

Economic Development Department

*FY 2025 CDBG Request for Proposals (RFP)
Mandatory Workshop*

Virtual RFP Workshop
December 2023

Welcome!!

- Opening Remarks/Housekeeping
- Topics to Be Covered:
 - City of San Diego's Strategic Plan
 - FY 2025 – FY 2029 Consolidated Plan Goals
 - Grant Application Process – RFP
 - FY 2025 Scoring Criteria and RFP Questions
 - Submittal Requirements
 - NCIP Construction Project Overview
 - Important Dates/ED Grants and What Comes Next



How does your organization's mission align with the City's goals?



City of San Diego's Strategic Plan

A Future For All of Us

Vision

Opportunity in every neighborhood, excellent service for every San Diegan.

Mission

Every day we serve our communities to make San Diego not just a fine city, but a great City.

Operating Principles



Customer Service

We value our residents, customers, and employees by designing solutions and services that put people first.



Empowerment & Engagement

We value a “Culture of Yes” where we empower employees to creatively solve problems and offer solutions.



Equity & Inclusion

We value equity and inclusion by taking intentional action to create equal access to opportunity and resources.



Trust & Transparency

We value transparency by using data to make better-informed decisions, answer questions, and build trust with the public.



Priority Areas of Focus

Create Homes
For All of Us

Protect &
Enrich Every
Neighborhood

Advance
Mobility &
Infrastructure

Champion
Sustainability

Foster
Regional
Prosperity

Economic Development Department: Mission

Increase economic prosperity for businesses, nonprofits and residents within San Diego through investment and strategic partnerships.



FY 2025 – FY 2029 Consolidated Plan Goals

FY 2025 - FY 2029 Consolidated Plan Goals

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.

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.

3

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

FY 2025 - FY 2029 Consolidated Plan Goals

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.

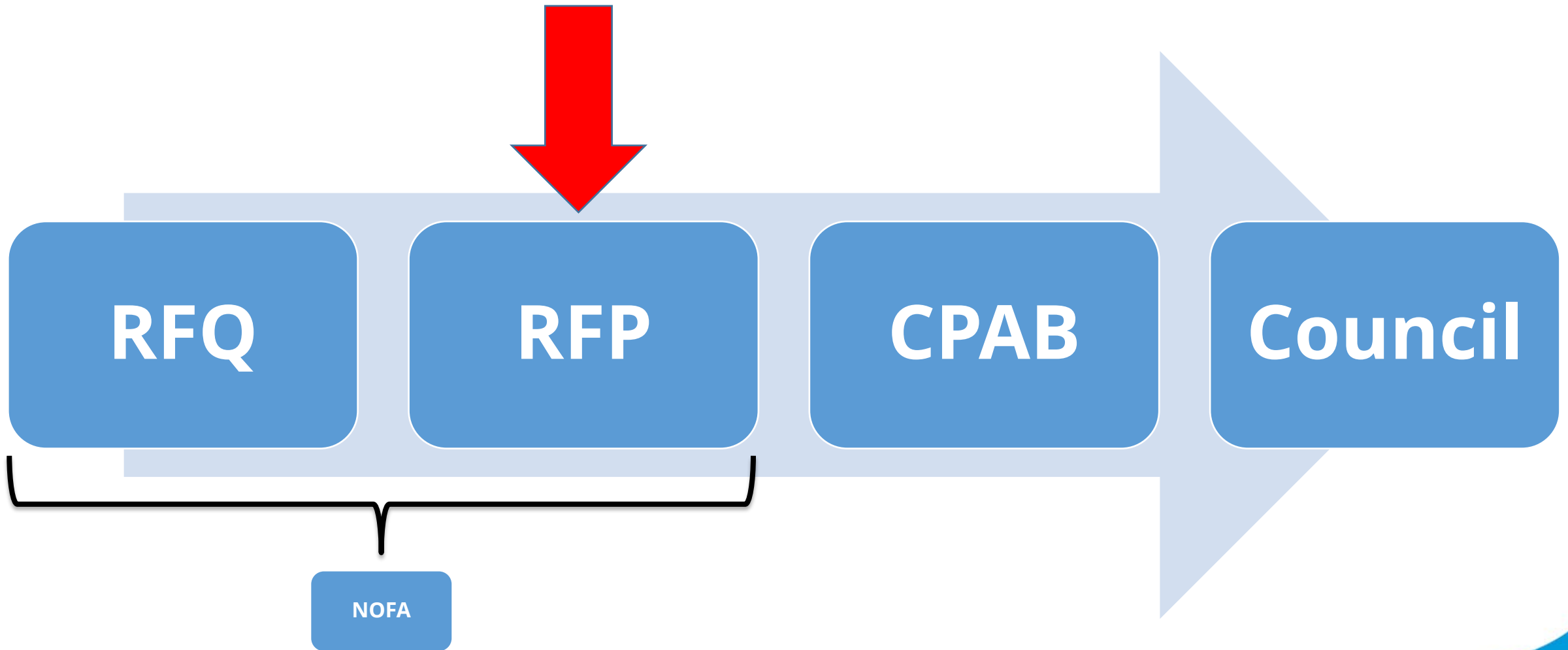
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- Improve community services by addressing critical needs and promoting equity through improved or increased access to community programming.



