COMMUNITY DEVELOPMENT BLOCK GRANT PROGRAM

FY 2025 REQUEST FOR PROPOSALS (RFP) HANDBOOK

Economic Development Department
Community Development Division
December 2023

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I. INTRODUCTION

The purpose of this Handbook is to guide interested parties through the City of San Diego's Community Development Block Grant (CDBG) Request for Proposals (RFP) phase for Fiscal Year 2025. (Together with the prior Request for Qualifications (RFQ) phase, the entire process is referred to as the Annual Notice of Funding Availability [Annual NOFA].) This Handbook provides a general overview of this phase and applicable requirements and is for informational purposes only. **It is not intended to be a full disclosure of all applicable federal, state and/or local rules, regulations, procedures, and/or reporting requirements. Information provided in this Handbook may be revised as needed.**

The CDBG Entitlement Communities Program provides federal assistance from the U.S. Department of Housing and Urban Development (HUD) to nearly 1,000 of the largest localities in the country. The statutory primary objective of the CDBG Program is the development of viable urban communities, principally for low- to moderate-income persons (LMI), through:

1. Decent housing
2. Suitable living environment
3. Expanded economic opportunity

Since 1974, the CDBG Program has provided a flexible source of annual funding to communities nationwide. The program offers local governments, with citizen participation, the opportunity to fund certain projects, programs, and/or public services provided that these meet one of three National Objectives:

1. **Benefit low/moderate-income (LMI) persons**
2. Prevent or eliminate slums and blight
3. Meet an urgent need

In the case of the City of San Diego, all CDBG-funded projects and programs must meet the National Objective of benefitting LMI persons.

II. GENERAL INFORMATION

The following information provides applicants the context and general information necessary to understand and successfully navigate through the RFP phase of the FY 2025 Annual NOFA. It is imperative that applicants understand the information presented and to consult with City staff if there are any doubts. Staff may be reached by emailing CDBG@sandiego.gov. Applicants are also encouraged to take full advantage of the resources provided by the City throughout the RFP phase, which are described in Section IV of this RFP Handbook.

RFQ Phase

For FY 2025, CDBG funding recommendations is based on a two-phase Notice of Funding Availability (NOFA) application process: Request for Qualifications (RFQ) and Request for Proposals (RFP). All FY 2025 CDBG applicant organizations must have successfully completed both phases to be considered for FY 2025 CDBG funding. Organizations that did not successfully complete the RFQ phase are precluded from participating in the RFP phase.

The RFQ phase was completed in December 2023. A total of 56 organizations submitted FY 2025 CDBG RFQ responses and notifications were sent to participating organizations confirming whether they were deemed **QUALIFIED** or **NOT QUALIFIED** to participate in the FY 2025 CDBG RFP phase.

RFP Period

The RFP phase began on December 15, 2023. **The deadline for RFP response submissions is Friday, January 19, 2024, at 5:00 p.m. (PST)** via ED Grants. Due to using an online technology system such as **ED Grants**, which is dependent on a working Internet connection, it is highly encouraged that RFP responses be submitted well in advance of the deadline. **Late submissions will not be accepted by ED Grants.** It is the responsibility of applicants to be sure their RFP responses are submitted via ED Grants ahead of time. **Staff support to address technical/IT questions regarding ED Grants is not available during weekends and official City holidays and ends promptly at 12:00 p.m. (PST) on Friday, January 19, 2024** (staff will not entertain questions received after this deadline). Hard copies of RFP responses will not be accepted, and extension requests will not be entertained.

RFP Category Budgets

The City receives annual CDBG entitlement funds. The City uses prior fiscal year entitlement funds to estimate the new fiscal year's entitlement budget, as the entitlement amounts are released after the RFP. The City also anticipates receiving CDBG Program Income funds related to CDBG repayment agreements with the former City of San Diego Redevelopment Agency. The **estimated budget** for the FY 2025 CDBG Annual NOFA by RFP category is as follows:

RFP Category	*Description*	*Estimated Budget*
Public Services: (PS)	Projects that provide defined social services or other direct assistance to individuals and not the general public as a whole.	$2,580,000
Nonprofit Capital Improvement Projects: Facilities (NCIP-F)	Projects that improve and/or expand facilities operated by nonprofit organizations to provide onsite public services.	$3,000,000
Community & Economic Development: Microenterprise Technical Assistance (CED-MTA)	Projects that provide technical assistance and general business support to microenterprises wishing to expand or be established. Excludes CDBG funds going towards financial assistance (grants or loans).	$2,600,000
Total		**$8,180,000**

NOTE: The estimated FY 2025 budget of $8,180,000 for the RFP categories above is contingent upon annual federal budget appropriations and is subject to change. The budget for each individual RFP category is also subject to adjustment by management depending on the most optimum distribution of funds after the proposals have been evaluated and scored.

General Proposal Eligibility Criteria

Each proposed CDBG project or program to be funded in FY 2025 **must** meet each of the five (5) criteria listed below. If City staff reviews the proposal and cannot determine, strictly based on the information presented, how one or more of the criteria will be met, the proposal will

be deemed ineligible and will not be forwarded to the Consolidated Plan Advisory Board (CPAB) for evaluation and scoring. **All decisions are final.**

1. **CONSOLIDATED PLAN GOALS:** The proposal must clearly target at least one of the following five (5) goals to be incorporated into the City of San Diego's recently updated FY 2025-2029 Consolidated Plan (Con Plan):

   GOAL 1: Increase, protect and preserve affordable rental and homeownership housing opportunities by improving access to a diverse set of affordable housing, accessible in design and energy efficient, with proximity to job centers, schools, parks and services.

   GOAL 2: Invest in inclusive economic growth initiatives that develop and strengthen small businesses, support local entrepreneurs, expand employment and/or workforce development programs, and improve access to job opportunities.

   GOAL 3: Develop vibrant and equitable neighborhoods by investing in public facilities, critical infrastructure, and/or nonprofit facilities that provide increased accessibility, resiliency, and sustainability.

   GOAL 4: Improve housing stability for individuals and households with critical needs, including persons experiencing or at-risk of homelessness, by providing appropriate housing and service solutions grounded in best practices.

   GOAL 5: Improve community services by addressing critical needs and promoting equity through improved or increased access to community programming.

2. **ELIGIBLE ACTIVITY:** Each proposal must implement an 'eligible activity' consistent with the provisions of 24 CFR 570 (Subpart C) and City Council Policy 700-02.

3. **ELIGIBLE EXPENSES:** Each proposal must budget only for 'eligible expenses' consistent with the provisions of 24 CFR 570, 2 CFR 200, City Council Policy 700-02, and this FY 2025 CDBG RFP Handbook.

4. **NATIONAL OBJECTIVE:** Each proposal must demonstrate compliance with meeting the National Objective of benefitting LMI persons residing in the City of San Diego by doing one of the following:

   a. Creating or improving housing for LMI households;
   b. Creating or retaining jobs for LMI individuals;
   c. Providing a specific service to definite LMI individuals; or
   d. Providing a defined, primarily residential LMI area with access to an amenity.

5. **STRATEGIC PLAN PRIORITY AREAS/OBJECTIVES:** Each proposal must clearly target at least one of the objectives of one of the five (5) priority areas of the City's Strategic Plan:

PRIORITY AREA 1: Create Homes for All of Us

- San Diegans benefit from a diversity of different housing types, with homes that are affordable to everyone in all communities.
- The City helps San Diegans find ways to build housing cheaper, faster, and easier.
- San Diegans live in vibrant communities with healthy homes and access to opportunity.
- San Diegans experiencing homelessness have access to long-term housing with supportive services.

PRIORITY AREA 2: Protect & Enrich Every Neighborhood

- San Diegans in all communities are connected to neighborhood assets that anchor community life, foster interaction, and promote well-being.
- Every San Diegan has access to arts and culture opportunities on their own terms. Visitors are able to discover and experience local culture.
- San Diegans benefit from accessible, convenient, safe, and comfortable recreational spaces in their communities.
- San Diegans have equitable access to a network of libraries, including robust digital services and programming, that are tailored to local needs and interests.
- San Diegans benefit from public safety services that encompass the diverse needs of residents and communities

PRIORITY AREA 3: Advance Mobility & Infrastructure

- San Diegans in all communities, of all ages and abilities, can efficiently get from point A to point B with mobility options that are safe, affordable, and sustainable.
- San Diegans travel on high-quality infrastructure that creates safe and comfortable spaces for people to walk, roll, ride, or drive

PRIORITY AREA 4: Champion Sustainability

- San Diegans have equitable access to high-quality, healthy, preserved open spaces.
- The City of San Diego provides a built environment that best sustains our natural environment and public health.
- A resilient San Diego that can adapt to, recover from, and thrive under changing climate conditions.
- San Diegans benefit from diligent, innovative waste management.
- The City of San Diego leads by example with zero emission vehicles, net zero emission facilities, and resilient and efficient delivery of services.

PRIORITY AREA 5: Foster Regional Prosperity

- San Diego residents and businesses are supported by a strong local economy, with well-paying jobs, economic activity, and opportunities in every community.
- San Diego businesses benefit from programs and funding opportunities that are accessible and equitably distributed.
- San Diegans have economic opportunity from relations with Mexico as a binational trade partner.
- The San Diego region benefits from a thriving, skilled, and educated workforce capable of tackling the challenges and opportunities of tomorrow.
- San Diegans benefit from a passionate, engaged City workforce that provides the highest level of customer service and represents the San Diego community.
- City employees enjoy a culture of great leadership, appreciation, and acknowledgement, with opportunities for learning and development.
- The City provides a clear, unified pathway for career growth and development.

Pre-Award Costs

Applicants should note that any premature commitment or expenditure of funds for proposed activities is prohibited. No project expenses will be eligible for CDBG reimbursement if they have been incurred or commissioned prior to a completed environmental review and clearance by the City. Project expenses will also not be eligible for CDBG reimbursement if they have been incurred or commissioned prior to the project start date identified in the executed FY 2025 CDBG agreement with the City of San Diego.

Geographic Targeting

The City's Geographic Targeting initiative includes the San Diego Promise Zone and the Opportunity Zone. On June 6, 2016, the San Diego Promise Zone became one of 22 federally designated Promise Zones in the United States and one of only four in California. It covers a targeted area of 6.4 square miles that spans from East Village and Barrio Logan to Encanto and Emerald Hills and is home to the City's most disadvantaged and underserved communities.

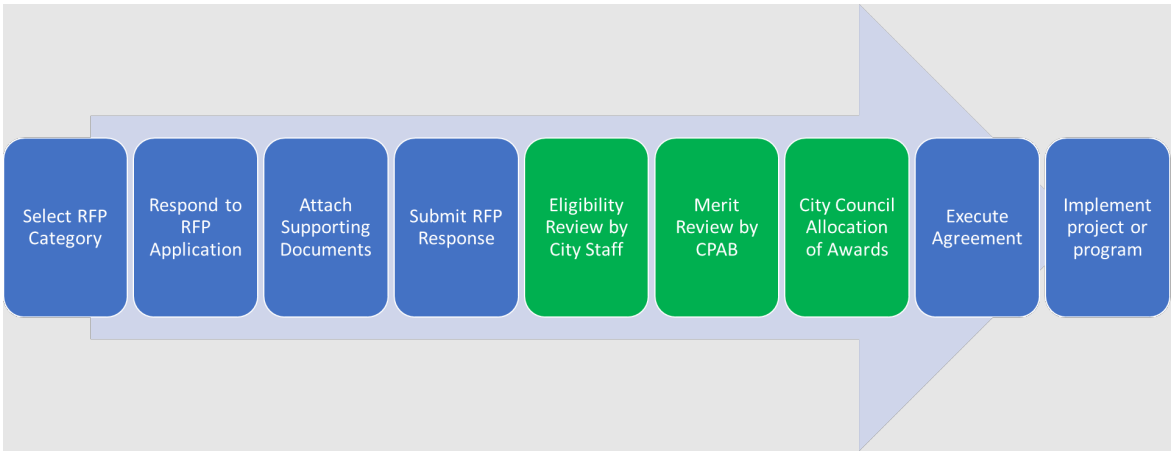
Beginning in Fiscal Year 2020, the Opportunity Zone also became an eligible area for the City's Geographic Targeting Initiative. The Opportunity Zone provides tax incentives for investment and supports environmental justice, sustainability, climate change, and affordable housing.

Applicants will need to indicate whether their main office is in the Promise Zone or the Opportunity Zone. Applicants must also describe their efforts and strategies to deliver services to clients located in the Promise Zone or the Opportunity Zone, if applicable. Organizations may cite collaborative efforts with local nonprofits within those geographic boundaries, specific resources/services deployed within those boundaries, or targeted outreach and educational efforts to residents of those areas. Refer to Attachment 3 for a map of the location of the Promise Zone and the Opportunity Zone, also referred to as CDBG Priority Areas. Please

note the Community Planning Areas previously included in the CDBG RFP scoring criteria have been removed.

III. RFP Process

The following graphic and corresponding sections describe the major stages and steps of the RFP phase. The blue boxes indicate the steps that require applicant involvement. The green boxes indicate the steps involving City staff and management only but that the applicant should be fully aware of. The CDBG application process is lengthy and complex and may be bewildering to the uninitiated. But the more the applicant is aware of the process and reasons behind the stages and steps, the more the applicant will be able to take advantage of the CDBG funding resources available.



Select RFP Category

The RFP process begins with the applicant selecting an RFP category to apply under. As noted in Section II above, there is one (1) RFP track and three (3) different RFP categories available, each with its own set of questions, scoring criteria, and budget. Access to the RFP categories depends on whether the applicant was deemed "qualified" via the RFQ application process.

RFP Categories

- Public Services
- Nonprofit Capital Improvement Projects: Facilities
- Community & Economic Development: Microenterprise Technical Assistance

If more than one response is submitted for any one category by the applicant, the City will count only the first one submitted. Each RFP response must deal with only one project/program, and the same project/program cannot be submitted more than once in multiple RFP categories. No matter the number of responses submitted, the sum of the CDBG funding amounts requested cannot exceed the applicant's Maximum Funding Request Threshold (MFRT) established during the RFQ phase.

Respond to RFP Application

The applicant prepares a proposal by responding to the application associated with the selected RFP category via ED Grants. Each RFP application consists of the following major sections ("tabs"):

- Agency Information
- Budget
- Required Forms
- Supporting Documents

Agency Information

This section states basic information on the applicant, such as name, address, and contact person. It also lists the name of the proposed project, its location(s), and the amount of CDBG funds being requested for the same. The RFP category is also indicated here. If the applicant needs to correct the basic organizational information, it must do so via the 'Organization Profile' screen.

Budget

This section consists of three parts:

a. Sustainability/Commitment Explanation (depending on RFP category)

- **Demonstration of Sustainability**: Applicants are asked to identify alternative funding to support the proposed project and demonstrate that the project will not rely on CDBG funds for long-term viability.
- **Demonstration of Commitment**: Applicants are asked to explain how the CDBG funds would be best utilized through investment in the proposed project and identify leveraged funds that will be utilized to maximize the City's investment and further the project's impact.

b. Budget by Funding Source

- Applicants will enter the amount of CDBG funding they would like to request for their proposed project or program. It must meet the minimum and maximum thresholds established for the RFP category and not exceed the organization's Maximum Funding Request Threshold (MFRT) in combination with its other RFP responses.
- Applicants will enter the amount of non-CDBG funding that they will be bringing to the proposed project or program. The funding must be entered by source, and the applicant must indicate whether the funding is secured or unsecured. Funding is considered "secured" when it has been formally allocated and committed to the specific proposed project or program and is not available for other uses. Note the following do not qualify as secured funding: lines of credit; funds expended prior to July 1,2024; in-kind support/match; future pledges; and/or multi-year contract options to renew funding. Applicants listing secured funding amounts will be required to complete and submit the 'Certification Regarding Secured Funding.' Note ED Grants will calculate the 'Leverage of Secured Funding Percentage' based on the 'Secured Amount' total entered by the applicant, and points will be assigned accordingly.

c. ***Budget by Expenditure Type***
   - Applicants will enter the amounts budgeted per expenditure type to implement the proposed project or program. There are 18 different expenditure types. Each expenditure type that has a budgeted amount must be accompanied by a descriptive narrative, including how costs were calculated and what expenditures will be covered. Refer to Attachment 4 for a description of each expenditure type and sample narratives. Note that certain expenditure types are only allowable for certain RFP categories, which will be enforced by ED Grants. For each expenditure type with a budgeted amount, applicants must enter the amount to be covered by CDBG and/or the amount to be covered by non-CDBG sources. ED Grants will check that the total CDBG budget equals the CDBG funding amount requested by the applicant and that the total non-CDBG budget equals the non-CDBG funding amount the applicant will be bringing to the project or program.

Required Forms

This section consists of five forms or tabs:

1. ***Organizational Capacity***
   - Applicants will answer a series of questions pertaining to their experience in implementing projects or programs similar in scope and complexity and in partnering with other organizations.

2. ***Project Characteristics***
   - Applicants will answer a series of questions regarding the target population to be served, the critical needs to be addressed, and the goals and anticipated results of their proposed project or program.

3. ***Project Specifics***
   - Applicants will answer a series of questions regarding the implementation schedule, the services to be provided and the methods of delivery, and the implementation readiness of their proposed project or program.

4. ***Project Benefits***
   - Applicants will answer a series of questions regarding how the proposed project or program will benefit LMI individuals, LMI households, and/or LMI areas of the City.

5. ***Certifications***
   - Applicants will certify understanding of and compliance with a number of regulations, policies, and laws. Applicants will also complete a questionnaire on conflict of interest.

Refer to Attachment 6 for a listing of the questions in the aforementioned forms. They are arranged by RFP category and form.

Supporting Documents

This section houses any available templates that applicants can download and complete to comply with the supporting documents requirements. This is the section where applicants will also upload supporting documents to incorporate into their RFP response.

Attach Supporting Documents

Supporting documents will need to be attached to your organization's RFP response. Failure to provide any of the requested documents may result in the disqualification of the response for further consideration. Prior to uploading each document, the applicant must convert the file into PDF format and name it according to the prescribed naming convention. Refer to Attachment 1 for a description of each document, its applicability to each RFP category, and the corresponding naming convention. Documents submitted to the City previously or as part of another RFP response must be submitted again. The applicant cannot rely on prior or other submissions to fulfill the supporting documents requirement.

Submit RFP Response

The Primary Representative must log in to submit the RFP response to the City. The Secondary Representative cannot submit the RFQ response. **Submissions must be completed by 5:00 p.m. (PST) on Friday, January 19, 2024, to be eligible for City evaluation**. The applicant must make sure to address any errors identified by ED Grants prior to submission. Any errors unaddressed will preclude the applicant from submitting its RFQ response. Only RFP responses submitted via ED Grants will be accepted. Hard copy, faxed, emailed, or late RFP responses will not be accepted. All RFP submissions will be tracked by electronic date/time stamp.

Eligibility Review by City Staff

Community Development Division (CDD) staff will review all RFP responses received by the deadline for completeness and eligibility. An RFP response will be deemed **eligible for scoring** if it is complete and accurate and describes activities consistent with applicable HUD regulations and City requirements. Any RFP response that is deemed **ineligible** by CDD staff **will not be forwarded** to the Consolidated Plan Advisory Board (CPAB) for their review and scoring. It is anticipated that FY 2025 CDBG RFP scoring results will be posted on the CDBG program website and emailed to interest list on or before **March 1, 2024**, for FY 2025 CDBG Grant applications. Applicants may also check the status of their proposals in ED Grants.

Common Disqualifiers

Applicants will automatically be deemed ineligible for funding consideration if at least one of the following is determined by City staff:

- Applicant organization staff did not attend the Mandatory FY 2025 CDBG RFP Virtual Workshop session conducted;\
- **Applicant organization staff did not attend a technical assistance session if interested in applying under the construction categories (NCIP-Facilities) to go over the specifics of construction projects with a construction-focused project manager;**
- **Applicant organization staff did not attend a technical assistance session if interested in applying under any category and has never applied to receive City of San Diego CDBG funding before.**

- A conflict-of-interest issue was identified, based on the applicant's responses to the 'Questionnaire Regarding Conflict of Interest'. (Please note: an identified conflict of interest during the agreement execution process review may also result in a disqualification after award.);
- Incorrect or incomplete attachments were included in the submittal;
- The applicant submitted a proposal under an incorrect RFP category, based on proposed target population or activities described;
- The applicant's proposal will not be benefitting City of San Diego residents or will target non-City of San Diego residents;
- The applicant has submitted an NCIP-F proposal and concurrently has an in-progress/open City of San Diego CDBG-funded construction project at the same location/facility;
- The applicant has submitted an NCIP-F proposal and did not submit documentation/confirmation of required site control or ownership approval;
- The applicant has submitted an NCIP-F proposal that included in whole or in part CDBG improvements that are not eligible;
- The response describes activities that are inconsistent with applicable HUD regulations and/or City requirements; and
- City staff cannot determine from the response how the National Objective of benefitting LMI persons will be met by the proposed project.

Upon conclusion of the CDD staff review process, all applicable FY 2025 CDBG RFP materials for projects determined to have met the RFP eligibility requirements will be made accessible in ED Grants to the Consolidated Plan Advisory Board (CPAB) for the members to review and score.

Merit Review by CPAB

Each Consolidated Plan Advisory Board (CPAB) member will review and score eligible FY 2025 CDBG RFP project proposals. Ad Hoc Committees may be formed, if deemed necessary by the CPAB. The CPAB will review each eligible project proposal in accordance with the approved FY 2025 Scoring Criteria for each category of funding. The criteria may be found in Attachment 7 of this RFP Handbook.

Upon completion of their project proposal reviews, each CPAB member will submit their resulting individual scores in ED Grants. The averaged score for each project proposal that was reviewed will be used to rank the proposals from highest to lowest for each category. These scores will be posted on the CDBG Program website.

CDD staff will present the scores and resulting recommendations for funding to CPAB during its regularly scheduled meeting on March 13, 2024. CPAB members will be asked to ratify the RFP scores and funding recommendations for submission to the City Council for its approval. **Pertinent information regarding dates, times and/or locations of these meetings will be posted on the CDBG Program** website as soon as it is available.

Information will be made available in alternative formats upon request, as required by the Americans with Disabilities Act (ADA). If you require disability-related modifications or accommodations to facilitate meeting participation, including requests for auxiliary aids, services or interpreters, please contact the City Clerk's Office at (619) 533-4000 or send an email to CityClerk@sandiego.gov as far in advance of the meeting as possible. Furthermore, if

you require language translation, please contact the Community Development Division at (619) 236-6700 as far in advance of the meeting as possible.

City Council Allocation of Awards

CDD staff will present CPAB's FY 2025 CDBG funding recommendations to the City Council for its consideration and approval during a public hearing sometime in April or May 2024. The time and date for this meeting will be provided once confirmed. This Council Action may be followed by a subsequent public hearing to complete the City's FY 2025 Annual Action Plan. The Action Plan will include a description of the allocation of all CDBG resources and constitute the application to HUD for receipt of the City's FY 2025 CDBG entitlement. The Annual Action Plan must be submitted to HUD on or before May 15, 2024.

Execute Agreement

Concurrent with the Annual Action Plan process, CDD staff will conduct **Mandatory FY 2025 CDBG Agreement Execution Process Workshops** to be attended by applicants allocated FY 2025 CDBG funding. Organizations recommended for funding will be required to submit documentation prior to the execution of agreements. Organizations should be prepared to respond to questions and/or clarifications issued by CDD staff within two (2) calendar days or within a specific timeline as requested by CDD staff. **All agreements must be executed by July 1, 2024,** and failure to do so may result in future point deductions related to the Performance Indicator portion of the Scoring Criteria. Please note insurance documents must be submitted to the Community Development Division by early June 2024, to ensure agreements can be executed by July 1, 2024. Refer to the City of San Diego Purchasing & Contracting Insurance Checklist for additional information on insurance requirements.

Implement Project or Program

The implementation period formally begins on July 1, 2024. CDD staff will conduct a FY 2025 CDBG Reporting Workshop with awarded organizations (called "subrecipients") to train them on how to prepare monthly programmatic and expenditure reports that meet federal and City standards. The FY 2025 Operating Manual will also be introduced and distributed, which, along with the signed agreement, will govern the implementation of all CDBG-funded projects and programs in FY 2025. For NCIP-F projects, no construction activities may be implemented on the project site from the time the CDBG proposal is submitted to the issuance of a Notice to Proceed from CDD staff.

NOTE: CDD reserves the option to delay the approved project implementation date (i.e., shorten the period of funding) or cancel the CDBG award should there be significant delays in the execution of an agreement resulting from an Organization's non-responsiveness or readiness during the agreement execution process.

IV. APPLICATION PERIOD SUPPORT

The City is committed to getting as many proposals as possible submitted and eligible for CDBG funding from as many different applicants as possible. The following resources will be available to applicants during the application period. Applicants should consider each one and take the appropriate steps to take advantage of them.

Mandatory RFP Workshop

All "qualified" CDBG applicant organizations are required to attend the Mandatory FY 2025 CDBG RFP Virtual Workshop. At least one (1) permanent staff member from the applicant organization must attend the session to meet the attendance requirement. It is highly recommended that the following attend a workshop session: (1) the applicant personnel who will be completing the RFP response and designated as the RFP contact; (2) the applicant personnel responsible for completing and reporting RFP program information; and (3) the applicant personnel responsible for completing and reporting RFP budget information. In addition to the mandatory workshop, organizations that have never applied to the City of San Diego CDBG program must schedule a technical assistance meeting. Also, organizations looking to apply under the construction category (NCIP-Facilities) must schedule a technical assistance meeting to go over the specifics of construction projects with a construction-focused project manager.

NOTE: Attendance by 'for hire' grant writers, interns, volunteers, custodial staff, and unpaid applicant representatives will not meet the Mandatory RFP Workshop attendance requirement. However, a member of the Board of Directors may represent the organization if it has no paid personnel.

At the Mandatory Workshop session, City staff will provide a brief overview on navigating the FY 2025 CDBG RFP application in the Economic Development Grants Management System (ED Grants). Links to resources and step-by-step ED Grants navigation guides will also be posted in the 'Resources' tab of ED Grants and on the CDBG Program website. Information on how to develop a sound CDBG project/program proposal will be covered.

Prior to the release of the FY 2025 CDBG RFP, "qualified" organizations were notified of their determination via email, which also included information on the Mandatory Virtual Workshop.

The workshop information is as follows:

Location	*Date*	*Sign-In*	*Workshop*
Virtual Zoom workshop	Tuesday, December 12, 2023	10:00-10:05 a.m.	10:05 – 11:30 a.m.

All attendees must sign-in prior to the start of the workshop session and sign-out at the end of the workshop by utilizing the chat function on Zoom. An applicant's failure to attend the full session of the mandatory FY 2025 CDBG RFP Workshop (i.e., late arrivals or early departures in addition to complete absence) will cause all RFPs submitted by that applicant to be deemed **ineligible for scoring** per Council Policy 700-02.

Mandatory RFP Category-Specific Technical Assistance Sessions

In addition to the Mandatory RFP Workshop, organizations that have never applied to the City of San Diego CDBG program must schedule a technical assistance meeting. Also, organizations looking to apply under the construction category (NCIP-Facilities) must schedule a technical assistance meeting to go over the specifics of construction projects with a construction-focused project manager.

Email Inquiries

All questions related to the RFP need to be submitted in writing to CDBG@sandiego.gov no later than **5:00 p.m. (PST) on Tuesday, January 16, 2024**, with "FY 2025 RFP Question" included in the subject line. To expedite the response to your question, please provide the following in your email:

1. Applicant organization name;
2. RFP category (PS; NCIP-F; or CED-MTA);
3. Topic of the question:
    a. ED Grants;
    b. Project specifics and eligibility;
    c. Budget;
    d. General administration;
    e. Other (specify);
4. Listing of actual question(s) or clarifications needed.

The Community Development Division will provide a written response. Frequently Asked Questions (FAQs) will be posted in ED Grants as warranted (refer to the 'FAQs' tab). It is the responsibility of the applicant to periodically check the FAQ page for new listings.

Technical Assistance Appointments

Up to two 30-minute one-on-one technical assistance meetings with City staff may be requested by submitting an RSVP through the FY 2025 CDBG RFP Technical Assistance Appointments via Microsoft Bookings. **Assistance WILL NOT be provided in terms of developing a project or providing recommendations and/or feedback on draft written RFP responses completed by applicants.** The technical assistance appointments will be available during the period of December 18-22, 2023, and January 2-12, 2024, excluding weekends and any City holidays. Only one meeting can be scheduled at a time; a second meeting cannot be scheduled until the first one has been completed. Appointments will be assigned on a "first come, first served" basis. After an RSVP is submitted via Microsoft Bookings, City staff will send a confirmation email. To make the most of the 30-minute Technical Assistance appointment, please respond to the email and provide the following:

1. Subject: *FY 2025 CDBG RFP TA Appointment Request – [insert your organization's name]*;
2. Applicant organization name;
3. Name and job title of each organization attendee;
4. RFP category (PS; NCIP-F; or CED-MTA);
5. Identify whether the questions are regarding:
    a. ED Grants;
    b. Project specifics and eligibility;
    c. Budget;
    d. General administration;
    f. Other (specify); and
6. Listing of actual questions or clarifications needed.

NOTE: All feedback and guidance provided during these meetings is limited to the extent of project details presented by the applicants.

Community Development Division staff will promptly respond to appointment requests with a confirmed date and time. Meetings will be held virtually.

It is required that first-time applicants secure a technical assistance appointment with City staff to ensure understanding of and compliance with all applicable requirements.

It is also required that organizations looking to apply under the NCIP category attend at least one technical assistance appointment with City staff to ensure understanding of compliance with all applicable NCIP project requirements.

V. SCHEDULE

Date	Milestone
12/12/23	Mandatory FY 2025 CDBG RFP Virtual Workshop
12/15/23	FY 2025 CDBG RFP released via ED Grants
12/18-12/22/23	One-on-one technical assistance meetings available
1/2-1/12/24	One-on-one technical assistance meetings available
1/16/24	5:00 p.m. (PST) deadline to Email RFP-Related Questions to CDBG@sandiego.gov
1/16/24	**5:00 p.m. (PST) deadline to request updates to Primary/Secondary Representatives in ED Grants**
1/19/24	12:00 p.m. (PST) deadline to request ED Grants navigation assistance/staff support
1/19/24	**FY 2025 CDBG RFP responses due in ED Grants no later than 5:00 p.m. (PST)**

NOTE: All of the dates outlined in this Handbook are tentative and may be subject to change. A full RFP timeline can be found on Attachment 8 of this handbook. Check the CDBG Program website (http://www.sandiego.gov/cdbg) for timely updates.

VI. TIPS & TRICKS

Applicants should take the following useful points into consideration when preparing their RFP responses. They have been compiled based on the collective experience of City staff over the years in managing the CDBG Program. Applicants risk missing the deadline or disqualifying themselves and their proposals from funding consideration if they fail to heed the following points. The last thing the City desires is for proposals to not be submitted or to be disqualified based on a preventable error.

1. Ensure the Primary Representative in ED Grants for your organization has authorization to submit the FY 2025 RFP response on behalf of your organization (e.g., Head of the Organization). The Secondary Representative will have data entry privileges in ED Grants but will not be allowed to submit the FY 2025 RFP response on behalf of the organization. Any changes to the Primary Representative or Secondary Representative will require City staff action, and so any update requests must be done by **5:00 p.m. (PST) on Tuesday, January 16, 2024**, prior to the RFP response deadline.

2. Ensure that all required fields are completed correctly and that all required documents are uploaded into ED Grants. Applicants will not be able to complete the submission process if there are errors or missing information. **NOTE: RFP responses with wrong or incomplete documents uploaded may be deemed ineligible.**

3. The RFP application contains a 5,000 maximum character count (not word count) for each of the required narrative fields. For the purposes of the online submission, a 'character' is defined as a letter, number, punctuation, or space (a blank space caused by hitting the space bar on the keyboard).

4. When cutting and pasting from a MS Word document into the required fields, the field should be limited to text characters only (plain text). **No tables, symbols, or images should be entered due to the character count limitations. Failure to do so may cause formatting issues.**

5. **Certification documents regarding real property, if applicable, will be addressed in the RFP application via ED Grants. A copy of a Deed of Trust or Lease Agreement is required to be uploaded to ED Grants.** Prior to uploading either certification document as a PDF into ED Grants, ensure that complete information and original authorized signatures are provided and legible. **NOTE: RFP responses with wrong or incomplete documents uploaded may be deemed ineligible.**

6. Ensure that the Primary Representative submits the FY 2025 RFP through ED Grants by the designated deadline. **NOTE:** ED Grants will not accept submittals from the Secondary Representative. Ensure that the Primary Representative's password is up to date and active (any changes can take up to forty-eight (48) hours to process).

