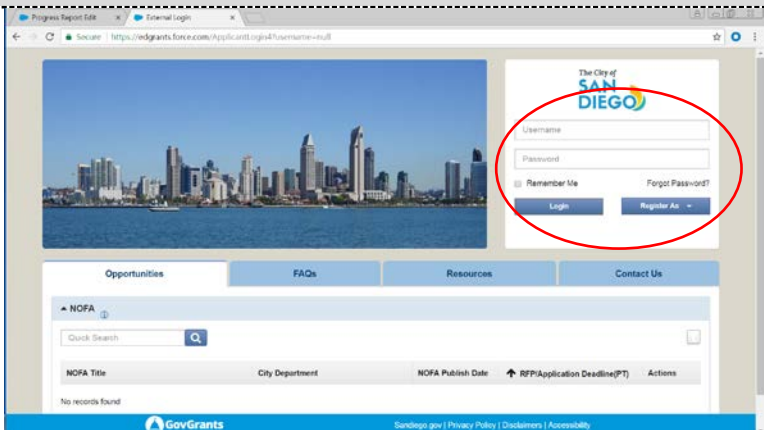
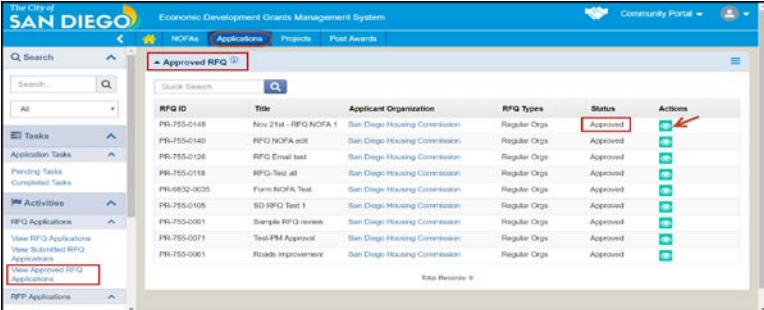
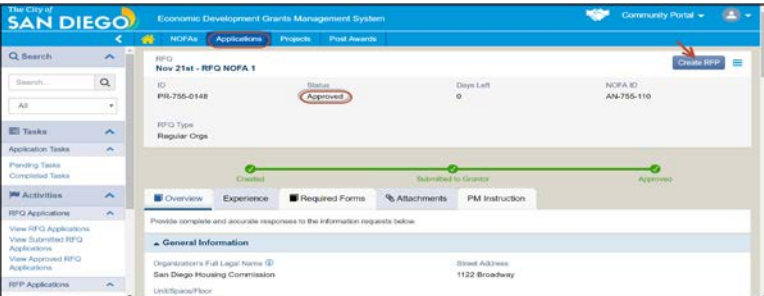
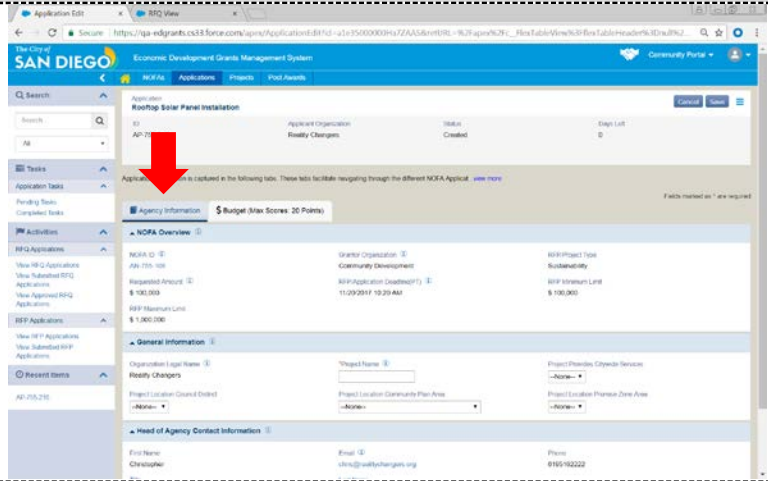
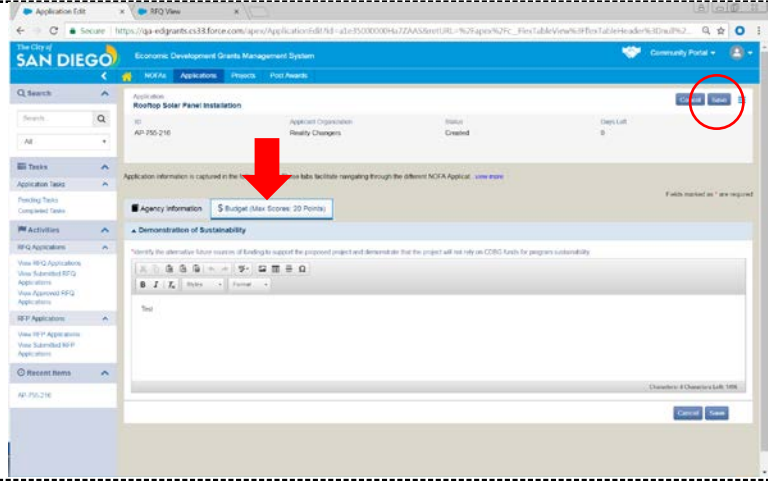
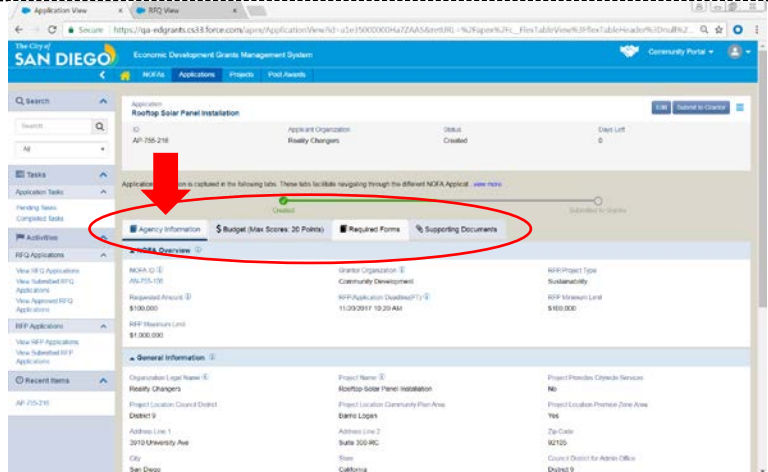


