial statement that meets applicable program requirements (e.g. CDBG requirement "Cash Balance" amount is at least \$12,500-\$25,000)
$\hfill \Box$ A copy of organization's tax return for the most recently completed calendar year
$\hfill\Box$ Organization charts: For the entire organization AND for each division administering funded projects
\square Information on Board of Directors (name, position, term start/end dates, profession/affiliation)
☐ An organization mission statement (50 words maximum)
$\hfill\square$ Narrative on organization's experience and success in providing services to target populations and/or low-and moderate-income City of San Diego residents
☐ Description of the target population(s) currently served by organization
$\hfill \square$ A copy of organization's Board-approved financial management policy and procedures
$\ \square$ A copy of organization's Board-approved procurement policy and procedures
☐ Organization is not on any state or federal debarment list
** Note: City of San Diego requires awarded organizations to have comprehensive insurance coverage during funding periods







The City of

SAN DIEGO Funding Opportunities

INFO SHEET

The City of San Diego offers several funding opportunities for nonprofits organizations each year through a competitive Request for Qualifications (RFQ) and Request for Proposals (RFP) process. Funding cycles vary per program. Stay updated on opportunities and deadlines by checking out each program's website.

Community Development Block Grant (CDBG) Program Funding

www.sandiego.gov/cdbg/apps

RFQ: September – October

RFP: November – January

Economic Development Funding Programs

www.sandiego.gov/economic-development-funding

RFQ: November - December RFP: January – February

Arts, Culture and Community Festivals Funding (ACCF) Program

www.sandiego.gov/citycouncil/accf

RFQ: July 1 - September 30, 2019

RFP: November 1 – December 2, 2019

City Council Community Projects, Programs and Services (CPPS)

www.sandiego.gov/citycouncil/cpps

RFQ: July 1st – September 27, 2019 RFP: November 8 – November 22, 2019

Commission for Arts and Culture Funding

www.sandiego.gov/arts-culture/funding

RFQ: September - October **RFP:** January - February