7. An email confirmation listing the FY 2025 RFP submission date and time will be sent by ED Grants. Applicants should send an email to CDBG@sandiego.gov if no confirmation email is received after submission.

VII. RFP CATEGORY–SPECIFIC INFORMATION

There is one (1) type of RFP track and three (3) types of RFP project/program categories, as described in Section II of this RFP Handbook. Below are points to remember, arranged by RFP track and RFP project/program types, as applicants prepare their responses. They must be factored into the proposals to ensure completeness and adherence to applicable laws, policies, and regulations.

CDBG RFP Project/Program Categories

1. **Public Services (PS):** This category funds projects that provide defined social services or other direct assistance to individuals, and not to the general public as a whole. Eligible public service activities include, but are not limited to: employment and workforce development, youth services, college readiness, programs serving individuals experiencing homelessness, financial literacy, health and safety services, etc. Individuals served must be documented via an intake process during which data on their household income, demographics (race/ethnicity), head of household status, etc. may be collected and documented per applicable regulations. Applicants must consider the following regarding their project proposals:

a. No allocation of funds less than $50,000 will be awarded to PS projects.
b. Applicants may only submit one RFP response in this category.
c. Assistance provided with CDBG funds is limited to City of San Diego residents only.
d. Organizations must directly implement their PS projects to directly benefit low- or moderate-income (LMI) persons.
e. Applicants must directly demonstrate the proposed project will meet the CDBG National Objective of benefitting LMI persons. At least 51 percent of the clients to be served by the project must be LMI (i.e., have incomes below 80 percent of the Area Median Income). Current HUD Income Levels are included as an attachment to this RFP Handbook.
f. Organizations awarded with FY 2025 CDBG funding will need to maintain written documentation on unduplicated City of San Diego clients served. The documentation must include household income data, race and ethnicity data, and head of household status. **Monthly data submission will be required.** Applicants must demonstrate it has an intake and documentation process that would ensure the accurate collection and reporting of such data monthly. Household income documentation must include tax returns, pay stubs, canceled checks/bank statements, etc. Income self-certification may be accepted but only with prior City approval. Attachment 9 has a sample form to show how applicants, if funded, may collect the needed data.
g. Applicants may satisfy the requirement to serve LMI clientele by serving "Presumed Low-Income Persons." Presumed Low-Income Persons include the following groups: abused children, battered spouses, elderly persons (62 years or older), severely disabled adults (as defined by the Bureau of Census), homeless persons, illiterate adults, persons living with AIDS, and migrant farm workers. Although household income will not be required to be documented, applicants must still verify and document the Presumed Low-Income Person status of their clients, race and ethnicity data, and head of household status. In addition, projects serving Presumed Low-Income Persons must ensure 100 percent of their clientele are Presumed Low-Income Persons.
h. Applicants may use CDBG funds to cover the salary/wages and fringe benefits of staff on the applicant's payroll who directly provide service to the target clients. Supplies, rent, utilities, publications/printing, insurance, and the like directly supporting the implementation of client services may be covered by CDBG funds.
i. Direct cash payments to individual clients are not an eligible project activity. (This includes rent, utilities, and security deposits.) However, stipends to LMI clients served may be eligible, subject to City approval, if the stipends are demonstrated to be an integral part of the service being provided, are explicitly called out in the project budget, and are paid to LMI clients on the organization's payroll.
j. The provision of tenant subsidies exclusively for rental payments is not an eligible project activity.
a. When completing a procurement process to purchase goods and/or services, Applicants are subject to adhering to 2 CFR 200.320 based the type of procurement that will be completed. In addition, Applicants must also adhere to 2 CFR 200.321 that requires necessary affirmative steps to be taken to assure that minority business and women business enterprises are used when possible. For subcontract awards totaling $10,000 or more, a report will be required to be completed and submitted to CDD upon completion of the procurement process.
k. **If your organization did not receive funding under the PS category in prior years, a one-on-one technical assistance appointment with the Community Development Division is highly recommended during the RFP phase. Please**

ensure detailed descriptions of your organization's proposed CDBG activities are presented for discussion.

2. **Nonprofit Capital Improvement Projects: Facilities (NCIP-F):** This category funds projects to improve facilities operated by nonprofit applicants to provide onsite public services. Sample projects include, but are not limited to, converting storage space into classroom space for new tutoring services, or expanding a commercial kitchen space to increase the number of LMI clients trained by the applicant on food preparation. Applicants must consider the following regarding their project proposals:
    a. No allocation of CDBG funds of less than $100,000 will be awarded to individual NCIP-F projects.
    b. Applicants may submit only one response under this category, and partnerships are not allowed. One site address/Assessor's Parcel Number (APN) equals one facility; a different site address/APN equals another facility. Verification of the facility APN must be included in the Proof of Ownership or Lease Agreement document required to be attached to the RFP, along with the real estate legal description.
    c. Nonprofit facilities to be improved must be located in the City of San Diego and must primarily serve City of San Diego residents.
    d. Improvements to temporary shelters and transitional housing for the homeless (including battered spouses, disaster victims, runaway children, drug offenders, and parolees) are eligible for funding under this project category.
    e. Improvements to neighborhood clinics, hospitals, nursing homes, and convalescent homes are eligible for funding under this project category.
    f. Water/sewer improvements, street improvements, or other public right-of-way improvements are not eligible for funding through the CDBG Annual NOFA.
    g. Interior facility restroom improvements including ADA are eligible.
    h. Improvements to areas of the facility that will not be used to serve clients (e.g., administrative offices or storage areas) are not eligible for funding and may not be included in the description of CDBG project activities to be conducted.
    i. Applicants must demonstrate that the portion of the facility to be improved is utilized by City of San Diego residents. If any of the portion of facility to be improved is regularly utilized by non-City of San Diego residents, the expectation is that leveraged funds will also be expended to complete the facility improvements.
    j. Facility improvements with a useful life of less than ten years may not be included in the CDBG budget.
    k. Applicants with an open CDBG-funded facility improvement project at the time of the FY 2025 RFP response submission are prohibited from submitting a FY 2025 RFP response to improve the same facility per San Diego Council Policy 700-02. An open CDBG project is defined as a project that has not been completed by CDD staff in HUD's IDIS system. Completion of CDBG projects in HUD's IDIS system is dependent on CDD staff's verification that all program and fiscal reporting requirements have been met by the Applicant, including submission of documentation that the designated CDBG National Objective has been achieved. Applicants awarded FY 2025 CDBG funding to complete facility improvements must maintain written documentation on unduplicated City of San Diego LMI clients (including household income, race and ethnicity data, and head of household status) using the facility after completion of the improvements (i.e., received direct services onsite). At a minimum, data will be required to be submitted for a duration of two (2) months after the facility improvements are made accessible to City of San Diego clients.

l. Applicants serving all residents of a designated area that is primarily residential may meet the CDBG National Objective of benefitting LMI persons by documenting that at least 51 percent of the residents within the designated service area are LMI. HUD eligible census block groups are included as an attachment to this RFP Handbook. To qualify under the LMA National Objective category, the proposed facility to be improved must be open and accessible to all residents within the designated service area, with no targeted limitations within the designation service area or access by persons residing outside of the designated service area. Otherwise, applicants must meet the LMC National Objective category by documenting that at least 51 percent of the facility users are LMI.

m. Projects completing improvements to centers serving seniors, centers serving persons with disabilities, homeless facilities, centers serving youth, abused and neglected children facilities, and facilities for AIDS patients may be considered as serving "Presumed Low-Income Persons." Presumed Low-Income Persons include the following groups: abused children, battered spouses, elderly persons (62 years or older), severely disabled adults (as defined by the Bureau of Census), homeless persons, illiterate adults, persons living with AIDS, and migrant farm workers. To be recognized as a project that serves Presumed Low-Income Persons, 100 percent of the project clients served in the facility to be improved must be documented members of the populations listed. Although household income will not be required to be documented, verification and documentation of the "Presumed Low-Income Person" status of the clients served will be required. Documentation of race and ethnicity data and head of household status will also be required. If 100 percent of the project clients are NOT Presumed Low-Income Persons, then the project must ensure that 51 percent or more of the clients benefitting from services housed in the improved facility have incomes below 80 percent of the Area Median Income. (Current HUD Income Levels are included as an attachment to this RFP Handbook.)

n. Applicants will be responsible for directly demonstrating and documenting that the improved facility will continue to meet the CDBG National Objective of benefitting LMI persons for at least five (5) years after project closeout is reported to HUD. In addition, applicants will be responsible for ensuring the proper maintenance of the quality of the improvements during that same period. A Declaration of Covenant will be recorded against the property to certify/ensure compliance of meeting this requirement, as stated in San Diego City Council Policy 700-02 for a period of 5 years after project closeout **NOTE: The determination of the 5-year period may not include periods of short- or long-term facility closures to the public consisting of one or more weeks.**

o. Funding for design and plan development is not allowable and may not be included in the description of project activities to be conducted. However, budget may be requested to cover minor design and plan adjustments resulting from the permit application process with the City's Development Services Department.

p. Funding for applicant administration expenses, including personnel, are not allowable and may not be included in the description of CDBG project activities to be conducted, but may be included in the Non-City budget.

q. A sealed bid/invitation for bid procurement process in accordance with federal, state, City of San Diego and CDBG-specific requirements must be completed to implement project construction activities. This includes notification that the project is subject to federal and state prevailing wage requirements, Section 3 requirements, and contracting with minority business and women business enterprises. The sealed bid/invitation for bid must be issued within 180 days after

the execution of the CDBG agreement, which should be detailed in the Project Schedule section of the RFP.

r. Third-party construction management services may be included in the budget but cannot exceed 6 percent of the project's total CDBG Construction/Renovation budget. Services may include, but are not necessarily limited to: scheduling, administering subcontracts, prevailing wage monitoring, supervising all onsite construction activities, daily labor logs, project-specific safety plans, accounting, monthly billing, site photos, progress reports, project close out, and punch list activities. **NOTE: Third-party construction management services must be procured in accordance with federal procurement requirements. If CDBG funds are not expended for these services, verification that the Applicant's procurement policies and procedures were completed must be documented. Additionally, parties involved in the development/drafting of FY 2025 CDBG RFP descriptions or materials are prohibited from competing in the procurement process issued for the CDBG project.**

s. When completing the procurement process, Applicants are subject to adhering to 2 CFR 200.321 that requires necessary affirmative steps to be taken to assure that minority business and women business enterprises are used when possible. For subcontract awards totaling $10,000 or more, a report will be required to be completed and submitted to CDD upon completion of the procurement process.

t. The budget for construction costs must be broken down by labor, materials, permits/approvals, and revisions to construction documents/drawings and entered into ED Grants as such under the Construction/Renovation line item. Construction costs must exclude construction management.

u. Applicants must have prior authorization from property owners to conduct improvement activities, if proposed improvements are to be completed on properties not owned by the applicant organization. Applicants will be required to document approval for their proposed scope of work by completion of the following forms within the certifications tab of the RFP application: 'Certification Regarding Use of Non-City-Owned or Non-Applicant-Owned Real Property,' 'Certification Regarding Use of City-Owned Real Property,' and 'Certification Regarding Property Owner Authorization to Complete CDBG Activities on Property.'

v. At the time of RFP submission, applicants will be required to confirm project site control via written authorization from the property owner (e.g., lease or deed of trust) to provide services to LMI individuals through a period of not less than five (5) years from the date of proposed project completion.

w. Applicants will be required to confirm with the City's Development Services Department whether City permits are required for the proposed CDBG-funded scope of work through a Preliminary Review Process (or provide information regarding existing permits or their status as applicable).

x. Davis-Bacon and Related Acts requirements shall apply to the project proposed in response to this RFP. Applicable prevailing federal wage rates and fringe benefits must be taken into consideration in the determination of the total project budget listed in the RFP response.

y. State prevailing wage laws and requirements shall also apply to the project proposed in response in this RFP. Applicable state prevailing wage rates and fringe benefits must also be taken into consideration in the determination of the total project budget listed in the RFP response. **NOTE: The highest applicable wage rate must be considered.**

z. NCIP-F projects awarded an excess of $200,000 in CDBG funding to complete construction activities are subject to Section 3 requirements. A new Section 3

regulation became effective on November 30, 2020, and requires the tracking of total labor hours worked. Benchmarks have been set for hours worked by Section 3 workers (25% of total number of labor hours) and Targeted Section 3 workers (5% of total number of labor hours). If the Section 3 benchmarks are not met, qualitative efforts must be reported. When determining the total project budget, the length of time between the RFP submission and the bid award, and any potential increases in labor and material costs in between, should be factored into the amount requested. **The applicant must submit a signed cost estimate based on a cost/price analysis prepared by a Certified Professional Estimator or licensed contractor who will be precluded from participating in any associated procurement opportunities. The cost estimate must provide confirmation that federal and state prevailing wage rates and fringe benefits were taken into consideration. Additionally, estimated costs related to bond fees, profit/overhead fees, insurance costs, and/or contingency fees are not eligible to be included in the CDBG budget but may be included in the Non-City portion of the total project budget. Note: An updated cost/price analysis will need to be completed prior to the issuance of a sealed bid for the project.**

aa. If the total project budget presented in the RFP document is later determined to be insufficient to complete the bidding process, the CDBG funds may be subject to reprogramming if construction activities are not able to be implemented.

bb. HUD rules prohibit contractors involved in developing and drafting specifications, requirements, statements of work, invitations for bids, or requests for proposals from subsequently competing in associated procurement opportunities. Doing so may result in the appearance of possible unfair competitive advantage to that bidder, as a well improper selection of the lowest and most responsive bidder. Full efforts must be made to ensure all procurement processes completed do not result in, or give an appearance of, an unfair competitive advantage to any potential bidder. As such, **contractors assisting RFP applicants in the development of the project descriptions/scope of work described in the FY 2025 CDBG RFP will be prohibited from submitting a bid to complete project activities should the project be approved for FY 2025 CDBG funding**.

cc. All facilities and services assisted with CDBG funds must be accessible to persons with disabilities. Accessibility includes such things as: entrance ramps, parking with universal logo signage, grab bars around commodes and showers, top of toilet seats that meet required height from the floor, drain lines under lavatory sink either wrapped or insulated, space for wheelchair maneuverability, accessible water fountains, access between floors (elevators, ramps, lifts), and other improvements needed to assure full access to funded facilities/programs, including serving persons who are blind or deaf. Applicants will need to confirm whether the proposed project site meets federal standards for accessibility by the disabled. **NOTE: The project site must first be fully compliant with the Americans with Disabilities Act (ADA) before other construction activities can be implemented with CDBG funding. ADA upgrades may be included in the description of project activities to be conducted.**

dd. **If your organization is applying for FY 2025 CDBG funding under the NCIP-F category, a one-on-one technical assistance appointment with the Community Development Division is required during the RFP phase. An initial 30-minute technical assistance appointment will be required, and an additional 30-minute appointment at a later date with NCIP project management staff may be required at the request of CDD staff. Please ensure detailed descriptions of your organization's proposed CDBG activities are presented for discussion.**

3. **Community & Economic Development: Microenterprise Technical Assistance (CED-MTA):** This category funds programs providing technical assistance and general business support to LMI individuals wishing to establish a microenterprise or expand an existing microenterprise they own. Funding cannot be used to provide financial grants or loans to microenterprises. A microenterprise is defined as a business with five or fewer employees, including the owner. Applicants must consider the following regarding their project proposals:
    b. No allocation of funds less than $50,000 will be awarded to CED-MTA programs.
    c. Assistance provided with CDBG funds is limited to City of San Diego LMI clients and businesses located in the City of San Diego only.
    d. CED projects must demonstrate microenterprise technical assistance services provided directly by the applicant organization to individual LMI clients or individual businesses owned by LMI persons, and **not through partners or subcontractors**.
    e. Applicants must directly be able to demonstrate that the project meets the CDBG National Objective of benefitting LMI persons by assisting LMI clients who want to establish a microenterprise or expand an existing microenterprise.
    l. One hundred percent of the clients assisted must be individuals from LMI households. (Current HUD Income Levels are included as an attachment to this RFP Handbook.) Applicants awarded FY 2025 CDBG funding to complete this activity must maintain written documentation on unduplicated City of San Diego LMI clients (including household income, race and ethnicity data, and head of household status). **Client household income verification and eligibility determination is required prior to the provision of CDBG assistance under this category.** Applicants must be able to demonstrate they have an intake and documentation process that would ensure the accurate collection and reporting of such data monthly.
    f. Note that the CDBG definition of a microenterprise is a business that has five (5) or fewer employees, one (1) or more of whom owns the enterprise. All part-time and full-time employees on the business payroll at the time of assistance and/or loan or grant application must be counted. Eligible microenterprise assistance activities refer to technical assistance and/or general support services to LMI business owners or potential LMI business owners that directly lead to the establishment of either new businesses or the expansion of existing (and stable) businesses (e.g., new employees, higher sales volume, or revenue, etc.). If funded, programs must be able to track and report on the status of the businesses assisted for a certain period after CDBG project closeout. **Projects that only provide general workshops or on-the-job training as services to assist individual clients and refer them for job placements will not qualify as a microenterprise assistance project. In addition, projects that only provide workshops or classroom curriculum with no direct individual assistance provided to clients in the establishment of a new business or in the expansion of an existing business will not qualify as a microenterprise assistance program.** Projects that only provide one specific type of technical assistance that does not directly lead to the establishment of either new businesses or the expansion of existing businesses will also not qualify as a microenterprise assistance program. Funding requests for such activities must be submitted under the PS category.
    g. Applicants awarded funding to implement microenterprise assistance activities will be required to coordinate with other awarded applicants in the CED category to: (1) ensure clients receiving the same type of microenterprise assistance from other awarded applicants are not reported more than once to the City; and (2) ensure businesses established or expanded as a result of receiving the same type of

microenterprise assistance from other awarded applicants are not reported more than once to the City.

h. Provision of direct cash payments to individual households, clients, or business owners is not an eligible project activity.

i. When completing a procurement process to purchase goods and/or services, Applicants are subject to adhering to 2 CFR 200.320 based the type of procurement that will be completed. In addition, Applicants must also adhere to 2 CFR 200.321 that requires necessary affirmative steps to be taken to assure that minority business and women business enterprises are used when possible. For subcontract awards totaling $10,000 or more, a report will be required to be completed and submitted to CDD upon completion of the procurement process.

j. **If your organization did not receive CDBG funding under the CED category in prior years, a one-on-one technical assistance appointment with the Community Development Division is recommended during the RFP phase. Please ensure detailed descriptions of your organization's proposed CDBG activities are presented for discussion.**

Project Implementation Period & Completion Dates

Projects falling under the following categories must be completed by **June 30, 2025**, and have 12 months to be implemented, starting on July 1,2024:

- PS
- CED-MTA

Projects and programs falling under the following categories must be completed by **June 30, 2026**, and have 24 months to be implemented, starting on July 1, 2024:

- NCIP-F

It is anticipated that FY 2025 CDBG agreements will be executed on or prior to July 1, 2024, and work must proceed immediately thereafter. The proposed projects and programs described in the RFP response must be completed and beneficiaries documented (National Objective met) prior to the completion dates mentioned above. **Failure to comply with the completion dates may negatively impact the applicant's ability to successfully compete for future CDBG funding since timeliness may be an indicator of performance used by the City to evaluate its partner organizations.**

VIII. PERFORMANCE INDICATORS

As part of the FY 2025 Scoring Criteria, CDBG subrecipient performance in FY 2023 will be reviewed. A 'Performance Report Card' will be compiled for each completed project awarded CDBG funding in FY 2023. The report cards will be used to determine how many points, if any, should be deducted from the total scores of the FY 2025 project proposals. Application of the report cards will be based on a combined "project type to project type" and "organization to organization" correspondence. For example, if an applicant submits a FY 2025 PS project proposal and it completed a FY 2023 PS project, then the results of the report card for the FY 2023 PS project will be applied to the FY 2025 PS project proposal. With that said, a FY 2025 NCIP project proposal will not be affected by the same PS report card but only

by a report card of a FY 2023 NCIP project (if available) that was completed by the same applicant. As such, no deduction will occur if there is no available corresponding Performance Report Card.

Assessment Area	Indicators	Standards
Fiscal Performance	• Balance of Award $ at Closeout • Total of Disallowance $ at Closeout • Number of Disallowances Processed	• Award Balance: ≥ 10% (-0.50 point) • Total Disallowances $: ≥10% (-0.25 point) • Disallowance Frequency: ≥ 50% (-0.25 point)
Programmatic Performance	• Number of Clients Served **OR** • Number of Projects Completed	• 80% of target met (-0.00 point) • 51-79% of target met (-0.50 point) • ≤50% of target met (-1.0 point)
Leveraged Funding	• Stated RFP Funding VS actual closeout funding	• Discrepancy > 25% is a deduction of 0.5 points

A maximum of two and a half (2.5) points may be deducted from the total score (derived from the averaged total of the CPAB scores and eligibility points awarded by CDD staff) of the FY 2025 project proposal, based on the proposing organization's past performance.

IX. APPLICABLE LAWS, RULES & REGULATIONS

CDBG programs are subject to numerous federal and local requirements. These include, but are not limited to, those that are listed below. Additional requirements can be found in the CDBG regulations in HUD's website and the City's CDBG Program website. Applicants are encouraged to familiarize themselves with these requirements to ensure their organization has the adequate administrative systems in place.

- **24 CFR Part 570, as amended**
  The regulations governing the Community Development Block Grant Program.

- **Fair Housing Act**
  Title VIII of the Civil Rights Act of 1968 (Fair Housing Act), as amended, prohibits discrimination in the sale, rental, and financing of dwellings, and in other housing-related

transactions, based on race, color, national origin, religion, sex, familial status (including children under the age of 18 living with parents or legal custodians, pregnant women, and people securing custody of children under the age of 18), and disability.

- **24 CFR Part 1 and Part 6, Public Law 90-284, Fair Housing Act**
  The regulations issued following Title VI of the 1964 Civil Rights Act (as amended by Executive Orders 11246, 11375, and 12086) and Section 109 of the 1975 Housing and Community Development Act that prohibits discrimination in HUD programs based on sex, race, color, national origin, and religion. Further, applicable programs and activities must be administered in such a manner as to affirmatively further the policies of the Fair Housing Act.

- **24 CFR Part 7 and Part 41**
  The regulations on equal employment opportunity without regard to race, sex, color, religion, age, national origin, and disability in federally assisted construction projects.

- **ADA Compliance**
  Americans with Disabilities Act (42 U.S.C. 12101-12213) and implementing regulations at 28 CFR Part 35.

- **Section 504 of the Rehabilitation Act of 1973, 24 CFR Part 40 and 41**
  The regulations that set forth policies and procedures for the enforcement of standards and requirements for accessibility to individuals with disabilities. The Architectural Barriers Act of 1968 and the American with Disabilities Act (ADA) provide additional laws on accessibility and civil rights to individuals with disabilities.

- **Age Discrimination Act of 1975 (42 U.S.C. 6101)**
  The regulations that prohibit discrimination on the basis of age.

- **24 CFR Part 75**
  Regulations outlining requirements of Section 3 of the Housing and Urban Development Act of 1968 providing for economic opportunities for low- and very low-income local residents. All projects funded with CDBG funds must comply with Section 3 of the Housing and Urban Development Act of 1968, revised, requiring that to the greatest extent feasible opportunities for training and employment be given to low- and moderate-income persons residing within the City of San Diego, and that contracts or works in connection with the project be awarded to eligible business concerns which are located in or owned in substantial part by persons residing in the City of San Diego. Special documentation is required for projects receiving CDBG funding more than $200,000.

- **29 CFR Part 3 and Part 5**
  The regulations on labor standard provisions that include the payment of prevailing wages on federally assisted projects as mandated by the Davis-Bacon Act and the Contract Work Hours and Safety Standards Act. CFR 24 Part 70 provides information on the use of volunteers.

- **Copeland "Anti-Kickback" Act (18 U.S.C. 874 and 40 U.S.C. 276c)**
  The regulations on contracts for construction or repair awarded by subrecipients shall include a provision for compliance with the Copeland "Anti-Kickback" Act.

- **24 CFR Part 58**
  The regulations prescribing the Environmental Review procedure under the National Environmental Policy Act of 1969.

- **National Flood Insurance Act of 1968, 24 CFR Part 55 under Executive Order 11988**
  The regulations for proposed projects and properties located in a floodplain.

- **36 CFR Part 800**
  The regulations outlining the procedures for the protection of historic and cultural properties.

- **Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970**
  These policies provide for displacement, relocation assistance, and real property acquisition as defined by 42 U.S.C. 4601 (URA) (42 U.S.C. 4601), and implementing regulations issued by the Department of Transportation at 49 CFR Part 24 and Section 104(d) of the Housing and Community Development Act of 1974 (42 U.S.C. 5304d).

- **Residential Lead-Based Paint Hazard Reduction Act of 1992**
  The regulations implemented by 24 CFR Part 35, Subpart B imposes certain requirements on disclosure of lead-based paint hazards.

- **24 CFR Part 24**
  The regulations that prohibit use of debarred or suspended contractors on federally assisted projects and Drug-Free Workplace requirements; issued according to Executive Order 12459.

- **2 CFR Part 200 Subpart E**
  Establishes principles and standards for determining allowable costs under federal grants.

- **2 CFR Part 200 Subpart B**
  Uniform Administrative Requirements for Grants and Other Agreements with Institutions of Higher Education, Hospitals and Other Non-Profit Organizations.

- **2 CFR Part 200 Subpart F**
  Audits of States, Local Governments and Non-Profit Organizations in connection with federal awards. This includes the single audit requirement for organizations that expend $750,000 or more of federal awards during the fiscal year.

- **2 CFR 200.230**
  The methods of procurement that must be followed by Organizations receiving federal awards.

- **2 CFR 200.231**
  The necessary affirmative steps Organizations receiving federal awards must take to assure minority business and women business enterprises and labor surplus area firms are used when possible.

- **HUD Requirements**
  All other required reports, circulars, and procedures when applicable.

- **Administrative Procedures**
  The rules issued by the City in relation to process and procedures.

- All applicable provision of the **City of San Diego Municipal Code**.

- **City of San Diego Purchasing & Contracting Department Insurance Checklist**
  A guide on the insurance requirements that organizations receiving CDBG funding must adhere to in order to execute a CDBG agreement with the City of San Diego.

- **California Labor Code Sections 1720 through 1861**
  Compliance with prevailing wage requirements.

- **California Environmental Quality Act (CEQA)**
  Statutes, guidelines, and other information from the State of California on the law governing environmental review.

- **System for Award Management**
  An official website of the United States government used by entities to register themselves to do business with the U.S. government and update or renew their entity registration. It may also be used by interested parties to check the status of an entity registration and to search for entity registration and exclusion records. All organizations receiving CDBG funding must be registered in SAM and maintain an 'active' registration status throughout the agreement period.

X. AGREEMENT EXECUTION

Applicants awarded FY 2025 CDBG funding will be required to meet with Community Development Division (CDD) staff to go over the FY 2025 agreement execution process. Subrecipients will be invited to attend a CDBG Agreement Execution Workshop where the process, timeline, and supporting documentation will be explained. Requirements and processes to be discussed may include the following:

HUD CDBG Project Performance Outcome Measures

The following will be incorporated into the Scope of Services/Scope of Work developed for approved FY 2025 CDBG projects, based on the FY 2025 CDBG RFP project details:

- PROJECT OBJECTIVE
  a. Creating Suitable Living Environments relates to activities that are designed to benefit communities, families, or individuals by addressing issues in their living environment. This objective relates to activities that are intended to address a wide range of issues faced by LMI persons, from physical problems with their environment, such as poor-quality infrastructure, to social issues, such as crime prevention, literacy, or elderly health services.

  b. Providing Decent Housing covers the wide range of housing activities that could be undertaken with CDBG funds. This objective focuses on housing activities where the purpose is to meet individual family or community housing needs. It does not include programs where housing is an element of a larger effort to

make community-wide improvements, since such programs would be more appropriately reported under 'Suitable Living Environments.'

c. Creating Economic Opportunities applies to activities related to economic development, commercial revitalization, or job creation/retention.

- PROJECT OUTCOME
  a. Availability/Accessibility applies to activities that make services, infrastructure, public services, public facilities, housing, or shelter available or accessible to LMI people, including persons with disabilities. In this category, accessibility does not refer only to physical barriers, but also to making the basics of daily living available and accessible to LMI people where they live.

  b. Affordability applies to activities that provide affordability in a variety of ways to LMI people. It can include the creation or maintenance of affordable housing, basic infrastructure hook-ups, or services such as transportation or day care. Affordability is an appropriate objective whenever an activity is lowering the cost, improving the quality, or increasing the affordability of a product or service to benefit a low-income household.

  c. Sustainability applies to activities that are aimed at improving communities or neighborhoods, helping to make them livable or viable by providing benefit to persons of LMI or by removing or eliminating slums or blighted areas, through multiple activities or services that sustain communities or neighborhoods.

CDBG Benefit Categories

In accordance with the CDBG program statutory requirements, each project funded must meet one of three National Objectives: (1) Benefit to low- to moderate-income (LMI) persons; (2) Aid in the prevention or elimination of slums or blight; or (3) Meet a need having a particular urgency (referred to as urgent need). The City of San Diego has no designated slums or blight nor any urgent needs in accordance with applicable HUD standards and regulations and, as such, projects funded with CDBG monies within the City must benefit LMI persons. (Refer to Attachment 1, 'Low/Moderate-Income Persons National Objective,' for more details.) In the RFP phase, applicants will be required to select one of the following to demonstrate that the project benefits LMI persons for each RFP response submitted:

- Area Benefit Activities (LMA). An activity that benefits all residents in a particular area, where at least 51 percent of the residents are LMI persons. Such an area need not be coterminous with census tracts or other officially recognized boundaries, but the entire area must be served by the activity. **An activity that serves an area that is not primarily residential in character shall not qualify under this criterion.** CDBG regulations require documentation of area boundaries served.

- Limited Clientele Activities (LMC). An activity that benefits a limited clientele, at least 51 percent of whom are LMI persons, or benefits clients presumed to be low-income persons. Presumed benefit clients are abused children, battered spouses, elderly persons (age 62 years or older), adults meeting the Census Bureau's current Population Reports definition of "severely disabled," homeless persons, illiterate adults, persons living with AIDS, and migrant farm workers. CDBG regulations require the subrecipient to document the demographics and income levels of clientele provided such activities.

- Housing Activities (LMH). An activity carried out for the purpose of providing or improving permanent residential structures which, upon completion, shall be occupied by at least 51 percent LMI households. CDBG regulations require the subrecipient to document the number of households served, number of units completed, and demographics and income level of the household occupying the unit.

- Job Creation or Retention Activities (LMJ). An activity designed to create or retain permanent jobs, where at least 51 percent of the jobs, computed on a full-time equivalent basis, involve the employment of LMI persons. CDBG regulations require the subrecipient to document one of the following: (1) for an activity that creates jobs, the recipient must document that at least 51 percent of the jobs will be held by, or will be available to, LMI persons; and (2) for an activity that retains jobs, the recipient must document that the jobs would have been lost without CDBG assistance and that either both: (i) the job is known to be held by a LMI person or the job can reasonably be expected to turn over within the following two (2) years; and (ii) that steps will be taken to ensure that it will be filled by, or made available to, a LMI person upon turnover.

Insurance Requirements

DOCUMENTATION OF THE REQUIRED INSURANCE COVERAGE FOR THE FY 2025 PERIOD MUST BE SUBMITTED TO THE COMMUNITY DEVELOPMENT DIVISION OFFICE BY EARLY JUNE 2024 (A SPECIFIC DATE WILL BE DESIGNATED). Note the following insurance requirements are subject to change by the Purchasing & Contracting Department.

- **Commercial General Liability [CGL] Coverage Document Accompanied with Endorsement.** The insurance must include coverage for liability arising from any and all personal injury, bodily injury, and property damage in the amount of $1,000,000 per occurrence, and subject to an annual aggregate of $2,000,000 with no endorsement or modification of the CGL limiting the scope of coverage for either the insured vs. insured claims or contractual liability. All defense costs shall be outside the limits of the policy. The policy providing coverage for CGL must be endorsed to include as an Insured, the City of San Diego and its respective elected officials, officers, employees, agents, and representatives. In addition, the policy must also be endorsed to expressly provide that the policy is primary and non-contributory to any insurance that may be carried by the City.