Grant Application Process RFP

Sequence





Overview of the FY 2025 Scoring Criteria and Related RFP Questions

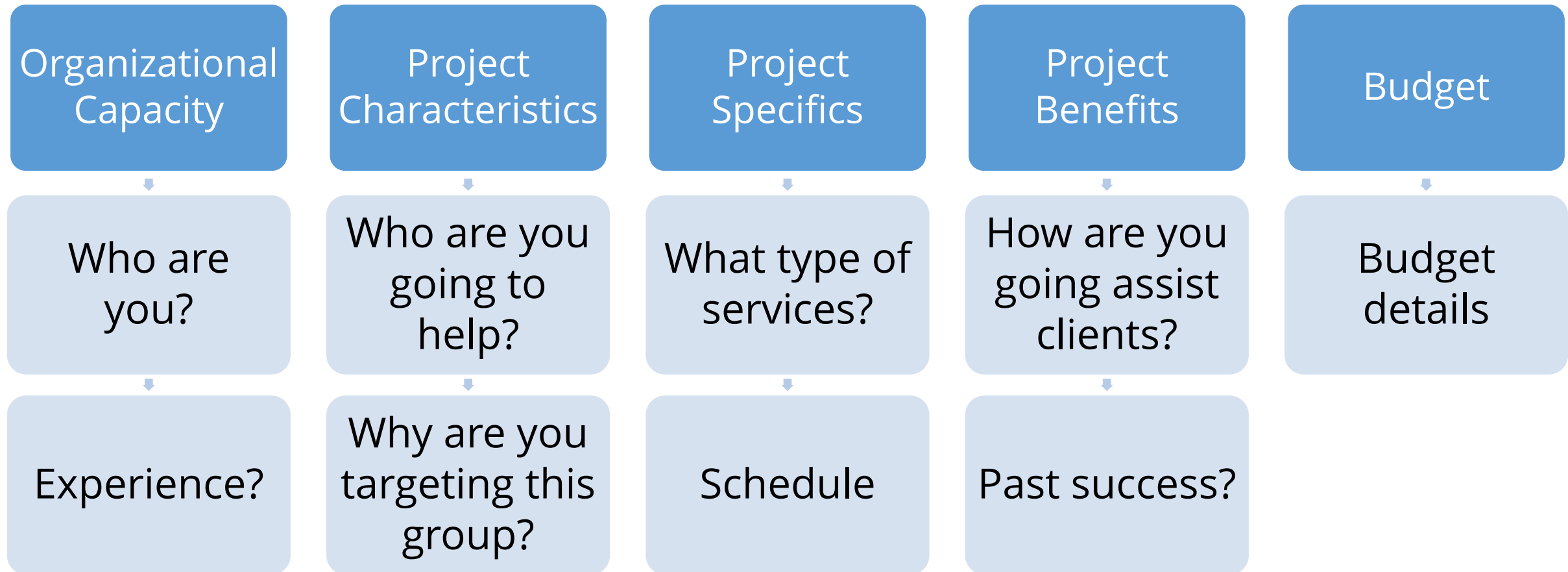
FY 2025 Scoring Criteria Updates

- 1.c: Organization Capacity: Collaboration
- 2.b.ii: Project Characteristics: Confirmation of Program Status
- 3.a.iv: Project Specifics: Cost per Beneficiary
- 4.a: Project Benefits: Description of Services
- 4.b & 4.c: Project Benefits: Geographic Targeting
- 4.d: Project Benefits: Collateral Material

