

Economic Development Department

FY 2020 CDBG Request for Proposals (RFP) Mandatory Workshop

Valencia Park/Malcolm X Branch Library
November 2018



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Welcome!!

- Opening Remarks/Housekeeping
- Topics to Be Covered:
 - City of San Diego's CDBG Program
 - FY 2020 Scoring Criteria and RFP Questions
 - ED Grants
 - Submittal Requirements

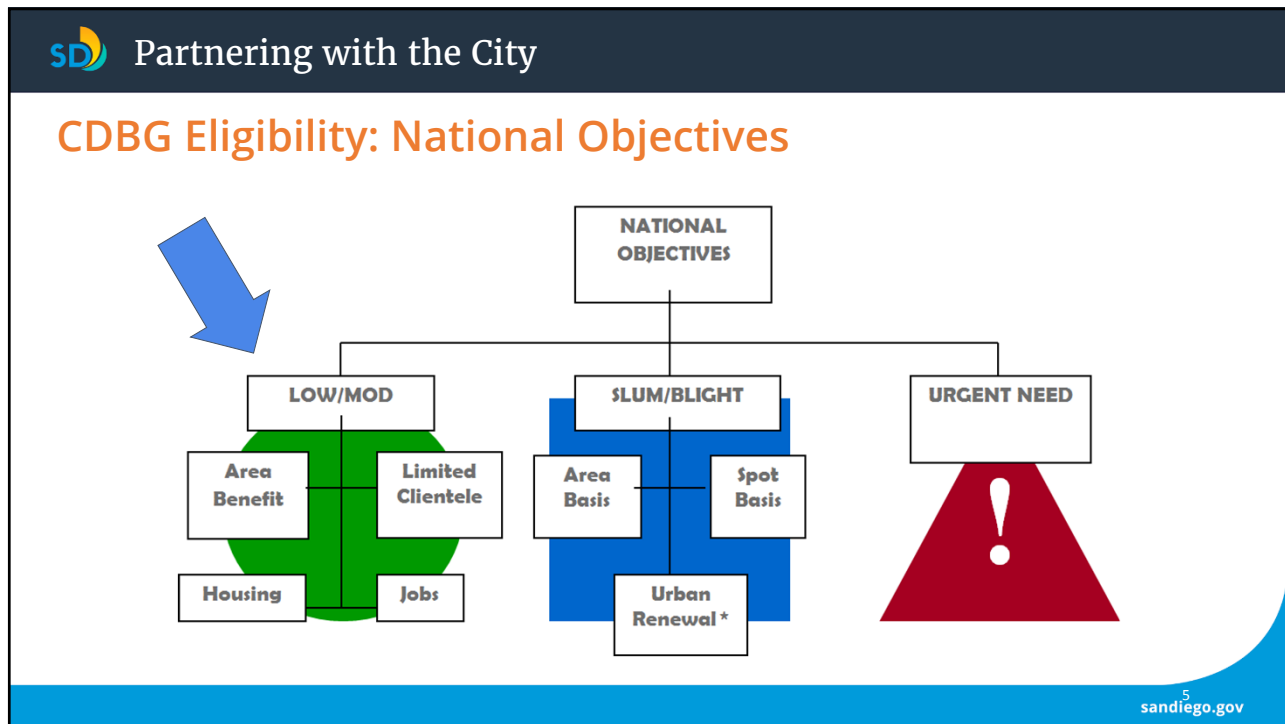
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City of San Diego's CDBG Program

Community Development Block Grants (CDBG)

Primary Objective: Improve living environment, expand economic opportunities, and provide decent housing for low- and moderate-income residents and areas

- Federal entitlement program established by Housing & Community Development Act of 1974
- Administered by U.S. Department of Housing and Urban Development (HUD)
- Regulations found in 24 CFR Part 570



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City of San Diego Strategic Plan

Mission

To effectively serve and support our communities

Vision

A world-class city for all

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City of San Diego Strategic Plan

Values

Integrity

- Do the right thing
- Be ethical, truthful, and fair
- Take responsibility for our actions

Service

- Exhibit pride in all that we do
- Treat others as we would like to be treated
- Anticipate and promptly respond to requests

People

- Value customers and employees as partners
- Recognize that an engaged City workforce is the key to quality customer service
- Promote diversity as a strength