**You will learn:**

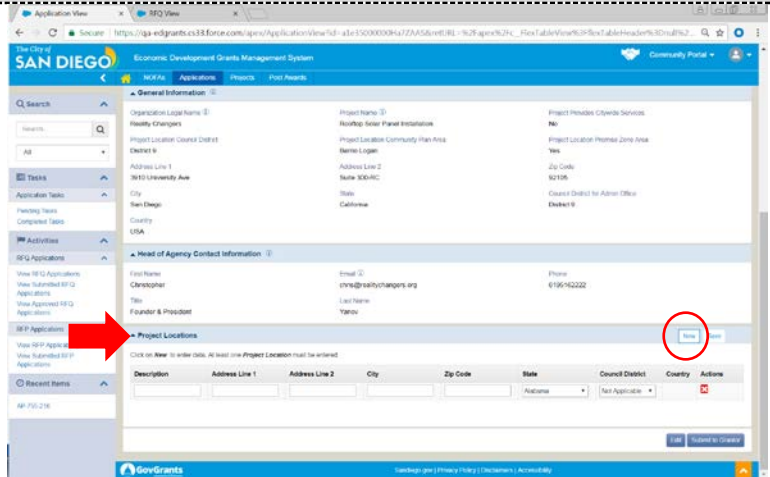
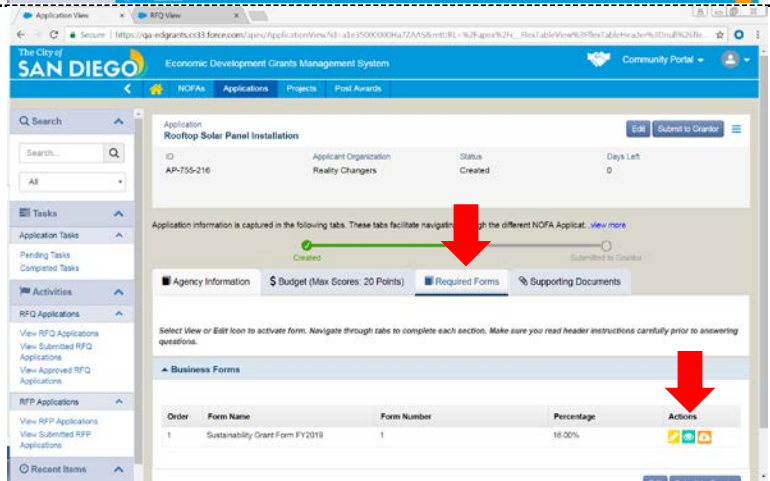
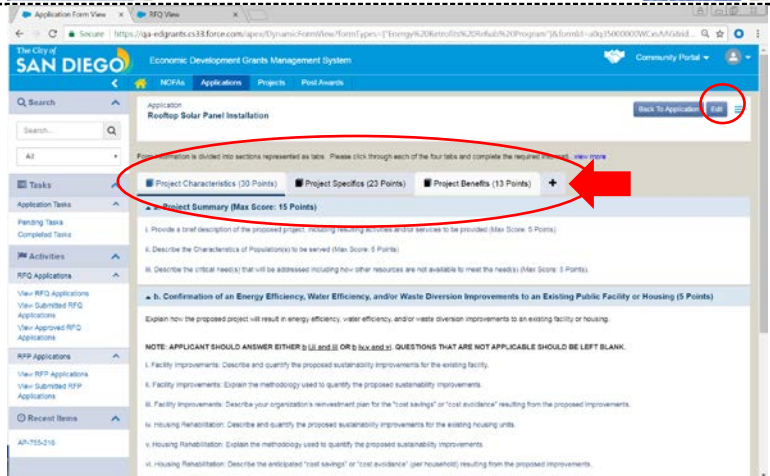
- How to complete and submit a Request for Proposals (RFP) response in ED Grants
- How to open and continue working on a previously saved RFP response in ED Grants
- How to edit your organization's Board of Directors members in ED Grants

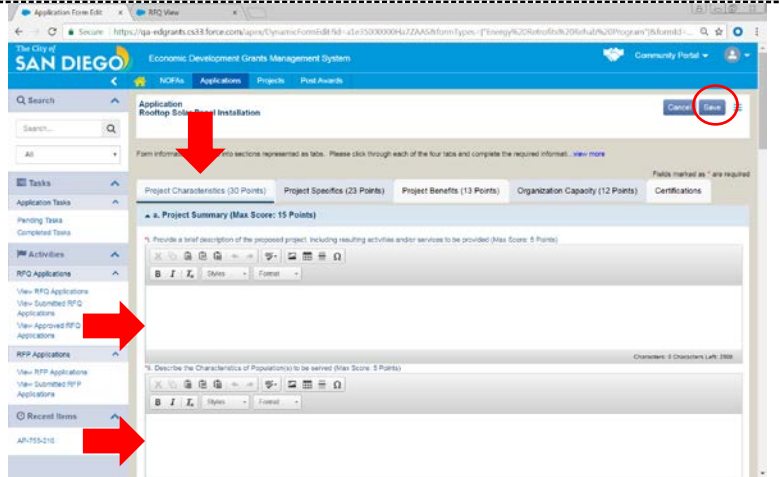
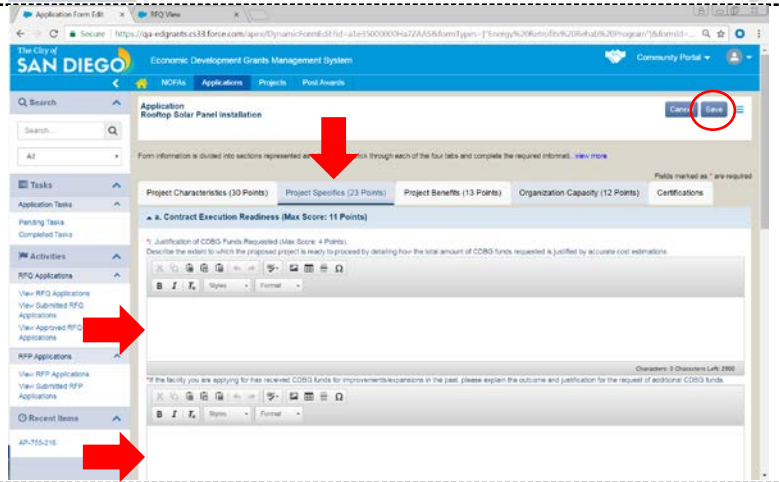
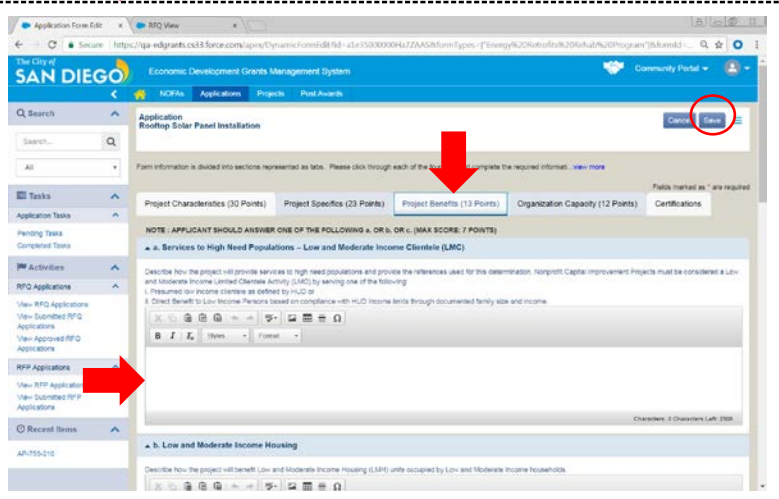
Step	Description	Screenshot
1	Log into <a href="http://edgrants.force.com">http://edgrants.force.com</a> using the credentials for either the Primary Representative or Secondary Representative of your organization. <b>NOTE:</b> Your organization will need to have been deemed 'qualified' during the Request for Qualifications (RFQ) phase to submit RFP responses.	
2	Go to the 'Applications' tab and then click on the 'View Approved RFQ Applications' along the left side. Click on the corresponding eyeball icon (👁️) in the 'Actions' column to open the RFQ response. <b>NOTE:</b> Make sure the 'Status' column has 'Approved' for the RFQ application. If there is no approved application, then your organization cannot participate in the RFP phase.	
3	You should now see the RFQ response in view mode only. After verifying once again that this is the RFQ response you would like to submit a companion RFP response for, find and click on the 'Create RFP' button. <b>NOTE:</b> The 'Create RFP' button will only be available during the actual RFP phase period. If there is no such button, then it means either the RFP response submission deadline has passed or the RFP phase has not yet started.	