FY 2025 Scoring Criteria Categories

Section	Section Name	Max Points Possible		
		PS	CED	NCIP
1	Organizational Capacity	14	13	15
2	Project Characteristics	28	28	28
3	Project Specifics	22	22	14
4	Project Benefits	16	17	19
5	Project Budget	18	18	22
6	Project Eligibility	2	2	2

Narrative Flow



Organizational Capacity – PS/CED (14/13 points)

- a. Experience in Implementation of Similar Projects
(5 points)
- b. Experience Providing Services to LMI Populations
(5 points)
- c. Collaboration with Other Agencies
(3 points for PS, 2 points for CED)
- d. Resiliency
(1 points for PS and CED)

Organizational Capacity – NCIP-F (15 points)

- a. Organization Project Experience:
 - i. CDBG specific experience or similar project (5 points)
 - ii. Specific staff experience (4 points)
- b. Experience Providing Services to LMI Populations (3 points)
- c. Collaboration with Other Agencies (2 points)
- d. Resiliency (1 point)

Project Characteristics – PS/CED (28 points)

- a. Project Summary: Specific program/services (13 points)
- b. Confirmation of Program Status (5 points)
- c. Project Goals (7 points)
- d. Project Results (3 points)

Project Characteristics – NCIP-F (28 points)

- a. Project Summary: Specific Activities/services, Characteristics of population, Critical need (13 points)
- b. Facility Impact Confirmation of a New Public Facility or Significant Expansion to an Existing Public Facility; metrics used (5 points)
- c. Project Goals (7 points)
- d. Project Results (3 points)

Project Specifics (22 points)

PS/CED (22 points)

- a. Services to Be Provided; quantity of services, method of delivery, justification of funding request, cost per beneficiary (18 points)
- b. Project Schedule (4 points)

Project Specifics (14 points)

NCIP-F (14 points)

- a. Contract Execution Readiness: Shovel ready with architect consultation, facility needs assessment (8 points)
- b. Project Schedule: permits identified and time needed for each, project released for BID, anticipated timeline (6 points)

Project Benefits (PS 16 points/CED 17 points)

PS/CED (16/17 points)

- a. Services to High-Need Populations (9 points)
 - How services will be/are provided, proof of past success
- b. Geographic Targeting—Office Providing Project Services (2 points)
 - CDD verification of score*
- c. Geographic Targeting—Client Location (3 points for PS, 4 points for CED)
 - How services are targeted, if any, to specific areas
- d. Collateral Material- Proof of Positive Impact (2 point)