Excellence

- Foster a high performing culture
- Establish clear standards and predictable processes
- Measure results and seek improvement in everything we do

Goal 1:
Provide high quality public service

Goal 2:
Work in partnership with all of our communities to achieve safe and livable neighborhoods

Goal 3:
Create and sustain a resilient and economically prosperous City with opportunity in every community

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Sequence

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graph LR; RFQ[RFQ] --> RFP[RFP]; RFP --> CPAB[CPAB]; CPAB --> Council[Council];
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A Word on Timeliness

- Entitlement jurisdictions are required to use their CDBG funds in a timely manner
- HUD timeliness standard = no more than 1.5 times the entitlement amount
- Unspent subrecipient funds can place the entire CDBG program into noncompliance



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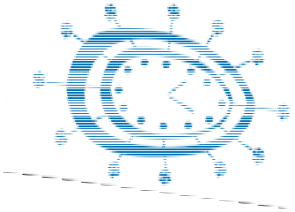
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City Strategy

- Select organizations with capacity
- Contractual timeliness requirements
- Sanctioning untimely subrecipients

What Can You Do (If Awarded)?

- Identify cause of any backlog
- Identify actions to take and expected results
- Develop a milestone schedule and expenditure projection



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Consolidated Plan Goals

- 1 • Increase and preserve **affordable rental and homeowner housing** to improve access to **housing** opportunities that reflect community needs, including, but not limited to, opportunities in close proximity to transit, employment, and community services.
- 2 • Enhance the City's economic stability by investing in inclusive economic growth initiatives that develop and strengthen **small businesses and support local entrepreneurs**.
- 3 • Foster individual and household resiliency by **investing in employment and workforce development** programs and improving access to job opportunities.

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Consolidated Plan Goals


- 4 • Support the development of vibrant, equitable, and adaptable neighborhoods by investing in **public facilities and critical infrastructure**.
- 5 • **Assist individuals and families to gain stable housing after experiencing homelessness or a housing crisis** by providing appropriate housing and service solutions grounded in best practices.
- 6 • **Invest in community services that promote equity and serve vulnerable populations** including, but not limited to, refugees and recent immigrants, previously incarcerated, veterans, youth, seniors, and food insecure households.
- 7 • Finance **impactful nonprofit facility improvements** to provide new or increased access to programs that serve vulnerable populations or implement sustainability measures.

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Overview of the FY 2020 Scoring Criteria and Related RFP Questions

FY 2020 Scoring Criteria Updates


- Rearranged criteria into more logical groupings and order
- Clarified language
- Revised point allocations regarding:
 - ✓ Method of delivery
 - ✓ Project schedule
 - ✓ Benefits to high-need populations
 - ✓ Geographic targeting
 - ✓ Cost per beneficiary

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FY 2020 Scoring Criteria Categories

Category	Category Name	Max Points Possible		
		PS	CED: TA	CED: Microloan
1	Organizational Capacity	13	12	12
2	Project Characteristics	28	28	28
3	Project Specifics	22	22	22
4	Project Benefits	17	18	18
5	Project Budget	18	18	18
6	Project Eligibility & Performance Indicators	2	2	2

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FY 2020 Scoring Criteria Categories

Category	Category Name	Max Points Possible (NCIP)		
		Facilities	Sustainability	Multi-Family Housing
1	Organizational Capacity	14	14	14
2	Project Characteristics	30	30	30
3	Project Specifics	14	14	14
4	Project Benefits	22	22	22
5	Project Budget	18	18	18
6	Project Eligibility & Performance Indicators	2	2	2

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FY 2020 Scoring Criteria Categories for New Categories

Category	Category Name	Max Points Possible	
		CED: Neighborhood Business Improvement Program	Single-Family Housing Rehabilitation (SHR) Program
1	Organizational Capacity	34	34
2	Project Characteristics	34	34
3	Project Budget	20	20
4	CPAB Presentation	10	10
5	Project Eligibility & Performance Indicators	2	2

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- SD** Partnering with the City
- ### 1. Organizational Capacity – PS/CED-TA (13/12 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-TA)
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 Partnering with the City**1. Organizational Capacity – NCIP/HR/SUS (14 points)**