- **Commercial Automobile Liability [CAL] Coverage Document Accompanied with Endorsement.** For all the subrecipient's automobiles (including owned, hired, and non-owned automobiles), the insurance must provide coverage at least as broad for bodily injury and property damage, for a combined single limit of $1,000,000 per occurrence. The insurance certificate should reflect coverage for any automobile [any auto]. The policy providing coverage for CAL must be endorsed to include as an Insured, the City of San Diego and its respective elected officials, officers, employees, agents, and representatives. In addition, the policy must also be endorsed to expressly provide that the policy is primary and non-contributory to any insurance that may be carried by the City.

- **Workers Compensation Insurance [WCI] Coverage Document Accompanied with Endorsement.** For all of the subrecipient's employees who are subject to the CDBG agreement with the City of San Diego, the subrecipient must keep, in full force and

effect, a Workers' Compensation policy to the extent required by the applicable federal or state law. The policy must provide a minimum of $1,000,000 of employers' liability coverage. The City must be provided with an endorsement that the insurer waives the right of subrogation against the City and its respective elected officials, officers, employees, agents, and representatives.

W-9 Form, Federal and State Nonprofit Status Letters, and FAIC Rate

The following documentation must be submitted to the Community Development Division office in early June 2024 (a specific date will be specified) prior to agreement execution:

- The organization's most recent signed W-9 form.
- If claiming nonprofit tax status, the organization must submit current federal and state nonprofit tax status determination letters if they were not already submitted with the RFQ response ('entity status letters' do not meet this requirement).
- If claiming a Federally Approved Indirect Cost (FAIC) Rate, the organization must submit a valid federally approved cost rate agreement if what was submitted with the RFQ response was temporary/not final.

NCIP Site Inspection

A site inspection by CDD staff may be conducted on NCIP-F projects with sites identified, prior to the execution of a FY 2025 CDBG agreement between the City and organization awarded with FY 2025 CDBG funding.

CDBG Budget Items

RFP applicants should note the following eligible and ineligible expenditures when developing their FY 2025 CDBG project budgets:

a. Eligible Expenditures
   Project expenditures must meet the following requirements to be eligible for reimbursement:
   1. They must be approved in detail as part of the executed CDBG agreement and budget justification forms in alignment with HUD regulations.
   2. They must be essential to the proper and efficient performance of the service as required by the executed CDBG agreement.
   3. The invoices, receipts, and other supportive documents should be dated during the month requested for reimbursement.
   4. During fiscal monitoring and/or audits, original receipts/invoices must be reviewed for authenticity and identification of funding sources that reimbursed the expense. All original, unmarked documents MUST be maintained at the local office address listed in the CDBG agreement for immediate monitoring review and/or audits. CDD staff will not travel to national offices for this purpose.
   5. They must be reasonable and comparable to the expenditures paid by the organization or other organizations providing similar services.
   6. They must be expended against the authorized line items in each category contained in the executed agreement budget that has been approved by the City.
   7. They must be thoroughly documented, and the net expenditures must reflect all applicable credits to the organization, such as purchase discounts, rebates,

allowances, receipts from the sale of publications or materials, and any other types of income or credits.

8. They must comply with the written policies of the organization, as approved by its governing body, regarding the employment, salaries and wage rates, working hours, holidays, fringe benefits, vacation and sick leave privileges, military leave, jury duty, travel, and other personnel matters as stated in the detailed budget forms in the executed CDBG agreement. If a unique payment is made for an employee, organization shall document and explain clearly how it relates to the project, how the organization policies support the payment and what funding source would normally pay this item. Example: Fringe payment made to an organization other than an insurance company or other fringe provider.
9. The organization is to keep in mind that the expenditure must be for direct services to the project or client. **TEST:** Is the expense paid as part of organization operating expenditures, if CDBG funding were not available? If it is, then this would be considered too high a level for indirect or direct cost and would be ineligible.

b. Ineligible Expenditures

Anticipated expenditures that do not clearly meet the eligibility requirements stated above are ineligible for reimbursement. Any of these expenditures submitted for payment will be disallowed and cannot be resubmitted. Ineligible costs include, but are not limited to, the following:

1. Bad Debts
   Loss resulting from uncollectible accounts or claims.
2. Commingling of Funds
   Expenditures related to services funded by sources other than CDBG funds are ineligible if they are charged against the CDBG funds.
   a. For subrecipients that operate many programs, or have more than one funding source, the subrecipient shall allocate expenditures to the various programs or funding sources according to an approved Cost Allocation Plan.
   b. The costs should be allocated on the basis most appropriate and feasible under the circumstances. Examples include number of hours spent, number of employees, or square footage utilized for the project.
   c. The subrecipient shall maintain proper documentation related to the allocation of expenses (i.e., timecards, time summaries, square footage measurements, etc.).
3. Contingency Funds
   The transfer or contribution of funds to a contingency reserve, or similar provisions for meeting future unforeseen expenses.
4. Fundraising
   Costs of organized fundraising, including financial campaigns, solicitation of gifts and bequests, and similar expenses paid to raise capital or obtain contributions for the project or subrecipient, regardless of the purpose for which the funds shall be used. In addition, expenditures to solicit contributions or donations for the project or subrecipient, including salary expenses.
5. Contributions and Donations
   Cash or in-kind contributions or donations to any subrecipient or cause.

6. Entertainment/Subrecipient Events
   Expenditures for social activities, amusement, entertainment, and general subrecipient events (i.e., space rentals, flyers/brochures, staff time/salaries, lodging, meals, refreshments, beverages, and gratuities). Examples of such events include, but are not limited to, subrecipient fundraising events, groundbreaking events, open house events, subrecipient staff meetings or staff development meetings/retreats, and staff/client birthday or other parties.
7. Fines and Penalties
   Expenditures to pay fines or penalties resulting from violations or noncompliance with federal, state, or local laws, rules, or regulations.
8. Late Fees and Interest
   Late fees and interest charged by vendors for invoices paid after the due date or fees associated with returned checks. Also, credit card interest or fees cannot be paid using CDBG funds.
9. Interest and Professional Fees
   Interest on any type of loan, bond discounts, financing and refinancing fees, and legal/professional fees related thereto.
10. Membership Fees/Subscriptions
    Fees for membership in any organization that is substantially involved in advocacy, lobbying, and other activities which are intended to influence legislation at the federal, state, or local levels, as well as fees for membership for which the purpose does not support the scope of work/scope of services of the executed CDBG agreement. Any memberships or subscriptions that is not directly associated to project clients or provision of client services.
11. Meeting Attendance Fees
    Fees or salaries claimed for attending meetings that are not open to attendees on a non-segregated basis. In addition, fees, or salaries for attending workshops or training sessions that do not support the scope of work/scope of services of the executed CDBG agreement; or are attended by personnel not budgeted under the executed CDBG agreement or are attended by project volunteers.
12. Training/Conference Expenses
    Training/conference expenses or salaries that do not clearly support the scope of services/scope of work of the executed CDBG agreement.
13. Out-of-Area Training
    Expenditures for travel outside the San Diego metropolitan area for administrative or project staff to attend training activities or conferences.
14. Credit Cards
    Credit Cards, business or personal, cannot be used to purchase materials or services to be reimbursed by CDBG. Many credit cards have points, mileage, percent reductions on purchases or other bonuses for use of the card. All these benefits are considered program income and would have to be returned to CDBG. It would be difficult to measure and detail the program income received in relation to the CDBG-eligible expenditure claimed. Therefore, the use of credit cards is ineligible.
15. Gift Certificates/Cash Awards
    Gift certificates or cash awards given to clients or staff, including cash payments to staff for compensatory time earned or bonus payments to employees, subcontractors, or consultants. NOTE: Any project-related gift certificates must be approved in the executed CDBG agreement, inventoried, and detailed to document how they are used for project clients or the provision of project

services, and such details are required to be submitted with the monthly RFR submittal packet.

16. Deposits
    Reimbursable deposits for rent, equipment, utilities, or other subrecipient expenditures are not eligible. Expenditures to pay for a past deposit for rent, equipment, or any other items are not eligible. Non-reimbursable deposits that go towards the overall payment of an item is eligible.
17. General Expenses
    General expenses for carrying out the non-project-related functions of the subrecipient or expenses unrelated to the direct scope of work/scope of services.
18. Purchases Paid with Personal Accounts
    Expenses paid by subrecipient personnel utilizing personal cash, personal checking accounts, or personal credit cards.
19. Services for Other City Departments/Agencies
    Expenses for performing services for any other City department, or governmental, nonprofit, or private agency during the executed CDBG agreement period or any previously executed CDBG agreement period.
20. Costs for Goods or Services
    Costs for goods or services not incurred within the executed CDBG agreement period. (Incurred expenses are defined as those expenses that have occurred and may or may not have been paid.) Expenditures incurred prior to the start date or after the end date listed in the executed CDBG agreement between the City and the subrecipient are not eligible.
21. Mortgage Payments and Property Taxes
    Mortgage payments and property taxes are not eligible expenditures. CDBG funds can be used to reimburse rent or lease payments to property owners for nonprofit facilities.
22. Automobile Purchase
    An automobile purchase is not an eligible expenditure.
23. Accrued Vacation and Sick Leave
    CDBG funds cannot be used as pay in lieu of vacation or as termination pay of an employee as the project is completed. Annual leave cannot be paid into a reserve and distributed after the project is completed. When an employee retires or terminates employment during the executed CDBG agreement period, the payment for unused vacation or sick leave should be allocated based on vacation and sick leave accrued during the executed CDBG agreement period and other funding sources used for the project.
24. File Storage Fees
    Fees to store project files. Compliance with records retention requirements is an administrative responsibility of subrecipients expending CDBG funds.
25. Monthly Parking Fees
    Monthly parking fees paid for/by subrecipient staff for place of employment.
26. Cell Phone Data Package
    Cell phone data packages paid for/by subrecipient staff.
27. Construction-Related Ineligible Expenses
    Regarding construction projects (NCIP, SUS), expenses related to the following are ineligible to be reimbursed by CDBG: profit/loss, overhead, temporary storage, administration, and contingency.

<u>NOTE</u>: Any expenditure not approved as part of the executed CDBG agreement and not clearly explained in the budget justification will be disallowed, and the reimbursement amount will be reduced to reflect this disallowance.

XI. ATTACHMENTS

1. HUD Income Limits for City of San Diego (June 2023)
2. CDBG-Eligible Census Block Groups in City of San Diego
3. CDBG Priority Areas Map
4. Budget Line-Item Descriptions & Applicability
5. Index of Supporting Documents & Naming Conventions
6. FY 2025 RFP Application Forms
7. FY 2025 CDBG RFP Scoring Criteria
8. FY 2025 RFP Timeline
9. Sample Income Verification & Demographics Form
10. RFP Response Submission Guide

The City of SAN DIEGO

Economic Development Department
Community Development Division

CDBG LMI NATIONAL OBJECTIVE & FY 2025 HUD INCOME LIMITS

CDBG NATIONAL OBJECTIVE: LOW/MODERATE-INCOME PERSONS

Any CDBG project funded by the City of San Diego must meet the CDBG program's National Objective of benefiting Low/Moderate-Income Persons (LMI National Objective), which may be met by doing one of the following:

A. Creating or improving housing for LMI households (LMH);
B. Creating or retaining jobs for LMI individuals (LMJ);
C. Providing a specific service to definite LMI individuals (LMC); or
D. Providing a defined, primarily residential LMI area with access to an amenity (LMA).

Bullet C above is referred to as the **Low/Moderate-Income Limited Clientele** (LMC) category of the LMI National Objective. The United States Department of Housing and Urban Development (HUD) has defined two methods for meeting the LMI National Objective for projects falling under the LMC category: (1) Presumed Low-Income Clientele; and (2) Direct Benefit to Low-Income Persons.

(1) <u>Presumed Low-Income Clientele</u>

To use the 'Presumed Low-Income Clientele' method, the Subrecipient must fully document how the activities of its CDBG-funded project serve a population from the following predefined list from HUD:

PRESUMED CATEGORY	PRESUMED INCOME LEVEL
Abused Children	Extremely Low Income
Battered Spouses	Low Income
Elderly Persons (62 and over)	Low Income[1]
Severely Disabled Adults	Low Income
Homeless Persons[2]	Extremely Low Income
Illiterate Adults	Low Income
Persons Living with AIDS	Low Income
Migrant Farm Workers	Low Income

Note the above Presumed Low-Income Clientele categories *CANNOT* be applied to economic development projects (e.g., microenterprise assistance projects) or projects providing assistance to households (e.g., single-family or multifamily housing rehabilitation projects) to meet the LMI National Objective requirement. They can only apply to projects falling under the LMC category.

In addition, a project using the Presumed Low-Income Clientele method must ensure that <u>100 percent</u> of the clients/persons benefitting from the activities of the project are documented members of the populations listed above.

[1] If assistance is to construct, convert, or rehabilitate a senior center or pay for providing center-based senior services, the elderly beneficiaries are considered Moderate Income.

[2] Persons are classified as having a severe disability if they meet at least one of the following conditions as defined by the United States Census Bureau:

- Use a wheelchair or another special aid for six (6) months or longer;
- Are unable to perform one or more functional activities (seeing, hearing, having one's speech understood, lifting and carrying, walking up a flight of stairs and walking);
- Need assistance with activities of daily living (getting around inside the home, getting in or out of bed or chair, bathing, dressing, eating and toileting) or instrumental activities of daily living (going outside the home, keeping track of money or bills, preparing meals, doing light housework and using the telephone);
- Are prevented from working at a job or doing housework;
- Have a selected condition including autism, cerebral palsy, Alzheimer's disease, senility or dementia or developmental disability; or
- Are under 65 years of age and are covered by Medicare or receive Supplemental Security Income (SSI).

(2) Direct Benefit to Low-Income Persons

To use the 'Direct Benefit to Low-Income Persons' method, the Subrecipient must verify and document the household income levels of the individual beneficiaries of the CDBG-funded project to ensure that at least 51 percent of the individuals served are persons whose household income is in compliance with the current HUD LMI income limits (that is, 80 percent or less of the Area Median Income) applicable to the City of San Diego. The HUD LMI income limits apply to activities that are restricted exclusively (100 percent) to LMI persons as well.

The following table outlines the current applicable household income limits for the City of San Diego's CDBG program:

HUD INCOME LIMITS*
FOR CITY OF SAN DIEGO
(Effective June 15, 2023 / Published June 2023 / Source: HUDUser.org)

HOUSEHOLD SIZE	EXTREMELY LOW-INCOME LIMITS (0-30% of median)	VERY LOW-INCOME LIMITS (31-50% of median)	LOW/MODERATE-INCOME LIMITS (51-80% of median)
1	$0 - $28,950	$28,951 - $48,250	$48,251 - $77,200
2	$0 - $33,100	$33,101 - $55,150	$55,151 - $88,200
3	$0 - $37,250	$37,251 - $62,050	$62,051 - $99,250
4	$0 - $41,350	$41,351 - $68,900	$68,901 - $110,250
5	$0 - $44,700	$44,701 - $74,450	$74,451 - $119,100
6	$0 - $48,000	$48,001 - $79,950	$79,951 - $127,900
7	$0 - $51,300	$51,301 - $85,450	$85,451 – $136,750
8	$0 - $54,600	$54,601 - $90,950	$90,951 - $145,550

**Income limits are set by HUD and are subject to change. The income limits listed above are the most current.*

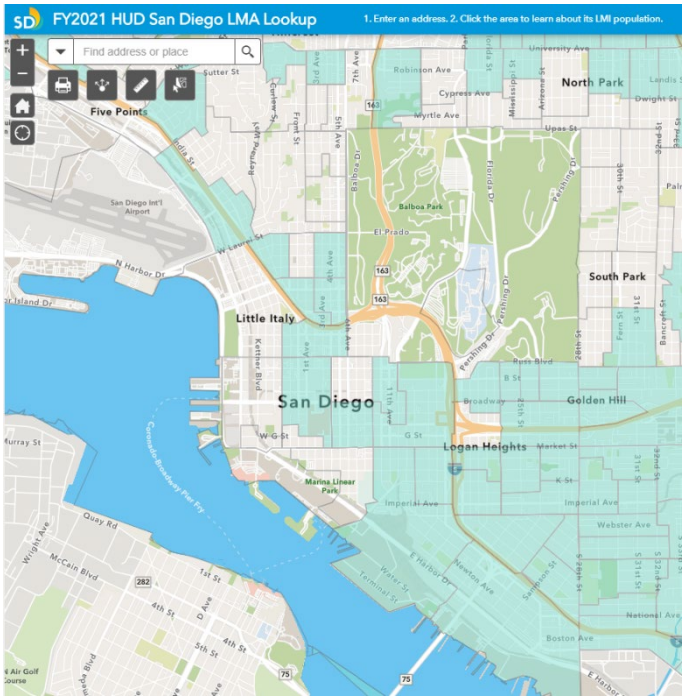
FY2025 HUD Low- and Moderate-Income Census Tract Block Groups City of San Diego

Effective April 1, 2019, community projects using low- and moderate-income (LMI) summary data to qualify for LMA National Benefit activities under the guidelines of the U.S. Department of Housing and Urban Development are subject to LMI data based on the American Community Survey 5-year Estimates 2011-2015.

Per HUD Guidelines (CPD-19-02), an activity may be eligible for Community Development Block Grant (CDBG) assistance if it benefits all residents of an area where at least 51 percent (51%) of its residents are LMI persons. Areas are typically defined as Census Tract Block Groups, which, if justified, may be combined for larger service geographies. For more information, please visit the HUD Exchange. (Access the FY2024 HUD San Diego LMI Lookup at www.sandiego.gov/cdbg)

Below are the LMI Census Tract Block Groups in the City of San Diego, sorted by City Council District:

District 1		LMI Population
Census Tract 82.00	Block Group 1	53.55%
Census Tract 83.05	Block Group 2	79.28%
Census Tract 83.39	Block Group 1	69.56%
Census Tract 83.40	Block Group 2	66.67%
Census Tract 83.41	Block Group 2	59.92%
Census Tract 83.43	Block Group 1	67.95%
	Block Group 2	70.87%
	Block Group 3	68.46%
Census Tract 83.61	Block Group 2	68.61%
Census Tract 83.62	Block Group 1	57.78%
Census Tract 83.63	Block Group 1	68.82%
	Block Group 2	66.36%
	Block Group 3	55.21%
Census Tract 83.64	Block Group 2	54.24%
Census Tract 94.00	Block Group 1	67.24%



District 2			LMI Population
Census Tract	2.02	Block Group 1	52.72%
Census Tract	61.00	Block Group 2	64.89%
Census Tract	65.00	Block Group 1	81.11%
		Block Group 2	54.80%
Census Tract	66.00	Block Group 1	69.55%
Census Tract	68.01	Block Group 1	52.06%
Census Tract	68.02	Block Group 2	56.29%
		Block Group 3	54.07%
Census Tract	74.00	Block Group 1	72.97%
		Block Group 2	59.23%
		Block Group 5	55.71%
Census Tract	75.01	Block Group 2	52.45%
		Block Group 3	82.54%
		Block Group 4	58.73%
		Block Group 5	67.41%
Census Tract	75.02	Block Group 3	57.03%
Census Tract	76.00	Block Group 1	63.43%
		Block Group 2	76.60%
		Block Group 3	55.00%
Census Tract	77.02	Block Group 4	76.43%
Census Tract	78.00	Block Group 1	80.00%
		Block Group 3	62.18%
		Block Group 4	58.82%
Census Tract	79.03	Block Group 1	72.33%
		Block Group 2	60.78%
		Block Group 4	72.08%
Census Tract	79.05	Block Group 1	61.88%
		Block Group 2	70.94%
Census Tract	79.08	Block Group 1	70.08%
		Block Group 2	60.17%
Census Tract	79.10	Block Group 2	58.36%
Census Tract	80.06	Block Group 4	51.20%
Census Tract	85.01	Block Group 3	59.18%
Census Tract	85.02	Block Group 5	58.76%
Census Tract	85.03	Block Group 2	66.39%
Census Tract	85.04	Block Group 3	55.50%
Census Tract	86.00	Block Group 1	57.61%
Census Tract	89.01	Block Group 4	60.00%
Census Tract	89.02	Block Group 1	55.36%

District 2 (continued)			LMI Population
Census Tract	90.00	Block Group 1	68.08%
		Block Group 2	70.21%
Census Tract	91.02	Block Group 1	63.16%
		Block Group 2	76.53%
Census Tract	91.03	Block Group 4	52.91%
Census Tract	91.06	Block Group 2	71.43%
Census Tract	91.07	Block Group 1	65.28%
		Block Group 2	52.40%
Census Tract	99.01	Block Group 1	66.67%
Census Tract	214.00	Block Group 2	57.39%
Census Tract	216.00	Block Group 1	52.88%

District 3		LMI Population
Census Tract 2.02	Block Group 1	52.72%
Census Tract 3.00	Block Group 1	62.64%
	Block Group 2	74.10%
Census Tract 6.00	Block Group 1	60.37%
	Block Group 2	64.79%
Census Tract 7.00	Block Group 1	65.89%
Census Tract 8.00	Block Group 1	56.67%
	Block Group 4	78.14%
Census Tract 9.00	Block Group 1	73.99%
	Block Group 2	83.54%
	Block Group 3	63.31%
	Block Group 4	86.54%
	Block Group 5	66.18%
	Block Group 6	53.47%
Census Tract 10.00	Block Group 3	55.17%
	Block Group 4	69.50%
Census Tract 11.00	Block Group 2	69.64%
	Block Group 3	56.00%
Census Tract 12.00	Block Group 1	81.21%
	Block Group 2	67.22%
	Block Group 3	53.79%
	Block Group 4	85.35%
Census Tract 13.00	Block Group 1	74.36%
	Block Group 2	72.22%
	Block Group 3	64.96%
	Block Group 4	65.74%
	Block Group 5	75.61%
Census Tract 14.00	Block Group 1	66.67%
Census Tract 15.00	Block Group 2	53.85%
	Block Group 4	58.12%
Census Tract 16.00	Block Group 3	79.68%
	Block Group 4	70.86%
Census Tract 17.00	Block Group 1	82.05%
	Block Group 2	53.78%
	Block Group 3	77.02%

District 3 (continued)		LMI Population
Census Tract 18.00	Block Group 1	55.40%
	Block Group 2	78.10%
	Block Group 3	97.35%
	Block Group 4	72.94%
	Block Group 5	52.63%
	Block Group 6	84.11%
Census Tract 21.00	Block Group 3	60.26%
	Block Group 4	59.02%
	Block Group 5	61.54%
Census Tract 24.01	Block Group 3	73.02%
Census Tract 25.01	Block Group 1	77.18%
	Block Group 2	78.51%
Census Tract 41.00	Block Group 1	63.27%
	Block Group 2	79.19%
	Block Group 3	72.75%
	Block Group 4	88.65%
Census Tract 42.00	Block Group 4	53.44%
Census Tract 44.00	Block Group 1	62.28%
Census Tract 45.01	Block Group 1	69.77%
	Block Group 2	77.27%
	Block Group 3	66.13%
Census Tract 46.00	Block Group 1	61.40%
Census Tract 47.00	Block Group 1	84.53%
	Block Group 2	78.65%
Census Tract 51.00	Block Group 1	95.79%
	Block Group 2	62.27%
Census Tract 52.00	Block Group 1	66.47%
	Block Group 2	60.57%
Census Tract 53.00	Block Group 2	60.38%
	Block Group 3	80.88%
Census Tract 56.00	Block Group 1	54.02%
Census Tract 57.00	Block Group 1	59.79%
	Block Group 2	80.41%
Census Tract 59.00	Block Group 1	53.57%
	Block Group 3	51.25%
Census Tract 61.00	Block Group 2	64.89%
Census Tract 65.00	Block Group 1	81.11%
	Block Group 2	54.80%
Census Tract 89.02	Block Group 1	55.36%

District 4			LMI Population
Census Tract	27.02	Block Group 2	55.73%
		Block Group 3	75.98%
Census Tract	27.03	Block Group 1	60.12%
		Block Group 2	59.41%
		Block Group 3	60.57%
		Block Group 4	82.92%
Census Tract	27.05	Block Group 1	68.91%
		Block Group 2	67.70%
Census Tract	27.10	Block Group 2	76.42%
Census Tract	27.11	Block Group 1	78.54%
Census Tract	27.12	Block Group 1	72.25%
		Block Group 3	77.94%
Census Tract	29.02	Block Group 2	61.99%
		Block Group 1	52.72%
Census Tract	29.03	Block Group 3	58.40%
Census Tract	30.01	Block Group 3	83.06%
		Block Group 2	55.18%
Census Tract	30.03	Block Group 2	66.92%
Census Tract	30.04	Block Group 1	79.46%
		Block Group 2	60.47%
Census Tract	31.01	Block Group 1	53.52%
		Block Group 2	63.26%
		Block Group 3	62.92%
Census Tract	31.03	Block Group 2	65.48%
		Block Group 3	80.15%
Census Tract	31.05	Block Group 1	60.65%
		Block Group 2	68.95%
Census Tract	31.07	Block Group 1	53.32%
		Block Group 2	55.24%
Census Tract	31.08	Block Group 1	61.09%
		Block Group 1	61.09%
Census Tract	31.11	Block Group 1	85.85%
		Block Group 2	80.91%
Census Tract	31.12	Block Group 1	69.30%
Census Tract	31.13	Block Group 2	55.71%
Census Tract	31.15	Block Group 1	86.49%
		Block Group 2	61.13%
Census Tract	32.01	Block Group 2	56.27%
		Block Group 3	70.61%

District 4 (Continued)			LMI Population
Census Tract	32.02	Block Group 2	60.37%
Census Tract	32.08	Block Group 1	86.86%
		Block Group 5	73.88%
Census Tract	32.09	Block Group 1	53.37%
		Block Group 2	61.22%
		Block Group 3	71.75%
Census Tract	32.11	Block Group 2	63.18%
Census Tract	33.01	Block Group 1	85.09%
		Block Group 2	85.95%
Census Tract	33.03	Block Group 1	94.17%
		Block Group 2	68.55%
Census Tract	33.04	Block Group 1	65.89%
		Block Group 2	94.56%
Census Tract	33.05	Block Group 1	64.71%
		Block Group 2	88.94%
		Block Group 3	58.20%
Census Tract	34.01	Block Group 1	67.25%
		Block Group 2	61.78%
		Block Group 4	56.49%
Census Tract	34.03	Block Group 1	86.85%
		Block Group 2	72.24%
		Block Group 3	66.67%
Census Tract	34.04	Block Group 1	74.28%
		Block Group 2	80.03%
Census Tract	35.01	Block Group 1	87.66%
Census Tract	118	Block Group 1	83.94%
Census Tract	119	Block Group 1	63.79%
Census Tract	120	Block Group 2	54.29%
Census Tract	121	Block Group 2	75.16%
Census Tract	122	Block Group 2	58.43%
Census Tract	141	Block Group 2	72.56%
Census Tract	142	Block Group 1	57.04%
		Block Group 3	60.12%
Census Tract	145	Block Group 2	74.41%
		Block Group 3	53.30%

District 5				LMI Population
Census Tract	94	Block Group	1	67.24%
Census Tract	170.14	Block Group	1	58.80%
Census Tract	170.19	Block Group	2	53.50%
Census Tract	170.35	Block Group	3	96.96%
Census Tract	170.36	Block Group	1	55.19%
Census Tract	170.51	Block Group	1	64.21%

District 6				LMI Population
Census Tract	83.39	Block Group	1	69.56%
Census Tract	83.51	Block Group	1	61.50%
Census Tract	83.57	Block Group	2	56.47%
Census Tract	83.58	Block Group	4	57.95%
Census Tract	83.59	Block Group	2	72.67%
Census Tract	85.02	Block Group	2	51.97%
		Block Group	3	51.77%
		Block Group	5	58.76%
Census Tract	85.03	Block Group	2	66.39%
Census Tract	85.04	Block Group	1	80.36%
		Block Group	3	55.50%
Census Tract	85.05	Block Group	1	60.13%
		Block Group	2	60.34%
		Block Group	5	60.95%
Census Tract	85.06	Block Group	1	59.11%
Census Tract	85.07	Block Group	3	69.88%
		Block Group	5	53.94%
		Block Group	6	60.38%
Census Tract	85.09	Block Group	3	68.15%
		Block Group	5	63.79%
Census Tract	85.10	Block Group	1	63.25%
		Block Group	4	52.23%
Census Tract	91.02	Block Group	1	63.16%
Census Tract	94.00	Block Group	1	67.24%
Census Tract	95.10	Block Group	2	71.69%

District 7				LMI Population
Census Tract	28.01	Block Group	2	100.00%
Census Tract	29.04	Block Group	1	77.34%
Census Tract	29.05	Block Group	3	58.17%
Census Tract	65.00	Block Group	2	54.80%
Census Tract	85.10	Block Group	4	52.23%
		Block Group	1	63.25%
Census Tract	86.00	Block Group	1	57.61%
		Block Group	2	74.64%
		Block Group	3	78.74%
		Block Group	4	92.96%
Census Tract	87.02	Block Group	3	57.91%
Census Tract	88.00	Block Group	2	71.64%
		Block Group	4	80.00%
Census Tract	89.01	Block Group	1	71.12%
		Block Group	4	60.00%
Census Tract	89.02	Block Group	1	55.36%
Census Tract	90.00	Block Group	1	68.08%
		Block Group	2	70.21%
Census Tract	91.06	Block Group	2	71.43%
Census Tract	91.07	Block Group	1	65.28%
		Block Group	2	52.40%
Census Tract	92.01	Block Group	2	60.13%
		Block Group	4	55.56%
Census Tract	93.01	Block Group	1	55.74%
		Block Group	4	65.48%
Census Tract	93.05	Block Group	3	69.46%
Census Tract	94.00	Block Group	1	67.24%
Census Tract	95.10	Block Group	1	59.36%
		Block Group	2	71.69%
		Block Group	3	73.64%
Census Tract	95.11	Block Group	1	66.18%
		Block Group	2	68.40%
Census Tract	96.03	Block Group	1	69.23%
		Block Group	3	56.93%
		Block Group	4	64.62%
Census Tract	96.04	Block Group	1	62.77%
		Block Group	4	54.67%
Census Tract	98.01	Block Group	4	57.89%
Census Tract	98.02	Block Group	2	76.36%
		Block Group	5	56.52%
Census Tract	148.06	Block Group	2	51.96%