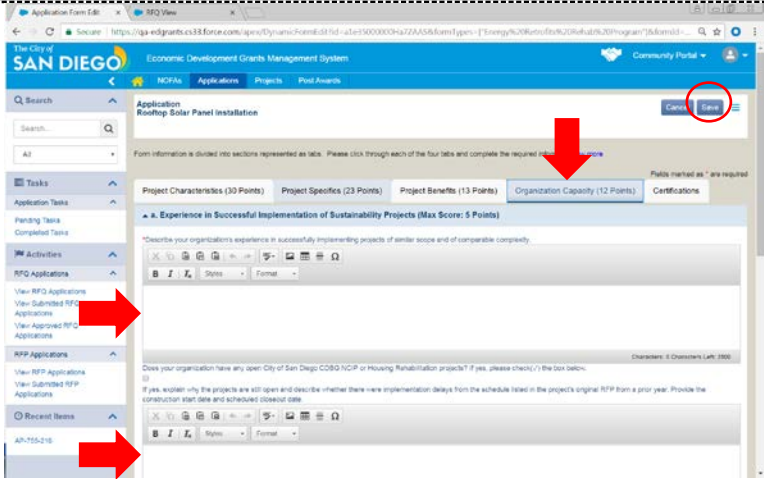
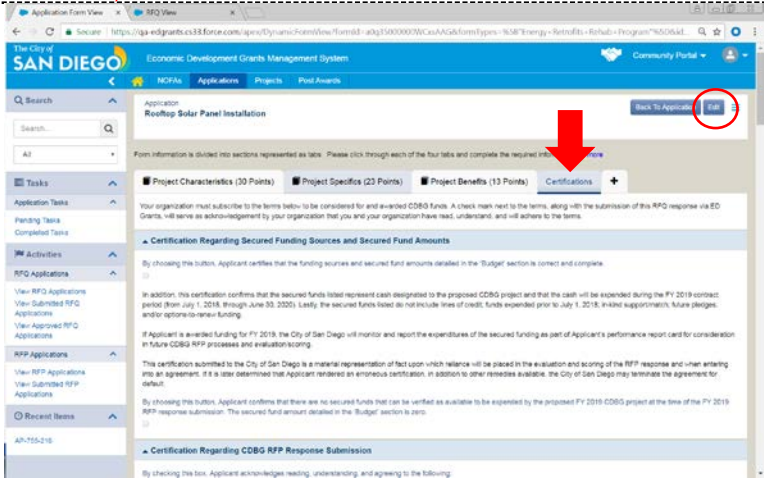
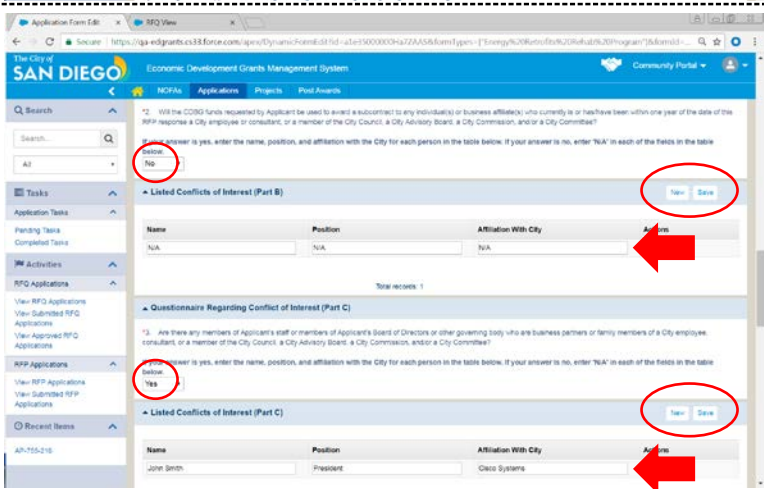
Step	Description	Screenshot
4	<p>You should now see a <b>'Focus Area/MOU Program'</b> field with a drop-down menu with the following selections: <b>'Sustainability,' 'Inclusive Economic Growth,' 'Infrastructure Programs,' 'Affordable Housing,'</b> and <b>'Public Services.'</b> Select the option corresponding to the RFP project type your organization would like to apply for. <b>NOTE: Select 'Sustainability' for the 'Sustainability (Facilities)' (SUS) category. Select 'Inclusive Economic Growth' for the 'Community and Economic Development' (CED) categories. Select 'Infrastructure Programs' for the 'Nonprofit Capital Improvement Projects (Facilities)' (NCIP-F) category. Select 'Affordable Housing' for the 'Single-Family Housing Rehabilitation' (SHR) category and the 'Nonprofit Capital Improvements (Multifamily Housing)' (NCIP-MHR) category. Select 'Public Services' for the 'Public Services' (PS) category (including those applying as small/emerging organizations).</b></p>	
5	<p>You should now see an <b>'RFP Type/Project Types'</b> field with a drop-down menu. The menu options available will vary depending on your selection in step 4. Select the RFP type you would like to apply for. Click on the <b>'Continue'</b> button. (If you change your mind, you may click on the <b>'Cancel'</b> button to go back to the NOFA).</p>	

Step	Description	Screenshot
6	You should now see two tabs: <b>'Agency Information'</b> and <b>'Budget.'</b> Click on the <b>'Agency Information'</b> tab and populate the following fields in the <b>'General Information'</b> section: <b>'Project Name,' 'Project Provides Citywide Services,' 'Project Location Council District,' 'Project Location Community Plan Area,'</b> and <b>'Project Location Promise Zone Area.'</b> <b>NOTE: Consult the FY 2020 CDBG RFP Handbook or contact City staff if you are not sure what to enter into the fields.</b>	
7	Click on the <b>'Budget'</b> tab. Read the instructions for the <b>'Demonstration of Sustainability'</b> or <b>'Demonstration of Commitment'</b> field and enter the requested response. (The title of the field will vary according to RFP type selected.) Once you are finished, click on the <b>'Save'</b> button.	
8	You should now see four additional tabs: <b>'Agency Information,' 'Budget,' 'Required Forms'</b> and <b>'Supporting Documents.'</b> Click on the <b>'Agency Information'</b> tab and scroll down to the <b>'Project Locations'</b> section.	