- a. Experience in Implementation of Similar Projects (9 points)
- b. Experience Providing Services to LMI Populations (3 points)
- c. Collaboration with Other Agencies (2 points)

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- a. Project Summary (13 points)
- b. Confirmation of Program Status (5 points)
- c. Project Goals (5 points)
- d. Project Results (5 points)


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2. Project Characteristics – NCIP/HR/SUS (30 points)

- a. Project Summary (15 points)
- b. Facility Impact Confirmation of a New Public Facility or Significant Expansion to an Existing Public Facility (5 points)
- c. Project Goals (5 points)
- d. Project Results (5 points)

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3. Project Specifics (22 or 14 points)

PS/CED (22 points)


- a. Services to Be Provided (18 points)
- b. Project Schedule (4 points)

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NCIP/HR/SUS (14 points)

- a. Contract Execution Readiness (8 points)
- b. Project Schedule (6 points)

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4. Project Benefits (17, 18 or 22 points)


PS/CED-TA, CED-Microloan (17/18 points)

- Services to High-Need Populations (12 points)
- Geographic Targeting—Office Providing Project Services (2 points)
- Geographic Targeting—Client Location (3 points for PS, 4 points for CED-TA and CED-Microloan)

NCIP/HR/SUS (22 points)

- Services to High-Need Populations (15 points)
- Geographic Targeting—Facility/Housing Units Location (4 points)
- Geographic Targeting—Client Location (3 points)

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4. Project Benefits (17, 18 or 22 points)

➤ Community Planning Areas identified by **Geographic Targeting Initiative:**

- Barrio Logan
- City Heights
- Encanto
- Linda Vista
- San Ysidro
- Southeastern San Diego

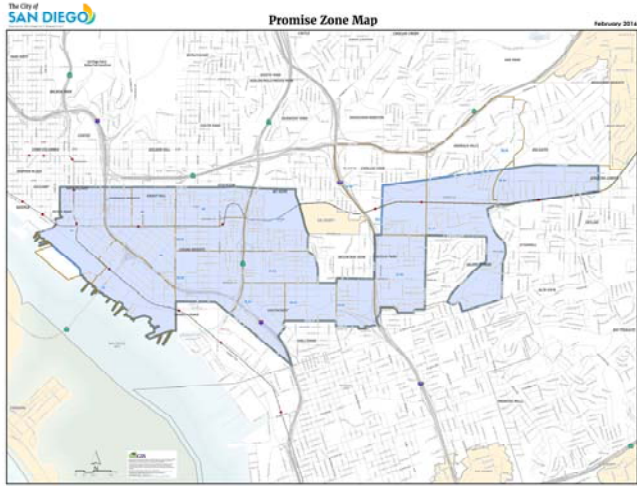
➤ Federally designated **San Diego Promise Zone:**

- 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

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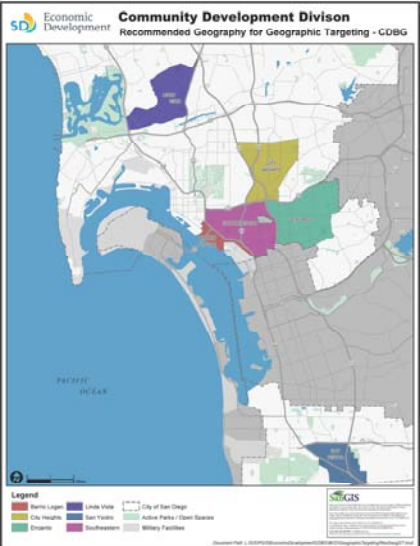
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4. Project Benefits (17, 18 or 22 points)



The City of SAN DIEGO Promise Zone Map February 2014

This map shows various zones in San Diego, with a large central area highlighted in blue, representing the Promise Zone.



SD Economic Development Community Development Division Recommended Geography for Geographic Targeting - CDBG

This map shows different geographic areas in San Diego, color-coded according to the legend. The legend includes: South Loop, City Heights, Encanto, Little Italy, San Ysidro, Eastlake, City of San Diego, Active Parks/Open Spaces, and Military Facilities.

