San Francisco Department of Public Health
Office of Contract Management and Compliance for Community Programs

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Mayor

Contract Documents Checklist

This checklist is not exhaustive, but is provided as a general aid to help you in making sure that you have submitted all of your contract and compliance documents correctly. There may be additional requirements for first-time contractors with the City, DPH or CBHS.

Organizational Information:

- ☐ Updated Contractor Fact Sheet (see form)
- ☐ Board of Directors list (on form provided)
- ☐ Board of Directors term information (on form provided)

Exhibit A/Description of Services:

- ☐ Have you included a current Exhibit A/Description of Services in the correct format?
- ☐ Have you included your revised objectives in Exhibit A?

Exhibit B/Budget and CRDC:

- ☐ Have you included your Exhibit B/Budget?
- ☐ Have you made sure that your Budget matches your award letter?
- ☐ Have you made sure that the dates in your Budget, especially for grants, are correct?
- ☐ Have you included any related CFDA number under DPH Revenues on DPH-1?

Initial Payment:

- ☐ If you *do* want to receive an initial payment, have you signed and submitted your invoice?
- ☐ If you *do no* want to receive an initial payment, have you informed the Contracts Office?

Proof of Insurance:

- ☐ Have you included all of the appropriate proofs of insurance?:
    - o Insurance certificate for Worker's Compensation
    - o Insurance certificate for General Liability
    - o Additional insured endorsement for General Liability
    - o Insurance certificate for Automobile Liability
    - o Additional insured endorsement for Automobile Liability
    - o Insurance certificate for Professional Liability (if needed)
    - o Insurance certificate for fidelity (if needed)

Cultural Competency Report:

- ☐ Cultural competency report should be planned for submission by September 30

Demographics:

- ☐ Demographics information (on form provided, if not already entered in BIS)