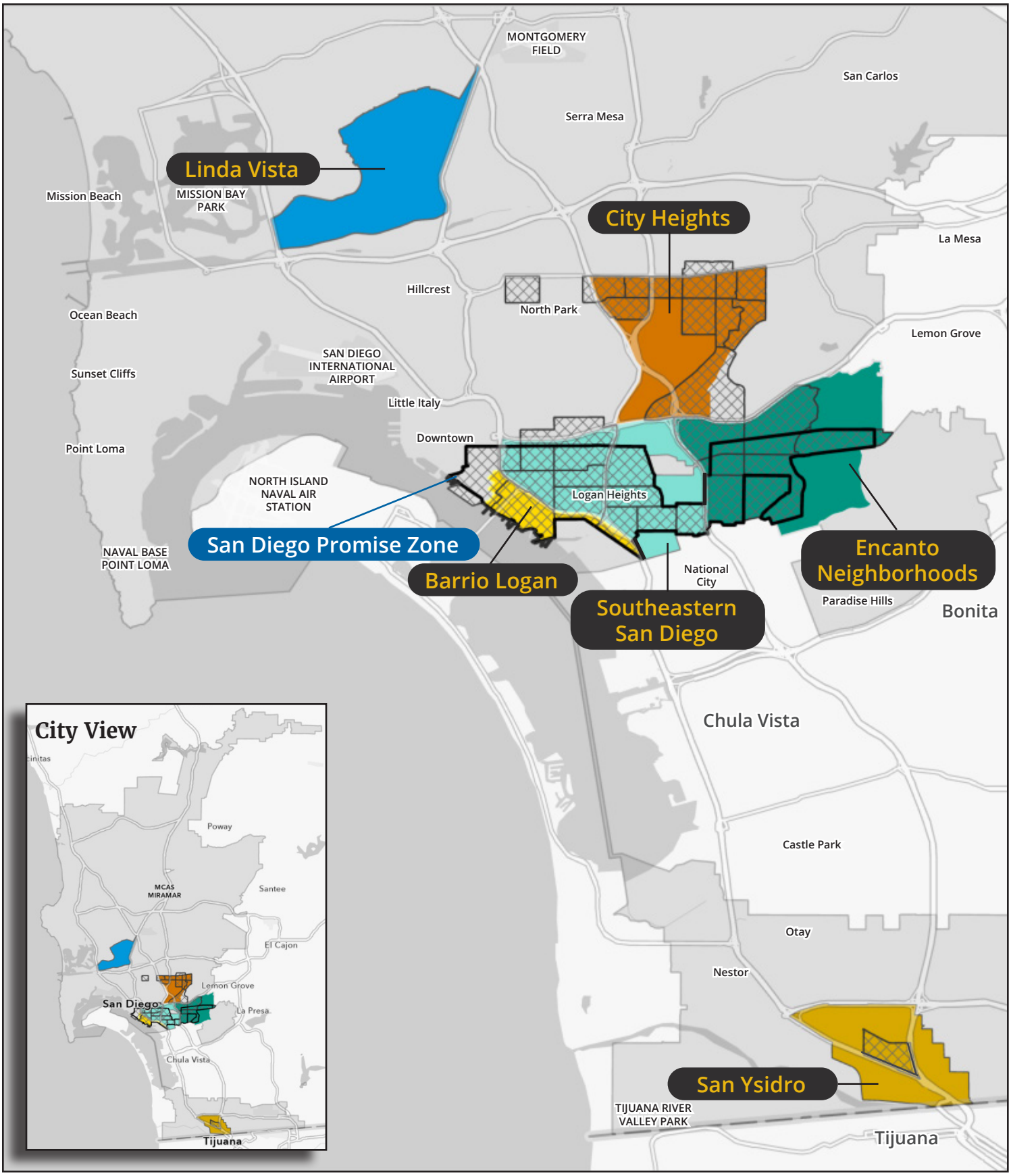
District 8			LMI Population
Census Tract	33.03	Block Group 1	94.17%
Census Tract	36.01	Block Group 1	83.66%
Census Tract	36.02	Block Group 1	76.72%
		Block Group 2	74.84%
Census Tract	36.03	Block Group 1	77.30%
		Block Group 2	65.25%
Census Tract	36.03	Block Group 3	77.04%
Census Tract	39.01	Block Group 1	94.12%
		Block Group 2	94.08%
		Block Group 3	81.53%
Census Tract	39.02	Block Group 1	88.54%
		Block Group 2	90.94%
		Block Group 3	76.81%
		Block Group 4	95.65%
Census Tract	40	Block Group 1	97.38%
		Block Group 2	85.03%
		Block Group 3	77.44%
		Block Group 4	88.24%
Census Tract	41	Block Group 2	79.19%
		Block Group 3	72.75%
		Block Group 4	88.65%
Census Tract	47	Block Group 1	84.53%
		Block Group 2	78.65%
Census Tract	48	Block Group 1	85.92%
		Block Group 2	98.23%
		Block Group 3	92.27%
Census Tract	49	Block Group 1	95.02%
		Block Group 2	89.03%
		Block Group 3	90.31%
Census Tract	50	Block Group 1	93.06%
Census Tract	51	Block Group 2	62.27%
Census Tract	52	Block Group 1	66.47%
Census Tract	100.04	Block Group 1	59.28%
		Block Group 2	56.57%
Census Tract	100.05	Block Group 1	63.85%
		Block Group 2	71.89%
		Block Group 3	80.87%
		Block Group 4	84.25%
Census Tract	100.09	Block Group 1	90.29%
		Block Group 3	85.37%
		Block Group 4	94.70%

District 8 (continued)			LMI Population
Census Tract	100.10	Block Group 1	72.82%
		Block Group 2	66.00%
		Block Group 3	54.93%
Census Tract	100.11	Block Group 2	62.86%
Census Tract	100.12	Block Group 1	62.07%
		Block Group 2	70.80%
		Block Group 3	77.34%
Census Tract	100.13	Block Group 1	87.27%
		Block Group 2	89.46%
Census Tract	101.03	Block Group 1	85.90%
		Block Group 2	53.54%
		Block Group 3	77.14%
Census Tract	101.04	Block Group 1	58.38%
		Block Group 2	68.35%
Census Tract	101.06	Block Group 1	82.20%
		Block Group 2	74.10%
		Block Group 3	78.55%
Census Tract	101.07	Block Group 1	54.49%
		Block Group 2	57.99%
		Block Group 3	62.28%
		Block Group 4	59.26%
Census Tract	101.09	Block Group 2	63.60%
Census Tract	101.10	Block Group 1	58.31%
		Block Group 2	63.79%
		Block Group 4	100.00%
Census Tract	101.11	Block Group 1	69.20%
		Block Group 2	84.63%
Census Tract	101.12	Block Group 1	83.47%
		Block Group 2	69.63%
Census Tract	102.00	Block Group 1	52.78%
Census Tract	104.02	Block Group 1	65.56%
Census Tract	105.02	Block Group 1	76.56%
		Block Group 4	76.44%
Census Tract	118.02	Block Group 1	83.94%
Census Tract	131.03	Block Group 1	73.23%
Census Tract	132.05	Block Group 1	64.24%
Census Tract	132.06	Block Group 2	86.70%
Census Tract	133.08	Block Group 1	58.61%
		Block Group 2	54.45%
Census Tract	216	Block Group 1	52.88%
Census Tract	219	Block Group 1	77.09%
		Block Group 2	59.32%

District 9			LMI Population
Census Tract	15	Block Group 1	67.13%
		Block Group 2	53.85%
Census Tract	16	Block Group 1	94.86%
		Block Group 2	88.34%
		Block Group 3	79.68%
		Block Group 4	70.86%
Census Tract	17	Block Group 1	82.05%
		Block Group 2	53.78%
		Block Group 3	77.02%
Census Tract	21	Block Group 2	55.07%
		Block Group 3	60.26%
		Block Group 4	59.02%
		Block Group 5	61.54%
Census Tract	22.01	Block Group 1	96.59%
		Block Group 2	94.60%
Census Tract	22.02	Block Group 1	88.34%
		Block Group 2	95.53%
		Block Group 3	80.79%
Census Tract	23.01	Block Group 1	89.01%
		Block Group 2	91.54%
		Block Group 3	67.48%
Census Tract	23.02	Block Group 1	80.38%
		Block Group 2	95.45%
		Block Group 3	100.00%
Census Tract	24.01	Block Group 1	94.29%
		Block Group 2	64.93%
		Block Group 3	73.02%
Census Tract	24.02	Block Group 1	80.81%
		Block Group 2	89.56%
Census Tract	25.01	Block Group 1	77.18%
		Block Group 2	78.51%
		Block Group 3	89.75%
Census Tract	25.02	Block Group 2	86.88%
		Block Group 3	60.11%
Census Tract	26.01	Block Group 1	78.67%
		Block Group 2	91.55%
		Block Group 3	77.05%
Census Tract	26.02	Block Group 1	74.69%
		Block Group 2	83.67%
		Block Group 3	87.39%

District 9 (Continued)			LMI Population
Census Tract	27.02	Block Group 1	58.30%
		Block Group 2	55.73%
		Block Group 3	75.98%
Census Tract	27.03	Block Group 1	60.12%
		Block Group 3	60.57%
Census Tract	27.07	Block Group 1	91.55%
		Block Group 2	99.07%
		Block Group 3	96.52%
		Block Group 4	95.85%
Census Tract	27.08	Block Group 1	94.70%
		Block Group 2	87.84%
		Block Group 3	90.38%
		Block Group 4	95.71%
Census Tract	27.09	Block Group 1	91.36%
		Block Group 2	66.78%
Census Tract	27.10	Block Group 1	72.11%
		Block Group 2	76.42%
Census Tract	28.01	Block Group 1	55.00%
		Block Group 2	100.00%
Census Tract	28.03	Block Group 1	79.18%
		Block Group 2	60.56%
		Block Group 4	51.03%
Census Tract	28.04	Block Group 1	92.11%
Census Tract	29.02	Block Group 1	52.72%
		Block Group 2	61.99%
Census Tract	29.04	Block Group 1	77.34%
		Block Group 2	95.69%
		Block Group 3	70.04%
		Block Group 4	77.30%
Census Tract	29.05	Block Group 1	67.43%
		Block Group 2	82.72%
		Block Group 3	58.17%
Census Tract	33.01	Block Group 1	85.09%
		Block Group 2	85.95%
Census Tract	33.03	Block Group 1	94.17%
		Block Group 2	68.55%
Census Tract	33.05	Block Group 3	58.20%
Census Tract	34.01	Block Group 1	67.25%
		Block Group 2	61.78%
		Block Group 4	56.49%

District 9 (Continued)				LMI Population
Census Tract	34.03	Block Group	1	86.85%
		Block Group	2	72.24%
		Block Group	3	66.67%
Census Tract	34.04	Block Group	2	80.03%
Census Tract	35.01	Block Group	1	87.66%
		Block Group	2	91.49%
		Block Group	3	74.22%
Census Tract	35.02	Block Group	1	84.33%
		Block Group	2	94.39%
		Block Group	3	82.64%
Census Tract	36.01	Block Group	1	83.66%
Census Tract	36.02	Block Group	1	76.72%
		Block Group	2	74.84%
Census Tract	36.03	Block Group	1	77.30%
Census Tract	39.01	Block Group	1	94.12%
Census Tract	39.02	Block Group	2	90.94%
		Block Group	3	76.81%
Census Tract	40	Block Group	1	97.38%
Census Tract	41	Block Group	4	88.65%
Census Tract	96.03	Block Group	4	64.62%
Census Tract	96.04	Block Group	4	54.67%
Census Tract	118.02	Block Group	1	83.94%
Census Tract	148.06	Block Group	1	85.23%
		Block Group	2	51.96%
Census Tract	36.03	Block Group	3	77.04%
Census Tract	145	Block Group	3	53.30%



The City *of* SAN DIEGO

This map was produced by the Economic Development Department Community Development Division using geospatial data from SanGIS, ESRI, City of San Diego Planning Department, City of San Diego Economic Development, and the U.S. Department of Housing and Urban Development.

Online version of CDBG Priority Areas map.

Community Development Block Grant (CDBG) Priority Areas

Name — Six Community Planning Areas (Barrio Logan, City Heights, Encanto Neighborhoods, Linda Vista, San Ysidro, and Southeastern San Diego)

Opportunity Zones (35 OZ census tracts are in the City of San Diego)

San Diego Promise Zone (SDPZ spans 19 census tracts, all of which are Opportunity Zones)

The City of SAN DIEGO

Economic Development Department
Community Development Division

BUDGET LINE ITEM DESCRIPTIONS

Refer to the descriptions and sample narratives below when completing the 'Budget' tab of your organization's Request for Proposals (RFP) response. There are 16 different expenditure types, each with a unique numeric identifier. Each expenditure type that has a budgeted amount must be accompanied by a descriptive narrative, including how costs were calculated and what expenditures will be covered. Note that certain expenditure types are only allowable for certain RFP categories, which will be enforced by ED Grants.

1. **Salary & Wages:** Salary & Wages: Refers to labor costs incurred as a result of implementing your organization's project. Ordinarily, CDBG covers only direct labor costs associated with providing client services (with indirect labor costs covered by other funding sources); however, indirect labor costs associated with implementing your organization's project may be covered by CDBG if: (a) your organization has budgeted for indirect costs under the Federally Approved Indirect Cost (FAIC) rate line item during the RFP phase (and have submitted an FAIC rate determination); or (b) your organization has budgeted for indirect costs among the different line items per a verified cost allocation methodology. If a cost allocation plan is used, the percentage determined must be consistent among all budget categories. For example, if the cost allocation plan calculates 20 percent for personnel costs, then 20 percent for non-personnel costs is required. Paid time off (e.g., sick leave, holiday, vacation) and/or premium pay (e.g., overtime, extra pay, multi-shift) may be covered by CDBG, but only if they are specifically identified in the budget narratives (however, no cash-outs are allowed; paid time off is paid for time taken and will not be reimbursed on an accrual basis). **Applicable project types: PS, CED-MTA.**

   - *SAMPLE NARRATIVE: **Senior Counselor** → This position will provide counseling services to youth targeted by the project undergoing familial crisis, as well as provide them with emotional support to minimize negative impacts on their schooling. Annual salary is $80,000, of which 75 percent will be covered by CDBG and 25 percent by other grant funds. Paid time off (i.e., sick leave, holiday, and vacation) will be claimed for reimbursement.*

   - *SAMPLE NARRATIVE: **Intake Business Officer** → This hourly position will work directly with LMI individuals seeking to establish a microenterprise in San Ysidro by assessing their situation and need, collecting income and demographic information, opening case files in our C-Star system, and setting up consulting appointments with our Business Counselors. Wage is $23/hour. CDBG will be covering 1,040 hours or $23,920 during the project implementation period. Paid time off (i.e., sick leave, holiday, vacation) and premium pay (i.e., overtime) will be claimed for reimbursement.*

   - *SAMPLE NARRATIVE: **Accountant** → This hourly position will provide indirect support to the project by tracking personnel and non-personnel expenses related to the implementation of the project and preparing the monthly requests for reimbursements. Wage is $25/hour. CDBG will be covering a quarter of the position's annual wage (520 hours or $13,000) during the project implementation period (the position supports four grant projects). No paid time off or premium pay will be claimed for reimbursement.*

2. **Fringe Benefits:** Refers to non-salary and non-wage compensation labor costs incurred as a result of implementing your organization's project. Examples include: medical, dental, and vision insurance; paid time-off (however, no cash-outs are allowed; paid time off is paid for time taken and will not be reimbursed on an accrual basis); overtime pay; and Social Security/retirement plan contribution. Each fringe benefit type must be its own subline item in the budget under the 'Fringe Benefits' line item (use the fringe benefit dropdown menu to indicate the type). The narrative must detail the positions receiving the fringe benefits. **Applicable project types: PS, CED-MTA.**

   - *SAMPLE NARRATIVE: **Employer Social Security Tax** → Positions covered: Counselor II, Intake Specialist, Executive Director*

   - *SAMPLE NARRATIVE: **State Unemployment Insurance (SUI)** → Positions covered: Counselor II, Intake Specialist, Executive Director*

- *SAMPLE NARRATIVE: **Health Insurance** → Positions covered: Counselor II, Intake Specialist, Executive Director*

- *SAMPLE NARRATIVE: **401(k) Match** → Positions covered: Counselor II, Intake Specialist, Executive Director*

3. **Direct Program Delivery Expenses:** Refers to direct costs incurred as a result of implementing your organization's project that cannot be placed in more specific budget categories. (If City staff determines that direct costs budgeted under this budget category should be under a more specific budget category, the organization will be directed to move the cost to the more appropriate budget category.) The narrative must detail the expenses and how they relate to the implementation of the project. **Applicable project types: PS, CED-MTA.**

   - *SAMPLE NARRATIVE: Training and certification courses (First Aid/AED/CPR) at the San Diego Red Cross for LMI youth being prepared to compete for jobs in the cruise industry. Each course is anticipated to cost $60 per person; with a target of getting 100 LMI youth trained, the total budget is $6,000.*

   - *SAMPLE NARRATIVE: Budget for background check fee and credit score/report fee for LMI clients looking to qualify for a business loan with major commercial banks. Each background check is $30, and each credit score/report is $20. The total budget is $3,750 to cover 75 LMI clients.*

   - *SAMPLE NARRATIVE: Budget to purchase prescription medicine according to the latest Medicare Part D Drug Formulary for LMI clients undergoing job training and substance abuse rehabilitation. The program anticipates assisting 30 unduplicated LMI clients, resulting in the need to budget $50,000 (approximately $1,600 per client).*

4. **Supplies–Administration Use:** Refers to the supplies purchased by your organization for staff use to directly support the implementation of the project. The narrative must detail the types of supplies to be purchased. Examples include but are not limited to: office supplies (e.g., paper, pens, toner, ink, clipboard), small equipment (e.g., computers, laptops, projectors, calculators), and protective gear (e.g., hard hats, steel-toe boots, safety vests). Note: supplies must be purchased, and expenses incurred within the first six months of the project's implementation period. **Applicable project types: PS, CED-MTA.**

   - *SAMPLE NARRATIVE: Purchase of office supplies (copy paper, writing instruments, notepads, folders, staplers/staples, stickers, toner, and other supply-related materials) to put together 75 to 90 client files of LMI clients assisted with home buying counseling services.*

   - *SAMPLE NARRATIVE: Purchase of 15 sets of protective gear (hard hats, steel-toe boots, safety vests, and safety goggles) to be used by our in-house solar installation trainers who will be working with LMI trainees in San Manuel. Each set is anticipated to cost $130. Purchase of 3 durable tablets and associated software licenses to be used by our solar installation trainers to track training data while out in the field for direct uploading to our cloud-based database and payroll systems. Each table is anticipated to cost $1,500 and each software license $500 for a total budget of $6,000.*

5. **Supplies–Client Use:** Refers to the supplies purchased by your organization to provide to clients for their use as part of directly supporting the implementation of the project. The narrative must detail the types of supplies to be purchased and how they relate to the implementation of the project. Past examples of client-use supplies include clean syringes, musical instruments, urban garden supplies and tools, computers and laptops, office supplies, course materials and books, packaged food, etc. NOTE: Supply purchases for individual client use and or supplies that will be retained by the client after the termination of the services will require a client distribution list upon submission of a reimbursement request. Also note: Food purchases, specifically for meal delivery programs and/or food banks, are not considered "Supply" budget items and should be listed in the Direct Program Delivery expense budget line item. Stockpiling of supplies

or equipment to be used after the expiration of the executed agreement is not permitted. **Applicable project types: PS, CED-MTA.**

- *SAMPLE NARRATIVE: Purchase of 50 bamboo flutes at $10 each to be used by our LMI students learning music in our after school tutoring program.*

- *SAMPLE NARRATIVE: Purchase of garden hoses, rakes, hoes, potting soil, seeds, trees, and fertilizer to support our community garden in Oak Heights that is maintained by LMI households that are being trained in business basics.*

- *SAMPLE NARRATIVE: Purchase of five workstations consisting of one monitor, one computer tower, and one printer each to be used by unemployed adults receiving job search training assistance. Each workstation is anticipated to cost $2,000.*

6. **Publications/Printing:** Refers to costs related to paper-based materials produced by your organization or the publication of project/construction-related notices and advertisements in newspapers and other media. Past examples of publications/printing costs include collateral material design and printing (flyers, brochures, pamphlets), construction drawing printing for permit acquisition, construction bid document printing and publication, Invitation for Bids (IFB) notices in newspapers, course materials, program advertisements to attract clients, etc. (Please reference p. 48 Section G of this manual) **Applicable project types: All.**

   - *SAMPLE NARRATIVE: Design and publication of flyers, brochures, pamphlets, and other collateral material to promote the microenterprise technical assistance program at local business resource fairs and online.*

   - *SAMPLE NARRATIVE: Printing of revised construction documents to address comments from the City of San Diego Development Services Department prior to permit and approval issuance. Budget of $2,000 anticipates three rounds of printing before documents are finalized. Publication of Invitation to Bid notices in one newspaper of general circulation and three community newspapers targeting LMI and minority-owned contractors. Budget of $1,000 anticipates at least two days of publication per newspaper.*

   - *SAMPLE NARRATIVE: Printing of 350 copies of a 20-page colored college application writing course packet for LMI youth participating in our college preparedness program. Each copy is anticipated to cost $2.50, totaling approximately $875.*

7. **Rent/Lease:** Refers to costs related to the rent or lease of a site where direct services to clients will be provided. Your organization must have submitted a current rental or lease agreement outlining the rent or lease cost, along with a cost allocation plan or methodology that determines how much of the rent or lease is reasonably attributable to the implementation of the CDBG-funded project or program. **Applicable project types: PS, CED-MTA.**

   - *SAMPLE NARRATIVE: Per the attached agreement, the monthly lease for our office at 123 Main Street where LMI youth tutoring will be held is $3,800. Per the attached cost allocation plan, 50 percent of our overhead costs is reasonably attributable to our youth tutoring program. With 75 percent of our youth tutoring program being covered by CDBG in FY 2025, we calculate the portion of the monthly lease to be covered by CDBG to be $1,425 ($3,800 x 0.50 x 0.75), annualized at $17,100 ($1,425 x 12).*

8. **Maintenance/Repair:** Refers to costs related to the maintenance and repair of the site where direct services to clients will be provided. The narrative must detail the types of maintenance/repairs to be covered. Your organization must also submit a cost allocation plan or methodology that determines how much of the maintenance and repair is reasonably attributable to the implementation of the CDBG-funded project or program. **Applicable project types: PS, CED-MTA.**

- *SAMPLE NARRATIVE: Per the attached cost allocation plan, 50 percent of our overhead costs is reasonably attributable to our LMI youth tutoring program. We will need to repair our furnace to accommodate wintertime tutoring and replace the ripped carpeting in our office, which has become a safety hazard. The furnace and carpeting are anticipated to cost $5,000 and $12,000, respectively, based on calls to third-party businesses. With 75 percent of our youth tutoring program being covered by CDBG in FY 2025, we calculate the portion of the repair/maintenance to be covered by CDBG to be approximately $6,375 ($17,000 x 0.50 x 0.75).*

9. **Utilities:** Refers to costs related to utilities (e.g., electricity, water, gas) used at the site where direct services to clients will be provided. The narrative must detail the types of utility service to be covered. Your organization must also submit a cost allocation plan or methodology that determines how much of the utility costs is reasonably attributable to the implementation of the CDBG-funded project or program. **Applicable project types: PS, CED-MTA.**

   - *SAMPLE NARRATIVE: Per the attached cost allocation plan, 50 percent of our overhead costs is reasonably attributable to our youth tutoring program. Our average monthly electric, water, and gas bills are $200, $150, and $100, respectively. With 75 percent of our youth tutoring program being covered by CDBG in FY 2025, we calculate the portion of the monthly utility costs to be covered by CDBG to be approximately $168.75 ($450 x 0.50 x 0.75), annualized at $2,025 ($168.75 x 12).*

10. **Communications:** Refers to costs related to telephone (including mobile) and Internet services needed to provide direct services to clients. Cell phone expenses paid directly by Subrecipient staff members/volunteers are not eligible for reimbursement. The narrative must detail the types of services to be covered, the breakdown of the costs per type of service, and how the costs were calculated. **Applicable project types: PS, CED-MTA.**

    - *SAMPLE NARRATIVE: Per the attached cost allocation plan, 50 percent of our overhead costs is reasonably attributable to our youth tutoring program. Our average monthly telephone and Internet bills are $300 and $300, respectively. With 75 percent of our youth tutoring program being covered by CDBG in FY 2025, we calculate the portion of the monthly communications costs to be covered by CDBG to be approximately $225 ($600 x 0.50 x 0.75), annualized at $2,700 ($225 x 12).*

11. **Equipment Rental:** Refers to costs related to equipment rented to provide direct services to clients or to rehabilitate public facilities or housing units. The narrative must detail the types of equipment to be rented and their proposed uses. Examples include, but are not limited to: transportation vehicles (cars, trucks, vans), bulldozers, sound systems, medical equipment, portable stoves/ovens, portable hand-washing stations, dump trucks, portable chairs/tables, office rental equipment (e.g., printers) and accompanying software, etc. **Applicable project types: PS, CED-MTA.**

    - *SAMPLE NARRATIVE: Rental of portable chairs, tables, and tent for onsite neighborhood outreach to conduct free basic medical screenings for LMI clients in Oak Heights. An anticipated 10 outreach events will be conducted. Each outreach will require a rental budget of $750 or $7,500 for the year ($750 x 10). Rental of a mobile mammography van to provide mammography service to LMI clients in Oak Heights. The monthly rental is $1,500, annualized at $18,000.*

    - *SAMPLE NARRATIVE: Rental of a backhoe for a month to prepare our community garden site for cultivation by LMI clients looking to supplement their food supply. Large boulders will need to be removed and the soil tilled. The monthly rental fee is $1,200.*

12. **Insurance:** Refers to costs related to liability insurance premiums covering staff providing direct services to clients or the site where direct services to clients will be provided. The narrative must detail the types of liability insurance to be covered and why each type is needed. Examples include commercial general

liability, automobile liability, and worker's compensation. Your organization must also submit a cost allocation plan or methodology that determines how much of the liability insurance costs is reasonably attributable to the implementation of the CDBG-funded project or program. **Applicable project types: PS, CED-MTA.**

- *SAMPLE NARRATIVE: Per the attached cost allocation plan, 50 percent of our overhead costs is reasonably attributable to our youth tutoring program. Our annual liability insurance premium (CGL, auto, and WC) is $3,500. With 75 percent of our youth tutoring program being covered by CDBG in FY 2025, we calculate the portion of the insurance costs to be covered by CDBG to be approximately $1,312 ($3,500 x 0.50 x 0.75).*

13. **Administrative Indirect Overhead:** Refers to the total indirect cost amount to be covered by CDBG. This amount can be calculated based on: (a) Federally Approved Indirect Cost (FAIC) rate; or (b) your organization has budgeted for indirect costs among the different line items per a verified cost allocation methodology; or (c) de minimis rate per CFR 200.414(f) Electronic Code of Federal Regulations. The amount is calculated by multiplying the stated overhead rate by the sum of all program delivery direct costs that will be covered by CDBG and identified in the budget. The narrative must detail if the FAIC rate or de minimis rate or cost allocation plan rate will be used in the calculation, the effective dates of the rate, and how the amount for this budget line item was calculated. If a cost allocation plan is used, the percentage determined must be consistent among all budget categories. For example, if the cost allocation plan calculates 20 percent for personnel costs, then 20 percent for non-personnel costs is required. Note: a current FAIC document is required or copy of the agency's cost allocation plan upon submission of a reimbursement request. **Applicable project types: PS, CED-MTA.**

    - *SAMPLE NARRATIVE: Per the attached FAIC rate letter received from the Department of Labor, our rate is 9 percent for FY 2025. The total amount of our program delivery direct costs to be covered by CDBG is $85,000. Therefore, the indirect cost budget is $7,650 ($85,000 x 0.09).*

14. **Construction/Renovation:** Refers to CDBG-funded construction and renovation costs related to permits/approvals, materials, and labor, excluding construction management, the creation of construction plans, revisions to construction documents/drawings prior to the execution of the CDBG agreement, or large equipment not bolted/attached to the facility. The narrative must detail the costs to be incurred, a description of each cost, and the activities to be completed. **Applicable project types: NCIP-F.**

    - *SAMPLE NARRATIVE: Costs to renovate an existing dilapidated warehouse into 10 classroom spaces for LMI clients seeking employment training in the electrical and plumbing trades: permits/approvals ($5,000 to get plumbing and electrical permits from Development Services Department), materials ($200,000 for windows, doors, drywall, pipes, lights, paint, insulation, carpet, and other related materials), and labor ($150,000 for laborers in specialized trades). Construction/renovation activities include: install windows, doors, light fixtures, and insulation; paint new interior walls; install necessary new and rerouted plumbing and electrical connections; demolish old storage units and dispose of debris; repave ADA pathway; and other construction/renovation-related activities.*

15. **Construction Management:** Refers to labor costs covering the on-site construction manager. The amount is limited to six percent (6%) of the 'Construction/Renovation' budget line-item amount. The narrative must detail how the amount was calculated and the services to be provided by the construction manager. Third-party construction managers must be procured in accordance with federal procurement requirements. In addition, conflict of interest verifications must be documented prior to the selection of third-party construction managers. **Applicable project types: NCIP-F.**

    - *SAMPLE NARRATIVE: Costs to hire a third-party construction manager to oversee all phases of the project (preconstruction, construction, and post construction). Services include: coordinate with all companies and*

agencies; prepare the specifications and construction contracts; manage the competitive bid process; coordinate all required permits; develop and implement the project schedule; prepare project reporting and compliance; monitor and report on labor compliance; and other construction management–related activities. Total budget is $65,000 (or 6 percent of 'Construction/Renovation' budget line item).

16. **Consultant Services:** Refers to costs related to third-party organizations hired by the Subrecipient to perform direct client services or prepare revisions to construction documents/drawings required by the City's Development Services Department as a condition of permit or approval issuance. Costs to complete revisions to construction documents/drawings completed prior to the execution of the CDBG agreement may not be budgeted with CDBG funds. Consultants must be procured in accordance with federal procurement requirements, as applicable. In addition, conflict of interest verifications must be documented prior to the selection of consultants. A contract agreement with the consultant and agency is required in order to request budget reimbursement for the CDBG contract. The narrative must detail what the third-party organization/consultant will be performing or preparing and how the costs were calculated. A current consultant agreement is required upon submission of a reimbursement request. **Applicable project types: All.**

    - *SAMPLE NARRATIVE: Budget to retain Oak Heights Community Services (OHCS) to provide mobile medical screening services to LMI clients in combination with our organization's nutrition outreach efforts. Agreement with OHCS will cover two Medical Assistants working two full days each month for one year plus medical supplies.*

    - *SAMPLE NARRATIVE: Budget to retain DesignPros, Inc., to provide as-needed revisions to construction documents/drawings pertaining to the warehouse rehabilitation project. We anticipate up to three rounds of revisions before the issuance of permits and approvals by the Development Services Department. Each revision is anticipated to cost $2,500 for a maximum amount of $7,500.*

Refer to the table below for a listing and description of the attachments to be uploaded to ED Grants as part of the RFP response to the City of San Diego. Note that some attachments are required only for certain RFP categories. Some attachments consist of a City-provided form be completed and then uploaded. These forms may be downloaded from ED Grants from the 'Agreement Checklist' tab. Contact City staff at CDBG@sandiego.gov for questions.

#	Document	Description	Form Available	Applicability[1]	Applicable Project Types			Naming Convention[2]
					PS	NCIP-F	CED-MTA	
1	Organization Chart: Entire Agency (Only if changes have been made since the RFQ application was submitted)	Shows the organization's general structure in terms of span of control and chain of command. If a subrecipient has offices in different locations, the chart for the office administering the CDBG-funded project should be provided. The chart needs only list the position titles (the incumbents' names are not necessary). PURPOSE: City staff will be looking to see that the subrecipient has capacity to successfully implement the CDBG-funded project and that there is sufficient separation of duties to implement proper procurement accounting controls (e.g., the same person does not create and approve a purchase order).	No	If Applicable	X	X	X	[orgname]_orgchart_partners.pdf
2	Organization Chart: Implementation Team	Shows the specific programmatic and fiscal staff within the organization charged with implementing the CDBG-funded project. The chart needs to only list the position titles (the incumbents' names are not necessary). ***PURPOSE:*** *City staff will be looking to see that the applicant has capacity to successfully implement the CDBG-funded project.*	No	Required	X	X	X	[orgname]_orgchart_implementation.pdf
3	Federally Approved Indirect Cost (FAIC) Rate Agreement	Refers to a negotiated and approved indirect cost rate agreement between the applicant and a federal entity. A copy of this agreement is needed if the project budget allocates funds calculated using this option to the line item 14 (Administrative Indirect Overhead). ***PURPOSE:*** *Documents the percentage rate used to calculate indirect cost amount reimbursable by CDBG funds.*	No	If Applicable	X		X	[orgname]_faic_agmt.pdf
4	Cost Allocation Plan	Refers to a written account of the methods used by the applicant to logically and fairly divide indirect costs among its different programs and their funding sources. A cost allocation plan is needed if the applicant desires to be reimbursed for indirect costs tied directly to the CDBG-funded portion of the program or activity and the applicant does not have a federally approved indirect cost (FAIC) rate agreement to base such costs on. ***PURPOSE:*** *Justifies to the City the amount of indirect costs to be covered by CDBG funds.*	No	If Applicable	X		X	[orgname]_costallocationplan.pdf
5	Rental/Lease Agreement	Refers to the agreement entered into by the applicant with its landlord describing the rent/lease terms and the amount to be paid to the landlord on the agreed-upon schedule. ***PURPOSE:*** *The City will reimburse rent/lease payments up to the amount indicated in the agreement and only for the portion reasonably attributable to the CDBG-funded activity per a cost allocation plan. A rental/lease agreement is needed only if the applicant requests assistance for its rent/lease.*	No	If Applicable	X		X	[orgname]_rent-lease_agmt.pdf
6	Proof of Property Ownership or Lease Agreement	Refers to a document proving ownership by the applicant of the property to be improved (e.g., deed of trust or grant deed) or a long-term lease agreement between the applicant and the owner of the property to be improved (at least five years past the anticipated completion of the proposed project). ***PURPOSE:*** *Reviewed by City staff as part of its due diligence efforts to ensure that CDBG funds are invested in facilities or multi-unit housing structures that will serve LMI individuals or households, respectively, for at least five years after project completion and that the applicant has adequate site control over the property to accomplish the proposed project.*	No	Required		X		[orgname]_rent-lease_agmt.pdf (if lease agreement) -OR- [orgname]_propownership.pdf (if proof of property ownership)
7	Real Estate Legal Description	Refers to a copy of the page from the deed of trust or grant deed identifying and describing legally the real estate on which the facility to be improved using CDBG funds may be found. The legal description may be in "lot and block" or "metes and bounds" form. ***PURPOSE:*** *Reviewed by City staff as part of its due diligence efforts to ascertain the exact location and identity of the real estate where the facility to be improved is found.*	No	Required		X		[orgname]_proplegaldescription.pdf

[1] 'Required' means the attachment must be uploaded to ED Grants as part of the RFP response. 'If applicable' means the attachment must be uploaded to ED Grants as part of the RFP response if the document pertains to the proposed project or program. 'If available' means the attachment should be uploaded to ED Grants for City reference if the document is available. Note that ED Grants uses 'Optional' to refer to both 'If applicable' and 'If available' and applicants must consult this table and City staff for any questions or clarifications needed.
[2] The ampersand (&) and other special symbols should not be used when naming files to be uploaded to ED Grants. If spaces are needed, use the underscore symbol (_), but only sparingly.