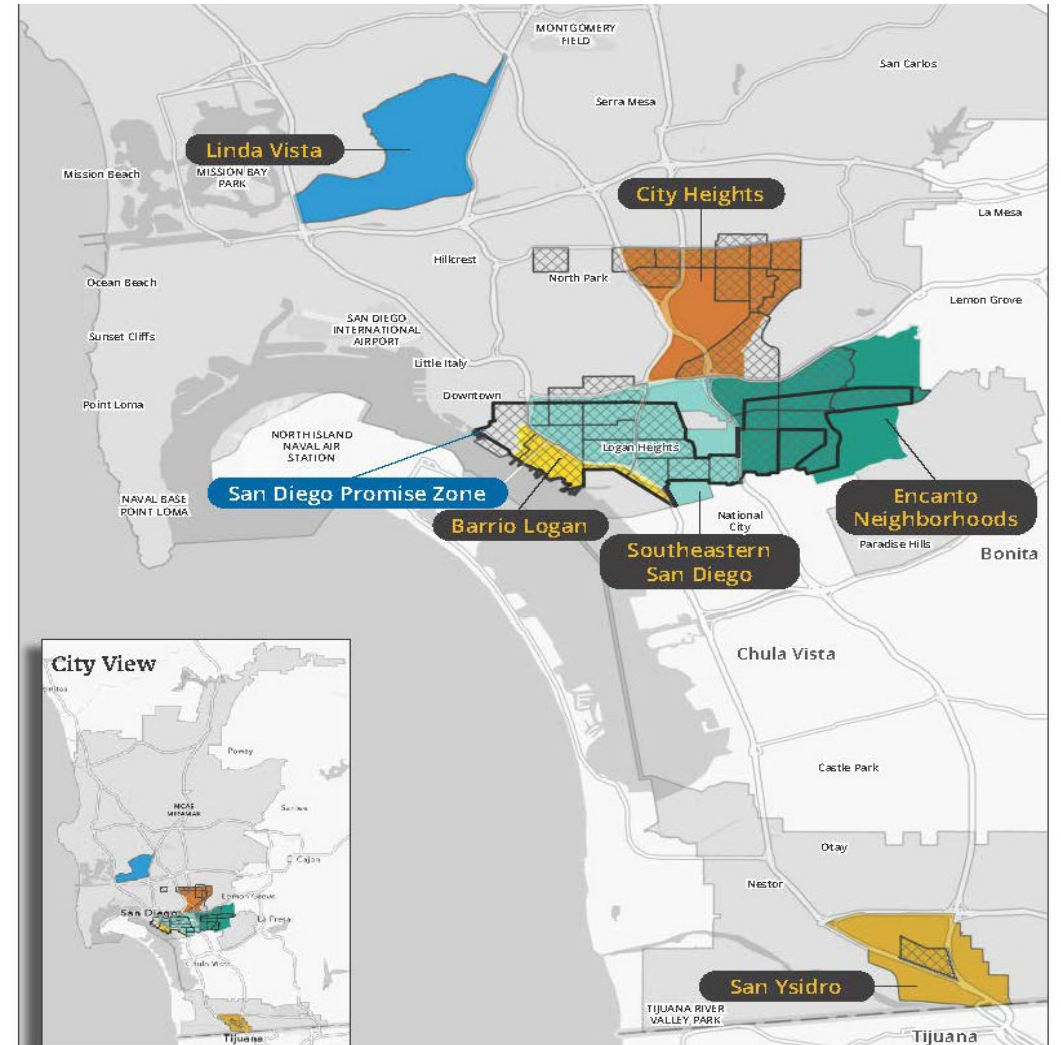
Project Benefits (19 points)

NCIP-F (19 points)

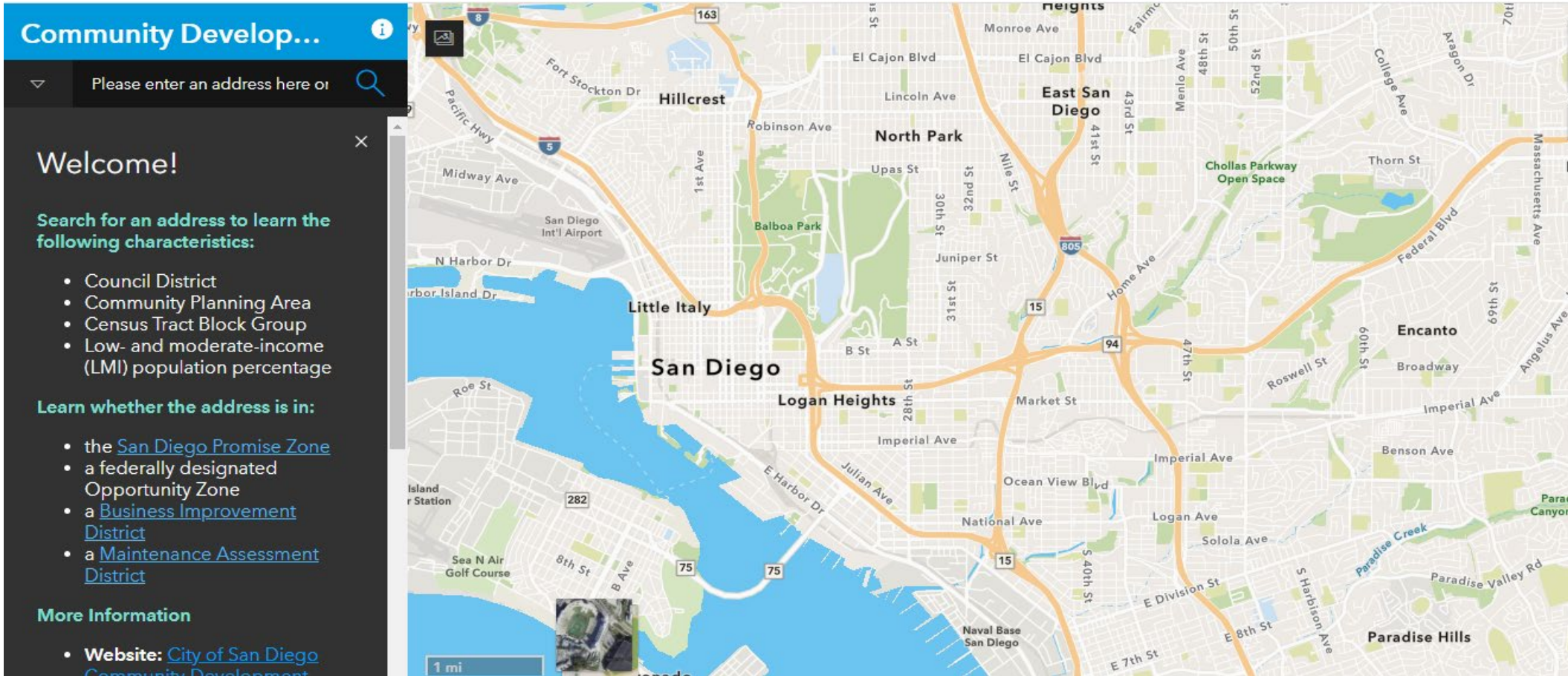
- a. Services to High-Need Populations (12 points)
 - How services provided, proof of past success with success stories
- b. Geographic Targeting—Facility Location (3 points)
 - CDD verification of score*
- c. Geographic Targeting—Services (2 points)
 - How services are targeted, if any, to specific areas
- d. Collateral Materials (2 point)