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5. Project Budget (18 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)

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5. Project Budget (18 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


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5. Project Budget (18 points)

c. Uses of Funding

- Provide detailed breakdown of costs necessary to complete project
- Personnel costs (PE)
 - ✓ Position title & salary description (Elaborate if overtime, sick leave, vacation and holiday pay 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

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5. Project Budget (18 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. Amount 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)
▪ 21% - 40% (2 points)	▪ 81% - 100% (5 points)


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6. Project Eligibility & Performance Indicators (2 points)

- a. Project Eligibility
 - Scope and budget demonstrate compliance with CDBG eligibility, CDBG National Objectives, and other HUD requirements
 - Environmental review (City, state, federal) needed has been identified and planned for
- b. Track Record with City of San Diego CDBG Program
 - Fiscal and programmatic performance of organizations previously awarded CDBG funding through City of San Diego


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6. Project Eligibility & Performance Indicators (-2 points)

Assessment Area	Indicators	Standards
Fiscal Performance	<ul style="list-style-type: none"> Balance of Award \$ at Closeout Total of Disallowance \$ 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 <u>OR</u> Number of Projects Completed 	<ul style="list-style-type: none"> Clients Served <u>OR</u> Projects Completed $\geq 80\%$ of target met (-0.00 point) 51-79% of target met (-0.50 point) $\leq 50\%$ of target met (-1.0 point)

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ED Grants: Submission Deadline

PROPOSALS MUST BE SUBMITTED
ON OR BEFORE
JANUARY 9, 2019, AT 11:59 P.M. (PST)

<https://edgrants.force.com>

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ED Grants: User Updates/Password Resets

- At least three (3) days prior to submission deadline, ensure your Primary Representative can access ED Grants and is available to click on 'Submit' button
- **Deadline to request updates to ED Grants users (Primary and Secondary Representatives) is Monday, December 17, 2018, at 5:00 p.m. (PST)**
- **All other technical assistance related to ED Grants navigation, including password resets, ends at 12:00 p.m. (PST) on Wednesday, January 9, 2019**
- Email CDBG@sandiego.gov with your request

Submittal Requirements

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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

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Supporting Documents

Project Category	Org. Chart (Entire Agency)	Org. Chart (Division/Section)	Active status on sam.gov	Documentation of Approved FAIC	Deed of Trust/Lease Agreement Copy
Public Services	Optional, if no revision since RFQ submittal		X	Only if budgeted	Only if budgeted
Public Services (Small/Emerging)			X	Only if budgeted	Only if budgeted
CED: Technical Assistance			X		Only if budgeted
CED: Neighborhood Business Improvement			X		Only if budgeted
CED: Microloan			X		Only if budgeted
NCIP: Facilities			X		X
NCIP: Sustainability			X		X
NCIP: Multi-Family Housing			X		X
SFR: Rehabilitation			X		X

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Supporting Documents

Project Category	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	Copy of GIN Issued to Tenants	Colored Photos
Public Services					
Public Services (Small/Emerging)					
CED: Technical Assistance					
CED: Neighborhood Business Improvement					
CED: Microloan					
NCIP: Facilities	X	X	X		X
NCIP: Sustainability	X	X	X		X
NCIP: Multi-Family Housing	X	X	X	X	X
SFR: Rehabilitation	X	X	X		X

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CDBG RFP Categories — FY 2020

- **Public Services**
 - *Direct Services*
 - *Small/Emerging Organization Capacity Building*
- **Community and Economic Development**
 - *Microenterprise Technical Assistance*
 - *Neighborhood Business Improvement Program*
 - *Microloan Program*
- **Nonprofit Capital Improvement Projects & Housing Rehabilitation**
 - *Nonprofit Facility Improvements*
 - *Multifamily Housing Rehabilitation*
- **Sustainability Rehabilitation**
 - *Nonprofit Facility Improvements*
 - *Single-Family Housing Rehabilitation*

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Public Services

FY 2020 Budget	\$1,000,000	
Eligible Activities	<ul style="list-style-type: none"> • Employment training • Senior services* • Health Services • Homeless services • Disability services* • Domestic violence services 	<ul style="list-style-type: none"> • 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

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Public Services: Small/Emerging Organizations