8	Construction Permits & Approvals	Refers to permits, approvals, and other documentation issued by the City's Development Services Department verifying that all development requirements have been met and the construction project may proceed. If such documentation is not yet available at the time of the submission of the RFP response, the applicant must provide an update to the City on the progress of securing the permits and approvals at CDBG agreement execution. ***PURPOSE:*** *Allows the City to evaluate the readiness of the proposed project and any potential issues that may arise should it be funded by CDBG.*	No	If Applicable		X		[orgname]_constructpermitsapps.pdf
9	Professional Construction Estimates	Refers to a document prepared and signed by a licensed contractor or Certified Professional Estimator (CPE) on the proposed facility improvement or multi-unit housing structure rehabilitation project. It must cover the entire scope of the project and factor prevailing wages. ***PURPOSE:*** *Provides evidence to City staff that the requested CDBG funding to complete the project is reasonable and is based on an unbiased third-party opinion. NOTE: Contractors providing the estimates are precluded from subsequently participating in any associated contractor procurement.*	No	Required		X		[orgname]_constructionestimate.pdf
10	Accessibility Survey/ADA Needs Assessment Reports	Refers to an evaluation of the facility or multifamily housing complex to be rehabilitated using CDBG funds in terms of meeting accessibility requirements and compliance with the Americans with Disabilities Act. All federally funded facilities and multifamily housing complexes must be accessible. If they are currently not accessible, the CDBG-funded rehabilitation project must ensure they are accessible after construction. If they are currently accessible, the applicant must submit documentation verifying compliance with accessibility requirements. ***PURPOSE:*** *Allows the City to track and verify all CDBG-funded projects are in compliance with accessibility requirements.*	No	If Available		X		[orgname]_access-ada-assessment.pdf
11	Property Inspection & Needs Assessment Reports	Refers to any property inspections and needs assessments commissioned by the applicant on the property to be rehabilitated using CDBG funds and on which the project scope is based. ***PURPOSE:*** *The documents serve as verification and justification of the needs to be addressed in part by CDBG funding.*	No	If Available		X		[orgname]_propertyinspec_needs.pdf
12	Lead Hazard & Asbestos Documentation	Refers to any lead hazard and asbestos assessments commissioned by the applicant on the property to be rehabilitated using CDBG funds. Also refers to documentation of actions taken by the applicant thus far to address lead hazards and asbestos. ***PURPOSE:*** *Allows the City to determine if any action regarding lead hazards and asbestos should be taken by the applicant if allocated CDBG funding.*	No	If Available		X		[orgname]_lead-asbestos.pdf
13	Environmental Documents & Reports	Refers to any environmental assessments and reports commissioned by the applicant on the property to be rehabilitated using CDBG funds. ***PURPOSE:*** *City staff may reference those documents to evaluate the readiness of the proposed project and to prepare documents per the National Environmental Policy Act (NEPA) and California Environmental Quality Act (CEQA) if it is allocated CDBG funding.*	No	If Available		X		[orgname]_envirorpts.pdf
14	Colored Photos	Refers to representative photos taken at the proposed project site showing existing conditions and the need for improvements. Both panoramic and detail shots should be submitted. A maximum of two 8.5x11 sheets of photos may be submitted. ***PURPOSE:*** *Provide City staff and the Consolidated Plan Advisory Board a visual of the need to be addressed by rehabilitation work for evaluation purposes.*	No	Required		X		[orgname]_photos.pdf

Application - Test - PS

Organization Capacity (14 Points)

a. Short Project Description

Enter a one-sentence description of your proposed project. This response must be limited to 250 characters.

a. Experience in Successful Implementation of Public Services Projects (Max Score: 5 Points)

Describe your organization's experience in successfully implementing projects of similar scope and comparable complexity.

b. Experience in Provision of Services to LMI Residents (Max Score: 5 Points)

Describe your organization's experience in providing services to low and moderate-income residents or presumed low and moderate-income CDBG beneficiaries such as elderly persons, illiterate adults, homeless persons, abused children and/or battered spouses. Please explain how this experience is applicable and beneficial to the proposed project.

c. Collaboration with Other Service Agencies (Max Score:3 Points)

Describe how your organization collaborates with other service agencies, including organizations that provide similar services and resources for the benefit of LMI individuals. Please provide specific examples of collaboration.

d. Resiliency (1 Point)

Describe the organization's ability to anticipate, prepare for, respond, and adapt to unexpected changes or sudden disruptions in order to continue to serve their clients. Disruptions or changes can include a significant event in the national or international economy, a downturn in a particular industry, or an external event such as a natural disaster or pandemic.

Project Characteristics (28 Points)

a. Project Summary (Max Score: 13 Points)

i. Provide a brief description of the proposed project, including resulting activities and/or services to be provided. (Max Score: 5 Points)

ii. Describe the characteristics of the population(s) to be served. (Max Score: 3 Points)

iii. Describe the critical need(s) that will be addressed, including how other resources are not available to meet the need(s). (Max Score: 5 Points)

b. Confirmation of Program Status (Max Score: 5 Points)

i. Select whether the proposed project will result in either continuation of an existing service, provision of a new service or the substantial expansion of an existing service (choose one)
Existing Service Continuation

ii. Explain the rationale, including metrics and available data, used to determine whether the program would result in the continuation of an existing service, provision of a new service or the substantial expansion of an existing service (choose one). Please explain how the project provides or will provide an impact to the clients you serve or the surrounding community.

c. Project Goal(s) (Max Score: 7 Points)

Identify the goal(s) and anticipated impact of the project and describe how these goals will be met. Please explain any systems used to monitor and track program progress and outcomes.

d. Project Results (Max Score: 3 Points)

i. Total number of unduplicated City of San Diego individuals to be assisted by the project overall (including leveraged funds).
1

i.a. Of total number listed above, the unduplicated number to be served specifically with CDBG funds.
1

i.b. Of total number listed above, the total number of LMI individuals anticipated to be served who are at or below 80% of AMI with CDBG funds.
1

i.c. Percentage of City of San Diego LMI individuals to be assisted by the project with CDBG funds.
100.00%

ii. Describe the methodology used to determine the anticipated overall project results, anticipated CDBG results, and the number of LMI individuals served by the project.

e. Short Project Description

Enter a one-sentence description of your proposed project. This response must be limited to 250 characters.

Project Specifics (22 Points)

a. Services to Be Provided (Max Score: 18 + Points)

i. Provide a listing and clear description of the services to be provided and details on the quantity and duration of each service listed. (Max Score: 5 Points)

ii. Provide details on the method of delivery of each service listed, which should include details on whether each service listed will be provided on an individual basis and/or group settings. (Max Score:5 Points)

iii. Explain the specific need(s) this project will address and justify the total amount of CDBG funds requested in relation to the services provided and any fees charged. Please ensure this aligns with information presented in the Proposed Budget Section and justify staffing costs requests. (Max Score: 4 Points).

iv. Determine a cost per beneficiary amount based on CDBG funds requested and projected number of clients served with CDBG funds. Give details on how the cost per beneficiary amount is warranted given the depth of services to be provided. (Max Score: 4 Points)

b. Project Schedule (Max Score: 4 Points)

i. Describe how the project will be completed within the required 12-month timeline with appropriate milestones and estimated expenditures per month/quarter. (Max Score: 4 Points)

Project Benefits (16 Points)

a. Services to High-Need Populations (Max Score: 9 Points)

Describe how the project will provide services to high need populations and result in a positive impact being made in the lives of LMI individuals. Please include a success story or describe a successful past outcome. Public Services projects must be considered a Low and Moderate-Income Limited Clientele Activity (LMC) by serving one of the following:

i. Presumed low-income clientele as defined by HUD (see the FY 2025 RFP Handbook); or

ii. Direct Benefit to Low-Income Persons based on compliance with HUD income limits (see the FY 2025 RFP Handbook) through documented family size and income.

b. Geographic Targeting: Location (Max Score: 2 Points)

Indicate whether your organization's office(s) providing project services is located in the Federally Designated Opportunity Zone or in the Promise Zone.
Not in Geographically Targeted Area

c. Geographic Targeting: Services (Max Score: 3 Points)

Describe your agency's efforts and strategies to deliver services to clients residing in the Federally Designated Opportunity Zone or in the Promise Zone.

d. Collateral Material (2 point)

Provide supporting documentation (in narrative or in the attachments) to demonstrate how your organization provides postive impact in the lives of LMI individuals or other high needs populations. These materials can include testimonial(s), annual report, photos/videos, social media or website postings, and/or marketing/promotional materials.

Budget (18 Points)

a. Demonstration of Sustainability (Max Score: 5 Points)

Identify the alternative future sources of funding to support the proposed project; or how receiving award will open up opportunities for additional funding sources. Demonstrate that the project will not rely on CDBG funds annually for program sustainability.
Test

Certifications

1. Certification Regarding Secured Funding Sources & Secured Fund Amounts

By choosing this button, Applicant certifies that the funding sources and secured fund amounts detailed in the 'Budget' section is correct and complete.
true

In addition, this certification confirms that the secured funds listed represent cash designated to the proposed CDBG project and that the cash will be expended during the FY 2025 contract period. Lastly, the secured funds listed do not include lines of credit; funds expended prior to July 1, 2024; in-kind support/match; future pledges; and/or options-to-renew funding.

If Applicant is awarded funding for FY 2025, the City of San Diego will monitor and report the expenditures of the secured funding as part of Applicant's performance report card for consideration in future CDBG RFP processes and evaluation/scoring.

This certification submitted to the City of San Diego is a material representation of fact upon which reliance will be placed in the evaluation and scoring of the RFP response and when entering into an agreement. If it is later determined that Applicant rendered an erroneous certification, in addition to other remedies available, the City of San Diego may terminate the agreement for default.

By choosing this button, Applicant confirms that there are no secured funds that can be verified as available to be expended by the proposed FY 2025 CDBG project at the time of the FY 2025 RFP response submission. The secured fund amount detailed in the 'Budget' section is zero.
false

2. Certification Regarding CDBG RFP Response Submission

By checking this box, Applicant acknowledges reading, understanding, and agreeing to the following:
true

1. That Applicant's program and fiscal staff has attended a minimum of one session of the Mandatory FY 2025 CDBG RFP Workshop and has signed the attendance log, as required. Applicant understands that, if such attendance cannot be verified by the Community Development Division, this RFP will be deemed "ineligible" and will not be forwarded for FY 2025 CDBG Program funding consideration per Council Policy 700-02.
2. That submission of this RFP response for this proposed project is not a guarantee of funding from the City of San Diego.
3. That all CDBG-funded activities shall be within the boundaries of the City of San Diego and/or benefit only City of San Diego residents.
4. That no revised RFP responses may be made in connection with this RFP process once the deadline for the RFP submission has passed.
5. That only eligible FY 2025 CDBG RFP submittals will be forwarded to the City of San Diego's Consolidated Plan Advisory Board (CPAB) for review and scoring. Applicant understands that there is no appeals process for final scores issued by each CPAB member. Funding recommendations will be based on the average of the total scores received for each RFP response reviewed. The funding recommendations will be forwarded to City Council for approval.

6. That, if the proposed project is recommended for funding, Applicant will be required to submit copies of their Financial Management Policies & Procedures, Procurement Policies & Procedures, and Household Income Verification Procedures for immediate review by Community Development Division staff.
7. That, if the proposed project is approved for funding, the City of San Diego reserves the right to reduce and/or cancel the allocation if federal entitlements are canceled, reduced, or rescinded.
8. That, if the proposed project is approved for funding, a written executed agreement that includes: a scope of services; budget terms; records retention and reporting requirements; program income procedures; local and federal requirements; circumstances that would trigger grant suspensions and terminations; and reversions of assets will be required between Applicant and the City of San Diego.
9. That, if the proposed project is approved for funding, Applicant's fiscal and program staff must attend a mandatory pre-agreement meeting with Community Development Division staff in Spring 2024.
10. That, if the proposed project is approved for funding, Applicant will be given a list of items to submit by designated deadlines to ensure contract execution by July 1, 2024, and that failure to comply with submittal requirements may impact award of funds.
11. That, if the proposed project is approved for funding, Applicant understands that the Community Development Division reserves the right to require final revisions to proposed scope of services and/or budget line items prior to the execution of a written agreement utilizing FY 2025 CDBG funds.
12. That, if the proposed project is approved for funding, Applicant will be required to address any issues related to Section 504/the Americans with Disabilities Act, Fair Housing, and Environmental Determinations by Community Development Division staff prior to agreement execution and sign certifications related to these and other federal, State, City requirements.
13. That, if the proposed project is approved for funding, Applicant acknowledges that FY 2025 agreement performance will be monitored, and reports based on performance indicators will be made available to the Consolidated Plan Advisory Board (CPAB) for subsequent funding recommendations. Applicant's required documentation and reporting of project beneficiaries by the agreement end date will be included.
14. That, if the proposed project is approved for funding, Applicant shall comply with all federal and City of San Diego policies and requirements, and that City of San Diego procedures must be followed, as applicable to the CDBG Program.
15. That, if the proposed project is approved for funding, proof of required insurance coverage will be submitted by Applicant to the City of San Diego prior to agreement execution. Applicant understands that the execution of a written agreement will be delayed until proof of required insurance is submitted to the City of San Diego.
16. That, if the proposed project is approved for funding, Applicant understands that a request to revise the "project category" OR "project description" listed in this RFP response will not be accepted by the Community Development Division.
17. That Applicant understands that the City of San Diego may verify any or all statements contained in all FY 2025 CDBG RFP submittals, and that any intentionally false information or omission may disqualify Applicant from consideration for CDBG funding in the current and future years.
18. That Applicant certifies that its Primary Representative, as registered in the City of San Diego's Economic Development Grants Management System (ED Grants), is legally authorized to submit this RFP response and bind the Applicant Organization contractually, and that Applicant acknowledges and agrees to the submission of this RFP response in electronic form only.

3. Questionnaire Regarding Conflict of Interest (Part A)

Federal, State, and local law prohibits employees and public officials of the City of San Diego from participating on behalf of the City in any transaction in which they have a financial interest. This questionnaire must be completed and submitted by each applicant for CDBG funding. The purpose of this questionnaire is to determine if Applicant, its staff, or any of Applicant's Board of Directors would create conflict of interest.

If you answer “YES” to any of the questions listed below, the Community Development Division and/or the City Attorney’s Office will need to determine whether a real or apparent conflict of interest exists.
If you answer "NO" to any of the question listed below, enter "N/A" for all values for at least one entry.

1. Are there any members of Applicant’s staff or any members of Applicant’s Board of Directors or governing body who currently are or have been within one year of the date of this RFP response a City employee or consultant, or a member of the City Council, a City Advisory Board, a City Commission, and/or a City Committee? If your answer is yes, enter the name, position, and affiliation with the City for each person in the table below. If your answer is no, enter 'N/A' in each of the fields in the table below.
No

Listed Conflicts of Interest (Part A)		
Name	Position	Affiliation With City
Test	Test	Test

3. Questionnaire Regarding Conflict of Interest (Part B)

2. Will the CDBG funds requested by Applicant be used to award a subcontract to any individual(s) or business affiliate(s) who currently is or has/have been within one year of the date of this RFP response a City employee or consultant, or a member of the City Council, a City Advisory Board, a City Commission, and/or a City Committee? If your answer is yes, enter the name, position, and affiliation with the City for each person in the table below. If your answer is no, enter 'N/A' in each of the fields in the table below.
No

Listed Conflicts of Interest (Part B)		
Name	Position	Affiliation With City
Test	Test	Test

3. Questionnaire Regarding Conflict of Interest (Part C)

3. Are there any members of Applicant's staff or members of Applicant's Board of Directors or other governing body who are business partners or family members of a City employee, consultant, or a member of the City Council, a City Advisory Board, a City Commission, and/or a City Committee? If your answer is yes, enter the name, position, and affiliation with the City for each person in the table below. If your answer is no, enter 'N/A' in each of the fields in the table below.

No

Listed Conflicts of Interest (Part C)

Name	Position	Affiliation With City
Test	Test	Test

Application - Test CED

Organizational Capacity (13 Points)

a. Short Project Description

Enter a one-sentence description of your proposed project. This response must be limited to 250 characters.

a. Experience in Successful Implementation of Community and Economic Development Projects (Max Score: 5 Points)

Describe your organization's experience in successfully implementing projects of similar scope and comparable complexity. Specifically address your organization's experience in assisting LMI individuals start-up or expand a microenterprise.

b. Experience in Provision of Services to LMI Households or LMI Business Owners (Max Score: 5 Points)

Describe your organization’s experience in providing services to low and moderate-income households or low and moderate-income business owners. Please explain how this experience is applicable and beneficial to the proposed project.

c. Collaboration with Other Service Agencies (Max Score: 2 Points)

Describe how your organization collaborates with other service agencies, including organizations that provide similar services and resources for the benefit of LMI individuals and LMI business owners. Please provide specific examples of collaboration.

d. Resiliency (1 Point)

Describe the organization's ability to anticipate, prepare for, respond, and adapt to unexpected changes or sudden disruptions in order to continue to serve their clients. Disruptions or changes can include a significant event in the national or international economy, a downturn in a particular industry, or an external event such as a natural disaster or pandemic.

Project Characteristics (28 Points)

a. Project Summary (Max Score: 13 Points)

i. Provide a brief description of the proposed project, including resulting activities and/or services to be provided. (Max Score: 5 Points)

ii. Describe the characteristics of the population(s) to be served. (Max Score: 3 Points)

iii. Describe the critical need(s) that will be addressed including how other resources are not available to meet the need(s). (Max Score: 5 Points)

b. Confirmation of Program Status (Max Score: 5 Points)

i. Select whether the proposed project will result in either the continuation of an existing service, provision of a new service, or the substantial expansion of an existing program.
Existing Service Continuation

ii. Explain the rationale, including metrics and available data, used to determine whether the program would result in the continuation of an existing service, provision of a new service or the substantial expansion of an existing service (choose one). Please explain how the project provides or will provide an impact to the clients you serve or the surrounding community.

c. Project Goal(s) (Max Score: 7 Points)

Identify the goal(s) and anticipated impact of the project and describe how these goals will be measured and tracked. Please explain any systems used to monitor and track program progress and outcomes. Also, provide information on follow-up procedures related to business assistance.

d. Project Results (Max Score: 3 Points)

i. Total number of unduplicated City of San Diego LMI individuals to be assisted by the project overall (including leveraged funds).
1

i. a. Of the total number listed above, the unduplicated number to be served specifically with CDBG funds.
1

ii. Total number of unduplicated City of San Diego businesses, owned by City of San Diego LMI residents, to be assisted by the project (established or expanded).
1

ii. a. Of total number listed above, anticipated City of San Diego businesses served specifically with CDBG funds.
1

iii. Describe the methodology used to determine the results listed above. (Total anticipated City of San Diego LMI individuals, anticipated LMI served with CDBG funds, Total City of San Diego Businesses and anticipated City of San Diego businesses with CDBG funds). Please be sure to highlight the differences in methodology between this section, and Section C: Project Goal(s).

Project Specifics (22 Points)

a. Services to be Provided (Max Score: 18 Points)

i. Provide a listing and clear description of the services to be provided and details on the quantity and duration of each service listed (Max Score: 5 Points).

ii. Provide details on the method of delivery of each service listed, which should include details on whether each service listed will be provided on an individual basis and/or group settings (Max Score: 5 Points).

iii. Explain the specific need(s) this project will address and justify the total amount of CDBG funds requested in relation to the services provided and any fees charged. Please ensure this aligns with information presented in the budget section and justify staff time costs requested. (Max Score 4 Points).

iv. Determine a cost per beneficiary amount based on CDBG funds requested and projected number of clients served with CDBG funds. Give details on how the cost per beneficiary amount is warranted given the depth of services to be provided. (Max Score: 4 Points).

b. Project Schedule (Max Score: 4 Points)

i. Describe how the project will be completed within the required 12-month timeline with appropriate milestones and estimated expenditures per month/quarter (Max Score: 4 Points).

Project Benefits (17 Points)

a. Services to High Need Populations - Low and Moderate-Income Clientele (LMC) (Max Score: 9 Points)

Describe how the project will provide services to high-need populations and result in a positive impact being made in the lives of City of San Diego LMI individuals and City of San Diego LMI business owners. Please include a success story or describe a successful past outcome. The CED Technical Assistance Program must meet the limited clientele criteria for LMI benefit by providing microenterprise assistance to Low-Income Persons and Business Owners in compliance with HUD income limits through documented family size and income. The CED Technical Assistance Program must exclusively serve microenterprises, which are defined as a commercial enterprise that has five or fewer employees, one or more of whom owns the enterprise.

b. Geographic Targeting (Max Score: 3 Points)

b. Indicate whether your organization's office(s) providing project services is located in the Federally Designated Opportunity Zone or in the Promise Zone.
Not in Geographically Targeted Area

c. Geographic Targeting (Max Score: 3 Points)

c. Describe your agency's efforts and strategies to deliver services to clients residing in the Federally Designated Opportunity Zone or in the Promise Zone.

d. Collateral Material (2 point)

d. Provide supporting documentation (in narrative or in the attachments) to demonstrate how your organization provides postive impact in the lives of LMI individuals or other high needs populations. These materials can include testimonial(s), annual report, photos/videos, social media or website postings, and/or marketing/promotional materials.

Budget (18 Points)

a. Demonstration of Sustainability (Max Score: 5 Points)

Identify the alternative future sources of funding to support the proposed project; or how receiving the award will open up opportunities for additional funding sources. Demonstrate that the project will not rely on CDBG funds annually for program sustainability.
Test

Certifications

1. Certification Regarding Secured Funding Sources & Secured Fund Amounts

By choosing this button, Applicant certifies that the funding sources and secured fund amounts detailed in the 'Budget' section is correct and complete.
true

In addition, this certification confirms that the secured funds listed represent cash designated to the proposed CDBG project and that the cash will be expended during the FY 2025 contract period. Lastly, the secured funds listed do not include lines of credit; funds expended prior to July 1, 2024; in-kind support/match; future pledges; and/or options-to-renew funding.

If Applicant is awarded funding for FY 2025, the City of San Diego will monitor and report the expenditures of the secured funding as part of Applicant's performance report card for consideration in future CDBG RFP processes and evaluation/scoring.

This certification submitted to the City of San Diego is a material representation of fact upon which reliance will be placed in the evaluation and scoring of the RFP response and when entering into an agreement. If it is later determined that Applicant rendered an erroneous certification, in addition to other remedies available, the City of San Diego may terminate the agreement for default.

By choosing this button, Applicant confirms that there are no secured funds that can be verified as available to be expended by the proposed FY 2025 CDBG project at the time of the FY 2025 RFP response submission. The secured fund amount detailed in the 'Budget' section is zero.
false

2. Certification Regarding CDBG RFP Response Submission

By checking this box, Applicant acknowledges reading, understanding, and agreeing to the following:
true

1. That Applicant's program and fiscal staff has attended a minimum of one session of the Mandatory FY 2025 CDBG RFP Workshop and has signed the attendance log, as required. Applicant understands that, if such attendance cannot be verified by the Community Development Division, this RFP will be deemed "ineligible" and will not be forwarded for FY 2025 CDBG Program funding consideration per Council Policy 700-02.
2. That submission of this RFP response for this proposed project is not a guarantee of funding from the City of San Diego.
3. That all CDBG-funded activities shall be within the boundaries of the City of San Diego and/or benefit only City of San Diego residents.
4. That no revised RFP responses may be made in connection with this RFP process once the deadline for the RFP submission has passed.
5. That only eligible FY 2025 CDBG RFP submittals will be forwarded to the City of San Diego's Consolidated Plan Advisory Board (CPAB) for review and scoring. Applicant understands that there is no appeals process for final scores issued by each CPAB member. Funding recommendations will be based on the average of the total scores received for each RFP response reviewed. The funding recommendations will be forwarded to City Council for approval.
6. That, if the proposed project is recommended for funding, Applicant will be required to submit copies of their Financial Management Policies & Procedures, Procurement Policies & Procedures, and Household Income Verification Procedures for immediate review by Community Development Division staff.
7. That, if the proposed project is approved for funding, the City of San Diego reserves the right to reduce and/or cancel the allocation if federal entitlements are canceled, reduced, or rescinded.
8. That, if the proposed project is approved for funding, a written executed agreement that includes: a scope of services; budget terms; records retention and reporting requirements; program income procedures; local and federal requirements; circumstances that would trigger grant suspensions and terminations; and reversions of assets will be required between Applicant and the City of San Diego.
9. That, if the proposed project is approved for funding, Applicant's fiscal and program staff must attend a mandatory pre-agreement meeting with Community Development Division staff in Spring 2024.
10. That, if the proposed project is approved for funding, Applicant will be given a list of items to submit by designated deadlines to ensure contract execution by July 1, 2024, and that failure to comply with submittal requirements may impact award of funds.

11. That, if the proposed project is approved for funding, Applicant understands that the Community Development Division reserves the right to require final revisions to proposed scope of services and/or budget line items prior to the execution of a written agreement utilizing FY 2025 CDBG funds.
12. That, if the proposed project is approved for funding, Applicant will be required to address any issues related to Section 504/the Americans with Disabilities Act, Fair Housing, and Environmental Determinations by Community Development Division staff prior to agreement execution and sign certifications related to these and other federal, State, City requirements.
13. That, if the proposed project is approved for funding, Applicant acknowledges that FY 2025 agreement performance will be monitored and reports based on performance indicators will be made available to the Consolidated Plan Advisory Board (CPAB) for subsequent funding recommendations. Applicant's required documentation and reporting of project beneficiaries by the agreement end date will be included.
14. That, if the proposed project is approved for funding, Applicant shall comply with all federal and City of San Diego policies and requirements, and that City of San Diego procedures must be followed, as applicable to the CDBG Program.
15. That, if the proposed project is approved for funding, proof of required insurance coverage will be submitted by Applicant to the City of San Diego prior to agreement execution. Applicant understands that the execution of a written agreement will be delayed until proof of required insurance is submitted to the City of San Diego.
16. That, if the proposed project is approved for funding, Applicant understands that a request to revise the "project category" OR "project description" listed in this RFP response will not be accepted by the Community Development Division.
17. That Applicant understands that the City of San Diego may verify any or all statements contained in all FY 2025 CDBG RFP submittals, and that any intentionally false information or omission may disqualify Applicant from consideration for CDBG funding in the current and future years.
18. That Applicant certifies that its Primary Representative, as registered in the City of San Diego's Economic Development Grants Management System (ED Grants), is legally authorized to submit this RFP response and bind the Applicant Organization contractually, and that Applicant acknowledges and agrees to the submission of this RFP response in electronic form only.

3. Questionnaire Regarding Conflict of Interest (Part A)

Federal, State, and local law prohibits employees and public officials of the City of San Diego from participating on behalf of the City in any transaction in which they have a financial interest. This questionnaire must be completed and submitted by each applicant for CDBG funding. The purpose of this questionnaire is to determine if Applicant, its staff, or any of Applicant's Board of Directors would create conflict of interest.

If you answer "YES" to any of the questions listed below, the Community Development Division and/or the City Attorney's Office will need to determine whether a real or apparent conflict of interest exists.
If you answer "NO" to any of the question listed below, enter "N/A" for all values for at least one entry.

1. Are there any members of Applicant's staff or any members of Applicant's Board of Directors or governing body who currently are or have been within one year of the date of this RFP response a City employee or consultant, or a member of the City Council, a City Advisory Board, a City Commission, and/or a City Committee? If your answer is yes, enter the name, position, and affiliation with the City for each person in the table below. If your answer is no, enter 'N/A' in each of the fields in the table below.

No

Listed Conflicts of Interest (Part A)		
Name	Position	Affiliation With City
Test	Test	Test

3. Questionnaire Regarding Conflict of Interest (Part B)

2. Will the CDBG funds requested by Applicant be used to award a subcontract to any individual(s) or business affiliate(s) who currently is or has/have been within one year of the date of this RFP response a City employee or consultant, or a member of the City Council, a City Advisory Board, a City Commission, and/or a City Committee? If your answer is yes, enter the name, position, and affiliation with the City for each person in the table below. If your answer is no, enter 'N/A' in each of the fields in the table below.

No

Listed Conflicts of Interest (Part B)		
Name	Position	Affiliation With City
Test	Test	Test

3. Questionnaire Regarding Conflict of Interest (Part C)

3. Are there any members of Applicant's staff or members of Applicant's Board of Directors or other governing body who are business partners or family members of a City employee, consultant, or a member of the City Council, a City Advisory Board, a City Commission, and/or a City Committee? If your answer is yes, enter the name, position, and affiliation with the City for each person in the table below. If your answer is no, enter 'N/A' in each of the fields in the table below.

No

Listed Conflicts of Interest (Part C)		
Name	Position	Affiliation With City
Test	Test	Test

Application - TEST - NCIP-F

Organizational Capacity (15 Points)

a. Short Project Description

Enter a one-sentence description of your proposed project. This response must be limited to 250 characters.

a. Experience in Successful Implementation of Capital Improvement Projects or Housing Rehabilitation Projects (Max Score: 9 Points)

i. Describe your organization's experience in successfully implementing projects of similar scope and of comparable complexity. (Max score: 5 Points) Please list any CDBG related construction project with allocation amount, year completed, and result of improvements.

ii. Describe specific staff within your organization that have experience overseeing the design and implementation of a construction project. Also, if your organization plans on using a third-party construction manager, please describe your organization/staff's approach to securing and utilizing a third-party. (Max Score: 4 Points)

iii. Does your organization have any open City of San Diego CDBG NCIP or Housing Rehabilitation projects located at other sites? Check box if yes.
true

If yes, please explain why the projects are still open and describe whether there were implementation delays from the schedule listed in the project's original RFP response from a prior year. Provide the construction start date and scheduled closeout date. If no, enter 'N/A' below.

b. Experience in Provision of Services to LMI Residents (Max Score: 3 Points)

Describe your organization’s experience in providing services to low and moderate-income residents or presumed low and moderate income CDBG beneficiaries such as elderly persons, illiterate adults, homeless persons, abused children and/or battered spouses. Please explain how this experience is applicable and beneficial to the proposed project.

c. Collaboration with Other Service Agencies (Max Score: 2 Points)

Describe how your organization collaborates with other service agencies, including organizations that provide similar services and resources for the benefit of LMI individuals. Please provide specific examples.

d. Resiliency (1 Point)

Describe the organization's ability to anticipate, prepare for, respond, and adapt to unexpected changes or sudden disruptions in order to continue to serve their clients. Disruptions or changes can include a significant event in the national or international economy, a downturn in a particular industry, or an external event such as a natural disaster or pandemic.

Project Characteristics (28 Points)

a. Project Summary (Max Score: 13 Points)

i. Provide a brief description of the proposed project, including resulting activities and/or services to be provided. (Max Score: 5 Points)

ii. Describe the characteristics of the population(s) to be served. (Max Score: 3 Points)

iii. Describe the critical need(s) that will be addressed, including how other resources are not available to meet the need(s). (Max Score: 5 Points)

b. Facility Impact: Confirmation of a New Public Facility or Expansion to an Existing Public Facility (Max Score: 5 Points)

i. Explain the expected impact of the proposed project and how the proposed project will result in an impactful new facility, expansion of services within an existing facility, or ADA accessibility improvements.

ii. Public Facility Improvement: Describe the number and type of major improvements that will be completed, and explain how the project is providing or will provide an impact.

c. Project Goal(s) (Max Score: 7 Points)

Identify the goal(s) and anticipated impact of the project and describe how these goals will be met. Please explain any systems used to monitor and track program progress and outcomes.

d. Project Results (Max Score: 3 Points)

i. Total number of unduplicated City of San Diego LMI individuals to be assisted by the project.