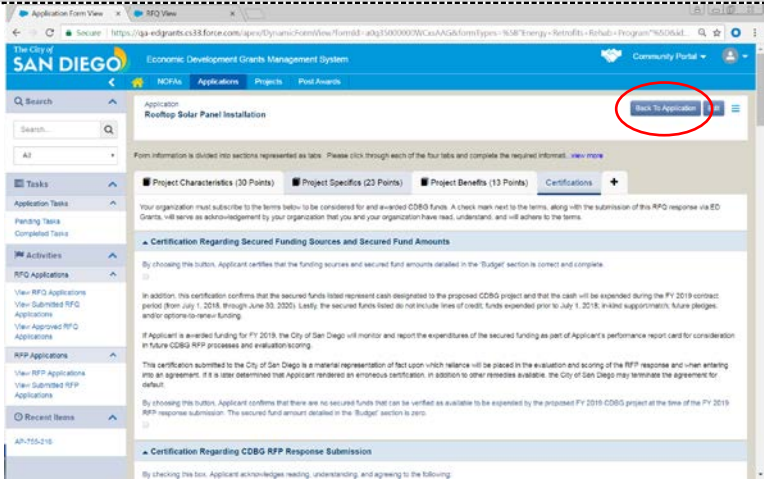
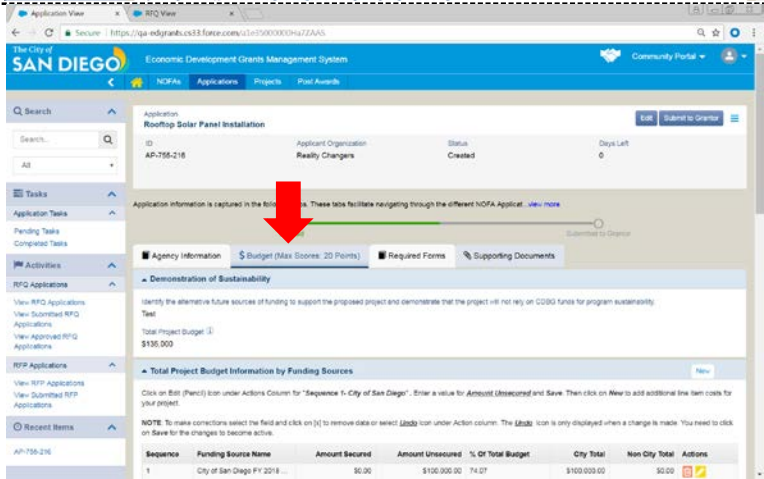
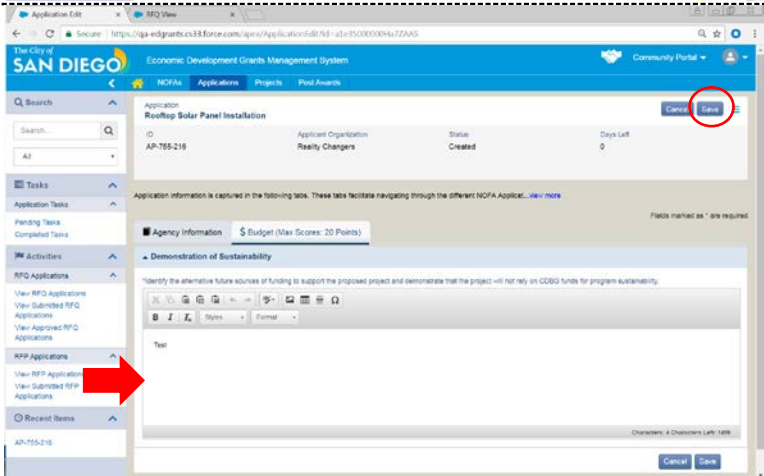


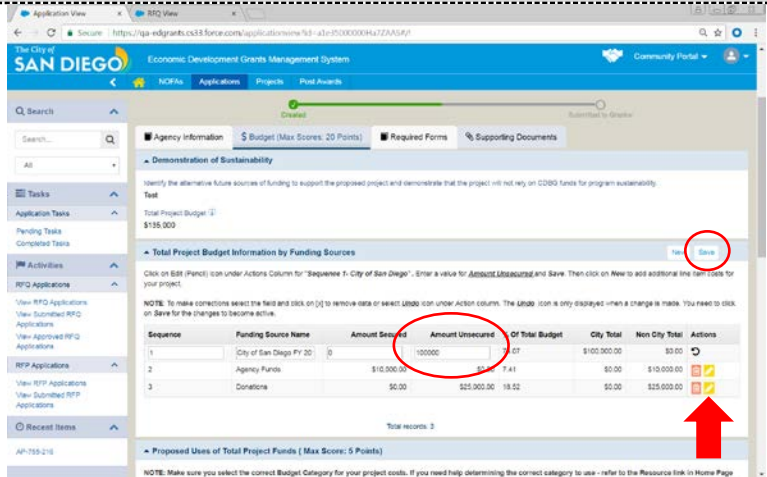
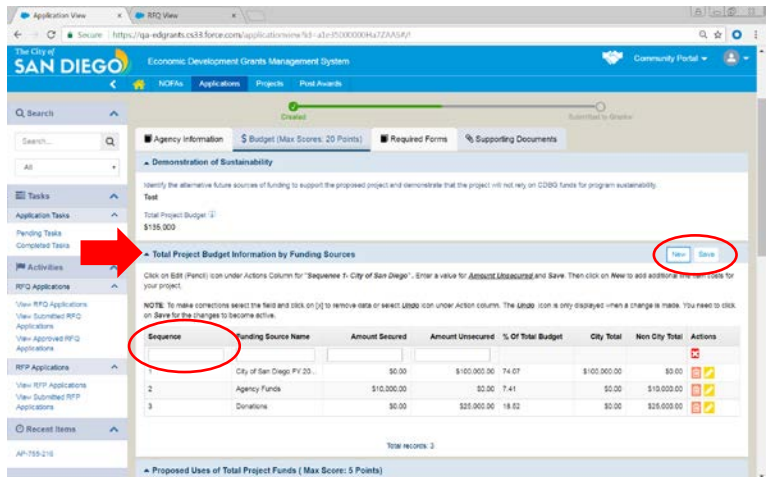
Step	Description	Screenshot
9	Click on the <b>'New'</b> button and populate the fields regarding the location of the proposed project. Click on the <b>'Save'</b> button. Repeat this process if there are more locations. <b>NOTE:</b> Each location must be within San Diego County. For Single-Family Housing Rehabilitation programs, enter the locations of the housing units to be rehabilitated. If they are not yet known at the time of the RFP response submission, enter 'Various Locations TBD' in the <b>'Description'</b> field and enter the administrative address of your organization.	 A screenshot of the 'Economic Development Grants Management System' interface. The 'Project Locations' section is highlighted with a red circle, and a red arrow points to the 'New' button in the top right corner of this section.
10	Click on the <b>'Required Forms'</b> tab. In the <b>'Business Forms'</b> section, click on the eyeball icon (👁) in the <b>'Actions'</b> column to open the form.	 A screenshot of the 'Required Forms' tab in the system. The 'Business Forms' section is highlighted with a red arrow. In the 'Actions' column, an eyeball icon is highlighted with a red arrow.
11	You should now see five tabs: <b>'Organizational Capacity,' 'Project Characteristics,' 'Project Specifics,' 'Project Benefits,'</b> and <b>'Certifications.'</b> (You may need to click on the <b>'+'</b> tab to see the rest of the tabs.) Click on the <b>'Project Characteristics'</b> tab and then click on the <b>'Edit'</b> button to open the fields.	 A screenshot of the 'Project Characteristics' tab. The 'Edit' button in the top right corner is highlighted with a red circle. A red arrow points to the 'Project Characteristics' tab itself.

