



**COMMUNITY DEVELOPMENT  
BLOCK GRANT (CDBG) PROGRAM**

**Fiscal Year 2025  
ANNUAL NOTICE OF FUNDING AVAILABILITY (NOFA)  
REQUEST FOR QUALIFICATIONS (RFQ) PHASE  
HANDBOOK**

**Economic Development Department  
Community Development Division  
October 2023**

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**I. BACKGROUND & INTRODUCTION**

**T**he City of San Diego (City) distributes a portion of its Community Development Block Grant (CDBG) Entitlement and Program Income funds through a process known as the **Annual Notice of Funding Availability (NOFA)**. This process consists of two distinct phases: the **Request for Qualifications (RFQ)** phase and the **Request for Proposals (RFP)** phase.

The purpose of the RFQ phase, which is the focus of this Handbook, is to vet organizations that wish to partner with the City in implementing CDBG-funded activities, projects, and programs. The City uses this phase to determine if your organization:

- Has the **programmatic capacity** to successfully design, implement, and report on a CDBG-funded project per the strict requirements of the United States Department of Housing and Urban Development (HUD), other federal agencies, the state of California, and the City;
- Has the **fiscal capacity** to accept, manage, and report on CDBG funds on a reimbursement basis in accordance with HUD and City requirements;
- Demonstrates a solid **track record and past experience** in implementing similar activities and projects that are indicative of potential future success;
- Implements **proper controls and best management practices** to ensure fair and ethical dealings in the areas of finance and accounting, procurement, and client and vendor grievances;
- Implements **eligible activities and projects** that may be funded by CDBG; and
- Has adopted a **mission statement, goals, and objectives** that closely align with those of the City (as expressed both in its [Strategic Plan](#) and [Consolidated Plan](#)) and of HUD.

The City accomplishes this vetting process by requesting from your organization a set of documents and asking you a series of questions. City staff analyzes the documents and responses to make a determination on whether your organization is “qualified” or “not qualified” to participate in the RFP phase. Only organizations deemed “qualified” through the RFQ phase will be invited to submit project proposals for funding consideration.

Organizations must undergo this vetting process annually. Being deemed “qualified” in the past or receipt of CDBG funds from the City in prior years does not guarantee continued eligibility.

This Handbook will guide you through the RFQ phase, which will be conducted through the City’s ED Grants system and consist of the following major steps:

1. **REGISTER ORGANIZATION:** Get access to ED Grants by registering your organization at <https://edgrants.force.com>; registration will create access credentials for two representatives from your organization (one Primary Representative and one Secondary Representative); organizations with existing access credentials may continue to use those during this RFQ phase;
2. **SELECT ANNUAL NOFA TYPE:** Choose the Annual NOFA type appropriate for your organization at the time of RFQ response submission. [Note: There is only one NOFA type to select in FY 2025.]
  - a. FY 2025 CDBG
3. **RESPOND TO RFQ APPLICATION:** Open the RFQ application and complete the questions carefully and thoroughly;
4. **ATTACH SUPPORTING DOCUMENTS:** Review the list of required supporting documents and compile PDF copies of them, making sure to name each file according to the naming convention; upload each supporting document to ED Grants;

5. **SUBMIT RFQ RESPONSE:** After answering the questions and uploading the supporting documents, submit the RFQ response to the City; note only the Primary Representative may submit the RFQ response; once submitted, the RFQ response cannot be modified; and
6. **WAIT FOR CITY DETERMINATION OF QUALIFICATION:** After the close of the RFQ phase, City staff will review all RFQ responses and make a determination as to whether or not each organization is “qualified” or “not qualified”. Only “qualified” organizations will be invited to submit project proposals during the RFP phase.

The City will conduct a virtual *Are You CDBG-Ready? Workshop* to help prepare organizations interested in applying for Fiscal Year (FY) 2025 CDBG funding. The Workshop will provide an overview of the RFQ phase, as well as preview examples of the RFP/project categories that may be offered in FY 2025. Questions received during the Workshop sessions will be answered during the workshop and additional questions will be posted to the ED Grants website under the ‘Resources’ tab for easy reference.

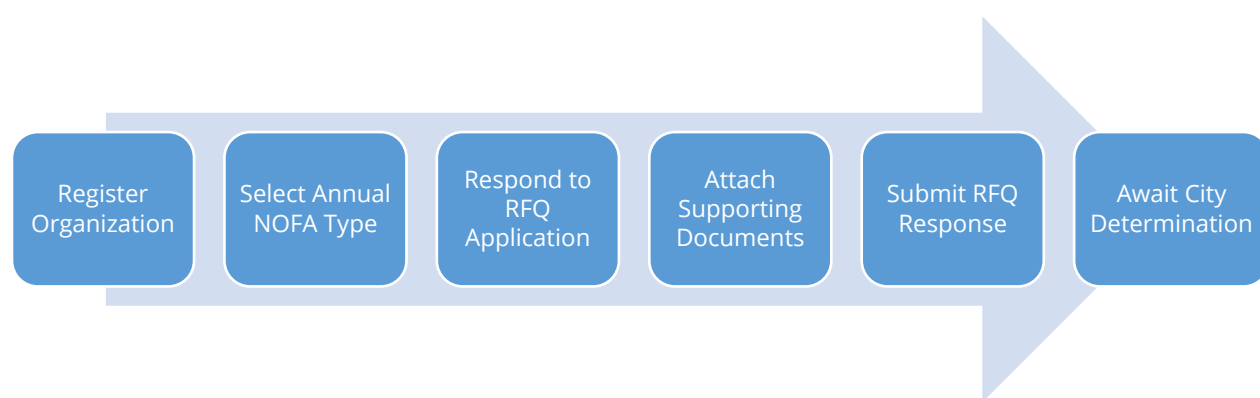
<i>Location</i>	<i>Date</i>	<i>Workshop Time</i>
Virtual (recording available online)	Thursday, October 12, 2023	10:00 a.m. – 12:00 p.m.

The virtual workshop will be recorded and made available for viewing on the City’s CDBG webpage at: <http://www.sandiego.gov/CDBG/apps>

Should you have questions, remember to direct them to [CDBG@sandiego.gov](mailto:CDBG@sandiego.gov). Be sure to consult this Handbook prior to contacting the City to see if your question may have already been addressed here.

## II. GENERAL PROCESS

Be sure to follow the steps outlined below to successfully submit your organization’s RFQ response.



**Register Organization**

Refer to Attachment 1 for a step-by-step guide on how to register your organization in ED Grants. Registration is necessary for ED Grants to issue access credentials to two persons from your organization. These persons will receive a username and password that they can use to log into ED Grants, select an Annual NOFA type, open an RFQ application, respond to the questions, and upload supporting documents. Upon registration, ED Grants will ask you to designate one Primary Representative and one Secondary Representative. The access rights for both representatives are identical, and one can continue, modify, and finish the work of the other. **However, only the Primary Representative will have access to the ‘Submit to Grantor’ button. Any required certifications will be signed off by the Primary Representative.** Therefore, it is important to designate as the Primary Representative someone from your organization who has the authority to bind the organization legally. Typically, the following positions serve in the Primary Representative role:

- Executive Director
- Chief Executive Officer
- Chief Operating Officer
- Chief Financial Officer
- President of the Board of Directors

Please note that, should your organization be allocated CDBG funding in the future, the City will require formal written evidence that your organization’s Board of Directors has duly authorized the person serving as the Primary Representative to bind your organization legally and represent it in all matters pertaining to the administration and implementation of the CDBG agreement. **Therefore, the City highly recommends that the Primary Representative, even at the RFQ phase, be someone that your organization’s Board of Directors would be willing to authorize.** Having the proper person as the Primary Representative from the very beginning will provide continuity and ease the administrative process when your organization does enter into a CDBG agreement with the City (i.e., there will not be a need to go through the process of switching Primary Representatives, which can take some time).

**Board of Directors**

When you are registering your organization, ED Grants will ask you to list the members of your organization’s Board of Directors. While you can skip providing this information at the time of registration (and instead provide it at a later date prior to submitting your RFQ response), the City highly recommends that you provide this information at the time of registration to avoid “rush jobs” just prior to submission deadlines. It may take you some time to compile all the required information, and so it is best to furnish what is requested as soon as possible. Your organization will not be allowed to submit an RFQ response unless information on your organization’s Board of Directors is provided. Refer to Attachment 1 for a step-by-step guide on how to enter the Board of Directors information in ED Grants.

**Select Annual NOFA Type**

After your organization is registered and you log into ED Grants, you will be asked to view the NOFAs currently accepting responses. You will notice there is one type of Annual NOFA for FY 2025:

- FY 2025 CDBG

**FY 2025 CDBG NOFA**

Organizations must have Board-approved audited financial statements dated **June 30, 2022**, or later, a copy of which must be submitted to the City as part of the RFQ response. For the FY 2025 CDBG NOFA, the 'Cash Balance' amount must be at least \$12,500. Qualified organizations will be able to submit proposals for consideration in the following **tentative** RFP categories<sup>1</sup>:

<b><i>FY 2025 CDBG NOFA - RFP Category</i></b>	<b><i>Description</i></b>
Public Services	Projects that provide defined social services or other direct assistance to individuals and not to the general public as a whole.
Nonprofit Capital Improvement Projects: Facilities	Projects that improve and/or expand facilities operated by nonprofit organizations to provide onsite public services.
Community & Economic Development: Microenterprise Technical Assistance	Projects that provide technical assistance and general business support to microenterprises (five employees or less, including owner) wishing to expand or be established. Excludes financial assistance (grants or loans).

**Please note the FY 2025 – FY2029 Consolidated Plan is currently being developed and the RFP categories may change depending on the new Consolidated Plan goals. FY 2025 RFP categories will be released in November 2023.**

Please also keep in mind If you will be applying for the NCIP category, you must complete a Facility Needs Assessment and include this report as part of the RFP submittal. The Facility Needs Assessment should be completed by a licensed Architect or Engineer who would know if the building has any ADA and/or Building Code violations, electrical, plumbing and mechanical issues that need to be addressed as part of the City's permitting and building inspection requirements. Tenant improvement work identified in the Facility Needs Assessment should be included in your proposed scope of work.