1

ii. Total number of unduplicated City of San Diego LMI individuals to be assisted by the project.
Test

Project Specifics (14 Points)

a. Contract Execution Readiness (Max 8 Points)

i.Justification of CDBG Funds Requested (Max Score: 3 Points) Describe the extent to which the proposed project is ready to proceed by detailing how the total amount of CDBG funds requested is justified by accurate cost estimations with a professional consultant from an architect.

If the facility you are applying for has received CDBG funds for improvements/expansions in the past, explain the outcome and justification for the request of additional CDBG funds.

ii. Applicable Project Permits and Construction/Architectural Plans (Max Score: 5 Points) Describe existing construction/architectural plans and demonstrate a knowledge of all applicable permits required for the proposed project by explaining those that have been identified, planned for, and/or secured. If permits are not needed, provide the information used for basis for that determination.

b. Project Schedule (Max Score: 6 Points)

i. Describe how the project will be completed and funds expended within the required 24-month timeline, specifying key milestones. The description should, at minimum, include the following information:

1. Permitting and design completion (may take 3-6 months);
2. Project will be released for bid (may take 3-6 months);
3. Construction contract awarded (may take 3-6 months);
4. Anticipated Construction Timeline;
5. 100% expenditure level; and
6. Project completion, beneficiaries reported (National Objective met), and closeout report approved by CDD staff. (Max Score: 6 Points)

Project Benefits (19 Points)

a. Services to High Need Populations - Low and Moderate-Income Clientele (LMC) (Max Score: 12 Points)

Describe how the project will provide impactful services to high need populations and provide the references used for this determination. Please include a success story or describe a successful past outcome. Nonprofit Capital Improvement Project projects must be considered a Low and Moderate Income Limited Clientele Activity (LMC) by serving one of the following:

i. Presumed low income clientele as defined by HUD (see the FY 2025 RFP Handbook); or
ii. Direct Benefit to Low Income Persons based on compliance with HUD income limits (see the FY 2025 RFP Handbook) through documented family size and income.

b. Geographic Targeting (Max Score: 3 Points)

Describe whether the proposed project improvements will occur in the Federally Designated Opportunity Zone or in the Promise Zone.

c. Geographic Targeting (Max Score: 2 Points)

Describe your agency's efforts and strategies to deliver services to clients residing in the Federally Designated Opportunity Zone or in the Promise Zone.

d. Collateral Material (2 point)

Provide supporting documentation (in narrative or in the attachments) to demonstrate how your organization provides postive impact in the lives of LMI individuals or other high needs populations. These materials can include testimonial(s), annual report, photos/videos, social media or website postings, and/or marketing/promotional materials.

Budget (22 Points)

a. Demonstration of Maintenance Capabilities (Max Score: 7 Points)

Please explain how the proposed project improvements would be maintained and financed in the future. Specifically, identify the alternative future sources of funding that could be used to maintain the proposed project improvements and demonstrate that the project will not rely on CDBG funds for deferred maintenance responsibilities. Describe other future improvements and funding opportunities that could be made to facility by being awarded CDBG funding, if applicable.
TEST

Certifications

1. Certification Regarding Secured Funding Sources & Secured Fund Amounts

By choosing this button, Applicant certifies that the funding sources and secured fund amounts detailed in the 'Budget' section is correct and complete.
true

In addition, this certification confirms that the secured funds listed represent cash designated to the proposed CDBG project and that the cash will be expended during the FY 2025 contract period. Lastly, the secured funds listed do not include lines of credit; funds expended prior to July 1, 2024; in-kind support/match; future pledges; and/or options-to-renew funding.

If Applicant is awarded funding for FY 2025, the City of San Diego will monitor and report the expenditures of the secured funding as part of Applicant's performance report card for consideration in future CDBG RFP processes and evaluation/scoring.

This certification submitted to the City of San Diego is a material representation of fact upon which reliance will be placed in the evaluation and scoring of the RFP response and when entering into an agreement. If it is later determined that Applicant rendered an erroneous certification, in addition to other remedies available, the City of San Diego may terminate the agreement for default.

By choosing this button, Applicant confirms that there are no secured funds that can be verified as available to be expended by the proposed FY 2025 CDBG project at the time of the FY 2025 RFP response submission. The secured fund amount detailed in the 'Budget' section is zero.
false

2. Certification Regarding CDBG RFP Response Submission

By checking this box, Applicant acknowledges reading, understanding, and agreeing to the following:
true

1. That Applicant's program and fiscal staff has attended a minimum of one session of the Mandatory FY 2025 CDBG RFP Workshop and has signed the attendance log, as required. Applicant understands that, if such attendance cannot be verified by the Community Development Division, this RFP will be deemed "ineligible" and will not be forwarded for FY 2025 CDBG Program funding consideration per Council Policy 700-02.
2. That submission of this RFP response for this proposed project is not a guarantee of funding from the City of San Diego.
3. That all CDBG-funded activities shall be within the boundaries of the City of San Diego and/or benefit only City of San Diego residents.
4. That no revised RFP responses may be made in connection with this RFP process once the deadline for the RFP submission has passed.
5. That only eligible FY 2025 CDBG RFP submittals will be forwarded to the City of San Diego's Consolidated Plan Advisory Board (CPAB) for review and scoring. Applicant understands that there is no appeals process for final scores issued by each CPAB member. Funding recommendations will be based on the average of the total scores received for each RFP response reviewed. The funding recommendations will be forwarded to City Council for approval.

6. That, if the proposed project is recommended for funding, Applicant will be required to submit copies of their Financial Management Policies & Procedures, Procurement Policies & Procedures, and Household Income Verification Procedures for immediate review by Community Development Division staff.
7. That, if the proposed project is approved for funding, the City of San Diego reserves the right to reduce and/or cancel the allocation if federal entitlements are canceled, reduced, or rescinded.
8. That, if the proposed project is approved for funding, a written executed agreement that includes: a scope of services; budget terms; records retention and reporting requirements; program income procedures; local and federal requirements; circumstances that would trigger grant suspensions and terminations; and reversions of assets will be required between Applicant and the City of San Diego.
9. That, if the proposed project is approved for funding, Applicant's fiscal and program staff must attend a mandatory pre-agreement meeting with Community Development Division staff in Spring 2024.
10. That, if the proposed project is approved for funding, Applicant will be given a list of items to submit by designated deadlines to ensure contract execution by July 1, 2024, and that failure to comply with submittal requirements may impact award of funds.
11. That, if the proposed project is approved for funding, Applicant understands that the Community Development Division reserves the right to require final revisions to proposed scope of services and/or budget line items prior to the execution of a written agreement utilizing FY 2025 CDBG funds.
12. That, if the proposed project is approved for funding, Applicant will be required to address any issues related to Section 504/the Americans with Disabilities Act, Fair Housing, and Environmental Determinations by Community Development Division staff prior to agreement execution and sign certifications related to these and other federal, State, City requirements.
13. That, if the proposed project is approved for funding, Applicant acknowledges that FY 2025 agreement performance will be monitored and reports based on performance indicators will be made available to the Consolidated Plan Advisory Board (CPAB) for subsequent funding recommendations. Applicant's required documentation and reporting of project beneficiaries by the agreement end date will be included.
14. That, if the proposed project is approved for funding, Applicant shall comply with all federal and City of San Diego policies and requirements, and that City of San Diego procedures must be followed, as applicable to the CDBG Program.
15. That, if the proposed project is approved for funding, proof of required insurance coverage will be submitted by Applicant to the City of San Diego prior to agreement execution. Applicant understands that the execution of a written agreement will be delayed until proof of required insurance is submitted to the City of San Diego.
16. That, if the proposed project is approved for funding, Applicant understands that a request to revise the "project category" OR "project description" listed in this RFP response will not be accepted by the Community Development Division.
17. That Applicant understands that the City of San Diego may verify any or all statements contained in all FY 2025 CDBG RFP submittals, and that any intentionally false information or omission may disqualify Applicant from consideration for CDBG funding in the current and future years.
18. That Applicant certifies that its Primary Representative, as registered in the City of San Diego's Economic Development Grants Management System (ED Grants), is legally authorized to submit this RFP response and bind the Applicant Organization contractually, and that Applicant acknowledges and agrees to the submission of this RFP response in electronic form only.

3. Questionnaire Regarding Conflict of Interest (Part A)

Federal, State, and local law prohibits employees and public officials of the City of San Diego from participating on behalf of the City in any transaction in which they have a financial interest. This questionnaire must be completed and submitted by each applicant for CDBG funding. The purpose of this questionnaire is to determine if Applicant, its staff, or any of Applicant's Board of Directors would create conflict of interest.

If you answer “YES” to any of the questions listed below, the Community Development Division and/or the City Attorney’s Office will need to determine whether a real or apparent conflict of interest exists.
If you answer "NO" to any of the question listed below, enter "N/A" for all values for at least one entry.

1. Are there any members of Applicant’s staff or any members of Applicant’s Board of Directors or governing body who currently are or have been within one year of the date of this RFP response a City employee or consultant, or a member of the City Council, a City Advisory Board, a City Commission, and/or a City Committee? If your answer is yes, enter the name, position, and affiliation with the City for each person in the table below. If your answer is no, enter 'N/A' in each of the fields in the table below.
Yes

Listed Conflicts of Interest (Part A)		
Name	Position	Affiliation With City
Test	Test	Test

3. Questionnaire Regarding Conflict of Interest (Part B)

2. Will the CDBG funds requested by Applicant be used to award a subcontract to any individual(s) or business affiliate(s) who currently is or has/have been within one year of the date of this RFP response a City employee or consultant, or a member of the City Council, a City Advisory Board, a City Commission, and/or a City Committee? If your answer is yes, enter the name, position, and affiliation with the City for each person in the table below. If your answer is no, enter 'N/A' in each of the fields in the table below.
Yes

Listed Conflicts of Interest (Part B)		
Name	Position	Affiliation With City
Test	Test	Test

3. Questionnaire Regarding Conflict of Interest (Part C)

3. Are there any members of Applicant's staff or members of Applicant's Board of Directors or other governing body who are business partners or family members of a City employee, consultant, or a member of the City Council, a City Advisory Board, a City Commission, and/or a City Committee? If your answer is yes, enter the name, position, and affiliation with the City for each person in the table below. If your answer is no, enter 'N/A' in each of the fields in the table below.
Yes

Listed Conflicts of Interest (Part C)		
Name	Position	Affiliation With City
Test	Test	Test

4. Certification Regarding Use of Real Property & Real Property Owner Authorization to Use the Same

Standards Regarding Real Property Acquired or Improved with CDBG Funds:

Real property acquired or improved, in whole or in part, with CDBG funds in excess of $25,000 must be maintained and used to continue to meet one of the CDBG Program's National Objectives for at least five (5) years after the CDBG project closeout and must not be a building for the general conduct of government. Failure to meet one of the CDBG Program's National Objectives during that time would require the City of San Diego's CDBG Program to be reimbursed in the amount of the current fair market value of the property, less any portion of the value attributable to expenditures of non-CDBG funds for acquisition or improvements. This payment would be considered program income to the City of San Diego's CDBG Program. (No payment is required after the 5-year period of time specified above.)

Real property means land, including any improvements to and structures located on the land, but excluding any movable machinery or equipment. These standards shall apply from the date CDBG funds are first spent for the property until five (5) years after the closeout of the grant from which the assistance to the property was provided per 24 CFR Part 570.503(b)(7).

The recordkeeping requirements found at 24 CFR 570.506(d) require that documents be maintained to demonstrate compliance with 24 CFR 570.505 regarding any change of use of real property acquired or improved with CDBG assistance.

Property Owner Name
Test

Property Address
123 Test

NOTE: Applicant must select ONE of the following options

Housing Rehabilitation Project: By selecting this option, Applicant acknowledges reading and understanding the above standards, which are **not applicable** to the Housing Rehabilitation project proposed in this FY 2025 CDBG RFP response.
false

Real Property Owned by Applicant: By selecting this option, Applicant acknowledges reading, understanding, and agreeing to comply with the above standards. Applicant also certifies:
true

1. That it owns the real property described above as substantiated by the **deed of trust** pertaining to that real property, a copy of which is attached to this FY 2025 CDBG RFP response;
2. That it currently provides services and/or programs at the real property location described above (and in this FY 2025 CDBG RFP response) and will continue to provide services and/or programs at the real property described above for a minimum of five (5) years after CDBG project closeout;
3. That it agrees to maintain the quality of any improvements completed with CDBG funds during that period;
4. That it understands that the Community Development Division reserves the right to inspect such real property during the five (5)-year period to substantiate compliance; and
5. That it agrees to documents being recorded against the real property as determined necessary by the City of San Diego to certify/ensure compliance with this certification.

Real Property Owned by City of San Diego: By selecting this option, Applicant acknowledges reading, understanding, and agreeing to comply with the above standards and with the following standards:
false

1. Per 24 CFR Part 570.505, for any real property acquired or improved, in whole or in part, with CDBG funds in excess of $25,000 within the City of San Diego's control, the use or planned use of the property (including the beneficiaries of such use) cannot change without first providing affected citizens notice and opportunity to comment, and determining that either:

   a. The contemplated new use of the property qualifies as meeting one of the CDBG Program's National Objectives in §570.208 and is not a building for the general conduct of government; or
   b. The contemplated new use is deemed appropriate (after consultation with affected citizens), but will not meet a National Objective. In this case, the City of San Diego must reimburse its CDBG Program in the amount of the current fair market value of the property, less any portion of the value attributable to expenditures of non-CDBG funds for acquisition or improvements

Applicant also certifies:

1. That it leases the real property described above from the City of San Diego as substantiated by the **lease agreement** with the City of San Diego pertaining to that property, a copy of which is attached to this FY 2025 CDBG RFP response;
2. That the said lease agreement is effective for a minimum of five (5) years after CDBG project closeout;
3. That it currently provides services and/or programs at the real property location described above and in this FY 2025 CDBG RFP response;
4. That it is authorized by the City of San Diego to continue providing services and/or programs at the real property described above for a minimum of five (5) years after CDBG project closeout as substantiated by a certain **'Certification Regarding Use of City-Owned Real Property'** form completed and signed by the City of San Diego, a copy of which will be submitted as part of the agreement execution process, if funded;
5. That it is authorized by the City of San Diego to complete CDBG activities at the real property indicated above, as described in this FY 2025 CDBG RFP response, for the duration of five (5) years after project closeout as substantiated by a certain **'Certification Regarding Property Owner Authorization'** form completed and signed by the City of San Diego, a copy of which will be submitted as part of the agreement execution process, if funded;
6. That it agrees to maintain the quality of any improvements completed with CDBG funds during that period as authorized by the City of San Diego; and
7. That it understands that the Community Development Division reserves the right to inspect such real property during the five (5)-year period to substantiate compliance.

Real Property Not Owned by City of San Diego or Applicant: By selecting this option, Applicant acknowledges reading, understanding, and agreeing to comply with the above standards. Applicant also certifies:
false

1. That it leases the real property described above as substantiated by the **lease agreement** pertaining to that property, a copy of which is attached to this FY 2025 CDBG RFP response;
2. That the said lease agreement is effective for a minimum of five (5) years after CDBG project closeout;
3. That it currently provides services and/or programs at the real property location described above and in this FY 2025 CDBG RFP response;
4. That it is authorized by the lessor/property owner to continue providing services and/or programs at the real property described above for a minimum of five (5) years after CDBG project closeout as substantiated by a certain **'Certification Regarding Use of Non-City-Owned or Non-Applicant-Owned Real Property'** form completed and signed by the lessor/property owner, a copy of which will be submitted as part of the agreement execution process, if funded;
5. That it is authorized by the lessor/property owner to complete CDBG activities at the real property indicated above, as described in this FY 2025 CDBG RFP response, for the duration of five (5) years after project closeout as substantiated by a certain **'Certification Regarding Property Owner Authorization'** form completed and signed by the lessor/property owner, a copy of which will be submitted as part of the agreement execution process, if funded;
6. That it and the lessor/property owner agree to maintain the quality of any improvements completed with CDBG funds during that period as authorized by the lessor/property owner; and
7. That it and the lessor/property owner understand that the Community Development Division reserves the right to inspect such real property during the five (5)-year period to substantiate compliance.

The City of SAN DIEGO

Consolidated Plan Advisory Board					
Fiscal Year 2025 CDBG Application Scoring Criteria					
CATEGORY: Public Services					
				Overall Score:	100
Category	**Criteria**				**Maximum Score**
1. Organization Capacity	a. Organization Project Experience: Applicant describes their experience in successfully implementing projects of similar scope and comparable				5
	b. Organization Experience w/ LMI clients: Applicant has experience in providing services to LMI residents or presumed LMI CDBG beneficiaries; applicant explains how experience is applicable and beneficial.				5
	c. Collaboration: Applicant describes and provides specific examples of collaboration with similar organizations, peer to peer networks, potential subcontractors and/or partner agencies for referral purposes to benefit				3
	d. Resiliency: Applicant describes the organization's ability to anticipate, prepare for, respond, and adapt to unexpected changes or sudden distruptions in order to continue to serve their clients. Disruptions or changes can include a significant event in the national or international economy, a downturn in a particular industry, or an external event such				1
				Total Points for Section 1:	**14**
2. Project Characteristics	a. Project Summary: Description of project includes all of the following iter				
		i. Activities and/or services to be provided; and			5
		ii. Characteristics of Population(s) to be served; and			3
		iii. The critical need(s) that will be addressed including how other resources are not available to meet the need(s)			5
	b. Confirmation of Program Status:				
		i. Applicant selects whether the proposed project will result in either the continuation of an existing services, the substantial expansion of an existing service, or the provision of a new service			5
		ii. Applicant explains the rationale, including metrics and available data, used to make above determination in section b. i. and describes how the project is providing or will provide an impact.			
	c. Project Goals: Applicant identifies the goal(s) and anticipated impact of the project and describes how these goals will be met. Applicant includes information on associated monitoring systems and procedures				7
	d. i. Applicant indicates the number of unduplicated COSD individuals, total number of LMI anticipated to be served below 80% AMI. ii. Applicant provides clear methodology on determining anticipated outcomes.				3
				Total Points for Section 2:	**28**

The City of SAN DIEGO

Category	Criteria				Maximum Score
3. Project Specifics	a. Services to be provided: Applicant provides a listing of the services to be provided and a clear description of each of these services which includes, as applicable, the following details:				
		i. The quantity and duration of each of these services;			5
		ii. The method of delivery; which should include details on how these services will be provided and if services will occur on an individual basis and/or group settings			5
		iii. Applicant provides an explanation and justification for total amount of CDBG funds requested in relation to the services provided and any fees charged. Information provided should be consistent with the proposed budget section.			4
		iv. A cost per beneficiary amount is provided and specifics are given on how costs are warranted. Costs are consistent with the proposed budget section and follows RFP Handbook guidelines on identifying eligible costs.			4
	b. Project Schedule: Applicant describes how the project will be implemented and completed within the required 12-month timeline with specific milestones and estimated expenditures per				4
				Total Points for Section 3:	**22**
4. Project Benefits	a. Applicant describes how the project will provide services to high need populations and results in a positive impact for LMI individuals; provides references used for this determination; describes a success story or successful outcome. Public Service project must be considered a Low and Moderate Income Limited Clientele Activity (LMC) by serving one of the following populations:				9
		i. Presume LMI clientele as defined by HUD; or			
		ii. Direct Benefit to LMI persons based on compliance with HUD income limits through documented family size and income.			
	b. Federally Designated Promise/Opportunity Zone location: Applicant's office(s) providing project services is located in at the Opportunity Zone or Promise Zone.*				***2***
	c. Federally Designated Promise/Opportunity Zone service location: Applicant indicates service delivery will occur to clients residing in the Opportunity Zone or Promise Zone.*				3
	d. Collateral Material: Applicant provides proof of positive impact through testimonial(s), annual report, photos/videos, social media or website postings, and/or marketing/promotional materials. Applicant shares materials that speak to their impact in the community.				2
				Total Points for Section 4:	**16**

The City of SAN DIEGO

Category	Criteria				Maximum Score
5. Budget	a. Applicant identifies alternative future sources of funding to support the proposed project and demonstrates that the project will not rely on CDBG funds for program sustainability. Organization identifies how receiving award can be used to leverage in applying and/or receiving additional funding from other sources.				5
	b. Budget for project identifies all sources of funding for the total project costs				3
	c. Budget details uses of funds (City of SD CDBG and non CDBG funds) by outlining eligible budget line items to be used to support project implementation				5
	d. Budget lists all other funding sources secured for project, submits documentation for each source listed, and percent of funds leveraged (calculated by other secured funding/total project costs) is:				***5***
	0%-5%=0 points		41%-60%=3 points		
	6%-20%=1 point		61%-80%=4 points		
	21%-40%=2 points		81%-100%=5 points	**Total Points for Section 5:**	**18**
6. Project Eligibility & Performance Indicators		i. The Scope of Work and Budget, in its entirety, demonstrates compliance with CDBG eligibility requirements			***1***
		ii. The Scope of Work and Budget demonstrates compliance with National Objective and other HUD and City requirements			***1***
	b. City of San Diego Track Record: Rating based on past performance of applicant agency on projects previously funded by the City of San Diego under the CDBG program. These are subtractive points from maximum 100 point score, determined by performance levels: • No deficiencies (0) • Minor deficiencies (-1) • Moderate deficiencies (-2) Performance Indicator data collected from FY 2023 for FY 2025 evaluations.				***0 to -2.5 (CDD Score)***
				Total Points for Section 6:	**2**

The City of SAN DIEGO

CONSOLIDATED PLAN ADVISORY BOARD		
FISCAL YEAR 2025 CDBG APPLICATION SCORING CRITERIA		
CATEGORY: Economic Development		
	Overall Score:	**100**
Category	**Criteria**	**Maximum Score**
1. Organization Capacity	a. Organization Project Experience: Applicant describes their experience in successfully implementing projects of similar scope and comparable complexity. Specifics are given on organization's experience in assisting LMI individuals start-up or expand a microenterprise.	5
	b. Organization Experience w/ LMI clients: Applicant has experience in providing services to LMI residents or presumed LMI CDBG beneficiaries; applicant explains how experience is applicable and beneficial.	5
	c. Collaboration: Applicant describes and provides specific examples of collaboration with similar organizations, peer to peer networks, potential subcontractors and/or partner agencies for referral purposes to benefit LMI/presumed LMI clients	2
	d. Resiliency: Applicant describes the organization's ability to anticipate, prepare for, respond, and adapt to unexpected changes or sudden distruptions in order to continue to serve their clients. Disruptions or changes can include a significant event in the national or internaional economy, a downturn in a particular industry, or an external event such as a natural disaster or pandemic.	1
	Total points for Section 1:	13
2. Project Characteristics	a. Project Summary: Description of project includes all of the following items:	
	i. Activities and/or services to be provided; and	5
	ii. Characteristics of Population(s) to be served; and	3
	iii. The critical need(s) that will be addressed including how other resources are not available to meet the need(s)	5
	b. Confirmation of Program Status:	
	i. Applicant selects whether the proposed project will result In either the continuation of an existing service, the substantial expansion of an existing service, or the provision of a new service	5
	ii. Applicant explains the rationale, including metrics and available data, used to make above determination in section b. i. and describes how the project is providing or will provide an impact.	

The City of SAN DIEGO

Category	Criteria		Maximum Score
	c. Project Goals: Applicant identifies the goal(s) and anticipated impact of the project and describes how these goals will be met. Applicant indicates the number of unduplicated COSD individuals, and number of unduplicated City of San Diego businesses to be assisted.		7
	d. Applicant includes information on associated monitoring systems, procedures, and methodology used in determining anticipated outcomes.		3
	Total points for Section 2:		28
3. Project Specifics	a. Services to be provided: Applicant provides a listing of the services to be provided and a clear description of each of these services which includes, as applicable, the following details:		
		i. The quantity and duration of each of these services;	5
		ii. The method of delivery; which should include details on how these services will be provided and if services will occur on an individual basis and/or group settings	5
		iii. Applicant provides an explanation and justification for total amount of CDBG funds requested in relation to the services provided and any fees charged. Information provided should be consistent with the proposed budget section	4
		iv. A cost per beneficiary amount is provided and specifics are given on how costs are warranted. Costs are consistent with the proposed budget section and follows RFP Handbook guidelines on identifying eligible costs.	4
	b. Project Schedule: Applicant describes how the project will be implemented and completed within the required 12-month timeline with specific milestones and estimated expenditures per month/quarter		4
	Total points for Section 3:		22
oject Benefits	a. Applicant describes how the project will provide services to high need populations and results in a positive impact for LMI individuals and City of San Diego business owners; provides references used for this determination; describes a success story or successful outcome. CED projects must be considered a LMI limited clientele activity (LMC) or LMI Microenterprise Development (LMCMC) by providing direct benefits to LMI persons. Applicant also describes what the anticipated percentage of clients to compete program		9
	b. Federally Designated Promise/Opportunity Zone location: Applicant's office(s) providing project services is located in at the Opportunity Zone or Promise Zone.*		***3***

The City of SAN DIEGO

Category	Criteria	Maximum Score
4. Pro	c. Federally Designated Promise/Opportunity Zone service location: Applicant indicates service delivery will occur to clients residing in the Opportunity Zone or Promise Zone.*	3
	d. Collateral Material: Applicant provides proof of positive impact through testimonial(s), annual report, photos/videos, social media or website postings, and/or marketing/promotional materials. Applicant shares materials that speak to their impact in the community.	2
	Total points for Section 4:	17
5. Budget	a. Applicant identifies alternative future sources of funding to support the proposed project and demonstrates that the project will not rely on CDBG funds for program sustainability. Organization identifies how receiving award can be used to leverage in applying and/or receiving additional funding from other sources.	5
	b. Budget for project identifies all sources of funding for the total project costs	3
	c. Budget details uses of funds (City of SD CDBG and non CDBG funds) by outlining eligible budget line items to be used to support project implementation	5
	d. Budget lists all other funding sources secured for project, submits documentation for each source listed, and percent of funds leveraged (calculated by other secured funding/total project costs) is:	***5*** ***(CDD Score)***
	0%-5%=0 points 6%-20%=1 point 21%-40%=2 points 41%-60%=3 points 61%-80%=4 points 81%-100%=5 points	
	Total points for Section 5:	18
6. Project Eligibility & Performance Indicators	a. Project Eligibility:	
	i. The Scope of Work and Budget, in its entirety, demonstrates compliance with CDBG eligibility requirements	1
	ii. The Scope of Work and Budget demonstrates compliance with National Objective and other HUD and City requirements	1
	b. City of San Diego Track Record: Rating based on past performance of applicant agency on projects previously funded by the City of San Diego under the CDBG program. These are subtractive points from maximum 100 point score, determined by performance levels: • No deficiencies (0) • Minor deficiencies (-1) • Moderate deficiencies (-2) Performance Indicator data collected from FY 2023 for FY 2025 evaluations.	***0 to -2.5 (CDD Score)***
	Total points for Section 6:	2

The City of SAN DIEGO

CONSOLIDATED PLAN ADVISORY BOARD			
FISCAL YEAR 2024 CDBG APPLICATION SCORING CRITERIA			
CATEGORY: Nonprofit Facility Improvements			
		Overall Score:	**100**
Category	**Criteria**		**Maximum Score**
1. Organization Capacity	a. Organization Project Experience:		
	I. Applicant describes their experience in successfully implementing projects of similar scope and comparable complexity. Applicant lists any CDBG related construction project with allocation amount, year completed, and result of improvements.		5
	ii. Applicant descries specific staff within organization that have experience overseeing the design and implementation of a construction project. If applicable, agency provides details on plans to secure and utilize a third party construction manager.		4
	b. Organization Experience w/ LMI clients: Applicant has experience in providing services to LMI residents or presumed LMI CDBG beneficiaries; applicant explains how experience is applicable and beneficial.		3
	c. Collaboration: Applicant describes and provides specific examples of collaboration with similar organizations, peer to peer networks, subcontractors, and/or partner agencies for referral purposes to benefit LMI/presumed LMI clients		2
	d. Resiliency: Applicant describes the organization's ability to anticipate, prepare for, respond, and adapt to unexpected changes or sudden distruptions in order to continue to serve their clients. Disruptions or changes can include a significant event in the national or internaional economy, a downturn in a particular industry, or an external event such as a natural disaster or pandemic. **Applicant acknowledges higher costs of supplies and overall increase of construction costs.**		1
		Total points for Section 1:	15
2. Project Characteristics	a. Project Summary: Description of project includes all of the following items:		
		i. Activities and/or services to be provided; and	5
		ii. Characteristics of Population(s) to be served; and	3
		iii. The critical need(s) that will be addressed including how other resources are not available to meet the need(s)	5
	b. Confirmation of Program Status:		
		i. Applicant selects whether the proposed project will result in either the continuation of an existing services, the substantial expansion of an existing service, or the provision of a new service	5
		ii. Applicant explains the rationale, including metrics and available data, used to make above determination in section b. i. and describes how the project is providing or will provide an impact	
	c. Project Goals: Applicant identifies the goal(s) and anticipated impact of the project and describes how these goals will be met. Applicant indicates the number of unduplicated COSD		7
	d. Applicant includes information on associated monitoring systems, procedures, and methodology used in determining anticipated outcomes.		3
		Total points for Section 2:	28

The City of SAN DIEGO

Category	Criteria		Maximum Score
3. Project Specifics	a. Contract Execution Readiness: Extent to which the proposed project is ready to proceed by the following details:		
		i. Applicant explains how the total amount of CDBG funds requested is justified by accurate cost estimations with a professional consultation from architect; (if facility has received CDBG funds for improvements/expansions in the past, applicant must explain the outcome and justification for the request of additional	3
		a knowledge of all applicable permits required fore the proposed project. If permits not needed, applicant provides documentation for basis of that determination. Applicant can show a Facility Needs Assessment that could be attached to their Proposal.	**5** ***CDD score***
	b. Project Schedule: Applicant describes how the project will be completed and funds expended within the required 24-month timeline specifying key milestones. Applicant acknowledges that each permit or construction requirement not completed, will need to be accounted for in overall timeline.		6
		a. Permitting and design completion *(may take 3-6 months)*	
		b. Project will be released for bid *(may take 3-6 months)*	
		c. Construction contract awarded *(may take 3-6 months)*	
		d. Anticipated Construction Timeline	
		e. 100% expenditure level	
		f. Project completion, beneficiaries reported (National Objective met),and close out report approved by CDD Program staff	
	Total points for Section 3:		14
4. Project Benefits	a. Applicant describes how the project will provide services to high need populations and results in a positive impact for LMI individuals; provides references used for this determination; describes a success story or successful outcome. Construction projects must be		12
		i. Presume LMI clientele as defined by HUD; or	
		ii. Direct Benefit to LMI persons based on compliance with HUD income limits through documented family size and income	
	b. Federally Designated Promise/Opportunity Zone location: Applicant's office(s) providing project services is located in at the Opportunity Zone or Promise Zone.*		***3 CDD Score***
	c. Federally Designated Promise/Opportunity Zone service location: Applicant indicates service delivery will occur to clients residing in the Opportunity Zone or Promise Zone.*		2
	d. Collateral Material: Applicant provides proof of positive impact through testimonial(s), annual report, photos/videos, social media or website postings, and/or marketing/promotional materials. Applicant shares materials that speak to their impact in the community.		2
	Total points for Section 4:		19

The City of SAN DIEGO

Category	Criteria	Maximum Score
5. Budget	a. Applicant identifies alternative future sources of funding to support the proposed project and demonstrates that the project will not rely on CDBG funds for program sustainability. Applicant may attach their 5 year maintenance plan.	7
	b. Budget for project identifies all sources of funding for the total project costs	5
	c. Budget details uses of funds (City of SD CDBG and non CDBG funds) by outlining eligible budget line items to be used to support project implementation	3
	d. Budget lists all other funding sources secured for project, submits documentation for each source listed, and percent of funds leveraged (calculated by other secured funding/total project costs) is:	***7***
	0%-5%=0 points 41%-60%=3 points 6%-20%=1 poin 61%-80%=5 points 21%-40%=2 poi 81%-100%=7 pc	***CDD Score***
	Total points for Section 5:	22
6. Project Eligibility & Performance Indicators	a. Project Eligibility:	
	i. The Scope of Work and Budget, in its entirety, demonstrates compliance with CDBG eligibility requirements	***1***
	ii. The Scope of Work and Budget demonstrates compliance with National Objective and other HUD and City requirements	***1***
	b. City of San Diego Track Record: Rating based on past performance of applicant agency on projects previously funded by the City of San Diego under the CDBG program. These are subtractive points from maximum 100 point score, determined by performance levels: • No deficiencies (0) • Minor deficiencies (-1) • Moderate deficiencies (-2)	***0 to -2.5 (CDD Score)***
	Total points for Section 6:	2

NOTE: Applicants deemed "not qualified" through the Request for Qualifications (RFQ) process are precluded from participating in the Request for Proposals (RFP) phase.