Step	Description	Screenshot
12	<p>Begin populating the fields in the <b>'Project Characteristics'</b> tab, making sure to follow the notes and instructions (for example, some fields must be left blank if they are not applicable to your project type). Observe the character count limits (note that formatting such as bold, italics, etc. will count towards the limits). Once you are finished, click on the <b>'Save'</b> button to preserve your work. <b>NOTE:</b> Consult the FY 2020 CDBG RFP Handbook or contact City staff if you are not sure what to enter into the fields.</p>	
13	<p>Click on the <b>'Project Specifics'</b> tab and then click on the <b>'Edit'</b> button to open the fields. Begin populating the fields in the <b>'Project Characteristics'</b> tab, making sure to follow any notes and instructions. Observe the character count limits (note that formatting such as bold, italics, etc. will count towards the limits). Once you are finished, click on the <b>'Save'</b> button to preserve your work. <b>NOTE:</b> Consult the FY 2020 CDBG RFP Handbook or contact City staff if you are not sure what to enter into the fields.</p>	
14	<p>Click on the <b>'Project Benefits'</b> tab and then click on the <b>'Edit'</b> button to open the fields. Begin populating the fields in the <b>'Project Benefits'</b> tab, making sure to follow the notes and instructions (for example, some fields must be left blank if they are not applicable to your project type). Observe the character count limits (note that formatting such as bold, italics, etc. will count towards the limits). Once you are finished, click on the <b>'Save'</b> button to preserve your work. <b>NOTE:</b> Consult the FY 2020 CDBG RFP Handbook or contact City staff if you are not sure what to enter into the fields.</p>	

Step	Description	Screenshot
15	Click on the <b>'Organization Capacity'</b> tab and then click on the <b>'Edit'</b> button to open the fields. Begin populating the fields in the <b>'Organization Capacity'</b> tab, making sure to follow any notes and instructions. Observe the character count limits (note that formatting such as bold, italics, etc. will count towards the limits). Once you are finished, click on the <b>'Save'</b> button to preserve your work. <b>NOTE:</b> Consult the FY 2020 CDBG RFP Handbook or contact City staff if you are not sure what to enter into the fields.	
16	Click on the <b>'Certifications'</b> tab and then click on the <b>'Edit'</b> button to open the fields. There are eight (8) or nine (9) sections to read, respond to, and/or acknowledge, depending on your RFP type. To indicate acknowledgement, click on the check boxes next to the statements. <b>NOTE:</b> Certain sections will require you to select all or only one of the options. Refer to the instructions for each section for guidance. If you selection more than one or only one option incorrectly, the system will display an error message upon submission of the RFP response.	
17	Regarding the three (3) <b>'Conflict of Interest'</b> questions (Parts A, B, and C), indicate your response to each question by selecting from the drop-down menu ( <b>'Yes'</b> or <b>'No'</b> ). If your answer is yes, enter the name, position, and affiliation with the City for each person in the following table by clicking on the <b>'New'</b> button, populating the fields, and then clicking on the <b>'Save'</b> button. (Note each person must be entered one at a time.) If your answer is no, enter 'N/A' in each of the fields in the following table by clicking on the <b>'New'</b> button, populating the fields with 'N/A,' and then clicking on the <b>'Save'</b> button.	



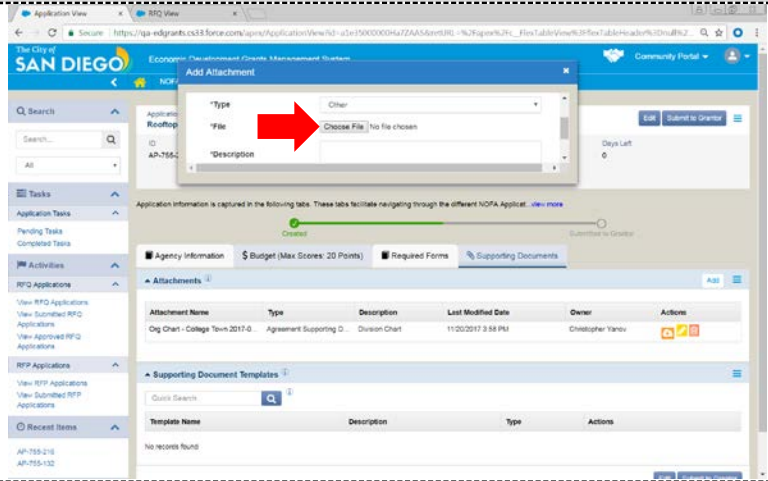
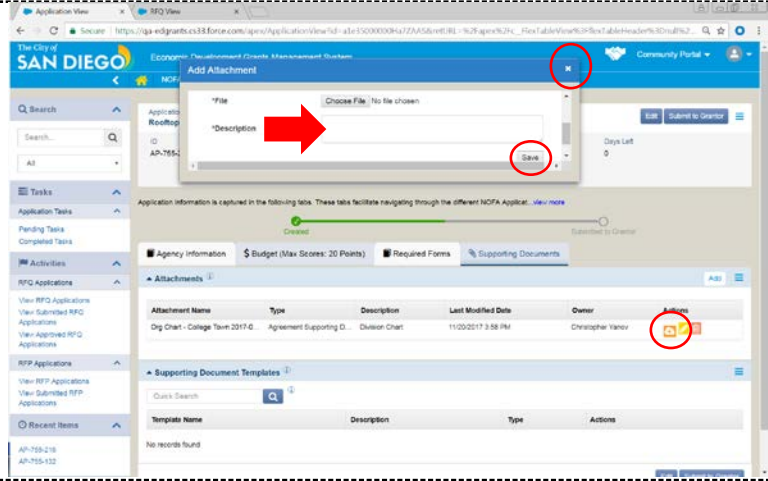
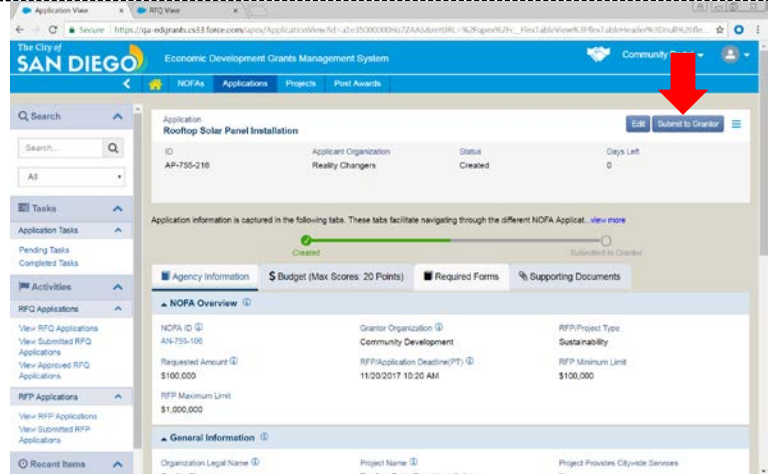
Step	Description	Screenshot
18	Once you have finished completing the 'Certifications' tab, click on the 'Back to Application' button.	
19	Click on the 'Budget' tab. There are three (3) sections to populate: 'Demonstration of Sustainability or Commitment,' 'Total Project Budget Information by Funding Sources,' and 'Proposed Uses of Total Project Funds.'	
20	To edit the 'Demonstration of Sustainability or Commitment' section, click on the 'Edit' button to reopen the field. After you are finished editing, click on the 'Save' button to preserve your work.	