FY 2020 Budget	\$500,000	
Eligible Activities	<ul style="list-style-type: none"> • Employment training • Senior services* • Health Services • Homeless services • Disability services* • Domestic violence services 	<ul style="list-style-type: none"> • Tenant/landlord counseling • Substance abuse services • Mental health services • Housing counseling • Food banks/meal distribution
Preset Allocation	\$50,000 for each organization awarded to cover audited financial statements and public services project implementation; mandatory attendance at nonprofit boot camp	
Outcome Measure	Low/moderate-income clientele	

*Presumed LMI possible

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Community/Economic Development: Microenterprise Technical Assistance

FY 2020 Budget	\$1,000,000
Eligible Activities	<p>Microenterprise assistance</p> <ul style="list-style-type: none"> • <i>Technical assistance on establishing or expanding a microenterprise, including accessing capital, filing legal documents, creating a 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>

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CED: Neighborhood Business Improvement Program

FY 2020 Budget	\$2,500,000
Eligible Activities	<p>Financial Grants</p> <ul style="list-style-type: none"> • <i>Program will be administered by one organization on behalf of the City of San Diego</i> • <i>Financial grants to neighborhood businesses in specific corridors of LMI communities (\$10,000 to \$35,000 per business)</i> • <i>Microenterprises and small businesses eligible for assistance</i>
Set Allocation	\$2,500,000 (\$500,000 for staff/administrative costs, \$2,000,000 for direct project delivery costs)
Outcome Measures	<p>Low/moderate-income clientele Businesses established or expanded Jobs created or retained</p>

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Community/Economic Development: Microloan Program

FY 2020 Budget	\$1,500,000
Eligible Activities	<p>Microloan assistance</p> <ul style="list-style-type: none"> • Program administered by a CDFI organization on behalf of the City of San Diego designed to provide financial assistance (\$10,000 to \$50,000) to LMI microenterprises via microloans
Set Allocation	\$1,500,000 (\$250,000 for staff/administrative costs, \$1,250,000 for loan capital)
Outcome Measures	<p>Low/moderate-income clientele</p> <p>Businesses established or expanded</p>

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Nonprofit Capital Improvement Projects: Facilities

FY 2020 Budget	\$1,500,000
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; child care centers; facilities for persons with disabilities</p>
Minimum Allocation	\$100,000
Outcome Measures	Low/moderate-income clientele

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Nonprofit Capital Improvement Projects: Multifamily Housing Rehabilitation

FY 2020 Budget	\$1,500,000
Eligible Activities	Multi-unit (rental) residential rehab <ul style="list-style-type: none"> • Implement ADA improvements • Address health/safety hazards • Improvements which enhance livability of units
Minimum Allocation	\$100,000
Outcome Measures	Low/moderate-income households

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Single-Family Housing Rehabilitation

FY 2020 Budget	\$2,500,000
Eligible Activity	Single-unit residential rehab <ul style="list-style-type: none"> • Owner-occupied units only • Sustainability improvements only <ul style="list-style-type: none"> ✓ Solar installation ✓ Effective insulation systems ✓ High-performance windows and doors ✓ Water leak repairs
Set Allocation	\$2,500,000 (\$500,000 for staff/administration costs; \$2,000,000 for rehabilitation/construction costs).
Outcome Measure	Low/moderate-income households

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Sustainability Rehabilitation

FY 2020 Budget	\$1,500,000
Eligible Activities	Public facilities improvements only
	<p><u>Examples:</u></p> <ul style="list-style-type: none"> • Solar installation • Effective insulation systems • High-performance windows and doors • Water leak repairs • Efficient heating and cooling • Energy Star-certified lighting • Water-wise faucets, shower heads, toilets
Minimum Allocation	\$100,000
Outcome Measures	Low/moderate-income clientele


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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/HR/SUS projects
- Inconsistent with HUD regulations

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What comes next?