<b><i>Respond to RFQ Application</i></b>
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Please refer to Attachment 2 for a step-by-step guide on how to navigate through the different forms to answer the questions in the RFQ application. Refer to Attachment 6 for a listing of the fields in the RFQ application arranged by application tab and tab section. Also included as needed are annotations for additional information on the fields. These annotations have been incorporated into ED Grants as help texts.

<b><i>Attach Supporting Documents</i></b>
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The following documents will need to be attached to your organization's RFQ response. **Failure to provide any of the requested supporting documents may result in the disqualification of your organization.** Prior to uploading each document, be sure to convert the file into PDF format and to name it according to the prescribed naming convention. Refer to Attachment 3 for a description of each document, its applicability to your organization, and the corresponding naming convention:

- ✓ Organization Chart: Entire Organization
- ✓ Organization Chart: Each Division/Section to Administer CDBG Projects/Activities
- ✓ Federal Tax Determination Letter
- ✓ State Tax Determination Letter

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<sup>1</sup> The RFP categories are subject to change, they will be finalized upon release of the RFP.



- ✓ Articles of Incorporation
- ✓ Audited Financial Statements
- ✓ Single or Program-Specific Audit
- ✓ Federal Audit Clearinghouse (FAC) Screenshot
- ✓ System for Award Management (SAM) Screenshot
- ✓ California Secretary of State Business Search Database Screenshot
- ✓ California Attorney General's Registry of Charitable Trusts Screenshot

Documents submitted previously to the City must be submitted again as part of your organization's RFQ response. You cannot rely on prior submissions to fulfill the requirements of this RFQ.

#### **A Note on Third-Party Registration Requirements**

- The federal government requires all organizations wishing to receive federal funds, including CDBG, to have a Unique Entity ID number that has an 'Active' status registration with the [System for Award Management](#) (SAM). Please note the unique identifier used across the federal government changed from the DUNS Number to the Unique Entity ID, which is generated by SAM. For more information about this transition, visit [www.sam.gov](http://www.sam.gov).
- Ensure that your organization is registered with the [California Secretary of State](#) and appears in the Business Search database. The status of your organization must be 'Active' at the time of the RFQ response submission.
- Ensure that your organization is registered with the [California Attorney General's Registry of Charitable Trusts](#). The registration status must be 'Current' at the time of the RFQ response submission.
- Ensure that your organization's Single Audits or Program-Specific Audits (if applicable) have been submitted to and accepted by the [Federal Audit Clearinghouse](#) (FAC).

**Please ensure your organization allows for ample time to comply with the above requirements. The City will not entertain requests to extend the RFQ response submission deadline under any circumstance.**

#### **Submit RFQ Response**

After completing the questions and attaching the required supporting documents, the Primary Representative must log in to submit the RFQ response to the City. **The Secondary Representative cannot submit the RFQ response.** Submissions must be completed by 5:00 p.m. (PDT) on **November 9, 2023**, to be eligible for City evaluation. Make sure to address any errors identified by ED Grants prior to submission. Any errors unaddressed will preclude your organization from submitting its RFQ response.

#### **Wait for City Determination of Qualification**

City staff will review all RFQ responses received. Notifications ("qualified" or "not qualified") from ED Grants will be sent by **December 4, 2023** to organizations that submitted an RFQ response.

#### **Maximum Funding Request Threshold**

"Qualified" organizations will also be notified of their "Maximum Funding Request Threshold" (MFRT) amount, which is based on the "Cash Balance" figure in their audited

financial statements multiplied by four. Organizations must have a MFRT amount of at least \$50,000 (for FY 2025 CDBG) to be invited to participate in the RFP phase. The MFRT amount indicates the maximum amount of CDBG funds your organization can be awarded in FY 2025, whether that amount is for one or more projects.

### III. VALIDITY OF DETERMINATION

The determination (“qualified” or “not qualified”) made by the City is valid for the FY 2025 Annual NOFA cycle only. Organizations previously deemed “qualified” must submit a new RFQ response; previous determinations do not carry over from year to year.

### IV. GENERAL SCHEDULE

Date	Step
10/9/2023	RFQ Released
10/12/2023	RFQ Virtual Workshop
10/16/23 - 10/27/23	Technical Assistance Appointments Available
11/9/2023	RFQ Response Due in ED Grants
12/4/2023	Organizations Notified of "Qualified" or "Not Qualified" Status
12/15/2023	RFP Released via ED Grants to "Qualified" Organizations Only
1/19/2024	RFP Responses Due in ED Grants
3/1/2024	Notification of Scoring/Ranking: FY 2025 CDBG Grants

**NOTE:** The schedule outlined above is subject to change at the City’s discretion. Refer to Attachment 4 for a more detailed timeline, as well as for the tentative RFP phase timeline.

### V. RESOURCES

The following resources are available to assist your organization through the RFQ process:

- RFQ Frequently Asked Questions  
<https://edgrants.force.com>
- City of San Diego Strategic Plan  
<https://performance.sandiego.gov/>
- FY 2020–2024 Consolidated Plan of the City of San Diego  
<https://www.sandiego.gov/cdbg/general/plansreports>
- System for Award Management (SAM)  
<https://sam.gov/portal/SAM/#1>
- Federal Audit Clearinghouse (FAC)  
<https://harvester.census.gov/facweb>
- California Secretary of State Business Search Database  
<https://bizfileonline.sos.ca.gov/>
- California Attorney General’s Registry of Charitable Trusts  
<http://rct.doj.ca.gov/Verification/Search.aspx?facility=Y>

### Technical Assistance Meetings

Organizations may set up one-on-one, half-hour virtual technical assistance meetings with City staff to go over their questions regarding the RFQ phase and requirements. Appointments may be secured by using the FY 2025 RFQ TA Appointments Doodle Poll on the [CDBG webpage](#). Please note that these appointments are limited to 30 minutes and will be assigned on a first come, first served basis. The Doodle Poll will ask you to provide the following:

- Name of the attendee;
- Contact email;
- Name of the organization

Before submitting an RSVP via the Doodle Poll, please be sure to also provide the following in the “Leave a Message” box:

- General topics you would like to cover.

The above information will help City staff prepare for and maximize the appointment you have with them. **Note each organization may set up only one (1) technical assistance meeting; therefore, make sure to come prepared with your questions. Topics must be restricted to the RFQ phase and requirements;** questions involving the RFP phase and requirements and specific project proposals and budgets will not be entertained.

#### Checklist

City staff has prepared a handy checklist (refer to Attachment 5) to assist you with gathering all the items and information necessary for a successful RFQ experience. Use this resource to avoid last-minute rush jobs and/or surprises when you click on the ‘Submit’ button.

#### Questions

Questions may be emailed to [CDBG@sandiego.gov](mailto:CDBG@sandiego.gov) regarding the RFQ phase and requirements **until 5:00 p.m. (PDT) on November 3, 2023. Allow at least two (2) business days for staff to respond.** Be as clear and concise as you can with your questions. Mention the organization you are representing in your email. Refer to the ‘Frequently Asked Questions’ tab of ED Grants for answers to inquiries previously addressed by City staff.

## VI. ATTACHMENTS

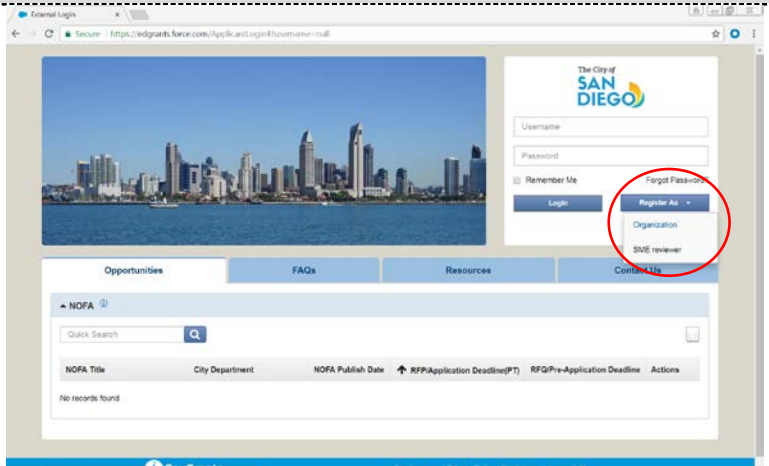
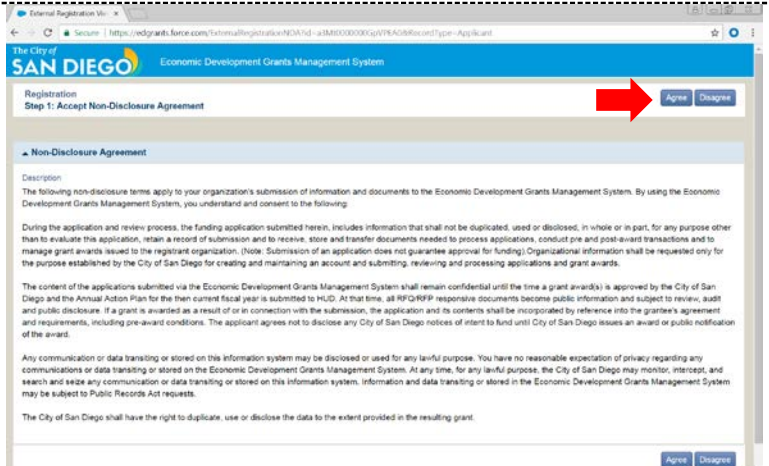
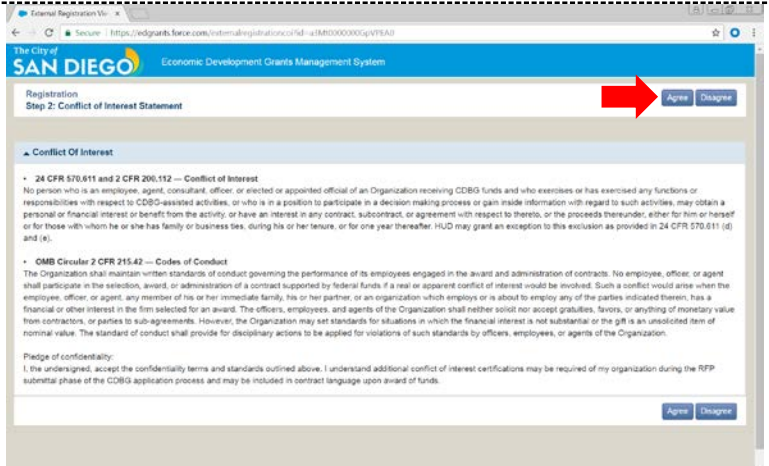
1. ED Grants Registration Guide
2. RFQ Response Submission Guide
3. Index of Supporting Documents & Naming Conventions
4. RFQ & RFP Timelines
5. RFQ Checklist
6. RFQ Application Fields