Step	Description	Screenshot
21	To add the CDBG funding amount being requested in the <b>'Total Project Budget Information by Funding Sources'</b> section, click on the pencil icon (✎) in the <b>'Actions'</b> column of the <b>'Sequence 1'</b> row to open the fields. Enter the CDBG funding amount requested in the field in the <b>'Amount Unsecured'</b> column only. Do not enter any amount in the field in the <b>'Amount Secured'</b> column. Click on the <b>'Save'</b> button. <b>NOTE:</b> Observe the minimum CDBG funding amount you must request, which varies by RFP project type.	
22	To add other funding sources and amounts to be used as leverage in the <b>'Total Project Budget Information by Funding Sources'</b> section, click on the <b>'New'</b> button to open the fields. Populate the fields, making sure to properly identify <b>'Amount Secured'</b> and/or <b>'Amount Unsecured'</b> figures. Ensure that each row has a unique <b>'Sequence'</b> number and that you do not skip numbers starting from '2' and so on. Click on the <b>'Save'</b> button after you are finished. Repeat this step until you have entered all of your proposed project's funding sources and amounts. <b>NOTE:</b> All amounts listed in the <b>'Amount Secured'</b> column will be totaled and used to calculate how many points your organizations should receive for leveraged funds.	

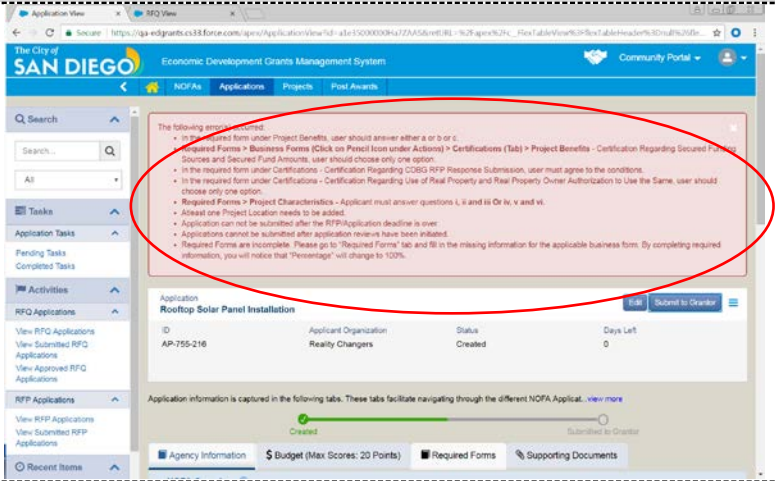


Step	Description	Screenshot
23	<p>After you have entered the CDBG funding amount requested and the leveraged funding sources and amounts (whether secured or unsecured), proceed to the <b>'Proposed Uses of Total Project Funds'</b> section to enter specific expenditure line items for the proposed project. To enter information for a specific expenditure line item, click on the arrow (↗) in the <b>'Actions'</b> column to open a popup window. In the popup window, click on the <b>'New'</b> button to open the fields to populate. Be careful to provide detailed but succinct narratives (i.e., descriptions) for each subline item (consult the FY 2020 RFP Handbook for examples). After you are finished, click on the <b>'Save'</b> button. To delete an entire subline item, click on the trash can (🗑) icon. To edit a subline item, click on the pencil icon (✎). Once you are ready and information has been saved, click on the <b>'X'</b> in the upper-right corner of the popup window to close it. <b>NOTE:</b> Certain budget lines are restricted by RFP type from being funded by the City. Consult the FY 2020 RFP Handbook for additional information.</p>	
24	<p><b>NOTE:</b> Each <b>'Non-Personnel Expenses (NPE)'</b> line item (rows 4–19) can only have one subline item. Furthermore, the <b>'Title'</b> field must be the same as the expenditure line item name. In contrast, each <b>'Personnel Expenses (PE)'</b> line item (rows 1–2) can have more than one subline item. Furthermore, the <b>'Title'</b> field can vary by position and personnel-related expenditure types (note when entering a subline item for <b>'Fringe Benefits'</b> only, select the type of fringe benefit from the drop-down menu that matches what was typed in the <b>'Title'</b> field; otherwise, ignore this drop-down menu). Be careful to provide detailed but succinct narratives (i.e., descriptions) for each subline item (consult the FY 2020 RFP Handbook for examples). <b>NOTE:</b> Certain budget lines are restricted by RFP type. Consult the FY 2020 RFP Handbook for additional information.</p>	