Geographic Targeting Eligible Locations

- Federally designated **San Diego Promise Zone**: Covers targeted area of 6.4 square miles spanning from East Village and Barrio Logan to Encanto and Emerald Hills; home to City's most disadvantaged and underserved communities.
- California **Opportunity Zones**: Census Tracts that are economically distressed communities where new investments may be eligible for preferential federal tax treatment or preferential consider for federal grants and programs.



Geographic Targeting Mapping Tool



Project Eligibility & Performance Indicators (2 points)

a. Project Eligibility

- Scope and budget demonstrate compliance with CDBG eligibility, HUD requirements, and City policies
- **NCIP-F:** Environmental review (City, state, federal) needed has been identified and planned for

Project Eligibility & Performance Indicators (0 to -2.5 points)

Assessment Area	Indicators	Standards
Fiscal Performance	<ul style="list-style-type: none">• Balance of Award at Closeout (\$)• Total Disallowances at Closeout (\$)• Number of Disallowances Processed (#)	<ul style="list-style-type: none">• Award Balance \geq 10% (-0.50 point)• Total Disallowances \geq 10% (-0.25 point)• Disallowance Frequency \geq 50% (-0.25 point)
Programmatic Performance	<ul style="list-style-type: none">• Number of Clients Served <p><u>OR</u></p> <ul style="list-style-type: none">• Number of Projects Completed	<ul style="list-style-type: none">• 51-79% of target met (-0.50 point)• \leq 50% of target met (-1.0 point)
Leveraged Funding	<ul style="list-style-type: none">• Stated RFP funding vs actual closeout funding	<ul style="list-style-type: none">• Discrepancy $>$ 25% is a deduction of 0.5 point

Other Considerations

Character limits

- *5000 limit*

Proof of Success Stories

- *Links, Testimonials, Reports*

Project Budget (18 or 22 points)

a. Future Sources of Funding to Sustain Program or Maintain Improvements

- Must provide description of future sources of funding to be used to support the continuation of the proposed project after CDBG funds have been fully expended
- Maximum Funding Request Threshold (see “Qualified” RFQ e-mail)

Project Budget (18 or 22 points)

b. Sources of Funding Identified

- Must be capable of performing services on a reimbursement basis (3-month cash recommendation)
- Total Project Budget includes secured/leveraged and unsecured funding sources
 - ✓ NOTE: CDBG funding amount is not secured
- Ineligible secured funding sources:
 - ✓ Lines of credit
 - ✓ Funds expended prior to July 1st
 - ✓ In-kind support/match or future pledges