# User Registration

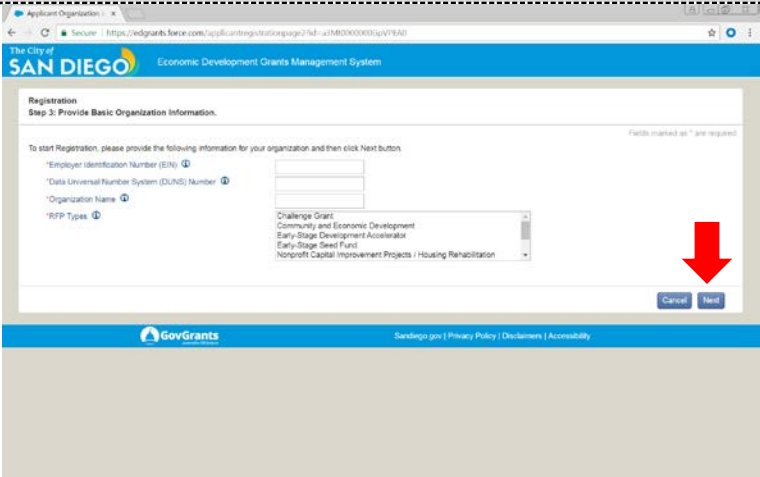
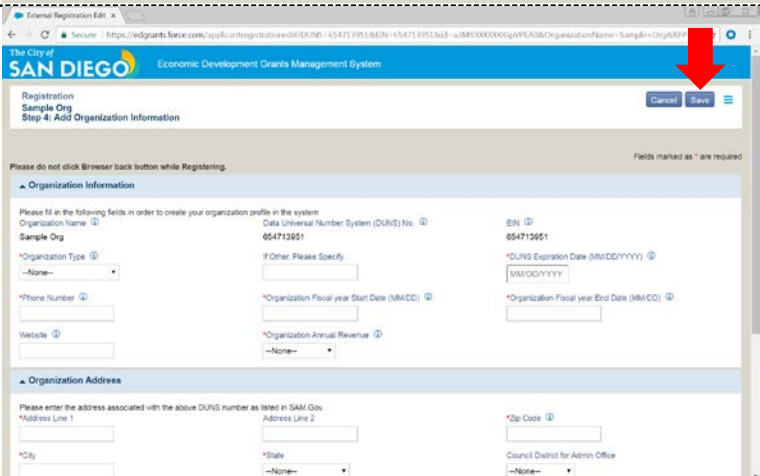
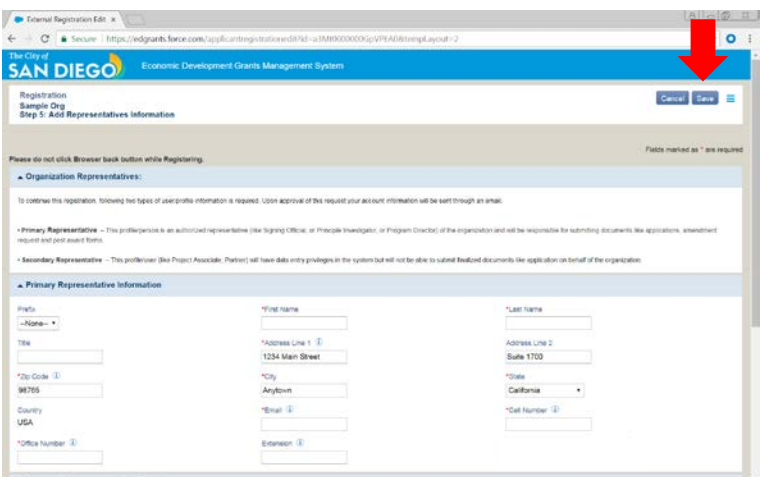
## You will learn:

- How to register your organization in ED Grants and obtain login credentials

Step	Description	Screenshot
1	Navigate to <a href="http://edgrants.force.com">http://edgrants.force.com</a> and click on the 'Register As' button. Select 'Organization' from the dropdown menu. <b>NOTE:</b> ED Grants is optimized to function using the Google Chrome browser.	
2	Read the 'Non-Disclosure Agreement' and click on the 'Agree' button. <b>NOTE:</b> Clicking on the 'Disagree' button will return you to the login page and preclude you from registering your organization.	
3	Read the 'Conflict of Interest' language and pledge of confidentiality language. Click on the 'Agree' button. <b>NOTE:</b> Clicking on the 'Disagree' button will return you to the login page and preclude you from registering your organization.	



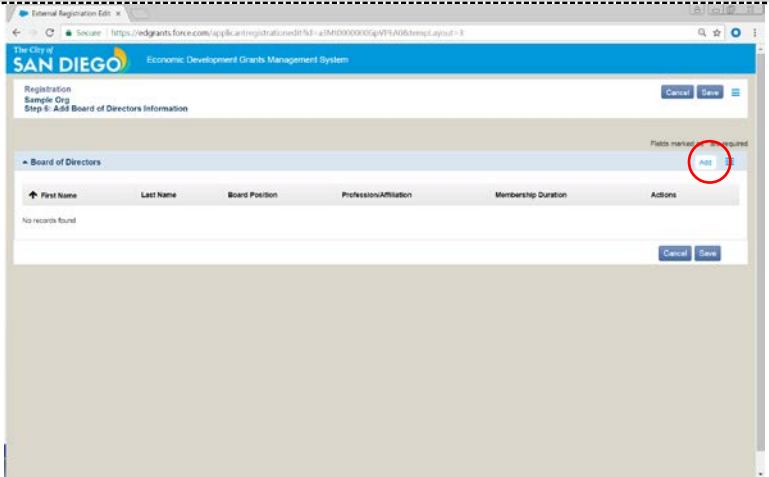
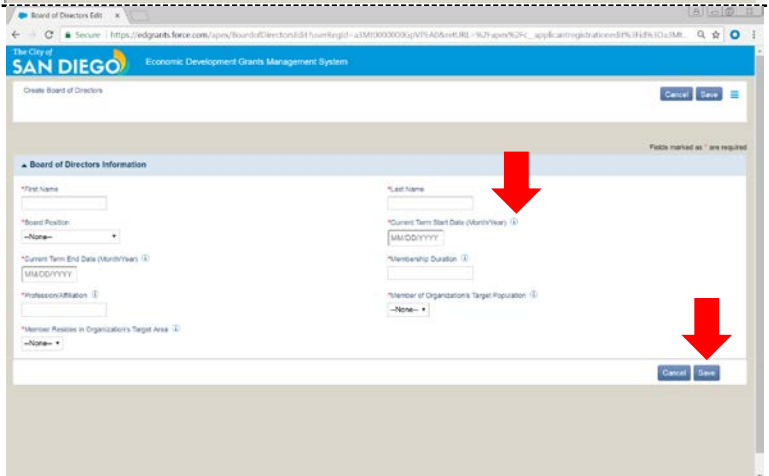
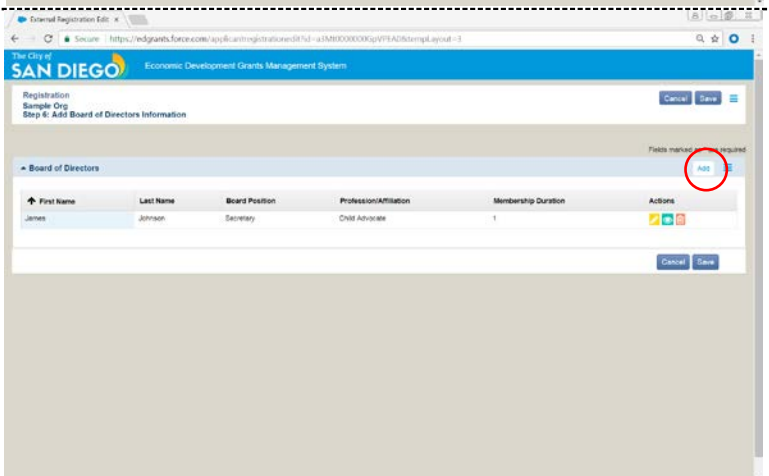
# User Registration

Step	Description	Screenshot
4	Populate the required fields regarding basic information on your organization (i.e., EIN number, Unique Entity ID number, organization name, RFP types interested in), using the help text icons (i) for guidance and clarification. After you are finished, click on the <b>'Next'</b> button.	
5	You should now see a form with four sections: <b>'Organization Information,' 'Organization Address,'</b> and <b>'Organization Head Information.'</b> Populate the required fields, using the help text icons (i) for guidance and clarification. After you are finished, click on the <b>'Save'</b> button. <b>NOTE:</b> Make sure all the information is correct as it will be used in future agreements with the City should your organization be awarded CDBG funding.	
6	You should now see sections to enter your organization's Primary Representative and Secondary Representative(s). Populate the required fields, using the help text icons (i) for guidance and clarification. After you are finished, click on the <b>'Save'</b> button. <b>NOTE:</b> Read the definitions of the terms located near the top of the screen. It is very important to enter the correct Primary Representative who has the authority to legally and contractually bind your organization and certify submissions to the City of San Diego. Only this person will have the functionality in ED Grants to sign agreements and certify and officially submit required documents and responses. Each organization must have both a Primary and Secondary Representative each with a distinct email address.	