Step	Description	Screenshot																																								
25	After you have completed the <b>‘Proposed Uses of Total Project Funds’</b> section, the system will sum the figures and provide totals at the bottom of the table (row 21). <b>NOTE:</b> The total for the <b>‘City Amount’</b> column must match the CDBG funding amount requested. The total for the <b>‘Non-City Amount’</b> column must match the non-CDBG funding amount (secured plus unsecured). Otherwise, the system will not allow you to submit the RFP response to the City.	<table><thead><tr><th>Sequence</th><th>Funding Source Name</th><th>Amount Secured</th><th>Amount Unsecured</th><th>% Of Total Budget</th><th>City Total</th><th>Non City Total</th><th>Actions</th></tr></thead><tbody><tr><td>1</td><td>City of San Diego FY 2018</td><td>\$0.00</td><td>\$100,000.00</td><td>74.07</td><td>\$100,000.00</td><td>\$0.00</td><td></td></tr><tr><td>2</td><td>Agency Funds</td><td>\$10,000.00</td><td>\$0.00</td><td>7.41</td><td>\$0.00</td><td>\$10,000.00</td><td></td></tr><tr><td>3</td><td>Donations</td><td>\$0.00</td><td>\$25,000.00</td><td>18.52</td><td>\$0.00</td><td>\$25,000.00</td><td></td></tr><tr><td colspan="5">Total records: 3</td><td></td><td></td><td></td></tr></tbody></table>	Sequence	Funding Source Name	Amount Secured	Amount Unsecured	% Of Total Budget	City Total	Non City Total	Actions	1	City of San Diego FY 2018	\$0.00	\$100,000.00	74.07	\$100,000.00	\$0.00		2	Agency Funds	\$10,000.00	\$0.00	7.41	\$0.00	\$10,000.00		3	Donations	\$0.00	\$25,000.00	18.52	\$0.00	\$25,000.00		Total records: 3							
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26	Click on the <b>‘Supporting Documents’</b> tab to see two sections: <b>‘Attachments’</b> and <b>‘Supporting Document Templates.’</b> The <b>‘Supporting Document Templates’</b> section lists the mandatory documents you are required to attach to the RFP response, as well as the optional documents you may need to attach if they are applicable to your RFP response. If there is a City-provided template or form, you may download the template or form from this section by clicking on the corresponding down-arrow cloud (☼) icon. Review the list and prepare the documents to upload. <b>NOTE:</b> ED Grants will only accept PDF or JPEG files.	<table><thead><tr><th>Attachment Name</th><th>Type</th><th>Description</th><th>Last Modified Date</th><th>Owner</th><th>Actions</th></tr></thead><tbody><tr><td>Org Chart - Entire Agency 2017-0...</td><td>Updated Org Chart/Entire Agency</td><td>Entire agency</td><td>01/27/2017 2:49 PM</td><td>Christopher Vancu</td><td></td></tr><tr><td>1 FY 2018 Certification Register...</td><td>FY 2018 Certification Register</td><td>Secured Funding</td><td>01/27/2017 2:48 PM</td><td>Christopher Vancu</td><td></td></tr><tr><td>2a FY 2018 Certification Register...</td><td>FY 2018 Certification Register</td><td>RFP Submissions</td><td>01/27/2017 2:49 PM</td><td>Christopher Vancu</td><td></td></tr><tr><td>3 FY 2018 Questionnaire Register...</td><td>FY 2018 Questionnaire Register</td><td>Conflict of Interest</td><td>01/27/2017 2:49 PM</td><td>Christopher Vancu</td><td></td></tr><tr><td>Org Chart - College Team 2017-0...</td><td>Updated Org Chart/College Team</td><td>Division Chart</td><td>01/27/2017 2:49 PM</td><td>Christopher Vancu</td><td></td></tr></tbody></table>	Attachment Name	Type	Description	Last Modified Date	Owner	Actions	Org Chart - Entire Agency 2017-0...	Updated Org Chart/Entire Agency	Entire agency	01/27/2017 2:49 PM	Christopher Vancu		1 FY 2018 Certification Register...	FY 2018 Certification Register	Secured Funding	01/27/2017 2:48 PM	Christopher Vancu		2a FY 2018 Certification Register...	FY 2018 Certification Register	RFP Submissions	01/27/2017 2:49 PM	Christopher Vancu		3 FY 2018 Questionnaire Register...	FY 2018 Questionnaire Register	Conflict of Interest	01/27/2017 2:49 PM	Christopher Vancu		Org Chart - College Team 2017-0...	Updated Org Chart/College Team	Division Chart	01/27/2017 2:49 PM	Christopher Vancu					
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27	To upload a document, click on the <b>‘Add’</b> button to call up a popup window. In the popup window, click on the <b>‘Upload File from Computer’</b> tab. Choose the <b>‘Type’</b> of the document from the drop-down menu. The selections are based on the list of documents in the <b>‘Supporting Document Templates’</b> section.	<table><thead><tr><th>Attachment Name</th><th>Type</th><th>Description</th><th>Last Modified Date</th><th>Owner</th><th>Actions</th></tr></thead><tbody><tr><td>Org Chart - College Team 2017-0...</td><td>Agreement Supporting D...</td><td>Division Chart</td><td>11/20/2017 3:58 PM</td><td>Christopher Vancu</td><td></td></tr></tbody></table>	Attachment Name	Type	Description	Last Modified Date	Owner	Actions	Org Chart - College Team 2017-0...	Agreement Supporting D...	Division Chart	11/20/2017 3:58 PM	Christopher Vancu																													
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Step	Description	Screenshot
28	Click on the <b>'Choose File'</b> button to navigate to the file you would like to upload from your local computer. Click on the <b>'Open'</b> button to upload the file to the system. <b>NOTE:</b> The system will only accept PDF and JPEG file types.	
29	Enter a brief description of the file in the <b>'Description'</b> field. Click on the <b>'Save'</b> button and then click on the <b>'X'</b> button to close the popup window. You should now see your file uploaded to the <b>'Attachments'</b> section. <b>NOTE:</b> Clicking on the corresponding down-arrow cloud (☁) icon brings up the document uploaded. Repeat steps 27–29 until all the required files have been attached to your organization's RFP response. The system will check to see if you have at least addressed all of the documents marked as <b>'Mandatory.'</b>	
30	Click on the <b>'Submit to Grantor'</b> button to officially submit the RFP response to the City for review. <b>NOTE:</b> Only your organization's Primary Representative will have access to the <b>'Submit to Grantor'</b> button. If you are working as the Secondary Representative, coordinate with the Primary Representative to officially submit the RFP response to the City.	

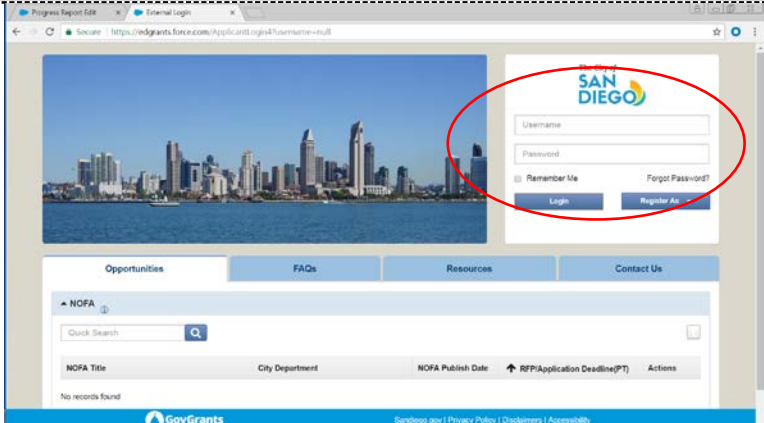
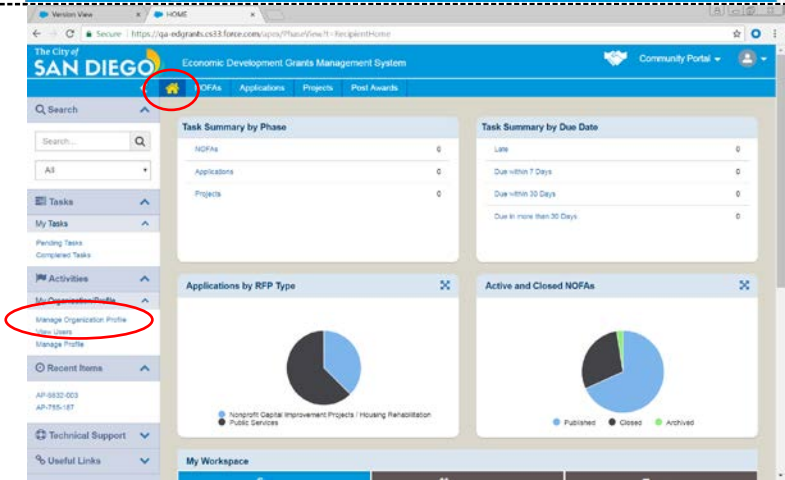
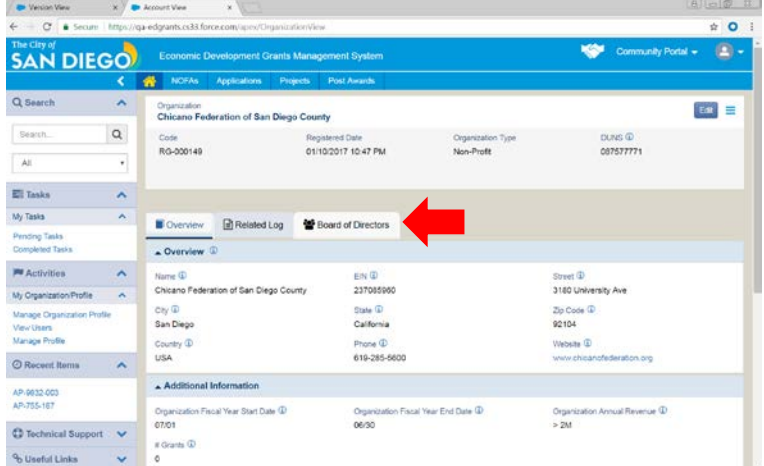