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Next Steps

Date	Step
11/16/2018	RFP released via ED Grants
01/09/2019	RFP submittals due in ED Grants
01/10–25/2019	Community Development Division (CDD) reviews RFP responses
01/28/2019	Consolidated Plan Advisory Board (CPAB) evaluation/scoring of proposals starts
03/07/2019	CPAB scores of proposals due in ED Grants
03/13/2019	CPAB meets to ratify scores of proposals for forwarding to City Council
04/2019	Council approval of FY 2020 allocations

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Technical Assistance (TA)


- Available **November 30 to December 17, 2018**
- 30-minute one-on-one Technical Assistance meetings with City staff (Two sessions per organization)
- Email CDBG@sandiego.gov to schedule an appointment
- Information on available appointment slots may be accessed at <http://www.sandiego.gov/cdbg>

To expedite your request, please provide the following in your email:

- Organization name
- Attendee name(s) and title(s)
- RFP category (PS; CED; NCIP/HR; SUS)
- Category of assistance needed:

<input checked="" type="checkbox"/> ED Grants	<input checked="" type="checkbox"/> General Administration	<input checked="" type="checkbox"/> Other (Specify)
<input checked="" type="checkbox"/> Project Specifics & Eligibility	<input checked="" type="checkbox"/> Budget	<input checked="" type="checkbox"/> Partnerships

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Computer and/or Internet Access

Applicants needing access to a computer or Internet may utilize resources in our office, starting November 30, 2018 until **3:00 p.m. on January 2, 2019**. Each appointment will be limited to three hours. To request an appointment:

- Email CDBG@sandiego.gov
- Subject Line: "Computer/Internet Access Request – [Insert Organization Name]"

To expedite your request, please provide the following in your email:

- Organization name
- Two or three preferred dates/time for an appointment
- Email/telephone number for questions

Confirmation will be emailed to you.

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Submitting RFP Related Questions

- All questions related to the RFP (not related to ED Grants navigation) must be submitted on or before **12:00 p.m. on December 17, 2018**.
- 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)
 - Partnerships
- To expedite the response to your question, please provide the following in your e-mail:
 - Applicant organization name
 - RFP category (PS; CED; NCIP/HR; SUS)
 - Clearly written question; break complicated questions into simpler ones

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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 9, 2019** 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

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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!
- Take advantage of opportunities for help, such as TA sessions, office hours, etc.

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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 Friday, January 4, 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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Summary of Deadlines

Date	Deadline (all Pacific Standard Time)
12/17/2018	12:00 p.m. deadline to meet with City staff for 1:1 technical assistance
12/17/2018	12:00 p.m. deadline to email RFP questions (not related to ED Grants navigation)
12/17/2018	5:00 p.m. deadline to request updates to Primary/Secondary Representatives
01/02/2019	5:00 p.m. deadline to use City computer/Internet to submit RFP responses
01/09/2019	12:00 p.m. deadline to request ED Grants navigation assistance/staff support
01/09/2019	11:59 p.m. deadline to submit RFP responses in ED Grants

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Organizational Requirements – Partnerships

- All proposed partners must have been deemed "qualified" to conduct business with the City
- Subject to traditional organizations RFQ NOFA Standards
- Small/emerging organizations are not eligible for partnerships

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Organizational Requirements - Partnerships

- Lead organization must have submitted a response to the FY 2020 RFQ phase and be deemed “qualified” to conduct business with the City
- Highly recommended to form partnerships with organizations already deemed qualified through the FY 2020 RFQ phase
- Partnerships proposed with organizations that did not respond to the RFQ may still be possible; such organizations will be subject to a special staff review during the FY 2020 RFP phase


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FY 2020 RFP Categories Eligible for Partnerships

Single-Family Housing Rehab <i>Single Awardee</i>	Microloan Program <i>Single Awardee</i>	Neighborhood Business Improvement <i>Single Awardee</i>
Public Services: Traditional Orgs		Microenterprise Technical Assistance


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FY 2020 RFP Categories NOT Eligible for Partnerships

NCIP: Multifamily Housing Rehab	NCIP: Facilities
Public Services: Small/Emerging Orgs	Sustainability: Facilities

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CDBG Organizational Partnerships

Partnerships Are Considered to be:

- A lead applicant organization, accounting for 51% or more of the proposed staff and administrative costs
- Proposing to partner with other organizations as subrecipients to undertake program activities and receive CDBG funding
- Partners receiving CDBG funding are subject to a qualifications process