# User Registration

Step	Description	Screenshot
7	You will now enter information on your organization's board of directors. Click on the 'Add' button to open a page where the profile of one board member may be entered.	
8	Fill out the fields on the page, using the help text icons provided (i) for guidance and clarification. When you are finished, click on the 'Save' button.	
9	Repeat steps 7–8 above for each board member until all members have been entered. <b>NOTE:</b> Although not recommended, you may choose to skip filling out the 'Board of Directors' tab during registration. If you do decide to skip, later on, you will be asked to provide this information. Failure to fill out the 'Board of Directors' tab will preclude your organization from submitting RFQ responses or project proposals.	



# User Registration

Step	Description	Screenshot
10	To edit a board member profile previously entered, click on the ' <b>Board of Directors</b> ' tab and one of the icons in the ' <b>Actions</b> ' column. The trash can icon (🗑️) deletes the entire existing profile from the system. The pencil icon (✎️) opens the profile for editing, after which the ' <b>Save</b> ' button should be clicked to preserve the changes. The eyeball icon (👁️) opens the profile for viewing only. When you are finished entering all the board members, click on the ' <b>Save</b> ' button.	
11	Examine the CAPTCHA challenge and type the number, word, or phrase you see in the text box. If you are not able to solve the CAPTCHA challenge, click on the reload button to get a new CAPTCHA image. If you are having difficulty reading the image, click on the audio (speaker) icon to hear the number, word, or phrase. Click on the ' <b>Submit</b> ' button to finish the registration and submit your organization's information to the City for review and approval.	
12	After your registration has been submitted, City staff will review it and either approve or reject the registration. If your organization's registration is approved, the Primary Representative and Secondary Representative(s) will receive an email from ED Grants directing them to set up their own login credentials (username and password) in accordance specified criteria. Login credentials must be set up within 24 hours of receipt of the email; if more than 24 hours lapses, the credential setup link will expire, and the representative will need to contact City staff to have the setup link reset.	End

For additional support, email [CDBG@sandiego.gov](mailto:CDBG@sandiego.gov) or visit the 'Resources' tab at [edgrants.force.com](http://edgrants.force.com).



# RFQ Response Submission

## You will learn:

- How to complete and submit a Request for Qualifications (RFQ) response in ED Grants
- How to open and continue working on a previously saved RFQ response in ED Grants
- How to enter your organization's Board of Directors members in ED Grants after registration

Step	Description	Screenshot
1	Log into <a href="http://edgrants.force.com">http://edgrants.force.com</a> using the credentials for either the Primary R–representative or Secondary Representative of your organization. <b>NOTE:</b> Your organization may need to be registered in ED Grants first to receive log-in credentials. Refer to the 'ED Grants User Registration' guide for assistance.	
2	Go to the 'NOFAs' tab and then scroll down to the 'Active NOFAs' section to view the Notices of Funding Availability (NOFAs) currently accepting Request for Qualifications (RFQ) responses. <b>NOTE:</b> If there are no NOFAs displayed, then that means the City is not accepting responses at the time of your visit.	





# RFQ Response Submission

Step	Description	Screenshot
3	Find the NOFA you would like to submit an RFQ response for. Click on the eyeball icon (👁️) in the 'Actions' column to view it.	
4	Verify this is the NOFA you would like to submit an RFQ response for by reviewing the 'General Information' section and locating the 'RFQ Types' field. If you had selected the wrong one, go back to step 2 to begin anew.	
5	Find and click on the 'Open' button to add the NOFA to your organization's 'View Open NOFAs' list.	



# RFQ Response Submission

Step	Description	Screenshot
6	Click on the <b>'View Open NOFAs'</b> link along the left side. Find the specific NOFA you would like to submit an RFQ response for. Click on the eyeball icon (👁️) in the <b>'Actions'</b> column to open it.	
7	You should now see the NOFA open and two tabs: <b>'Overview'</b> and <b>'Financial.'</b> After verifying once again that this is the NOFA you would like to submit a response for, find and click on the <b>'Create RFQ'</b> button.	
8	The <b>'Overview'</b> tab should now be open with five sections (i.e., <b>'General Information,'</b> <b>'Fiscal/Financial Head,'</b> <b>'RFQ Contact,'</b> <b>'Mission Statement,'</b> and <b>'Organization Profile'</b> ) with editable fields. Begin populating the fields, using the help text icons (i) for guidance and clarification. After you are finished, click on the <b>'Save'</b> button. <b>NOTE: You will only see the fields you can edit. Other fields from your 'Organization Profile' (such as organization name, address, board of directors, etc.) will be imported automatically.</b>	



# RFQ Response Submission

Step	Description	Screenshot
9	After clicking on the 'Save' button, you should now have access to the 'Experience,' 'Required Forms,' and 'Attachments' tabs. Review the 'Overview' tab and verify your entries. If needed, click the 'Edit' button to reopen the fields to make changes and then click on the 'Save' button. Also, make sure the information on your organization's Board of Directors was imported from the 'Organization Profile' (make updates in the 'Organization Profile' if needed).	
10	Click on the 'Experience' tab. You will need to populate the 'Experience' section and 'Target Population' section. Click on the 'Edit' button first to open those fields. Enter your responses in the narrative fields, using the help text icons provided (i) for guidance and clarification. You are limited to 4,000 characters per section, including spaces. After you are finished, click on the 'Save' button.	
11	Click on the 'Required Forms' tab. You will find four forms to complete: 'Financials,' 'Controls,' 'Procurement,' and 'Certification.' To open and populate each form one at a time, click on the pencil icon (✎) in the 'Actions' column corresponding to each form.	



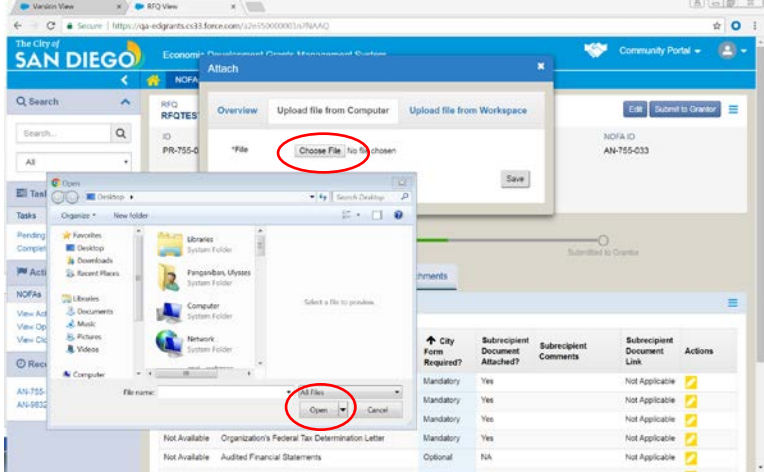
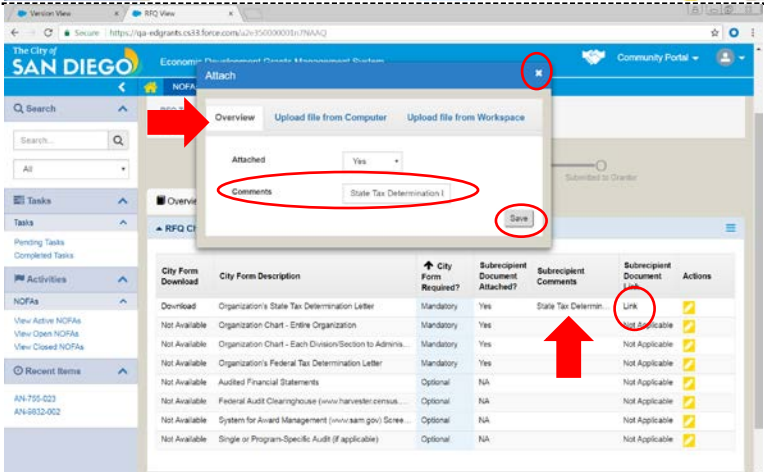
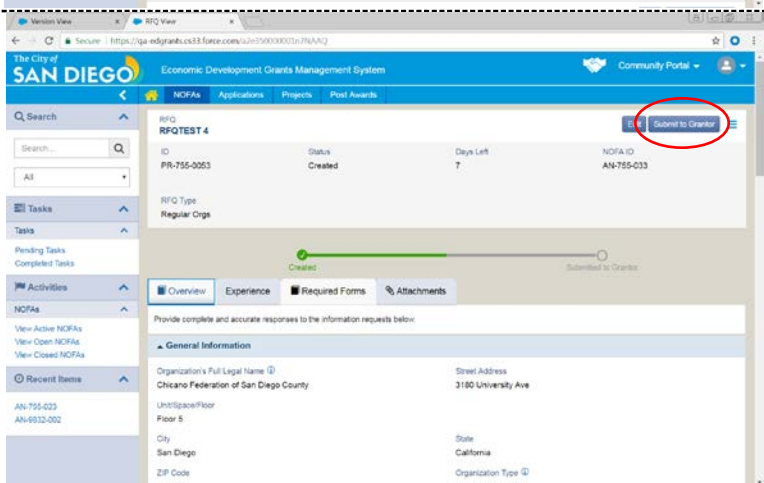


# RFQ Response Submission

Step	Description	Screenshot
12	Fill out each required field, using the help text icons provided (i) for guidance and clarification. You may navigate from form to form using the dropdown menu next to the 'Cancel' button towards the top. Make sure to click on the 'Save' button before navigating away from a form. After saving each form, you will need to click on the 'Edit' button to reopen the fields for changes, if necessary.	
13	Click on the 'Attachments' tab. You will see a list of documents in the 'City Form Description' column which you may need to provide by uploading a PDF of each document to the corresponding item on the list. Check the 'City Form Required?' column or the RFQ Handbook to see if a particular document is either required or optional (i.e., as applicable).	
14	To upload a document for a particular form on the list, click on the pencil icon (✎) in the 'Actions' column corresponding to the form. A popup window with the 'Upload File from Computer' tab and 'Upload File from Workspace' tab should appear. Click on the 'Upload File from Computer' tab.	