Step	Description	Screenshot
31	The system will validate the information you had entered using internal controls. If there are any errors or deficiencies identified, the system will display error messages along the top of the screen. All error messages must be addressed and cleared before the system will allow you to submit the RFP response.	 <p>The screenshot shows the 'RFP Applications' page for 'Rooftop Solar Panel Installation'. A red circle highlights a list of error messages at the top of the application form, including: 'In the required form under Project Benefits, user should answer either a or b or c.', 'Required Forms &gt; Business Forms (Click on Pencil icon under Actions) &gt; Certifications (Tab) &gt; Project Benefits - Certification Regarding Secured Fund Sources and Secured Fund Amounts, user should choose only one option.', 'In the required form under Certifications - Certification Regarding COSG RFP Response Submission, user must agree to the conditions.', 'In the required form under Certifications - Certification Regarding Use of Real Property and Real Property Owner Authorization to Use the Same, user should choose only one option.', 'Required Forms &gt; Project Characteristics - Applicant must answer questions L, i and iii Or iv, v and vi.', 'At least one Project Location needs to be added.', 'Application can not be submitted after the RFPApplication deadline is over.', 'Applications cannot be submitted after application reviews have been initiated.', 'Required Forms are incomplete. Please go to "Required Forms" tab and fill in the missing information for the applicable business form. By completing required information, you will notice that "Percentage" will change to 100%.</p>
32	Once successfully submitted, the RFP response will be reviewed by City staff, and a determination will be made on whether or not it should be forwarded to the Consolidated Planning Advisory Board (CPAB) for evaluation and scoring.	<p><b>End</b></p>

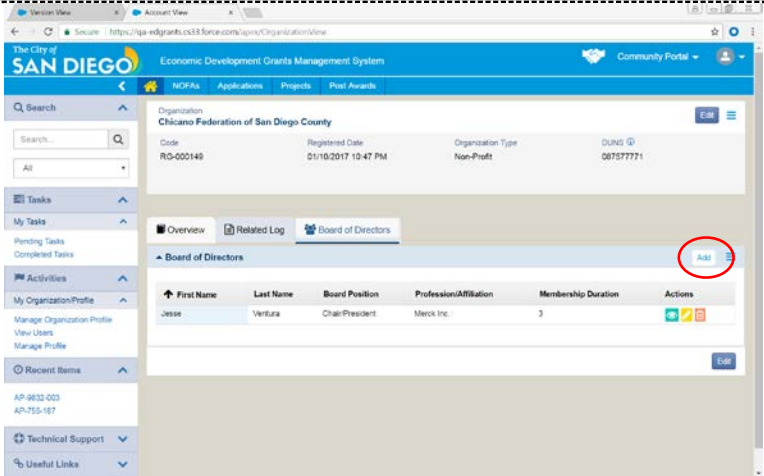
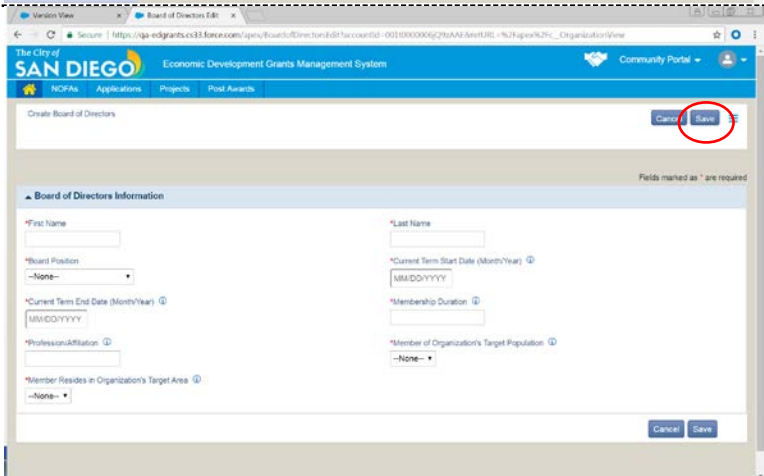
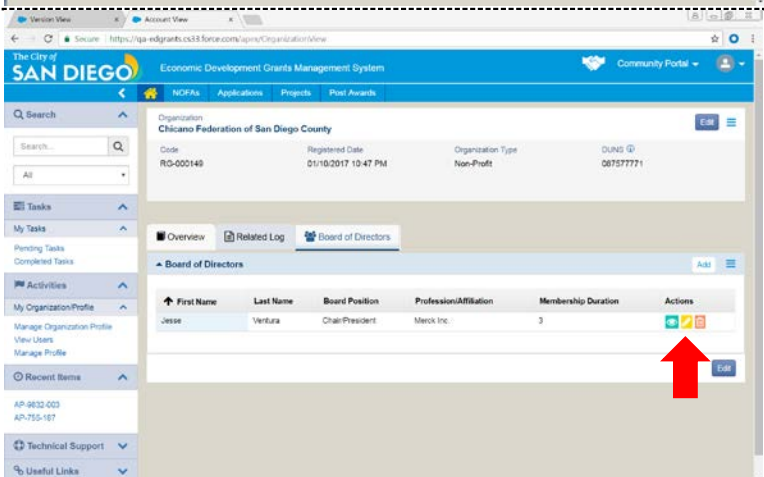
## How to Open and Continue Working on a Previously Saved RFP Response:

Step	Description	Screenshot
1	Log into <a href="http://edgrants.force.com">http://edgrants.force.com</a> using the credentials for either the Primary Representative or Secondary Representative of your organization. <b>NOTE:</b> While both the Primary Representative and Secondary Representative are able to work on the RFQ response, only the Primary Representative will be able to officially submit it to the City.	
2	Go to the 'Applications' tab and then click on 'View RFP Applications' along the left side. Look for the previously saved RFP response you would like to revise. Click on the corresponding eyeball icon (👁️) in the 'Actions' column to open the RFP response.	
3	Click on the 'Edit' button to continue working on the RFP response. Refer to the steps outlined in the 'RFP Response Submission' guide.	
4	You may continue to access saved RFP responses here as many times as needed until you have submitted it.	End

## How to Enter Your Organization's Board of Directors Members in ED Grants:

Step	Description	Screenshot
1	Log into <a href="http://edgrants.force.com">http://edgrants.force.com</a> using the credentials the Primary Representative of your organization.	
2	Click on the 'Home' tab (🏠) and then click on 'Manage Organization Profile' along the left side.	
3	You should now see three tabs: 'Overview,' 'Related Log,' and 'Board of Directors.' Click on the 'Board of Directors' tab.	



Step	Description	Screenshot
4	Click on the <b>'Add'</b> button to open a page where the profile of one board member may be entered.	
5	Fill out the fields on the page, using the help text icons provided (i) for guidance and clarification. When you are finished, click on the <b>'Save'</b> button. Repeat steps 3–5 for each board member until all members have been entered.	
6	To edit a board member profile previously entered, click on the <b>'Board of Directors'</b> tab and one of the icons in the <b>'Actions'</b> column. The trash can icon (🗑️) deletes the entire existing profile from the system. The pencil icon (✎️) opens the profile for editing, after which the <b>'Save'</b> button should be clicked to preserve the changes. The eyeball icon (👁️) opens the profile for viewing only.	
7	You may update the 'Board of Directors' tab at any time by following the above steps.	<b>End</b>