



FY26 Compliance Intake Form Checklist



The City and GFTA require all grantees to submit their FY26 Compliance Intake Form in order to be eligible for your FY26 grant award.

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. *Since your organization has most of the City's funding requirements, the form will ask you to review and update information from your FY25 Intake Form.*

STEP B: Once your compliance intake form has been approved, your organization can claim your grant funds through the Reimbursement Request Process. *(Note: this is typically a quick and straightforward process, yay!)*



FY26 Compliance Intake Form Links are issued **only** upon approval of your Mid-Cycle Report.

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 Tuesday, September 30.

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's business tax registration current?

☐

YES! Then you must....

Move on to **Step 1B**.

☐

NO, Then you must....

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

*Please note that all entities engaging in business within the City must register within 30 days after commencing business and **renewed every year by May 31st**. Business Registration is generally valid for one fiscal year **July 1st through June 30th**.*

STEP 1B

Was your FY25 grant amount over \$50,00?

☐

YES! Then you must....

Complete the [First Source Hiring Program form](#) to notify the City if you have any entry-level job openings in their organizations.

If you're not anticipating any changes, you must still execute the form by noting "no entry-level positions projected" in Section 3.

☐

NO, Then you must....

Move on to **Step 2**.



STEP 2:

Collect the necessary information/documents for contracting



Contact GFTA at gfta@sfgov.org for any questions about the below

STEP 2A:

Updated Contact Information

Please review your organization's Signatory and Contact information and Fiscal Sponsor information, if applicable. Please update in the form if needed.

- **Signatory 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.
- **Contact information** - person who will serve as the main point of contact for GFTA.
- **Fiscal Sponsor** - if your organization experienced a change in your fiscal sponsorship, please indicate in the form and GFTA will follow up with next steps.

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.

*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.



STEP 2 (continued):

Collect the necessary information/documents for Contracting



Contact GFTA at gfta@sfgov.org for any questions about the below

- **General operating budget for July 1, 2025 to June 30, 2026** from the organization (not fiscal sponsor). [See a sample budget template](#). If your organization operates in a calendar year, please ensure to submit two budgets to cover the requested date range.
- **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. If you have a fiscal sponsor, please use the Fiscal Sponsor's information when filling out the template.



NEW: Year 2 (FY26) Grant Plan

The City and GFTA are requiring **all** grantees to share significant Grant Plan changes for Year 2 of the Two-Year Grant, and if so, to provide an explanation.

Your personalized intake form link will include your original Grant Plan for review, and a section to provide a brief update, if needed. Please ensure that these anticipated changes in Grant Plan aligns with the definition of the grant type you were awarded: Arts Programming, Arts Services, or Parades & Festivals. **1000-character limit**



NEW: Performance Measures*

Starting in FY26, performance measures will help GFTA assess the impact of funded initiatives, ensuring accountability for delivering measurable outcomes that improve the lives of San Francisco residents.

*FY25 Grantees with a grant award of **more than \$200,000** must select one of GFTA's standard performance measures in their FY26 Intake Form. Contact gfta-program@sfgov.org for questions.



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 Tuesday, September 30, 2025
to avoid a delay in receiving your second-year renewal agreement/contract.*



Your personalized intake form link is located in your Mid-Cycle Report approval email. Contact gfta@sfgov.org if you are unable to find your link.