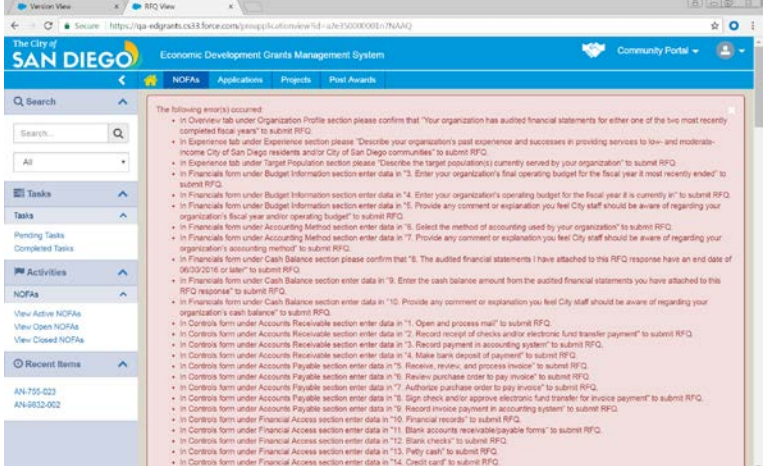


# RFQ Response Submission

Step	Description	Screenshot
15	Click on the <b>'Choose File'</b> button to navigate to the file you would like to upload from your local computer. Click on the <b>'Open'</b> button to upload the file to the system. <b>NOTE:</b> The system will only accept the following file types: PDF, JPEG, and PNG.	
16	Click on the <b>'Overview'</b> tab. Enter a required short description of the file in the <b>'Comments'</b> field. Click on the <b>'Save'</b> button and then click on the <b>'X'</b> button to close the popup window. You should now see your comment in the <b>'Subrecipient Comments'</b> tab and the word <b>'Link'</b> in the <b>'Subrecipient Document Link'</b> column. <b>NOTE:</b> Clicking on the word <b>'Link'</b> brings up the documents uploaded. Refer to the FAQs on RFQ attachments to get guidance on the correct documents to upload.	
17	Click on the <b>'Submit to Grantor'</b> button to officially submit the RFQ response to the City for review. <b>NOTE:</b> Only your organization's Primary Representative will have access to the <b>'Submit to Grantor'</b> button. If you are working as the Secondary Representative, coordinate with the Primary Representative to officially submit the RFQ response to the City.	



# RFQ Response Submission

Step	Description	Screenshot
18	<p>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 RFQ response.</p>	 <p>The screenshot shows the 'Economic Development Grants Management System' interface. On the left, there's a sidebar with navigation links: Search, Tasks, Pending Tasks, Completed Tasks, Activities, NOFAs, Recent Items. The main content area displays a list of error messages under the heading 'The following error(s) occurred:'. The errors include:         <ul style="list-style-type: none"> <li>In Overview tab under Organization Profile section please confirm that "Your organization has audited financial statements for either one of the two most recently completed fiscal years" to submit RFQ.</li> <li>In Experience tab under Experience section please "Describe your organization's past experience and successes in providing services to low- and moderate-income City of San Diego residents and/or City of San Diego communities" to submit RFQ.</li> <li>In Experience tab under Target Population section please "Describe the target population(s) currently served by your organization" to submit RFQ.</li> <li>In Financials form under Budget Information section enter data in "3. Enter your organization's final operating budget for the fiscal year it most recently ended" to submit RFQ.</li> <li>In Financials form under Budget Information section enter data in "4. Enter your organization's operating budget for the fiscal year it is currently in" to submit RFQ.</li> <li>In Financials form under Budget Information section enter data in "5. Provide any comment or explanation you feel City staff should be aware of regarding your organization's fiscal year and/or operating budget" to submit RFQ.</li> <li>In Financials form under Accounting Method section enter data in "6. Select the method of accounting used by your organization" to submit RFQ.</li> <li>In Financials form under Accounting Method section enter data in "7. Provide any comment or explanation you feel City staff should be aware of regarding your organization's accounting method" to submit RFQ.</li> <li>In Financials form under Cash Balance section please confirm that "8. The audited financial statements I have attached to this RFQ response have an end date of 9/30/2016 or later" to submit RFQ.</li> <li>In Financials form under Cash Balance section enter data in "9. Enter the cash balance amount from the audited financial statements you have attached to this RFQ response" to submit RFQ.</li> <li>In Financials form under Cash Balance section enter data in "10. Provide any comment or explanation you feel City staff should be aware of regarding your organization's cash balance" to submit RFQ.</li> <li>In Controls form under Accounts Receivable section enter data in "1. Open and process mail" to submit RFQ.</li> <li>In Controls form under Accounts Receivable section enter data in "2. Record receipt of checks and/or electronic fund transfer payment" to submit RFQ.</li> <li>In Controls form under Accounts Receivable section enter data in "3. Record payment in accounting system" to submit RFQ.</li> <li>In Controls form under Accounts Receivable section enter data in "4. Make bank deposit of payment" to submit RFQ.</li> <li>In Controls form under Accounts Payable section enter data in "5. Receive, review, and process invoice" to submit RFQ.</li> <li>In Controls form under Accounts Payable section enter data in "6. Review purchase order to pay invoice" to submit RFQ.</li> <li>In Controls form under Accounts Payable section enter data in "7. Authorize purchase order to pay invoice" to submit RFQ.</li> <li>In Controls form under Accounts Payable section enter data in "8. Sign check and/or approve electronic fund transfer for invoice payment" to submit RFQ.</li> <li>In Controls form under Accounts Payable section enter data in "9. Record invoice payment in accounting system" to submit RFQ.</li> <li>In Controls form under Financial Access section enter data in "10. Financial records" to submit RFQ.</li> <li>In Controls form under Financial Access section enter data in "11. Bank accounts receivable payable forms" to submit RFQ.</li> <li>In Controls form under Financial Access section enter data in "12. Bank checks" to submit RFQ.</li> <li>In Controls form under Financial Access section enter data in "13. Petty cash" to submit RFQ.</li> <li>In Controls form under Financial Access section enter data in "14. Credit card" to submit RFQ.</li> </ul> </p>
19	<p>Once successfully submitted, the RFQ response will be reviewed by City staff, and a determination (either "qualified" or "not qualified") will be made. Only "qualified" organizations will be invited to participate in the subsequent RFP process.</p>	<p style="text-align: center;"><b>End</b></p>





# RFQ Response Submission

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

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



# RFQ Response Submission

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

Step	Description	Screenshot
1	Log into <a href="http://edgrants.force.com">http://edgrants.force.com</a> using the credentials for either the Primary Representative or Secondary 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.	

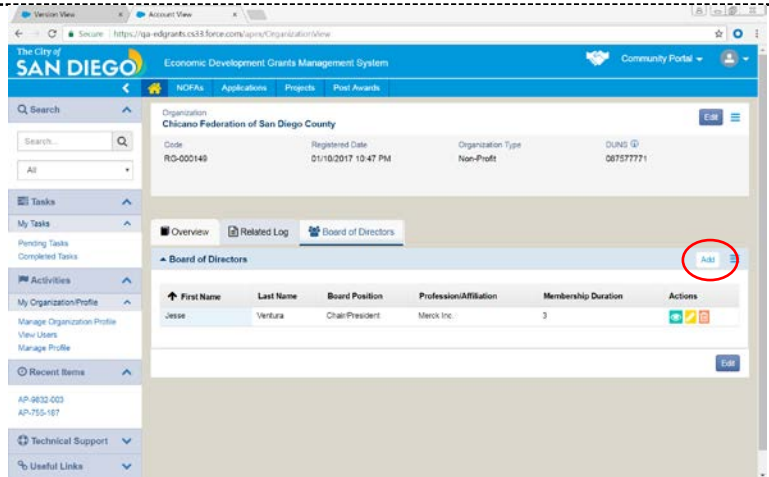




# RFQ Response Submission

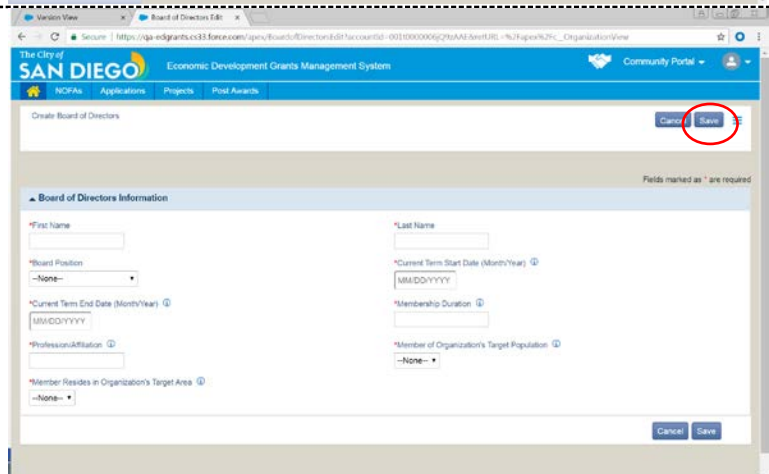
4

Click on the **'Add'** button to open a page where the profile of one board member may be entered.



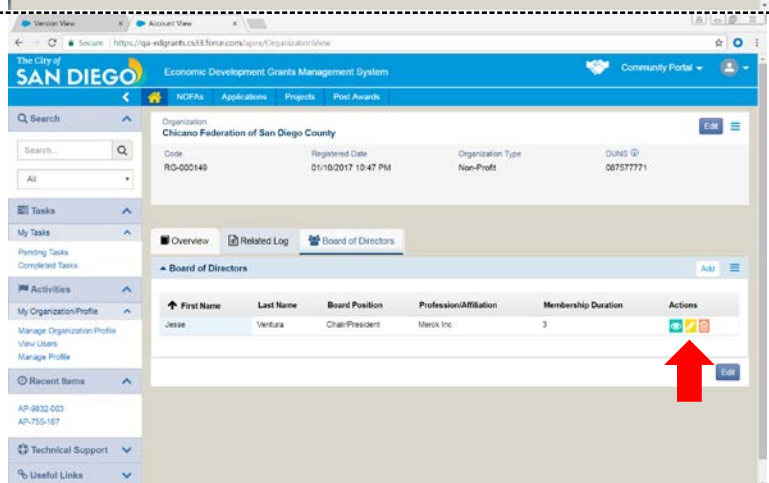
5

Fill out the fields on the page, using the help text icons provided (i) 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**

For additional support, email [CDBG@sandiego.gov](mailto:CDBG@sandiego.gov) or visit the 'Resources' tab at [edgrants.force.com](http://edgrants.force.com).



