

TIPS ON COMPLETING YOUR CONTRACT DOCUMENTS

Below are highlights of common mistakes and information that tends to get overlooked by grantees. Please complete the documents in its entirety and as required. Use this as a reference when completing the documents.

SCOPE OF WORK

The Scope of Work should be the first section you complete. You will find some sections completed with information that was copied over from your RFP. Please review this information and update it if needed. Modify your budget to reflect your grant award amount.

After your scope of work has been signed, your grant manager will review it for approval. You will be notified by Cityspan when it has or has not been approved. If it has not been approved, your grant manager will include the reason and you will be able to modify for approval.

GRANT AGREEMENT

For those of you who will be signing the grant agreement, please read the agreement in full. By providing your signature, you are agreeing to use the funds granted by the City, to provide the activities listed in the scope of work, in hopes that they can be accomplished.

In addition to your signature, print your name and include your title and the date.

COMBINED GRANTS SCHEDULE

Please read the entire form. I highlighted the sections that grantees tend to miss or answer incorrectly.

On the first page, Schedule N, it asks _____. When answering this question, only answer for the OFCY funded program. If you do pay permanent employees below the Living Wage rate, your contract will be delayed. For more information on the Living Wage requirements refer to #26 in your grant agreement.

On second page, Schedule N-1, Section A asks _____. If yes, Skip the rest of Schedule N-1. If no, complete the entire Schedule N-1. Information on the EBO and how to obtain your certificate/memo, is listed under the EBO section.

INSURANCE

Insurance is the number one cause of contracting delays. OFCY staff are not insurance experts. We serve as a liaison between you and Risk Management. It is important that you share the Schedule Q or the insurance requirements provided in the Grantee Document Checklist to your broker. As I stated earlier, I am only highlighting the common mistakes made and in this case the mistakes that cause contracting delays.

On the Certificate of Liability or commonly known as the ACCORD:

Commercial General Liability (CGL): Limit of not less than \$2,000,000 each occurrence. It is acceptable, if your CGL is split, one million under the CGL and one million under commercial umbrella insurance.

Automobile Liability Insurance: If you plan to use a vehicle(s) for OFCY funded program, you must include your auto coverage. For example, vehicles to transport participants.

Workers Compensation: Some brokers issue your coverage as endorsement on the CGL or as a separate document. They are both accepted.

Sexual/Abuse insurance is required with a limit of not less than \$1,000,000 each occurrence. It must be included in the endorsement. It will not be accepted if it is included in the Descriptions of Operations box.

The **“Description of Operations”** box must include the following language: The City of Oakland, its councilmembers, directors, officers, employees, agents, and volunteers are named as additional insured.

The **“Certificate Holder”** must be:
Oakland Fund for Children & Youth
150 Frank Ogawa Plaza, Suite 4216

Oakland Ca 9461

Additional Insured: Must include naming the City of Oakland, its Councilmembers, directors, officers, agents, employees and volunteers as insured's under the Commercial General Liability policy. The policy number must match the CGL policy number.

Worker's Comp. Waiver of Subrogation waives all rights against the City of Oakland for recovery of damages to the extent these damages are covered by the forms of insurance coverage required above. The waiver must name City of Oakland and its Councilmembers, officers, directors, employees and volunteers. The policy number must match the Worker's Comp. policy number.

You can request a waiver of a requirement or reduction in the coverage amount, except Sexual Abuse. If you would like to request a waiver, please email your grant manager and attach your request on agency letterhead stating the reason for the waiver request.

Before you upload your insurance documents into Cityspan, please check the expiration date. If your insurance is scheduled to expire within 30 days, request a binder from your insurance broker. A binder is an official document that states that your insurance will be renewed. Once you have received the binder, please upload it along with your current policy. Notify your grant manager by email that your insurance has been uploaded but it is scheduled to expire, include the date. Please note your contract may still be delayed until the renewed insurance policy is received.

Equal Benefits Ordinance/Social Equity Work Order aka EBO Certificate

The Equal Benefits Ordinance (EBO) Work Order is to verify that you pay equal benefits to all your employees regardless of marital status or sexual orientation. For example: If medical benefits are offered to employees and their spouses then they must also be offered to employees in domestic partner relationships.

EBO certificates/memos do not expire. If you do not have a EBO certificate/memo, upload the benefits pages of your Employee Manual as one PDF, in the EBO Certificate tab. Once approved, you will receive an email stating, "The organization

complies with the EBO and LWO requirements of the City of Oakland”. Please keep this for your records.

Public entities (government agencies) are required to have a EBO certification.

Business Tax Certificate

Double check the expiration date. You can upload the certificate or a copy of the receipt as proof of renewal.

Public entities (government agencies) are not required to have a Business Tax Certificate.