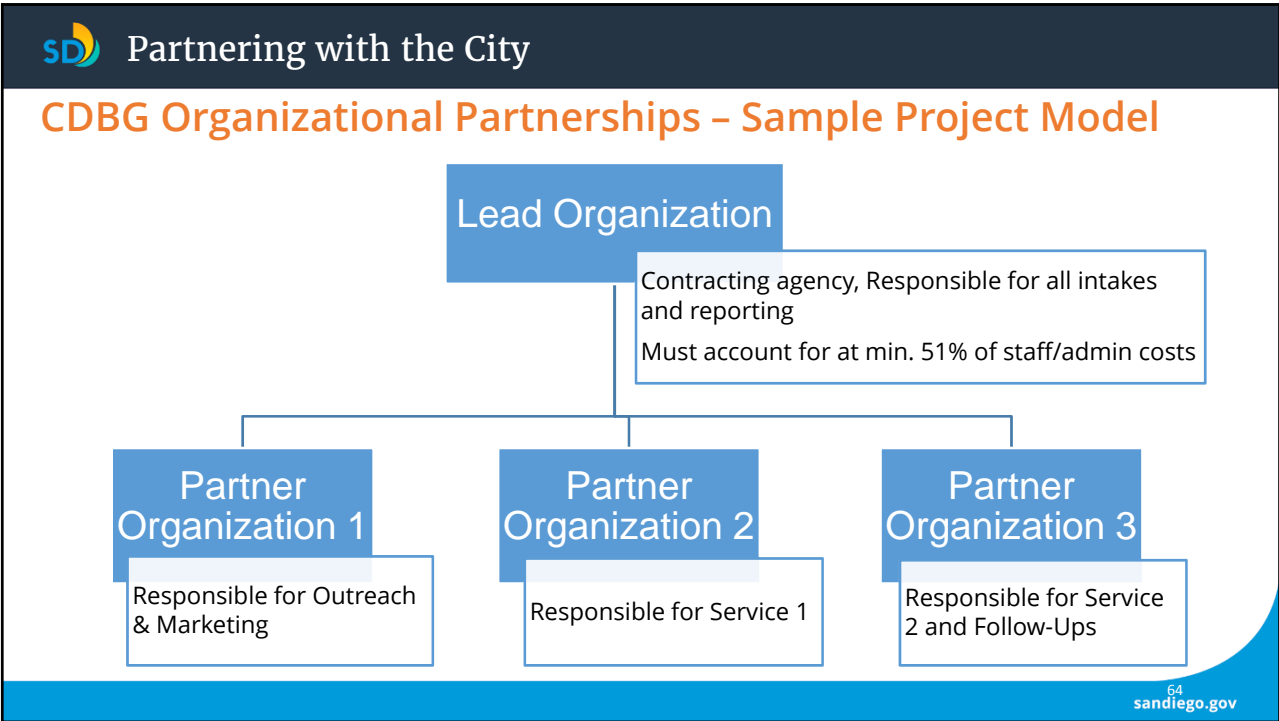
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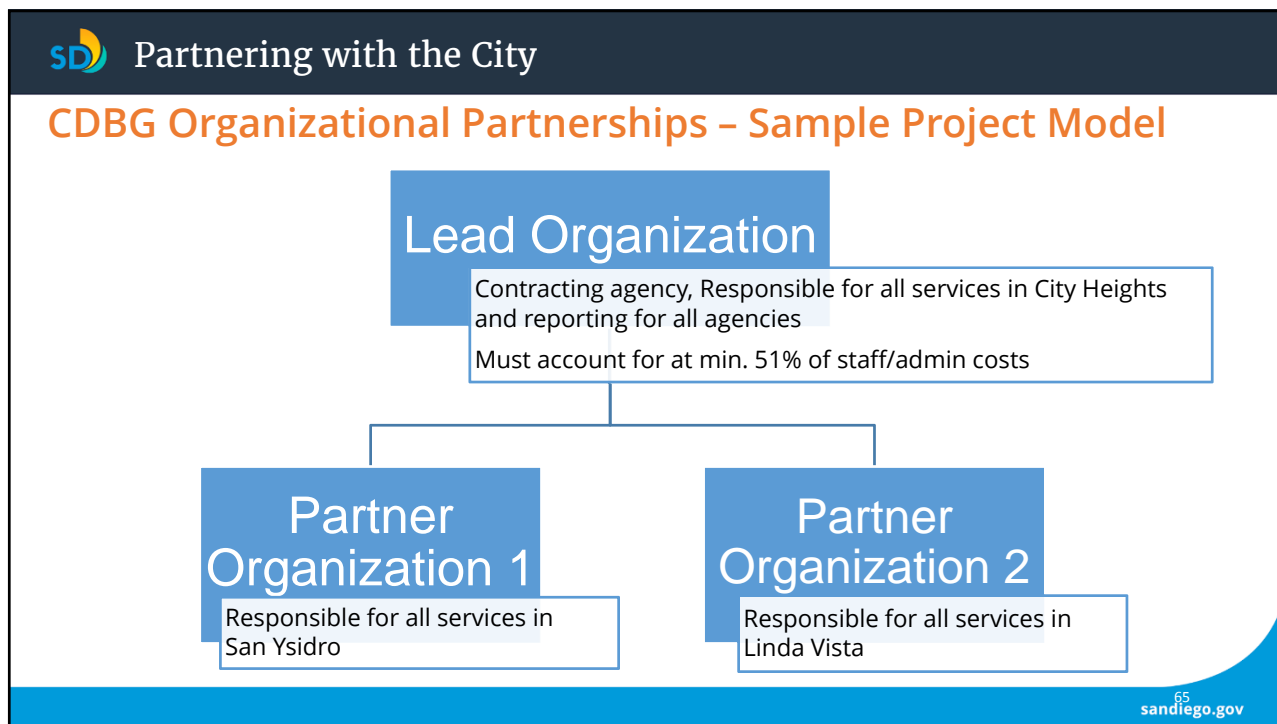
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CDBG Organizational Partnerships – Considerations