Project Budget (18 or 22 points)

c. Uses of Funding

- Provide detailed breakdown of costs necessary to complete project
- Personnel costs (PE)
 - ✓ Position title & salary description (Include overtime, sick leave, vacation and holiday pay if it will be requested for reimbursement)
 - ✓ Specific list of fringe benefits to be covered, if applicable
 - ✓ Annual budget for salaries/wages & fringe benefits
 - ✓ *NOTE: Personnel costs not eligible for NCIP public facilities/construction*
- Non-personnel (NPE) costs by line item

Project Budget (18 or 22 points)

d. Leveraged/Secured Funding

- a. Organization required to certify funding sources and secured fund amounts
 - ✓ Erroneous/falsified claims may be cause for forfeiture of award funds
- b. The formula for the leverage percentage is the total amount of secured funding divided by the total project budget.
- c. Number of points awarded varies by percentage calculated (scored by city staff)

▪ 0% - 5% (0 points)	▪ 41% - 60% (3 points)
▪ 6% - 20% (1 point)	▪ 61% - 80% (4 points / 5 points for NCIPs)
▪ 21% - 40% (2 points)	▪ 81% - 100% (5 points / 7 points for NCIPs)



Submittal Requirements

RFP Applications

- Applications and questions therein vary by RFP type
- Refer to RFP Handbook for instructions and information on questions
- Refer to RFP Submission Guide for instructions on how to navigate ED Grants to submit proposals
- Attach all 'Required' documents → *NOTE: 'Optional' means 'if applicable, then attach' (**not** 'applicant decides if to submit or not')*
- Beware of character count limits
- When entering budget information, provide detailed and specific descriptions of planned expenditures

Supporting Documents

Project Category	Org. Chart (Entire Agency)	Org. Chart (Division/Section)	Documentation of Approved FAIC	Deed of Trust/Lease Agreement Copy	Certification Regarding Use of Applicant-Owned Real Property	Certification Regarding Use of City-Owned Real Property	Certification Regarding Property Owner Authorization to Complete CDBG Activities on Property	Colored Photos
Public Services	Optional, if no revision since RFQ submittal		Only if budgeted	Only if budgeted				
CED: Technical Assistance			Only if budgeted	Only if budgeted				
NCIP: Facilities				X	X	X	X	X



CDBG RFP Categories — FY 2025

- **Public Services**
 - *Direct Services*
- **Community and Economic Development**
 - *Microenterprise Technical Assistance*
- **Nonprofit Capital Improvement Projects**
 - *Nonprofit Facility Improvements*

Public Services

FY 2025 Budget	\$2,580,000 (estimated)	
Eligible Activities	<ul style="list-style-type: none">• Employment training• Senior services*• Health Services• Homeless services• Disability services*• Domestic violence services• Tenant/landlord counseling• Substance abuse services• Mental health services• Housing counseling• Food banks/meal distribution	
Minimum Allocation	\$50,000	
Outcome Measure	Low/moderate-income clientele	

**Presumed LMI possible*

Community/Economic Development: Microenterprise Technical Assistance

FY 2025 Budget	\$2,500,000 (estimated)
Eligible Activities	<p>Microenterprise assistance</p> <ul style="list-style-type: none">• <i>Technical assistance on <u>establishing</u> a microenterprise, including accessing capital, filing legal documents, creating business plan, etc.</i>• <i>'Microenterprise' defined as a for-profit business with five or fewer employees, one or more of whom owns the business</i>
Minimum Allocation	\$50,000
Outcome Measures	<p>Low/moderate-income clientele Businesses established or expanded</p>



Nonprofit Capital Improvement Projects: Facilities

FY 2025 Budget	\$3,000,000
Eligible Activities	<p>New construction or rehabilitation of public facilities</p> <ul style="list-style-type: none">• Improve spaces used to provide direct public services• Implement ADA improvements• Address health/safety hazards <p>❖ Examples: Senior and youth centers; homeless facilities; health facilities; childcare centers; facilities for persons with disabilities</p>
Minimum Allocation	\$100,000
Outcome Measures	Low/moderate-income clientele