City of San Diego Community Development Division (CDD) <b>FY 2025 COMMUNITY DEVELOPMENT BLOCK GRANT  REQUEST FOR QUALIFICATIONS (CDBG RFQ) TIMELINE*</b>	
Deadline	Action
<b>October 9, 2023</b>	<b>FY 2025 CDBG RFQ Released via ED Grants</b>
October 11, 2023	CPAB Meeting (RFP Scoring Criteria Item)
October 12, 2023	FY 2025 CDBG RFQ Workshop ED Grants Overview Virtual Recorded Meeting: 10 am (PDT)
October 16 – October 27, 2023	Virtual Technical Assistance Meetings, by Appointment Only
<b>November 3, 2023 No later than 5:00 p.m. (PDT)</b>	<b>Deadline to Email RFQ-Related Questions to <a href="mailto:CDBG@sandiego.gov">CDBG@sandiego.gov</a></b>
<b>November 3, 2023 No later than 5:00 p.m. (PDT)</b>	<b>Deadline to Request Updates to Primary/Secondary Representatives on ED Grants</b>
November 6, 2023	Last Day of FAQ Posting on ED Grants
November 8, 2023	CPAB Meeting
<b>November 9, 2023 No later than 12:00 p.m. (PST)</b>	<b>Deadline to Request ED Grants Navigation Assistance/Staff Support (NO EXCEPTIONS)</b>
<b>November 9, 2023 No later than 5:00 p.m. (PST)</b>	<b>Deadline to Submit FY 2025 CDBG RFQ Response via ED Grants (NO EXCEPTIONS)</b>
November 13 - 28, 2023	Community Development Division Office Review of RFQ Responses
November 10 and November 23, 2023	Veterans Day Holiday and Thanksgiving Holiday Observed (City Offices Closed)
December 4, 2023	Notification of Results: All Respondent Organizations Notified of Results of RFQ Determination ("Qualified" or "Not Qualified") via Email Generated by ED Grants
<b>December 15, 2023 - January 19, 2024</b>	<b>FY 2025 CDBG RFP Release, Response Period, and Submittal Deadline</b>

*\*Dates subject to change.*



*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) <b><i>NOTE:</i></b> All applicants must attend this session or certify they have viewed the recorded presentations.
December 13, 2023	CPAB Meeting (Tentative)
<b>December 15, 2023</b>	<b>FY 2025 CDBG RFP released via ED Grants</b>
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)
<b>January 16, 2024 No later than 5:00 p.m. (PST)</b>	<b>Deadline to Email RFP-Related Questions to <a href="mailto:CDBG@sandiego.gov">CDBG@sandiego.gov</a></b>
<b>January 16, 2024 No later than 5:00 p.m. (PST)</b>	<b>Deadline to Request Updates to Primary/Secondary Representatives on ED Grants</b>
January 17, 2024	Last Day of FAQ Posting on ED Grants
<b>January 19, 2024 No later than 12:00 p.m. (PST)</b>	<b>Deadline to Request ED Grants Navigation Assistance/Staff Support (NO EXCEPTIONS)</b>
<b>January 19, 2024 No later than 5:00 p.m. (PST)</b>	<b>Deadline to Submit FY 2025 CDBG RFP Responses via ED Grants (NO EXCEPTIONS)</b>



*City of San Diego Community Development Division (CDD)*  
**FY 2025 COMMUNITY DEVELOPMENT BLOCK GRANT  
 REQUEST FOR PROPOSALS (CDBG RFP) TIMELINE\***

<b>Deadline</b>	<b>Action</b>
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 ( <i>Tentative Mandatory Proposal Presentations for Certain RFP Categories, if Needed</i> )
<b>February 28, 2024</b>	<b>CPAB FY 2025 CDBG Scoring Results Due to CDD Staff</b>
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 <b>Economic Development &amp; Intergovernmental Relations Committee</b> for Approval with FY 2025 Annual Action Plan
April or May 2024 (tentative)	FY 2025 CDBG Funding Recommendations Presented to <b>City Council</b> for Approval with FY 2025 Annual Action Plan; Contracts Begin July 1, 2024

*\*Dates subject to change*



The City of



## Economic Development

## RFQ CHECKLIST

### CDBG Annual NOFA

The City distributes a portion of its CDBG Entitlement and Program Income funds through an Annual Notice of Funding Availability (NOFA) process, which consists of two phases: **Request for Qualifications (RFQ)** and **Request for Proposals (RFP)**. During the RFQ phase, organizations present their qualifications to the City to demonstrate their capacity to successfully implement CDBG-funded projects and meet regulatory requirements. Organizations qualified via the RFQ phase are then invited to participate in the RFP phase by submitting project proposals for CDBG funding consideration. The Annual NOFA cycle typically begins in the late summer/early fall.



#### Checklist

**How to prepare your organization to submit its qualifications to partner with the City:**

- ☐ Register your organization to gain access to ED Grants at <https://edgrants.force.com>
- ☐ Get a copy of your organization's articles of incorporation as filed with the Secretary of State and check that your organization has been in existence for at least two years from the date of incorporation
- ☐ Ensure your organization's EIN number is valid
- ☐ Update and register your organization's Unique Entity ID number with [www.sam.gov](http://www.sam.gov)
- ☐ Get a copy of your organization's Federal Tax Determination Letter
- ☐ Get a copy of your organization's State Tax Determination Letter
- ☐ Get a copy of your organization's Board-approved Audited Financial Statements for the latest fiscal year that ended (or the one before)
  - ☐ Ensure the "Cash Balance" amount is at least \$12,500-\$25,000
- ☐ Get a copy of your organization's Single or Program-Specific Audit (if applicable) for the latest fiscal year that ended (or the one before)
- ☐ Get a copy of your organization's tax return for the latest calendar year that ended
- ☐ Prepare your organization charts: one for the entire organization and one for each division/section that will likely administer CDBG-funded projects
- ☐ Compile information on the members of your organization's Board of Directors (name, position, term start/end dates, profession/affiliation)
- ☐ Prepare your organization's mission statement (must be concise)
- ☐ Prepare a statement describing your organization's past experience and successes in providing services to low- and moderate-income City of San Diego residents and/or City of San Diego communities
- ☐ Prepare a statement describing the target population(s) currently served by your organization
- ☐ Get a copy of your organization's Board-approved financial management policy and procedures
- ☐ Get a copy of your organization's Board-approved procurement policy and procedures
- ☐ Ensure that your organization is not on any state or federal debarment list

***[This page is intentionally left blank.]***



Refer to the table below for a listing and description of the supporting documents to be uploaded to ED Grants as part of your organization's Request for Qualifications (RFQ) response. Each document must be a PDF file and named according to the naming convention indicated below. For [orgname], abbreviate your organization's name within reason (e.g., 'San Mateo Health Center' can be shortened to 'sanmateohc'); **the key is to be consistent and not use spaces**. Email [CDBG@sandiego.gov](mailto:CDBG@sandiego.gov) with any questions.

#	Document	Description	NOFA Type	Applicability	Naming Convention <sup>1</sup>
1	Organization Chart: Entire Agency	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). <b>PURPOSE:</b> 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).	FY 2025 CDBG	Required	[orgname]_orgchart_agency.pdf
2	Organization Chart: Division/Section	Shows the specific programmatic and fiscal groups within the organization charged with implementing the CDBG-funded project. The chart needs only list the position titles (the incumbents' names are not necessary). <b>PURPOSE:</b> 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 procurement accounting controls (e.g., the same person does not create and approve a purchase order).	FY 2025 CDBG	Required	[orgname]_orgchart_div-sect.pdf
3	Federal Tax-Exempt Status Affirmation Letter	Refers to a document issued by the federal Internal Revenue Service indicating the request of the subrecipient for nonprofit status recognition. <b>PURPOSE:</b> Verifies the organization's status as a 501(c)(3) prior to the execution of the CDBG agreement. Will be used by the City to set up the vendor profile of the subrecipient.	FY 2025 CDBG	Required	[orgname]_federaltaxexemptltr.pdf
4	California Tax-Exempt Status Determination Letter	Refers to a document issued by the California Franchise Tax Board indicating the request of the subrecipient for nonprofit status recognition. An 'Entity Status Letter' is not a substitute for the tax-exempt status determination letter. <b>PURPOSE:</b> Verifies the organization's status as a nonprofit entity prior to the execution of the CDBG agreement. Will be used by the City to set up the vendor profile of the subrecipient.	FY 2025 CDBG	Required	[orgname]_statetaxexemptltr.pdf
5	Articles of Incorporation	Refers to a document filed by nonprofit organizations with the Secretary of State that outlines the name of the organization, its corporate structure, its purpose, and the contact information and establishes the organization as a legally recognized entity. <b>PURPOSE:</b> Verifies the official existence of the organization and allows the City to determine if the length of existence of the organization is sufficient to meet City requirements.	FY 2025 CDBG	Required	[orgname]_incorporationarticles.pdf
6	Audited Financial Statements	Refers to the subrecipient's audited financial statements submitted as part of the Request for Qualifications (RFQ) phase. The audited financial statements must be Board-approved, include a qualified/unmodified opinion, and be in conformance with generally accepted accounting principles. <b>PURPOSE:</b> Allows the City to determine the financial capacity of the subrecipient to receive CDBG funds on a reimbursement basis.	FY 2025 CDBG	Required	[orgname]_auditedfinstatements.pdf
7	Single or Program-Specific Audit	Refers to the subrecipient's single or program-specific audit submitted as part of the Request for Qualifications (RFQ) phase. <b>PURPOSE:</b> Allows the City to determine the subrecipient's compliance with 2 CFR 200 requirements for entities that have received federal funding.	FY 2025 CDBG	If Applicable	[orgname]_single-progaudit.pdf
8	Federal Audit Clearinghouse Screenshot	Refers to proof of submission of a subrecipient's latest single or program-specific audit as specified by 2 CFR 200. <b>PURPOSE:</b> Allows the City to determine the subrecipient's compliance with 2 CFR 200 requirements for entities that have received federal funding.	FY 2025 CDBG	If Applicable	[orgname]_fedauditclearinghouse.pdf
9	System for Award Management Screenshot	Refers to a screenshot from <a href="http://www.sam.gov">www.sam.gov</a> showing: (1) the applicant organization's registration is currently 'Active' and (2) the expiration date of the 'Active' status. <b>PURPOSE:</b> Allows the City to determine that the applicant organization meets the federal requirement that all organizations recipient of federal funds be registered with <a href="http://www.sam.gov">www.sam.gov</a> .	FY 2025 CDBG	Required	[orgname]_samregistration.pdf
10	California Secretary of State Business Search Database Screenshot	Refers to a screenshot from the California Secretary of State Business Search database showing: (1) the applicant organization has an 'Active' status; (2) the registration date; (3) the entity type; and (4) the entity number. <b>PURPOSE:</b> Allows the City to determine that the applicant organization is in good standing with the state of California, is officially recognized by the same, and is authorized to carry out its business activities.	FY 2025 CDBG	Required	[orgname]_casecyofstateregistration.pdf
11	California Attorney General's Registry of Charitable Trusts Screenshot	Refers to a screenshot from the California Attorney General's Registry of Charitable Trusts showing: (1) the applicant organization has a 'Current' registration status; (2) the renewal due date; (3) and the registration number and corporate/organization number. <b>PURPOSE:</b> Allows the City to determine that the applicant organization is in good standing with the state of California.	FY 2025 CDBG	Required	[orgname]_caagcharityregistry.pdf

<sup>1</sup> 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.

