



# FY25 Compliance Intake Form Checklist



Congratulations on your GFTA FY25 grant award! To claim your grant award, your organization must complete Steps A & B:

**STEP A: Your organization must complete the Compliance Intake Process, in which your organization complies with City requirements to become eligible to claim your grant funds.** *(Note: please allow plenty of time to complete this process)*

**STEP B: Once you're eligible, your organization can claim your grant funds through the Reimbursement Request Process.** *(Note: this is typically a quick and straightforward process, yay!)*



Does your organization have a fiscal sponsor? If so, they must complete the following steps on your behalf.

## STEP A: Compliance Intake Process 3 Easy Steps to Complete!

- STEP 1: *Comply*** with City Requirements for Contracting  
*Each organization are required by the City to comply and meet requirements with additional City agencies outside of GFTA. This applies to new and returning awardees.*
- STEP 2: *Collect*** the necessary information and documents for Contracting  
*The City requires all awarded organizations to submit information and documents.*
- STEP 3: *Submit*** your personalized intake form by Monday, December 2, 2024  
*Once your organization has complied with City agencies and gathered the required information and documents, you are now ready to submit your form!*



# STEP 1: Comply with City Requirements for Contracting



Contact the appropriate agency directly with your queries and submissions.

## STEP 1A:

Is your organization a registered supplier?



### YES! Then you must....

Have your Supplier ID handy (all digits, no letters). If this letter starts with B, you are still in Bidder status and need to become a Supplier. [Follow this link](#) to become a Supplier.



### NO, Then you must...

[Follow these instructions](#) to become a registered Supplier. This is a two-step process: First you become a Bidder, then a Supplier. This process generally takes a few weeks.

## STEP 1B:

Does your GFTA grant exceed \$50,000?



### YES! Then you must....

Comply with the [First Source Hiring Requirements by completing this form.](#)



### NO, Then you must....

Move on to **Step 1C**. This is not applicable for your organization.

## STEP 1C:

Does your organization have 50 or more employees?



### YES! Then you must....

Comply with the [Health Care Security Ordinance.](#)



### NO, Then you must....

Move on to **Step 1D**. This is not applicable for your organization.

## STEP 1D:

Is your organization compliant with the Minimum Compensation Ordinance (MCO)?



### YES! Then you must....

Move on to **Step 1E**. This is required for all organizations so review this [link](#) to ensure compliance.



### NO, Then you must....

Comply with the [Minimum Compensation Ordinance \(MCO\)](#) by completing this [form](#) and submitting to [sfcitypartnersupport@sfgov.org](mailto:sfcitypartnersupport@sfgov.org).



## STEP 1 (continued):

### Comply with City Requirements for Contracting



Contact the appropriate agency directly with your queries and submissions.

#### STEP 1E:

Is your organization's business tax registration current?



#### YES! Then you must....

Move on to **Step 1F**. This is required for all organizations so review this [link](#) to ensure compliance.



#### NO, Then you must....

[Renew or register](#) with the Treasurer & Tax Collector's Office.

#### STEP 1F:

Is your organization compliant with the 12B Equal Benefits Ordinance?



#### YES! Then you must....

Move on to **Step 1G**. This is required for all organizations so review this [link](#) to ensure compliance.



#### NO, Then you must....

Comply with the [12B Equal Benefits Ordinance](#) by following these steps to [submit a Declaration](#).

#### STEP 1G:

Is your organization compliant with the CA Secretary of State?



#### YES! Then you must....

Move on to **Step 1H**. This is required for all organizations so visit this [database](#) to check status. Your status must show as "active" to be compliant.



#### NO, Then you must....

Comply with the [CA Secretary of State](#). Visit this [database](#) if unsure about current status.

#### STEP 1H:

Is your organization compliant with the CA Office of the Attorney General?



#### YES! Then you must....

**Move on to Step 2 of the checklist!** This is required for all organizations so visit this [database](#) to verify your status. Your status must show as "registered" to be compliant.



#### NO, Then you must....

Comply with the [CA Office of the Attorney General](#). Visit this [database](#) to verify your status. Your status must show as "registered".



## STEP 2:

### Collect the necessary information/documents for contracting



Contact GFTA at [gfta@sfgov.org](mailto:gfta@sfgov.org) for any questions about the below

#### STEP 2A:

##### Contract Information

Please ensure you have the following information for completion of your grant agreement (a.k.a contract)\*.

*\*If your organization has a fiscal sponsor, they must provide the following information on your behalf.*

- Organization Name
- Federal Tax ID
- Full Address (e.g. 401 Van Ness Ave. Suite 321, San Francisco, CA 94201)
- Signatory's information - person authorized to sign a contractual agreement with the City. If your organization has a fiscal sponsor, this should be your fiscal sponsor ED/contact.
  - Signatory Name
  - Signatory Title
  - Signatory Email Address
- Backup person's contact information - person who can respond to GFTA if the Signatory cannot be reached.
  - Backup Contact Name
  - Backup Contact Email Address

#### STEP 2B:

##### Required Contracting Documents

If your organization has a fiscal sponsor, they must provide the following documents on behalf of your organization.

- **Certificate of Insurance (COI)** must meet the minimum requirements below\*

[See sample COI here.](#)

- General Liability - \$1M with Additional Insured Endorsement
- Auto Liability - \$1M with Additional Insured Endorsement if you own or operate personal or company-owned vehicles.
- Workers Comp - \$1M with Waiver of Subrogation if you host activities on City property.



## STEP 2 (continued):

### Collect the necessary information/documents for Contracting



Contact GFTA at [gfta@sfgov.org](mailto:gfta@sfgov.org) for any questions about the below

\*GFTA and the City waive insurance requirements under these circumstances

- Auto Liability- If your organization does not own vehicles or if your team doesn't use vehicles for the work that you do.
- Workers Comp - If your organization has 0 people on payroll.
- Submit a waiver letter if either/both of the circumstances above apply to your organization. Use this [waiver template](#) and complete highlighted areas by marking with X or a checkmark.
- **General operating budget for July 1, 2024 to June 30, 2025** from the organization (not fiscal sponsor). [See a sample budget template](#).
- **Appendix D** to share a list a of your other contracts with the City. This only applies if you have other contracts with the City.

## STEP 3:

### Submit your personalized intake form

Once Step 1 + 2 are complete, you are ready to submit your intake form!

*Submit your form by Monday, December 2, 2024  
to avoid a delay in claiming your grant payment.*



Your personalized intake form link is located in your award notification email. Contact [gfta@sfgov.org](mailto:gfta@sfgov.org) if you are unable to find your award notification email and/or link.