Common Disqualifiers

- Organization did not attend a mandatory workshop
- Conflict of interest identified
- Incorrect or incomplete attachments submitted
- Incorrect RFP category
- Not providing services to City of San Diego residents
- Currently open NCIP project at the same facility
- No documentation of site control for NCIP projects
- Inconsistent with HUD regulations



NCIP Overview and RFP Requirements

What does "Shovel Ready" Mean:

- Organization has met with an architect and/or engineer to fully ascertain what is required to complete their scope of work
- They have construction documents created by a licensed firm that are complete or routing in DSD
- Bid issuance within 180 days of contract execution



What makes a Successful NCIP:

- Having a Facility Needs Assessment
- Construction Plans and Proper Permits
- Has actual leveraged funds, not just staff time
- Comprehensive Scope of Work
- Fully developed Budget
- In-house designated Project Manager or 3rd Party Construction Manager – competitively bid



Common Issues with Past NCIP Projects

- Not enough funding requested
- No details in Scope of Work
- No dedicated Subrecipient Project Manager
- Bidding – too high/not enough bidders
- Piece Meal NCIPs over years for same location
- No Permits/Construction documents

Common NCIP Scope of Work Items

- ADA improvements
- HVAC/Generator replacement
- Window replacement
- Flooring replacement
- Roof replacement/Solar
- Additional exam
- rooms/classrooms
- Elevator replacement
- Exterior building improvements
- (lighting, gates/parking lot)



Successful NCIP Improvements Completed

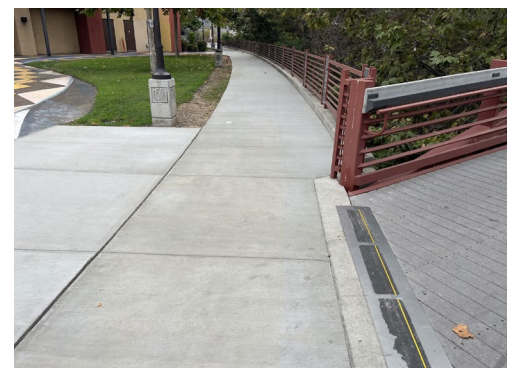
Before



The City Heights Family Health Center Solar Project will install a solar photovoltaic system on the roof of the clinic. The proposed project will result in greater energy efficiency as well as substantial financial and environmental benefits.



After



Important NCIP Reminders

- All grant expenditures and project completion must occur within 24 months from grant award
- Construction bidding process takes between 4-5 months from advertisement to contract award
- Allowing at least 15 months for permit issuance and completion of construction
- Successful projects are:
 - “Shovel ready” upon grant award
 - Invitation to Bid must be issued within 180 days of contract execution
 - Agencies have a dedicated project management team (in-house or hired)
 - Project scope is well defined, budget is refined, project management team is on standby
 - Prepared for increases in Construction Labor and Materials costs
- Careful planning and adhering to a project timeline is the key to success

Important Dates/ ED Grants

What comes next?



Summary of RFP Deadlines

Date	Deadline (all Pacific Standard Time)
12/12/23	Mandatory FY 2025 CDBG RFP Virtual Workshop, 10 am (PST)
12/15/23	FY 2025 CDBG RFP released via ED Grants
12/18-12/22/23	Virtual Technical Assistance Meetings, by Appointment Only
01/02-01/12/24	Virtual Technical Assistance Meetings, by Appointment Only
01/16/24	5:00 p.m. deadline to email RFP questions (not related to ED Grants navigation)
01/16/24	5:00 p.m. deadline to request updates to Primary/Secondary Representatives
01/19/24	12:00 p.m. deadline to request ED Grants navigation assistance/staff support
01/19/24	5:00 p.m. deadline to submit FY 2025 CDBG RFP Responses via ED Grants (NO EXCEPTIONS)



Next Steps After RFP Submittals

Date	Step
01/19/24	RFP submittals due in ED Grants
01/22-02/02/24	Community Development Division (CDD) determines FY 2025 RFP eligibility
02/05-02/06/24	CDD Staff Internal Verification of RFP Reviews; Preparation for Release to Consolidated Plan Advisory Board (CPAB)
02/07-02/28/24	FY 2025 CDBG RFP Materials Available to Consolidated Plan Advisory Board (CPAB) Members for Review and Scoring
03/01/24	FY 2025 CDBG RFP Scoring Results Posted on CDBG Program Website and Emailed to Interest List
03/13/24	CPAB Meeting; FY 2025 CDBG RFP Scores Ratified and Funding Recommendations Forwarded to City Council for Approval
04/24	Council approval of FY 2025 allocations