City of San Diego Community Development Division (CDD)

FY 2025 COMMUNITY DEVELOPMENT BLOCK GRANT REQUEST FOR PROPOSALS (CDBG RFP) TIMELINE*

Deadline	Action
December 12, 2023	Mandatory FY 2025 CDBG RFP Virtual Workshop, 10 am (PST) ***NOTE:*** *All applicants must attend this session or certify they have viewed the recorded presentations.*
December 13, 2023	CPAB Meeting (Tentative)
December 15, 2023	**FY 2025 CDBG RFP released via ED Grants**
December 18 - 22, 2023	Virtual Technical Assistance Meetings, by Appointment Only
December 25, 2023 and January 1, 2024	Christmas Day and New Year's Day (City Offices Closed)
January 2 – 12, 2024	Virtual Technical Assistance Meetings, by Appointment Only
January 10, 2024	CPAB Meeting (Tentative)
January 15, 2024	Martin Luther King Jr. Day (City Offices Closed)
January 16, 2024 No later than 5:00 p.m. (PST)	**Deadline to Email RFP-Related Questions to CDBG@sandiego.gov**
January 16, 2024 No later than 5:00 p.m. (PST)	**Deadline to Request Updates to Primary/Secondary Representatives on ED Grants**
January 17, 2024	Last Day of FAQ Posting on ED Grants
January 19, 2024 No later than 12:00 p.m. (PST)	**Deadline to Request ED Grants Navigation Assistance/Staff Support (NO EXCEPTIONS)**
January 19, 2024 No later than 5:00 p.m. (PST)	**Deadline to Submit FY 2025 CDBG RFP Responses via ED Grants (NO EXCEPTIONS)**

The City of SAN DIEGO

City of San Diego Community Development Division (CDD) **FY 2025 COMMUNITY DEVELOPMENT BLOCK GRANT REQUEST FOR PROPOSALS (CDBG RFP) TIMELINE***	
Deadline	**Action**
January 22 – February 2, 2024	CDD Staff Review of RFP Proposals
February 5 - 6, 2024	CDD Staff Internal Verification of RFP Reviews; Preparation for Release to Consolidated Plan Advisory Board (CPAB)
February 7 – 28, 2024	FY 2025 CDBG RFP Materials Available to Consolidated Plan Advisory Board (CPAB) Members for Review and Scoring
February 7 – 23, 2024	Potential CPAB Ad Hoc Meetings on Proposals
February 7, 2024 (Tentative)	CPAB Meeting *(Tentative Mandatory Proposal Presentations for Certain RFP Categories, if Needed)*
February 28, 2024	**CPAB FY 2025 CDBG Scoring Results Due to CDD Staff**
March 1, 2024	FY 2025 CDBG RFP Scoring Results Posted on CDBG Program Website and Emailed to Interest List
March 13, 2024	CPAB Meeting; FY 2025 CDBG RFP Scores Ratified and Funding Recommendations Forwarded to City Council for Approval
April 2024 (tentative)	FY 2025 CDBG Funding Recommendations Presented to **Economic Development & Intergovernmental Relations Committee** for Approval with FY 2025 Annual Action Plan
April or May 2024 (tentative)	FY 2025 CDBG Funding Recommendations Presented to **City Council** for Approval with FY 2025 Annual Action Plan; Contracts Begin July 1, 2024

**Dates subject to change*

The City of SAN DIEGO

Economic Development Department
Community Development Division

CDBG Income Verification & Demographics Form Sample

Personal information requested below is confidential and will remain internal. We collect information directly from you with your permission as required by those funding our programs. As such, this information is required as it allows us to provide services free of charge and better understand the needs of our clients.

Client Name:				**Client Unique Identifier #:**			
Client Physical Address:		**City:**		**State:**		**ZIP:**	
Telephone:	( ) —	**Email:**					
Client Ethnic Background (Required to check one):	☐ Hispanic/Latino ☐ Not Hispanic/Latino	**Gender identity (Optional):**	☐ Female ☐ Male ☐ Non-Binary	**Is Client Head of Household?**	☐ Yes ☐ No		
Client Racial Background (Required to check one):	☐ White ☐ Black/African American ☐ Asian ☐ American Indian/Alaskan Native ☐ Native Hawaiian/Other Pacific Islander		☐ American Indian/Alaskan Native & White ☐ American Indian/Alaskan Native & Black/African American ☐ Asian & White ☐ Black/African American & White ☐ Other Multi-Racial				

Household Size	Name (First and Last)	Relationship to Head of Household (Self, spouse, child, parent, sibling, other, etc.)	Annual Income (from all sources; attach verification as available such as pay stubs, W-2 forms, proof of SSI/pension, cash aid, unemployment, etc.)	
Head of Household			$	Source(s):
Household Member 2			$	Source(s):
Household Member 3			$	Source(s):
Household Member 4			$	Source(s):
Household Member 5			$	Source(s):
Household Member 6			$	Source(s):
Household Member 7			$	Source(s):
Household Member 8			$	Source(s):
Household Size Total		Annual Household Income Total:	$	

DETERMINING HOUSEHOLD INCOME LEVEL

The following sources of income should be considered when calculating the client's total household income:

- ✓ Wages, salaries, tips, commissions, etc. (except full-time students);
- ✓ Self-employment income from own non-farm business, including proprietorships and partnerships (except full-time students);
- ✓ Interest, dividends, net rental income, or income from estates or trusts;
- ✓ Social Security or railroad retirement;
- ✓ Supplemental Security Income, Aid to Families with Dependent Children, or other public assistance or public welfare programs;
- ✓ Retirement, survivor, or disability pensions; and
- ✓ Any other sources of income received regularly, including Veterans' (VA) payments, unemployment compensation, child support and alimony.

Based on the client's household size and total household annual income reported on this form, the client's household income category is as selected below (check one):

HOUSEHOLD SIZE	EXTREMELY LOW INCOME LIMITS (0-30% OF MEDIAN)	VERY LOW INCOME LIMITS (31-50% OF MEDIAN)	LOW/MODERATE INCOME LIMITS (51-80% OF MEDIAN)	NON-LOW/MODERATE INCOME LIMITS (ABOVE 80% OF MEDIAN)
1	$0 - $28,950 ☐	$28,951 - $48,250 ☐	$48,251 - $77,200 ☐	ABOVE $77,200 ☐
2	$0 - $33,100 ☐	$33,101 - $55,150 ☐	$55,151 - $88,200 ☐	ABOVE $88,200 ☐
3	$0 - $37,250 ☐	$37,251 - $62,050 ☐	$62,051 - $99,250 ☐	ABOVE $99,250 ☐
4	$0 - $41,350 ☐	$41,351 - $68,900 ☐	$68,901 - $110,250 ☐	ABOVE $110,250 ☐
5	$0 - $44,700 ☐	$44,701 - $74,450 ☐	$74,451 - $119,100 ☐	ABOVE $119,100 ☐
6	$0 - $48,000 ☐	$48,001 - $79,950 ☐	$79,951 - $127,900 ☐	ABOVE $127,900 ☐
7	$0 - $51,300 ☐	$51,301 - $85,450 ☐	$85,451 – $136,750 ☐	ABOVE $136,750 ☐
8	$0 - $54,600 ☐	$54,601- $90,950 ☐	$90,951 - $145,550 ☐	ABOVE $145,550 ☐

Source: U.S. Department of Housing and Urban Development, June 15, 2023.

CLIENT CERTIFICATION

I certify that the information given on this form is complete and accurate to the best of my knowledge. *I certify that I am at least 18 years of age or older. I am aware that there are penalties for willfully and knowingly giving false information on an application for federal funds, which may include immediate repayment of all Federal funds received and/or prosecution under the law. I understand that the information on this form is subject to review by City staff and federal personnel for compliance monitoring purposes only.*

☐ By checking this box, I hereby declare that I am homeless residing predominantly within the City of San Diego.

☐ By checking this box, I hereby certify that I do not have income to report.

_____ _____

Client Signature (or Parent Signature if Client is Minor) Date

REQUIRED TO BE COMPLETED BY PROGRAM STAFF ONLY

Determination Date: _____ **Determination:** **Qualified** ☐ **Not Qualified** ☐

_____ _____

Subrecipient Staff Name/Signature **Date** **Date Client Notified of Determination:** _____

_____ _____

Subrecipient Staff Name/Signature **Date** **Date This Form and Income Verification Documents Filed in Client Records:** _____

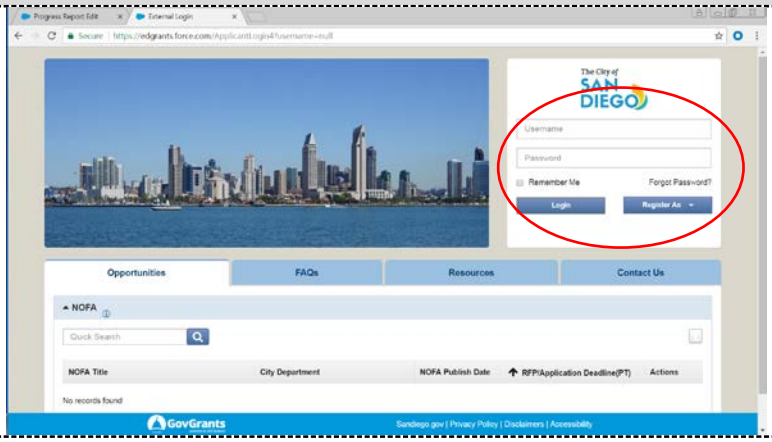
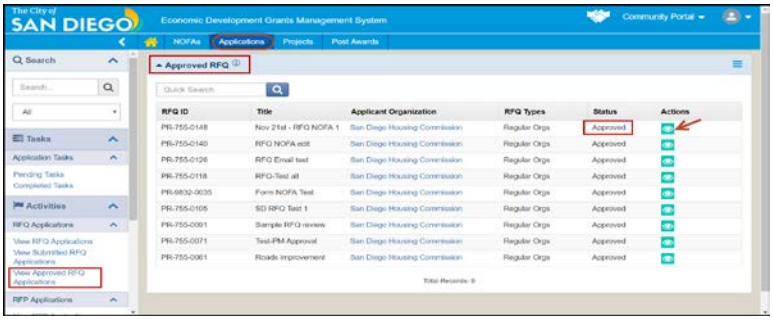
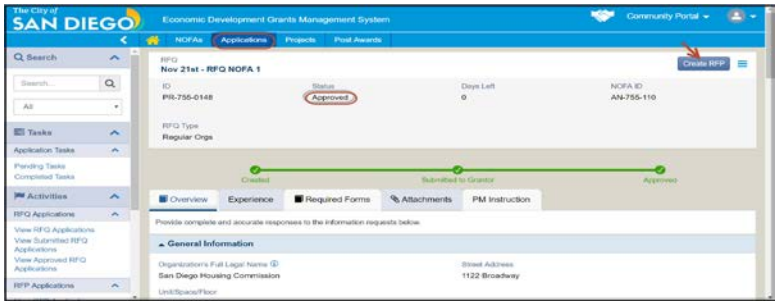
Type of Income Verification Document(s) Attached/Comments/Notes:

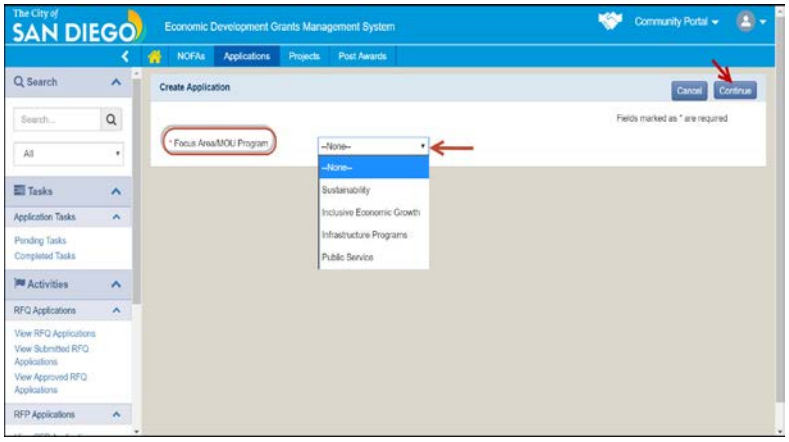
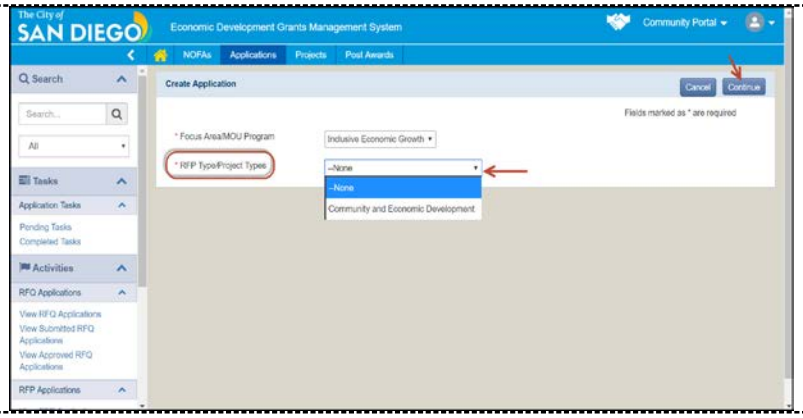
The City of SAN DIEGO

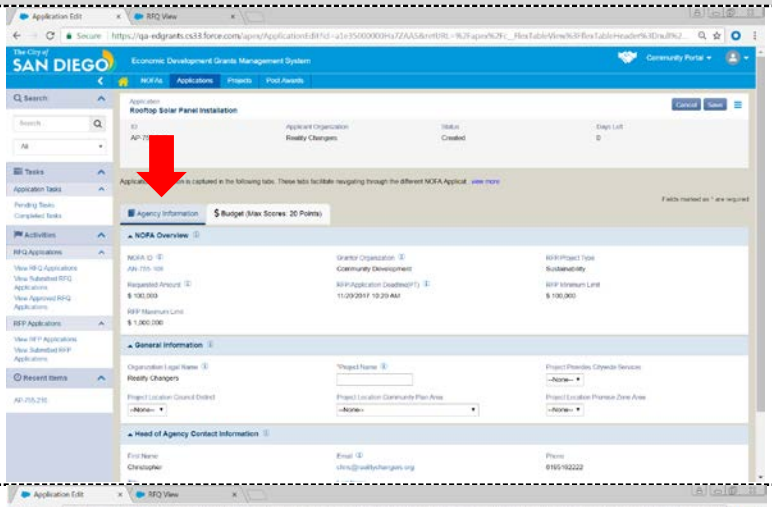
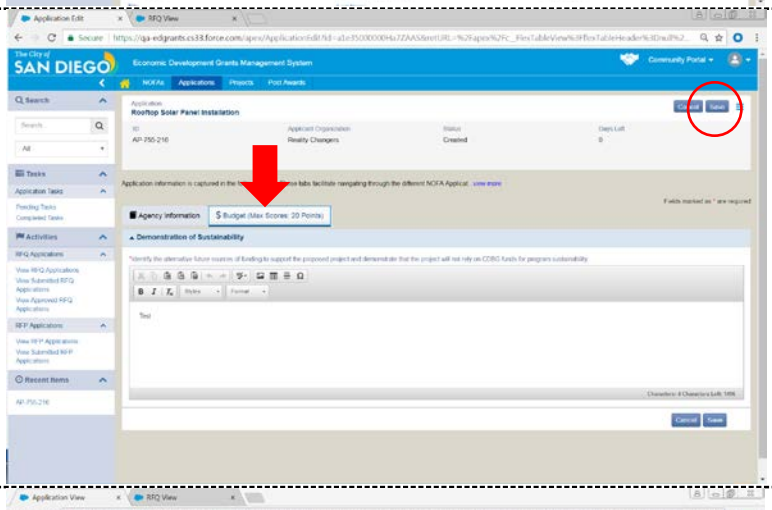
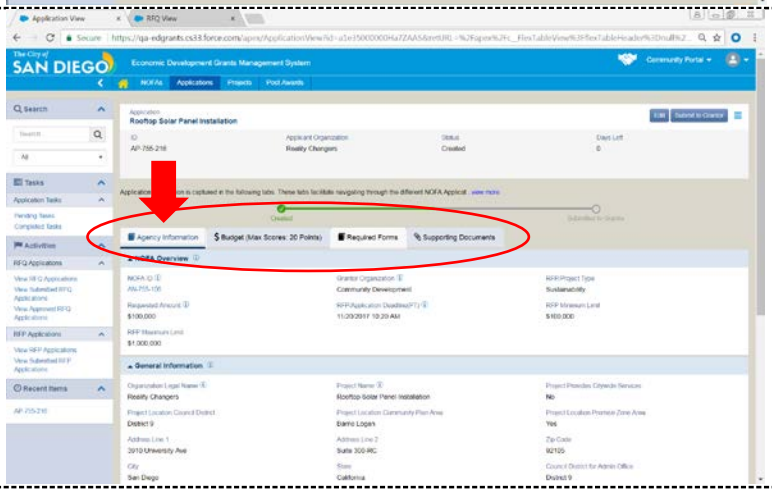
RFP Response Submission

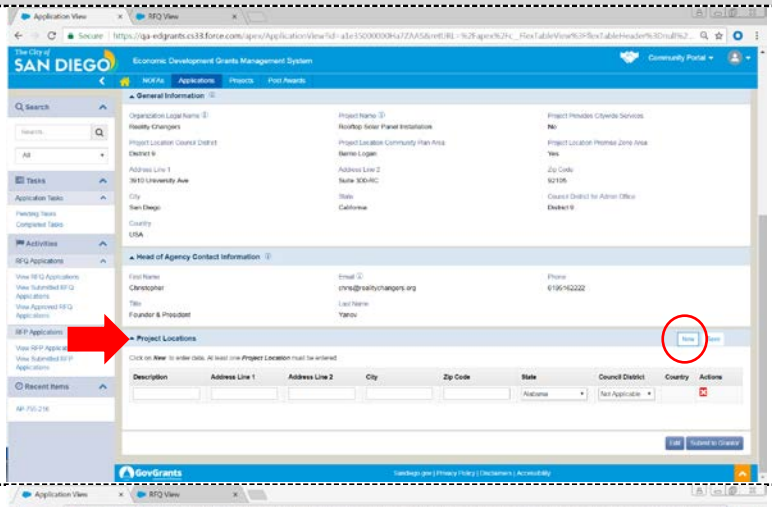
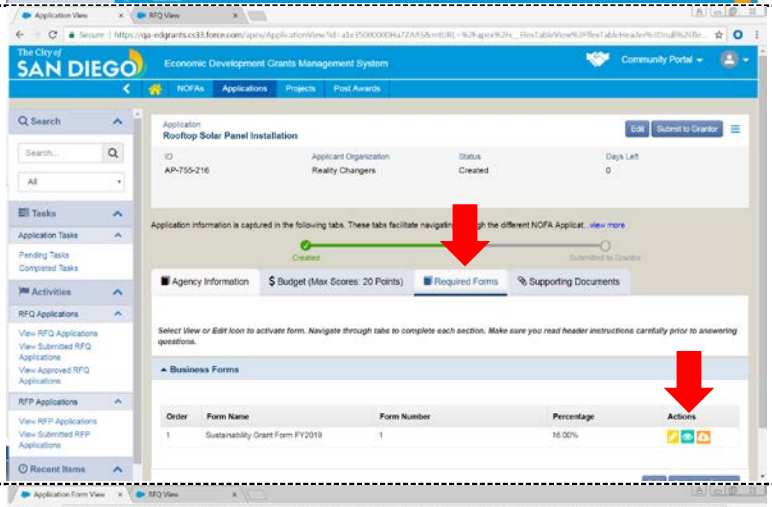
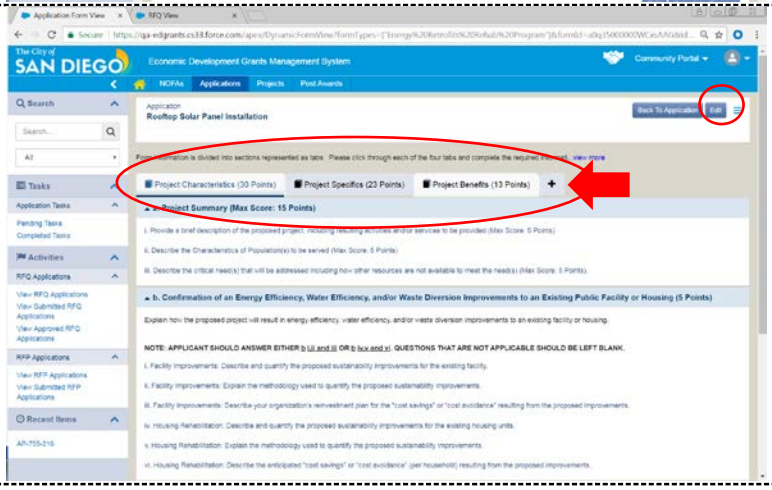
You will learn:

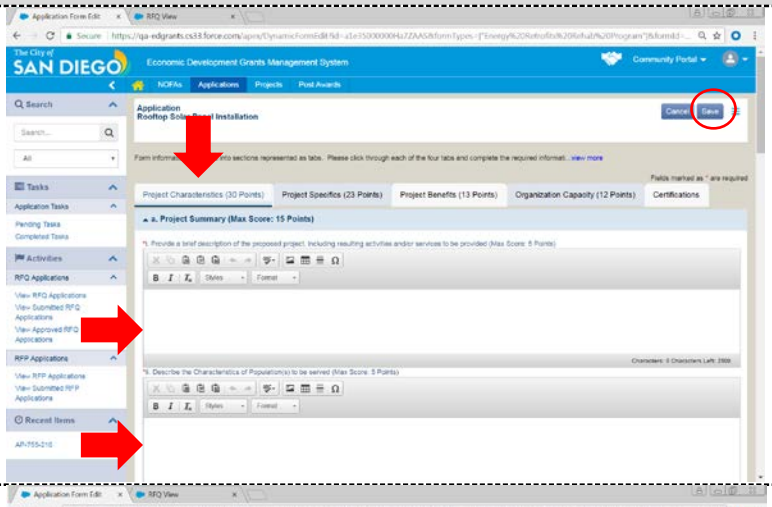
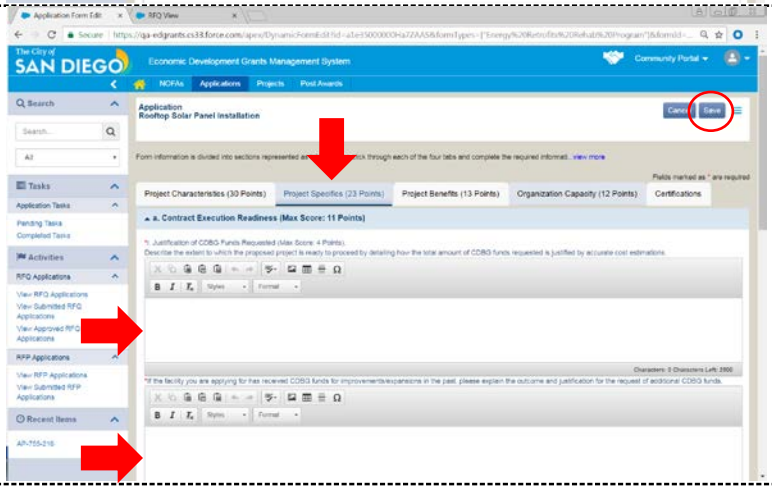
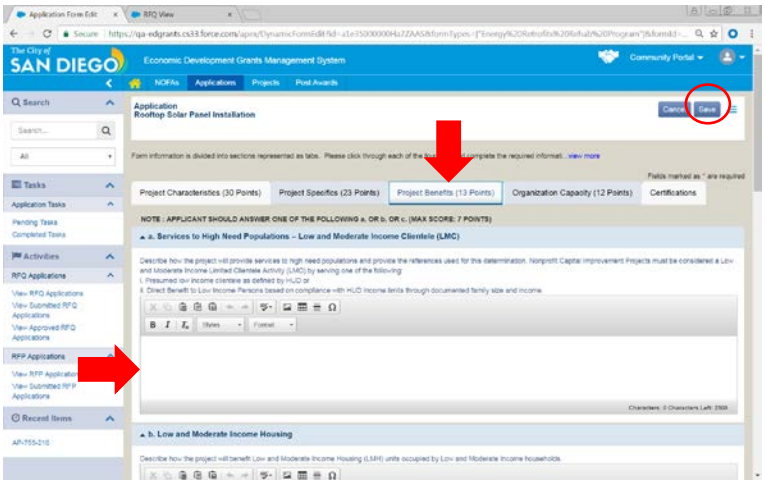
- **How to complete and submit a Request for Proposals (RFP) response in ED Grants**
- **How to open and continue working on a previously saved RFP response in ED Grants**
- **How to edit your organization's Board of Directors members in ED Grants**

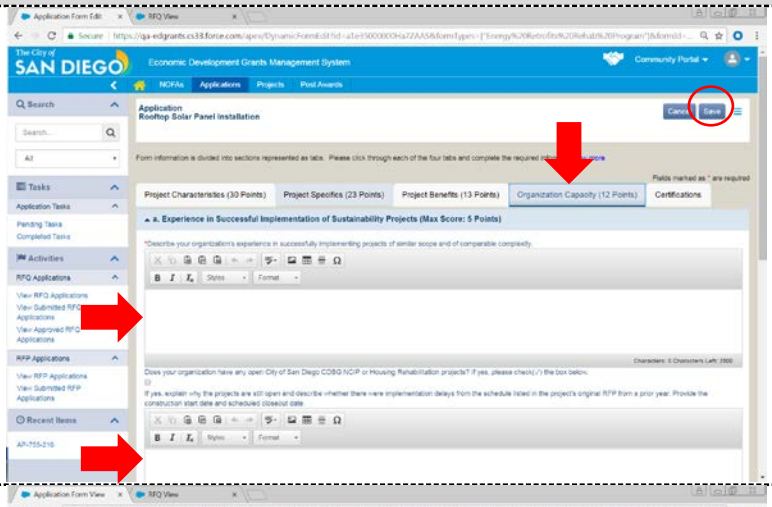
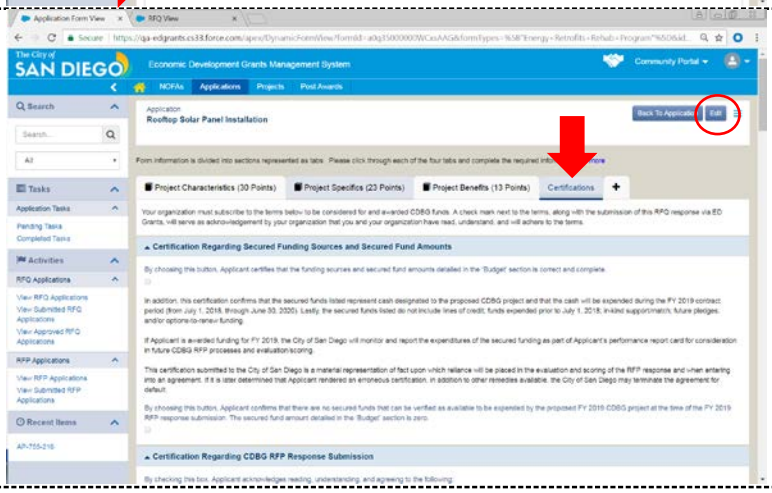
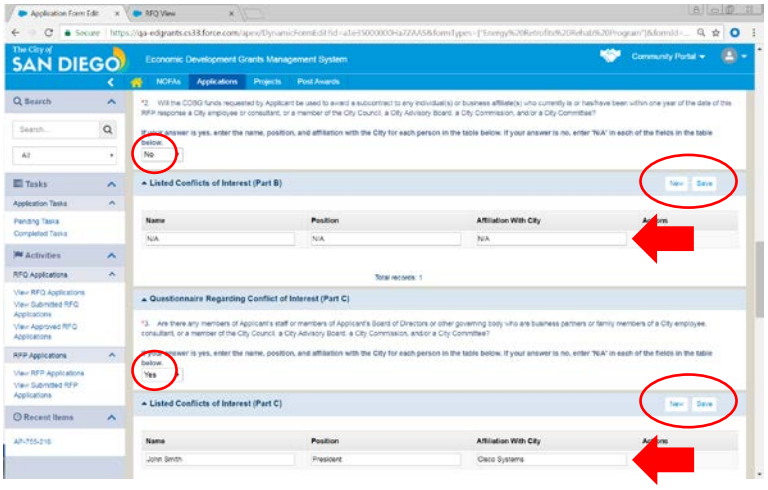
Step	Description	Screenshot
1	Log into http://edgrants.force.com using the credentials for either the Primary Representative or Secondary Representative of your organization. ***NOTE:*** *Your organization will need to have been deemed 'qualified' during the Request for Qualifications (RFQ) phase to 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. ***NOTE:*** *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. ***NOTE:*** *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.*	

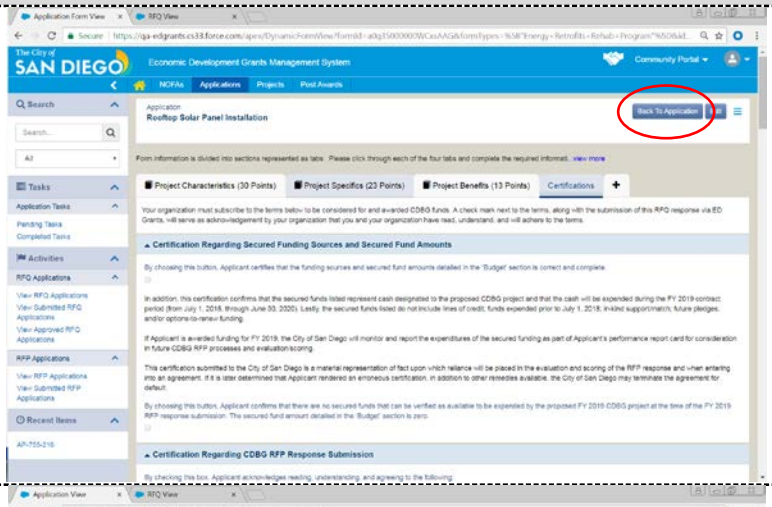
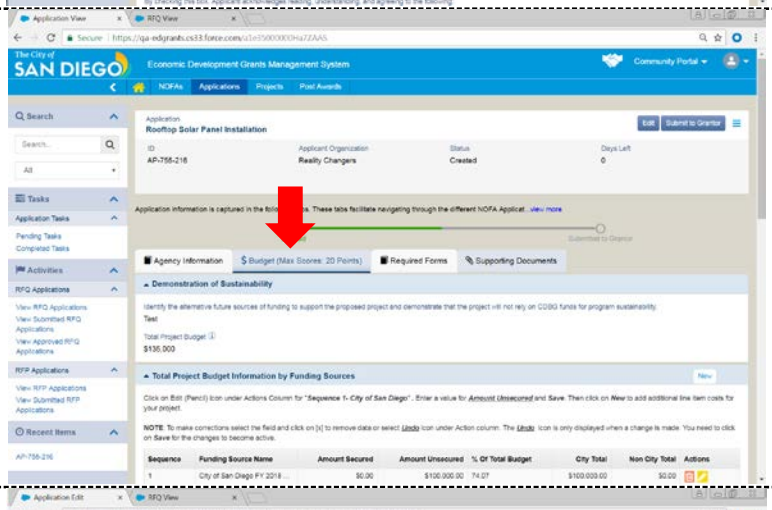
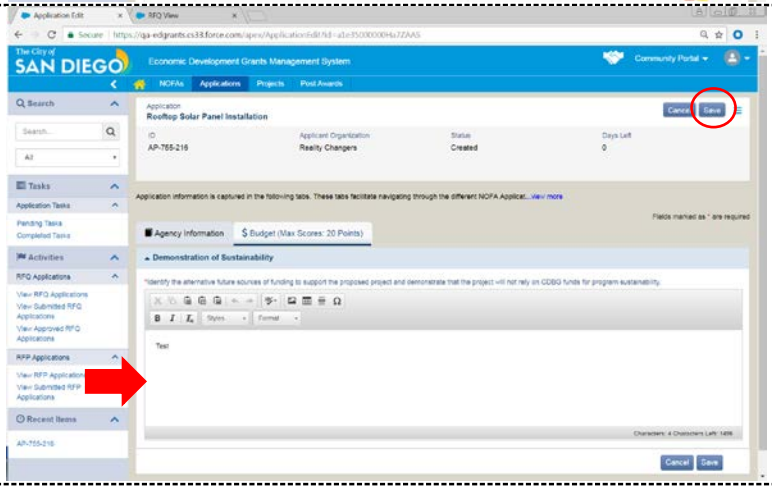
Step	Description	Screenshot
4	You should now see a **'Focus Area/MOU Program**' field with a drop-down menu with the following selections: '**Sustainability**,' '**Inclusive Economic Growth**,' '**Infrastructure Programs**,' '**Affordable Housing**,' and '**Public Services**.' Select the option corresponding to the RFP project type your organization would like to apply for. ***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).*	
5	You should now see an '**RFP Type/Project Types**' 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 '**Continue**' button. (If you change your mind, you may click on the '**Cancel**' button to go back to the NOFA.	