Section Name	Field Name	Field Type	Response Options	Annotation (Help Text)	NOFA
General Information	Organization's Full Legal Name	Text	N/A	Enter your organization's full legal name as it appears on its federal W-9 form. Do not enter the name of the person populating this form!	CDBG
General Information	Street Address	Text	N/A	None	CDBG
General Information	Unit/Space/Floor	Text	N/A	None	CDBG
General Information	City	Text	N/A	None	CDBG
General Information	State	Dropdown	AL; AK; AZ; AR; CA; CO; CT; DE; FL; GA; HI; ID; IL; IN; IA; KS; KY; LA; ME; MD; MA; MI; MN; MS; MO; MT; NE; NV; NH; NJ; NM; NY; NC; ND; OH; OK; OR; PA; RI; SC; SD; TN; TX; UT; VT; VA; WA; WV; WI; WY	None	CDBG
General Information	ZIP Code	Numeric	N/A	None	CDBG
General Information	Organization Type	Dropdown	501(c)(1); 501(c)(2); 501(c)(3); 501(c)(4); 501(c)(5); 501(c)(6); 501(c)(7); 501(c)(8); 501(c)(9); 501(c)(10); 501(c)(11); 501(c)(12); 501(c)(13); 501(c)(14); 501(c)(15); 501(c)(16); 501(c)(17); 501(c)(18); 501(c)(19); 501(c)(21); 501(c)(22); 501(c)(23); 501(c)(25); 501(c)(26); 501(c)(27); 501(c)(28); 501(c)(29); Other	Refer to your organization's federal tax determination letter or IRS Publication 557 for guidance.	CDBG
General Information	Organization Tax ID (FEIN) Number	Numeric	##-#####	Your organization's tax ID number should have nine digits with a hyphen separating the first two digits from the last seven.	CDBG
General Information	Organization's Unique Entity ID Number	Numeric	#####	The Unique Entity ID is a 12-character alphanumeric ID assigned to an entity by SAM.gov.. Ensure your organization's Unique Entity ID is registered with www.sam.gov and has an 'Active' status. The Unique Entity ID has replaced the DUNS number.	CDBG
General Information	My organization is found in the California Secretary of State Business Search database and has an 'active' status as of the submission of this RFQ response. My organization's entity number is entered below.	Alphanumeric	X##### or #####	Visit the California Secretary of State Business Search database for more information on how to register your organization and keep the registration status current.	CDBG
General Information	My organization is found in the California Attorney General's Registry of Charitable Trusts, and the registration status is 'current' as of the submission of this RFQ response. My organization's registration number is entered below.	Numeric	#####	Visit the California Attorney General's Registry of Charitable Trusts website for more information on how to register your organization and keep the registration status current.	CDBG
Organization Head	Title	Text	N/A	None	CDBG
Organization Head	First Name	Text	N/A	None	CDBG
Organization Head	Last Name	Text	N/A	None	CDBG
Organization Head	Email	Text	N/A	None	CDBG
Organization Head	Telephone	Number	###-###-####	Use hyphens instead of parentheses to separate the telephone number digits (e.g., 619-987-6543).	CDBG
Fiscal/Financial Head	Title	Text	N/A	None	CDBG
Fiscal/Financial Head	First Name	Text	N/A	None	CDBG
Fiscal/Financial Head	Last Name	Text	N/A	None	CDBG
Fiscal/Financial Head	Email	Text	N/A	None	CDBG



Section Name	Field Name	Field Type	Response Options	Annotation (Help Text)	NOFA
Fiscal/Financial Head	Telephone	Number	###-###-####	Use hyphens instead of parentheses to separate the telephone number digits (e.g., 619-987-6543).	CDBG
RFQ Contact	Title	Text	N/A	None	CDBG
RFQ Contact	First Name	Text	N/A	None	CDBG
RFQ Contact	Last Name	Text	N/A	None	CDBG
RFQ Contact	Email	Text	N/A	None	CDBG
RFQ Contact	Telephone	Numeric	###-###-####	Use hyphens instead of parentheses to separate the telephone number digits (e.g., 619-987-6543).	CDBG
Board of Directors	First Name	Text	N/A	None	CDBG
Board of Directors	Last Name	Text	N/A	None	CDBG
Board of Directors	Board Position	Dropdown	Chair/President; Vice Chair/Vice President; Secretary; Treasurer; Member; Ex Officio; Other	None	CDBG
Board of Directors	Current Term Start Date (Month/Year)	Alphanumeric	N/A	Type the month and year of the current term's start date (e.g., January 2000).	CDBG
Board of Directors	Current Term End Date (Month/Year)	Alphanumeric	N/A	Type the month and year of the current term's end date (e.g., January 2000).	CDBG
Board of Directors	Membership Duration	Numeric	N/A	Enter how many terms the board member has served, including the current term.	CDBG
Board of Directors	Profession/Affiliation	Text	N/A	Enter the board member's occupation, general work field, or organization worked for.	CDBG
Board of Directors	Member of Organization's Target Population	Dropdown	Yes; No	Indicate if the board member is part of your organization's target population. For example, if your organization targets college students, is the board member a college student?	CDBG
Board of Directors	Member Resides in Organization's Target Area	Dropdown	Yes; No	Indicate if the board member's residence is located within an area of the City of San Diego served by your organization's projects and activities.	CDBG
Mission Statement	Organization Mission Statement	Text	N/A	Your organization's mission statement must be succinct. It is usually stated on your organization's website. Do not simply enter a narrative describing what your organization does. It should state why your organization exists in the first place.	CDBG
Organization Profile	Have members of your organization's executive team, board of directors, or staff ever attended nonprofit organization capacity-building training, academies, certification programs, or something similar, including those sponsored by the City of San Diego, within the past five (5) years?	Dropdown	Yes; No	Capacity refers to your organization's ability to serve clients and deliver services, function effectively as a nonprofit organization, compete successfully for funding, and comply with all applicable laws, policies, and regulations. Let the City know if your organization has benefitted from capacity-building efforts/programs.	CDBG
Organization Profile	Enter the date your organization's articles of incorporation were filed with the relevant Secretary of State.	Calendar	N/A	The file date of your organization's articles of incorporation is your organization's birthday.	CDBG
Organization Profile	Enter the state where your organization filed its articles of incorporation and was officially formed.	Dropdown	AL; AK; AZ; AR; CA; CO; CT; DE; FL; GA; HI; ID; IL; IN; IA; KS; KY; LA; ME; MD; MA; MI; MN; MS; MO; MT; NE; NV; NH; NJ; NM; NY; NC; ND; OH; OK; OR; PA; RI; SC; SD; TN; TX; UT; VT; VA; WA; WV; WI; WY	Indicate the state of formation/incorporation of your organization. If your organization is awarded CDBG funds, this information will be part of the agreement your organization will have with the City.	CDBG
Organization Profile	Is your organization a subsidiary of another organization?	Dropdown	Yes; No	None	CDBG
Organization Profile	If yes, enter the full legal name of your parent organization. If no, enter 'N/A' in the field.	Text	N/A	Enter your parent organization's full legal name as it appears on its federal W-9 form.	CDBG

Section Name	Field Name	Field Type	Response Options	Annotation (Help Text)	NOFA
Organization Profile	Does your organization have a fiscal agent?	Dropdown	Yes; No	A fiscal agent is an organization, such as a bank or trust company, that acts on behalf of another party performing various financial duties. A fiscal agent may assist in the redemption of bonds or coupons, handle tax issues, replace lost or damaged securities, and perform various other finance-related tasks.	CDBG
Organization Profile	If yes, enter the full legal name of your fiscal agent. If no, enter 'N/A' in the field.	Text	N/A	Enter your fiscal agent's full legal name as it appears on its federal W-9 form.	CDBG
Organization Profile	Select all the CDBG project types for which your organization is interested in applying for funding in the Fiscal Year.	Dropdown	Microenterprise Assistance; Direct Homeownership Financial Assistance; Nonprofit Facility Improvements; Housing Rehabilitation (Single-Family Homes); Housing Rehabilitation (Multi-Family Units); Direct Client Services; Business Development; Sustainability/Environmental Improvements	Failure to select a CDBG project type will NOT preclude you from applying for funding for that type.	CDBG
Organization Profile	My organization has audited financial statements for either one of the two most recently completed fiscal years.	Checkbox	N/A	If your organization does not have audited financial statements, perhaps you may consider responding to the Notice of Funding Availability (NOFA) for small and emerging organizations. Otherwise, you cannot submit an RFQ response at this time.	CDBG
Organization Profile	My organization is not on the State Debarment List.	Checkbox	N/A	Organizations on the California State Debarment List are precluded from submitting an RFQ response.	CDBG

**Instruction:** Provide complete and accurate responses to the information requests below.

NOFA Column:

**CDBG** Field applicable to the FY 2025 CDBG NOFA.

Section Name	Field Name	Field Type	Annotation (Help Text)	NOFA
Experience	Describe your organization's past experience and successes in providing services to low- and moderate-income City of San Diego residents and/or City of San Diego communities.	Text	Do not simply repeat your organization's mission statement here. Focus on your organization's work with low- and moderate-income (LMI) clients. Mention specific projects your organization has implemented successfully to benefit LMI clients. Include in your description: the target populations served; their area median income (AMI) levels; the goals and objectives of those projects and activities; the activities implemented; and the results and outcomes. The City wants to know your track record in implementing projects and activities that benefit LMI clients, residents, businesses, and communities.	CDBG
Target Population	Describe the target population(s) currently served by your organization.	Text	Do not describe projects or activities here. Include in your description the demographics and characteristics of your organization's target populations, such as age, income levels, educational levels, ethnicity/race, etc. Mention the challenges they face and the special needs they have. Describe where they are located within the City of San Diego. Cite credible and recognizable sources of information and data (e.g., Census data, SANDAG, etc.) to bolster your description. Demonstrate to the City that your organization knows its target populations well and is fully aware of what needs to be done to address their challenges and special circumstances.	CDBG

The City would like to know about your organization's experience with low- and moderate-income (LMI) residents, businesses, and communities and the target population(s) served by your organization. Per federal requirements, CDBG funding must be expended to benefit LMI clients, and the City wants to partner with organizations with demonstrated experience and successes in working with LMI clients.