Technical Assistance (TA)

- Available **December 18 - 22, 2023 and January 2 - 12, 2024**
- No TA appointments from December 23, 2023 – January 1, 2024, in observance of the holidays.
- 30-minute one-on-one TA meetings with City staff (two session limit per org)
- New organizations and NCIP applicants are **required** to attend at least one TA session
NCIP applicants encouraged to schedule additional TA with NCIP Project Team.

Technical Assistance RSVPs via Microsoft Bookings

- | | | |
|--|---------------------------------|--------------------------|
| ✓ ED Grants | ✓ General Administration | ✓ Other (Specify) |
| ✓ Project Specifics & Eligibility | ✓ Budget | ✓ NCIP |



ED Grants: Submission Deadline

PROPOSALS MUST BE SUBMITTED
ON OR BEFORE
January 19, 2024, AT 5:00 P.M. (PST)

<https://edgrants.force.com>

ED Grants: User Updates/Password Resets

- **Deadline to request updates to ED Grants users (Primary and Secondary Representatives) is Monday, January 16, 2024, at 5:00 p.m. (PST)**
- **BEFORE this January 16, 2024 deadline**, ensure your Primary Representative remembers their password, can access ED Grants and sees the 'Submit' button when they log in. Also, be sure your Primary Representative is available to "Submit" the RFP response by the final January 19, 2024 deadline.
- **All other technical assistance related to ED Grants navigation, including password resets, ends at 12:00 p.m. (PST) on Monday, January 19, 2024.**
- Email CDBG@sandiego.gov with your request

Submitting RFP Related Questions

- All questions related to the RFP (not related to ED Grants navigation) must be submitted on or before **5:00 p.m. on January 16, 2024**.
- Email **CDBG@sandiego.gov**
Subject Line: "RFP Question – [Subject matter of the question – see below]"
 - ED Grants
 - Project Specifics and Eligibility
 - Budget
 - General Administration
 - Other (Specify)
- To expedite the response to your question, please provide the following in your e-mail:
 - Applicant organization name
 - RFP category (PS, CED, or NCIP/F)
 - Clearly written question; break complicated questions into simpler ones



Submitting ED Grants Navigation Related Questions

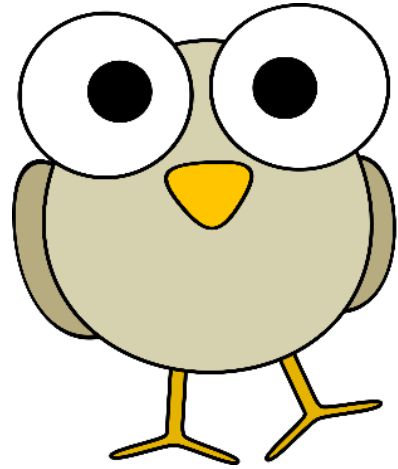
- Staff will assist applicants with ED Grants navigation (except updates to Primary and Secondary Representatives) until **12:00 p.m. (PST) on January 19, 2024**, only.
- Staff will not entertain questions received after the deadline
- Email **CDBG@sandiego.gov**
Subject Line: "CDBG RFP – ED Grants Navigation"
Make sure to include a call back number

Responding to the RFP: Tips and Tricks

- ❑ Choose one person to be the lead contact for your organization
- ❑ Read the Handbook, FAQs, and Resources before contacting City staff with questions
- ❑ But if you do have questions, don't hesitate to email us at CDBG@sandiego.gov; we are here to help!
- ❑ Highly recommend taking advantage of opportunities for help, such as TA sessions

Responding to the RFP: Tips and Tricks

- ❑ Start the process early and allow enough time to review the quality and accuracy of your responses and the required documents before submission
- ❑ Have someone proofread and review your application before submission
- ❑ By 5:00 p.m. (PST) on Monday, January 16, confirm your organization's Primary Representative has a valid username and password and would be available to click on the 'Submit' button by the deadline



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Q&A