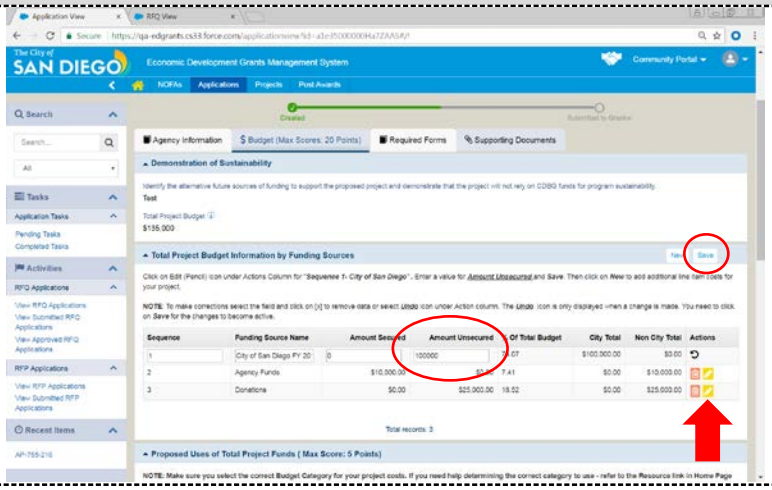
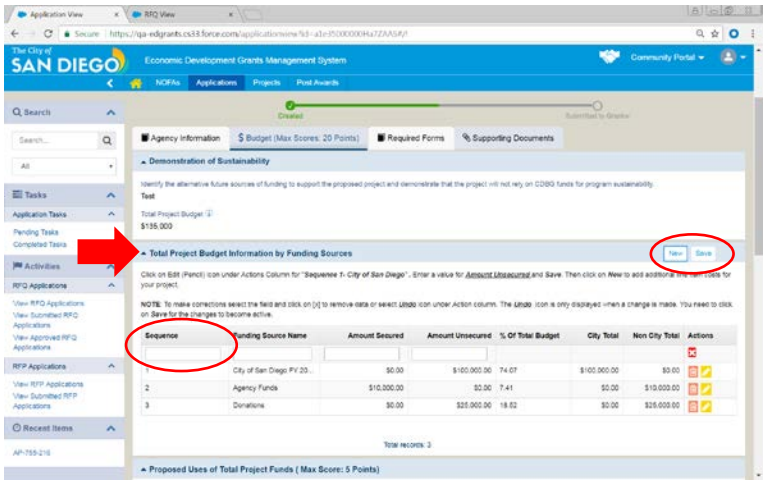
Step	Description	Screenshot
6	You should now see two tabs: '**Agency Information**' and '**Budget**.' Click on the '**Agency Information**' tab and populate the following fields in the '**General Information**' section: '**Project Name**,' '**Project Provides Citywide Services**,' '**Project Location Council District**,' '**Project Location Community Plan Area**,' and '**Project Location Promise Zone Area**.' ***NOTE:*** *Consult the CDBG RFP Handbook or contact City staff if you are not sure what to enter into the fields.*	
7	Click on the '**Budget**' tab. Read the instructions for the '**Demonstration of Sustainability**' or '**Demonstration of Commitment**' 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 '**Save**' button.	
8	You should now see four additional tabs: '**Agency Information**,' '**Budget**,' '**Required Forms**' and '**Supporting Documents**.' Click on the '**Agency Information**' tab and scroll down to the '**Project Locations**' section.	

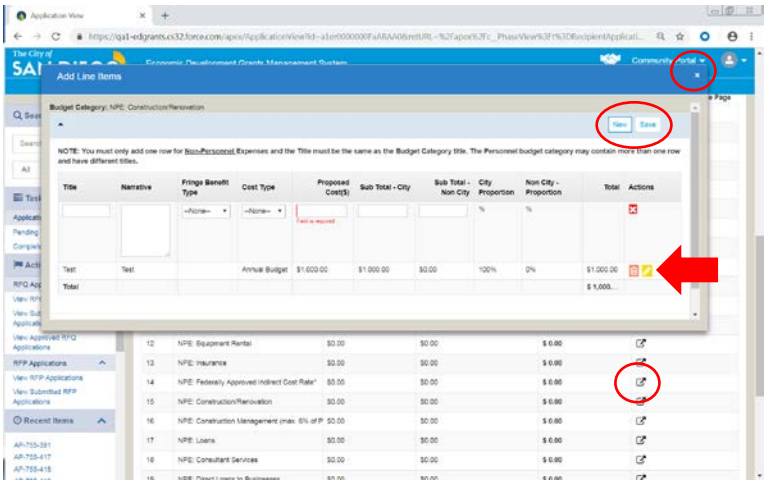
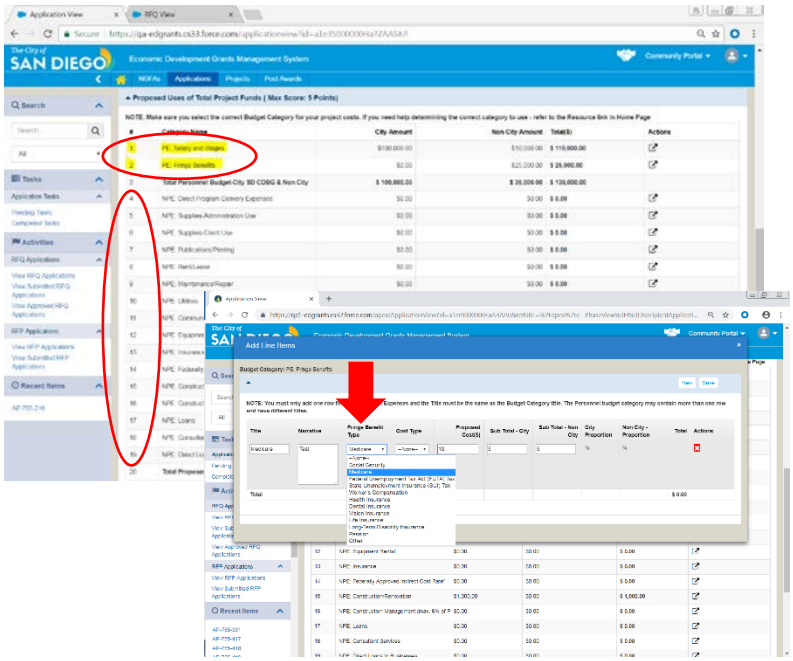
Step	Description	Screenshot
9	Click on the '**New**' button and populate the fields regarding the location of the proposed project. Click on the '**Save**' button. Repeat this process if there are more locations. ***NOTE:*** *Each location must be within San Diego County. For Single-Family Housing Rehabilitation 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 '**Description**' field and enter the administrative address of your organization.*	
10	Click on the '**Required Forms**' tab. In the '**Business Forms**' section, click on the eyeball icon (👁) in the '**Actions**' column to open the form.	
11	You should now see five tabs: '**Organizational Capacity**,' '**Project Characteristics**,' '**Project Specifics**,' '**Project Benefits**,' and '**Certifications**.' (You may need to click on the '**+**' tab to see the rest of the tabs.) Click on the '**Project Characteristics**' tab and then click on the '**Edit**' button to open the fields.	

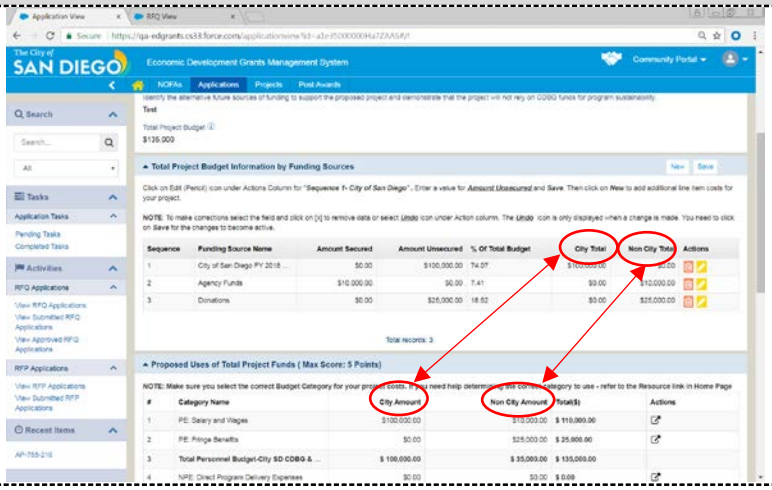
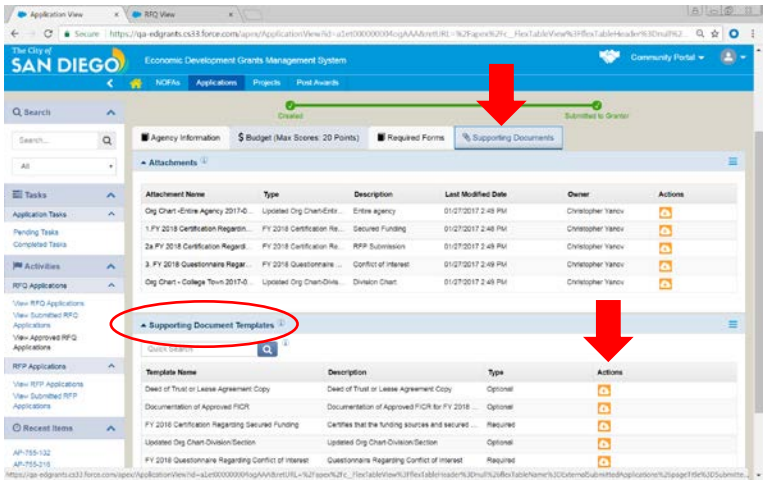
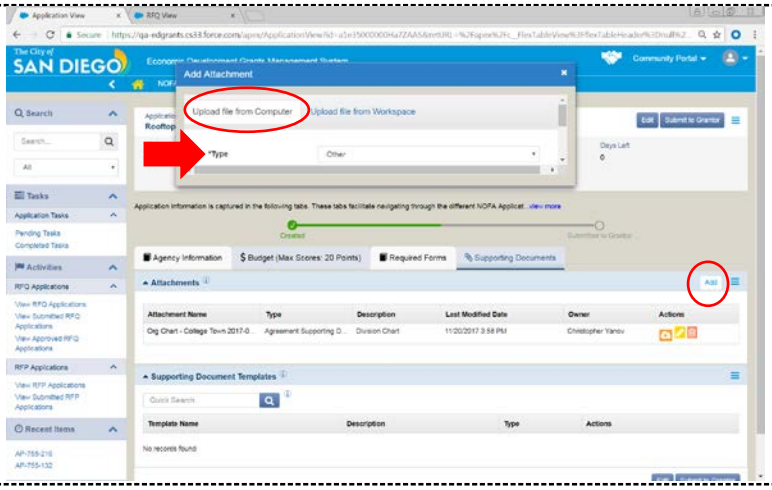
Step	Description	Screenshot
12	Begin populating the fields in the '**Project Characteristics**' tab, making sure to follow the notes and instructions (for example, some fields must be left blank if they are not applicable to your project type). Observe the character count limits (note that formatting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

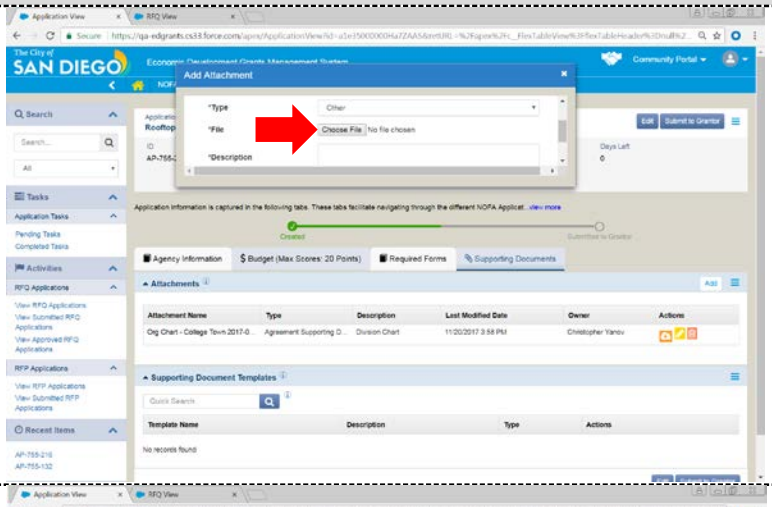
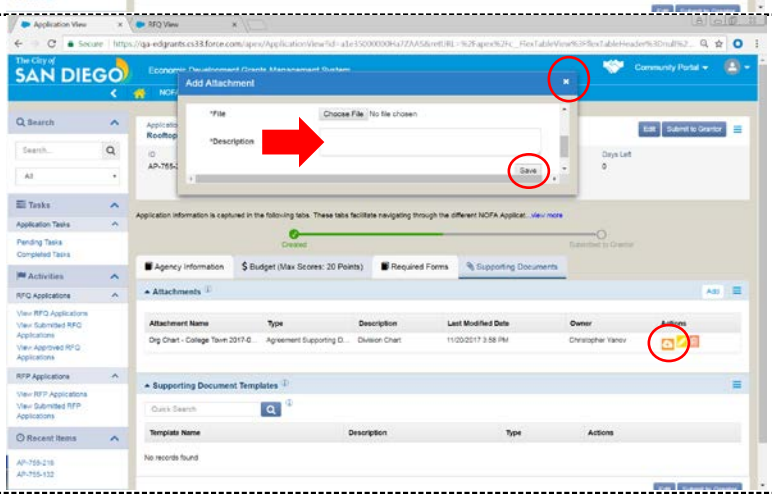
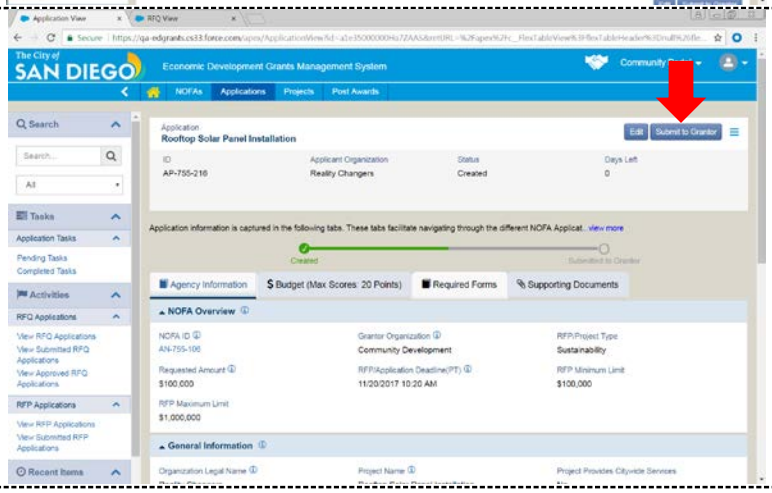
Step	Description	Screenshot
15	Click on the '**Organization Capacity**' tab and then click on the '**Edit**' button to open the fields. Begin populating the fields in the '**Organization Capacity**' tab, making sure to follow any notes and instructions. Observe the character count limits (note that formatting such as bold, italics, etc. will count towards the limits). Once you are finished, click on the '**Save**' button to preserve your work. ***NOTE:*** *Consult the CDBG RFP Handbook or contact City staff if you are not sure what to enter into the fields.*	
16	Click on the '**Certifications**' tab and then click on the '**Edit**' 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. ***NOTE:*** *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) '**Conflict of Interest**' questions (Parts A, B, and C), indicate your response to each question by selecting from the drop-down menu ('**Yes**' or '**No**'). 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 '**New**' button, populating the fields, and then clicking on the '**Save**' 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 '**New**' button, populating the fields with 'N/A,' and then clicking on the '**Save**' button.	

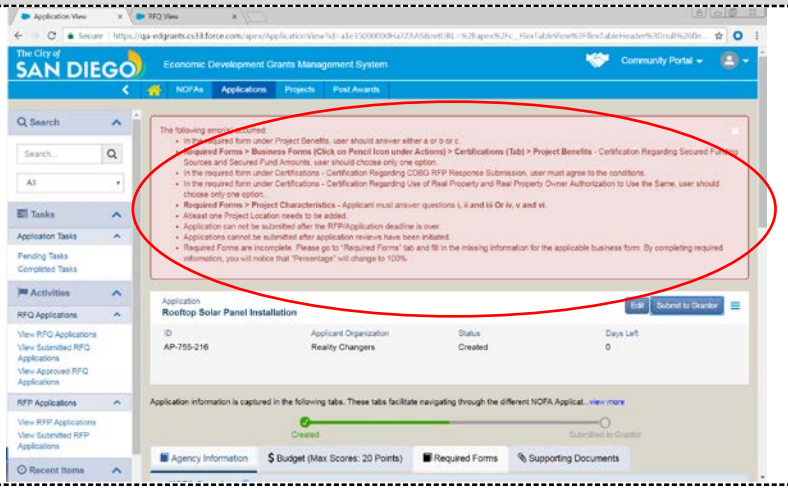
Step	Description	Screenshot
18	Once you have finished completing the '**Certifications**' tab, click on the '**Back to Application**' button.	
19	Click on the '**Budget**' tab. There are three (3) sections to populate: '**Demonstration of Sustainability** or **Commitment**,' '**Total Project Budget Information 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 '**Total Project Budget Information by Funding Sources**' section, click on the pencil icon (✎) in the '**Actions**' column of the '**Sequence 1**' row to open the fields. Enter the CDBG funding amount requested in the field in the '**Amount Unsecured**' column only. Do not enter any amount in the field in the '**Amount Secured**' column. Click on the '**Save**' button. ***NOTE:*** *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 '**Total Project Budget Information by Funding Sources**' section, click on the '**New**' button to open the fields. Populate the fields, making sure to properly identify '**Amount Secured**' and/or '**Amount Unsecured**' figures. Ensure that each row has a unique '**Sequence**' number and that you do not skip numbers starting from '2' and so on. Click on the '**Save**' button after you are finished. Repeat this step until you have entered all of your proposed project's funding sources and amounts. ***NOTE:*** *All amounts listed in the 'Amount Secured' column will be totaled and used to calculate how many points your organizations should receive for leveraged funds.*	

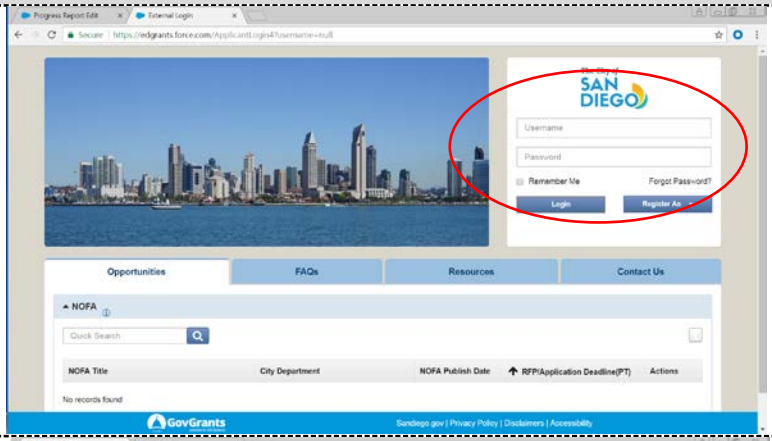
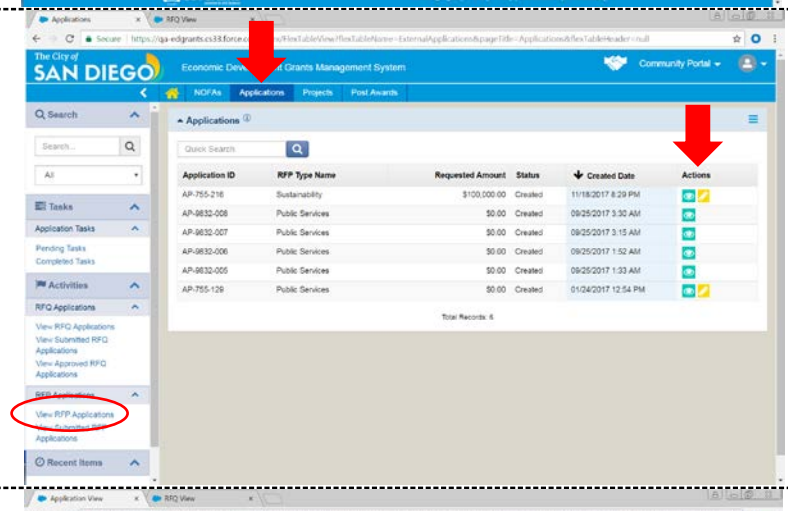
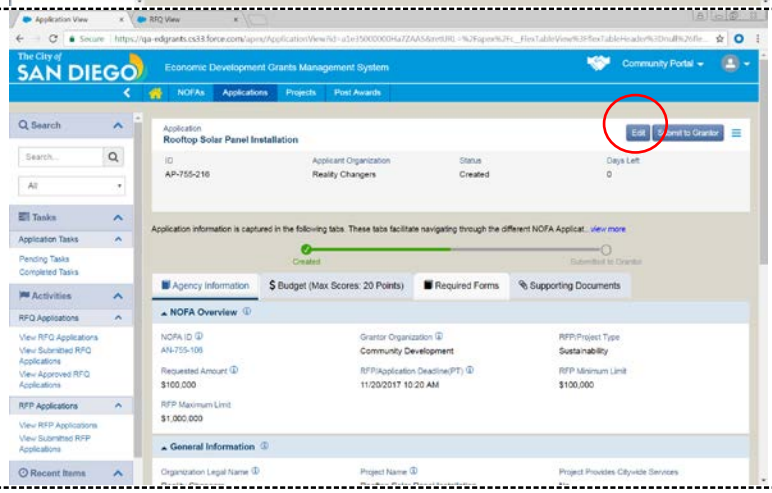
Step	Description	Screenshot
23	After you have entered the CDBG funding amount requested and the leveraged funding sources and amounts (whether secured or unsecured), proceed to the '**Proposed Uses of Total Project Funds**' section to enter specific expenditure line items for the proposed project. To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

Step	Description	Screenshot
25	After you have completed the '**Proposed Uses of Total Project Funds**' section, the system will sum the figures and provide totals at the bottom of the table (row 21). ***NOTE:*** *The total for the '**City Amount**' column must match the CDBG funding amount requested. The total for the '**Non-City Amount**' 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.*	
26	Click on the '**Supporting Documents**' tab to see two sections: '**Attachments**' and '**Supporting Document Templates**.' The '**Supporting Document Templates**' 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. ***NOTE:*** *ED Grants will only accept PDF or JPEG files.*	
27	To upload a document, click on the '**Add**' button to call up a popup window. In the popup window, click on the '**Upload File from Computer**' tab. Choose the '**Type**' of the document from the drop-down menu. The selections are based on the list of documents in the '**Supporting Document Templates**' section.	

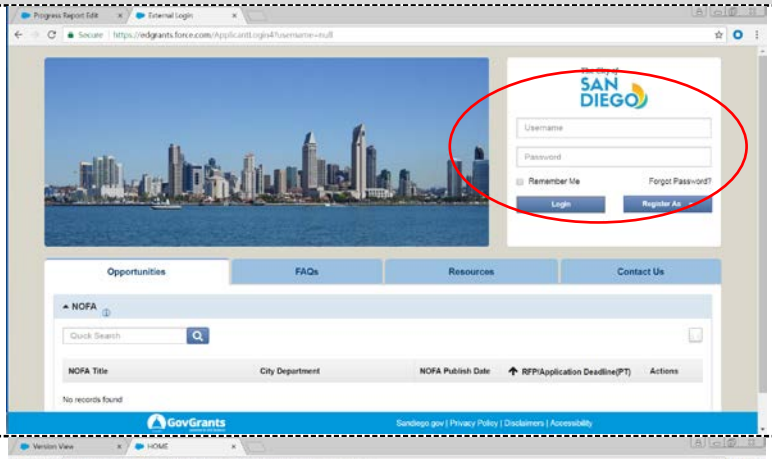
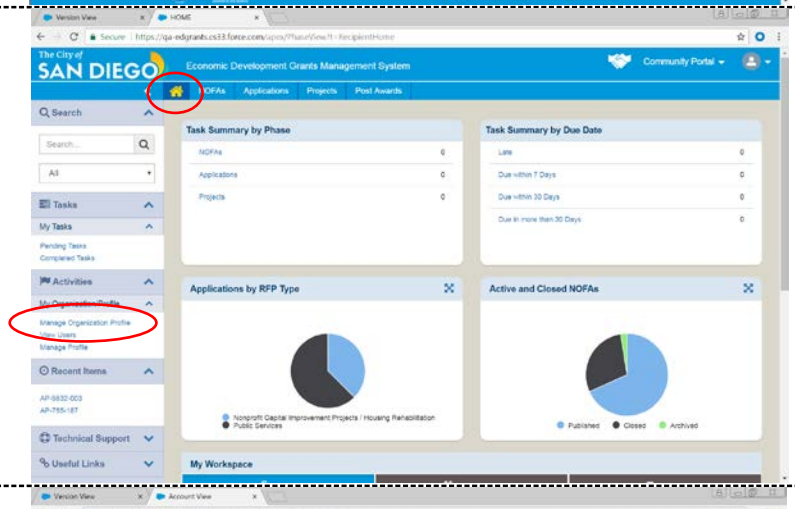
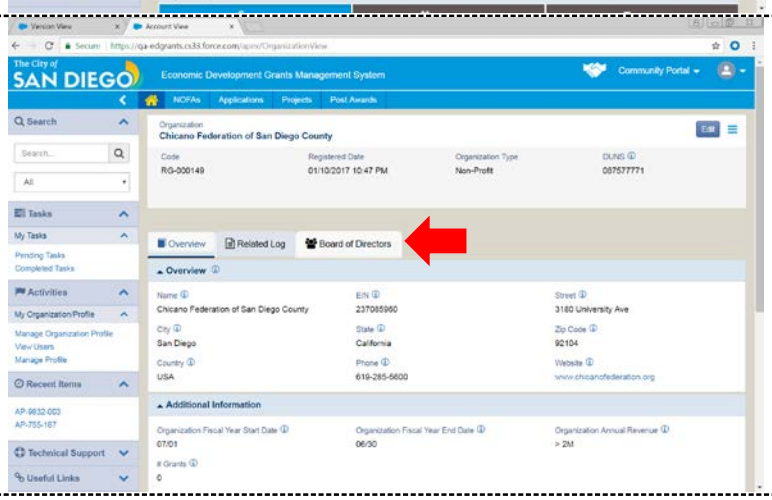
Step	Description	Screenshot
28	Click on the '**Choose File**' button to navigate to the file you would like to upload from your local computer. Click on the '**Open**' button to upload the file to the system. ***NOTE:*** *The system will only accept PDF and JPEG file types.*	
29	Enter a brief description of the file in the '**Description**' field. Click on the '**Save**' button and then click on the '**X**' button to close the popup window. You should now see your file uploaded to the '**Attachments**' section. ***NOTE:*** *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 '**Mandatory**.'*	
30	Click on the '**Submit to Grantor**' button to officially submit the RFP response to the City for review. ***NOTE:*** *Only your organization's Primary Representative will have access to the '**Submit to Grantor**' button. If you are working as the Secondary Representative, coordinate with the Primary Representative to officially submit the RFP response to the City.*	

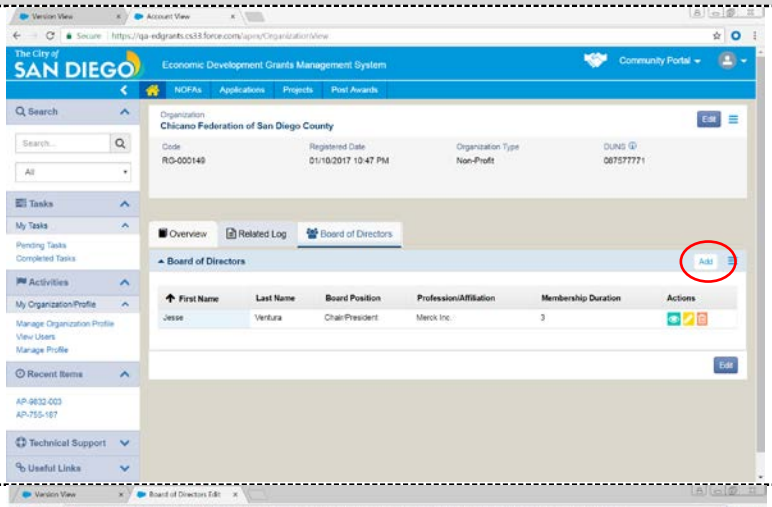
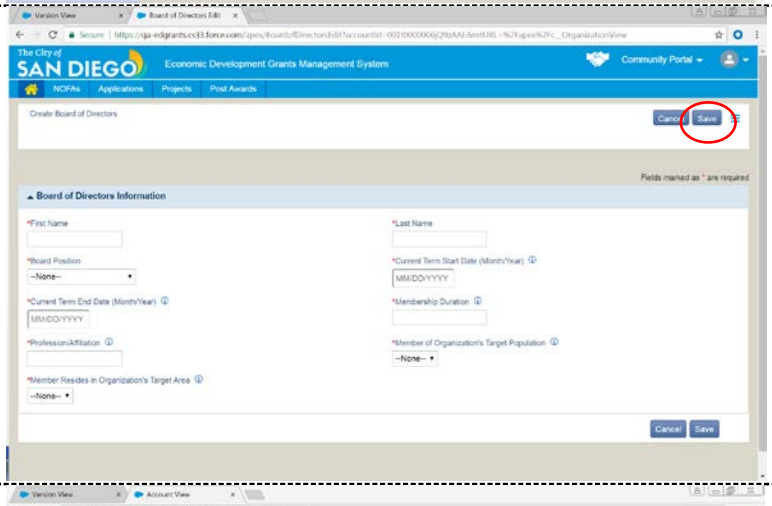
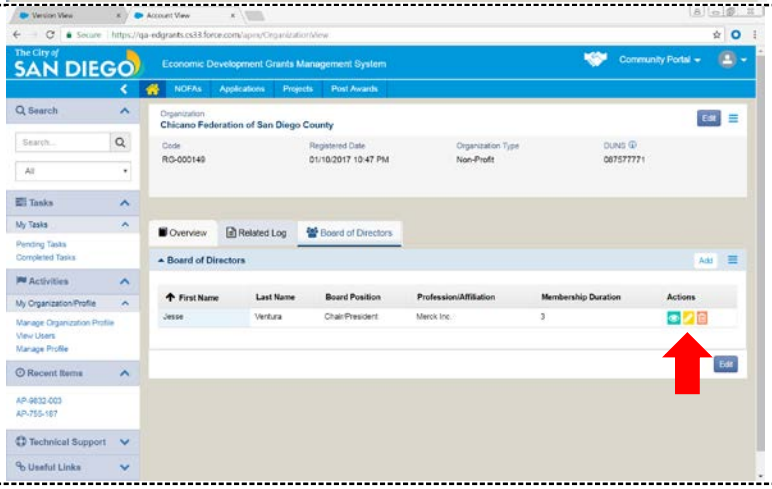
Step	Description	Screenshot
31	The system will validate the information you had entered using internal controls. If there are any errors or deficiencies identified, the system will display error messages along the top of the screen. All error messages must be addressed and cleared before the system will allow you to submit the RFP response.	
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.	**End**

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

Step	Description	Screenshot
1	Log into http://edgrants.force.com using the credentials for either the Primary Representative or Secondary Representative of your organization. ***NOTE**: 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 http://edgrants.force.com 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 '**Add**' 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 (ⓘ) for guidance and clarification. When you are finished, click on the '**Save**' 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 '**Board of Directors**' tab and one of the icons in the '**Actions**' column. The trash can icon (🗑) deletes the entire existing profile from the system. The pencil icon (✎) opens the profile for editing, after which the '**Save**' 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.	**End**