1. Ensure lead organization has been deemed qualified through the FY 2020 CDBG RFQ Phase
2. Consider the organizational structure to the proposed partnerships
 - What will the roles and responsibilities be for each and associated costs?
3. Consider what unique benefit each proposed partnership adds to the project
 - Location, type of service, implementation, cost effectiveness, experience
4. Evaluate the merit of partnering to implement a project and whether the partnership will realize operational efficiencies and programmatic effectiveness

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Partnerships - Maximum Funding Request Threshold

The MFRT amount indicates the maximum amount of CDBG funds your organization can be awarded in FY 2020, whether that amount is for one or more projects.

- **Determined by Cash Balance from the entire team of organizations' Audited Financial Statements (multiplied by 4)**
- Limited by overall budget for each RFP project category
- Applies to all of organization's RFP responses combined
- MFRT was included in RFQ notification of results

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CDBG Organizational Partnerships – Budgeting Considerations

1. Approach the budget after a well thought out business model for the project has been developed
2. Consider efficient and effective uses of CDBG funds
3. Remember that the lead organization must account for at least 51% of proposed staff and administrative costs
 - As such, the lead organization must also carry out the majority of the services to be provided and administrative responsibilities
4. Expectation that for the single awardee categories that the full RFP category budget will be utilized in the proposal

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CDBG Organizational Partnerships – Budget Example

```

graph TD
    LO[Lead Organization] --- CA[Contracting agency, Responsible for all intakes and reporting]
    CA --- PO1[Partner Organization 1]
    CA --- PO2[Partner Organization 2]
    CA --- PO3[Partner Organization 3]
    PO1 --- R1[Responsible for Outreach & Marketing]
    PO2 --- R2[Responsible for Service 1]
    PO3 --- R3[Responsible for Service 2 and Follow-Ups]
            
```

Organization	# Program Staff	CDBG Budget %
Lead Organization	4	51%
Partner Org. 1	1	11%
Partner Org. 2	2	18%
Partner Org. 3	2	20%

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Three-Month Cash Reserve Recommendation

- CDBG works on a **reimbursement** basis
- Team of organizations cash reserves should be sufficient to cover three (3) months of operations to be a successful CDBG subrecipients
- How and when lead organization reimburses subrecipients is between organizations

Month 1

Lead organization spends funds to cover their costs and partners costs.

➤

Month 2

Lead organization submits a single reimbursement request that compiles information from partners, including all supporting documentation.

➤

Month 3

City completes review of reimbursement request and processes reimbursement payment to lead organization.

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- ✓ **P**eople
- ✓ **I**ntegrity
- ✓ **E**xcellence
- ✓ **S**ervice



We are here to serve and assist you.

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