**Instruction:****NOFA Column:****CDBG**

Field applicable to the FY 2025 CDBG NOFA.

Section Name	Field Name	Field Type	Response Options	Annotation (Help Text)	NOFA
Budget Information	Select the first month of your organization's fiscal year.	Dropdown	January; February; March; April; May; June; July; August; September; October; November; December	None	CDBG
Budget Information	Select the year of the fiscal year your organization most recently ended.	Dropdown	Years	None	CDBG
Budget Information	Select the year of the fiscal year your organization is currently in.	Dropdown	Years	None	CDBG
Budget Information	Enter your organization's final operating budget for the fiscal year it most recently ended.	Currency	N/A	The amount should cover the entire fiscal year.	CDBG
Budget Information	Enter your organization's operating budget for the fiscal year it is currently in.	Currency	N/A	The amount should cover the entire fiscal year.	CDBG
Budget Information	Provide any comment or explanation you feel City staff should be aware of regarding your organization's fiscal year and/or operating budget.	Text	N/A	None	CDBG
Accounting Method	Select the method of accounting used by your organization.	Dropdown	Cash; Accrual	None	CDBG
Accounting Method	Provide any comment or explanation you feel City staff should be aware of regarding your organization's accounting method.	Text	N/A	None	CDBG
Cash Balance	The audited financial statements I have attached to this RFQ response have an end date of 06/30/2022 or later.	Checkbox	N/A	The end date of your organization's audited financial statements must be 06/30/2022 or you will not be able to submit an RFQ response.	CDBG
Cash Balance	Enter the cash balance amount from the audited financial statements you have attached to this RFQ response.	Numeric	Currency	Refer to your audited financial statements for this figure. City staff will verify this figure by reviewing the audited financial statements you submit. It will be multiplied by four (4) to determine the maximum amount of funding your organization may apply for in Fiscal Year 2025. Your organization's cash balance amount multiplied by four (4) must be at least \$50,000 for FY 2025 CDBG funding.	CDBG
Cash Balance	Provide any comment or explanation you feel City staff should be aware of regarding your organization's cash balance.	Text	N/A	None	CDBG

**Instruction:**

Provide information regarding your organization's budget, accounting method, and cash balance. The City will use the information to make a preliminary assessment of your organization's capacity to successfully use CDBG funds on a reimbursable basis.

**NOFA Column:****CDBG**

Field applicable to the FY 2025 CDBG NOFA.

Section Name	Field Name	Field Type	Response Options	Annotation (Help Text)	NOFA
Accounts Receivable	Open and process mail	Text	N/A	Enter job titles. Do not enter personal names of staff.	CDBG
Accounts Receivable	Record receipt of checks and/or electronic fund transfer payment	Text	N/A	Enter job titles. Do not enter personal names of staff.	CDBG
Accounts Receivable	Record payment in accounting system	Text	N/A	Enter job titles. Do not enter personal names of staff.	CDBG
Accounts Receivable	Make bank deposit of payment	Text	N/A	Enter job titles. Do not enter personal names of staff.	CDBG
Accounts Payable	Receive, review, and process invoice	Text	N/A	Enter job titles. Do not enter personal names of staff.	CDBG
Accounts Payable	Review purchase order to pay invoice	Text	N/A	Enter job titles. Do not enter personal names of staff.	CDBG
Accounts Payable	Authorize purchase order to pay invoice	Text	N/A	Enter job titles. Do not enter personal names of staff.	CDBG
Accounts Payable	Sign check and/or approve electronic fund transfer for invoice payment	Text	N/A	Enter job titles. Do not enter personal names of staff.	CDBG
Accounts Payable	Record invoice payment in accounting system	Text	N/A	Enter job titles. Do not enter personal names of staff.	CDBG
Financial Access	Financial records	Text	N/A	Enter job titles. Do not enter personal names of staff.	CDBG
Financial Access	Blank accounts receivable/payable forms	Text	N/A	Enter job titles. Do not enter personal names of staff.	CDBG
Financial Access	Blank checks	Text	N/A	Enter job titles. Do not enter personal names of staff.	CDBG
Financial Access	Petty cash	Text	N/A	Enter job titles. Do not enter personal names of staff.	CDBG
Financial Access	Credit card	Text	N/A	Enter job titles. Do not enter personal names of staff.	CDBG
Financial Access	Accounting system	Text	N/A	Enter job titles. Do not enter personal names of staff.	CDBG
Financial Procedures	Enter the date of when your organization last updated its written financial management policies and procedures.	Calendar	Date	Updates should have been approved by your organization's board of directors.	CDBG

Section Name	Field Name	Field Type	Response Options	Annotation (Help Text)	NOFA
Financial Procedures	Think about your organization's current written financial management policies and procedures. Select which of the following are addressed by those policies and procedures.	Checkbox	Staff qualifications and duties; Lines of authority; Separation of duties; Access to assets and sensitive documents; System of approving and recording transactions; Payroll/fringe benefits.	If awarded funds, your organization will need to formally address any identified deficiencies in its policies and procedures. City staff will be available to provide guidance at that time.	CDBG

**General Instruction:** Provide the information requested below regarding your organization's internal controls and financial management policies. The City will use the information to do a preliminary assessment of the controls and policies in place in terms of their adequacy in complying with federal regulations as described in 2 CFR 200.303. A more comprehensive review of your organization's accounting and financial management policies and procedures will be required before agreement execution, if funding is awarded. If deficiencies are identified, your organization will be required to address them by formally updating your internal controls and financial management policies accordingly.

**Instruction for 'Accounts Receivable' Section:** Enter the exact job title of the person responsible for each of the steps list below in the 'Accounts Receivable' process in your organization. Differentiate between similar job titles (e.g., Account Clerk 1, Account Clerk 2, etc.). DO NOT ENTER PERSONAL/STAFF NAMES.

**Instruction for 'Accounts Payable' Section:** Enter the exact job title of the person responsible for each of the steps list below in the 'Accounts Receivable' process in your organization. Differentiate between similar job titles (e.g., Account Clerk 1, Account Clerk 2, etc.). DO NOT ENTER PERSONAL/STAFF NAMES.

**Instruction for 'Accounts Payable' Section:** Enter the exact job title of the person responsible for each of the steps list below in the 'Accounts Receivable' process in your organization. Differentiate between similar job titles (e.g., Account Clerk 1, Account Clerk 2, etc.). DO NOT ENTER PERSONAL/STAFF NAMES.

**Instruction for 'Financial Procedures' Section:** N/A

NOFA Column:

**CDBG** Field applicable to the FY 2025 CDBG NOFA.

Section Name	Field Name	Field Type	Response Options	Annotation (Help Text)	NOFA
Procurement Methods	Select all the procurement methods listed below that are used by your organization for small purchases.	Checkbox	Procurement by Micro-Purchase; Procurement by Small Purchase	"Procurement by Micro-Purchase" is the acquisition of supplies or services, the total dollar amount of which does not exceed \$10,000 (or \$2,000 in the case of acquisition for construction subject to the Davis-Bacon Act). This purchase may be awarded without soliciting competitive quotations, if the organization considers the price to be reasonable. "Procurement by Small Purchase" is the acquisition of supplies, services, or other property not to exceed \$250,000. An adequate number of price or rate quotations must be documented.	CDBG
Procurement Methods	Select all the procurement methods listed below that are used by your organization for large purchases.	Checkbox	Procurement by Sealed Bid; Procurement by Competitive Proposal; Procurement by Noncompetitive Proposal	"Procurement by Sealed Bid" is the preferred method for procuring construction services. Bids are publicly solicited and a firm fixed price contract is awarded. "Procurement by Competitive Proposal" is normally conducted with more than one source submitting an offer, and either a fixed price or cost-reimbursement-type contract is awarded. "Procurement by Noncompetitive Proposal" is conducted when an item is available from a single source; emergency circumstances will not permit a competitive proposals; federal awarding agency authorizes use of this method; or, after solicitation, competition is deemed inadequate.	CDBG
Procurement Procedures	Think about your organization's current written procurement policies and procedures. Select which of the following are addressed by those policies and procedures.	Checkbox	Procurement procedures in place based on methods previously selected; How quotes are solicited; How the organization determines which quote is reasonable to accept; How long an Invitation for Bids should be publicly advertised; Where advertisements are published/posted; How the organization determines which bid is reasonable to accept; How the organization determines if a Request for Qualifications (RFQ), a Request for Proposals (RFP), or an Invitation for Bids (IFB) is to be used in the solicitation; Where advertisements are published/posted; How the organization determines which response is reasonable to accept; How the organization determines that it is appropriate to use the noncompetitive proposal method; A conflict of interest policy or code of conduct is in place governing employees, officers, or agents engaged in the award or administration of the award; What records should be maintained to document procurement process; For how long procurement records must be retained; How to ensure awards are not made to debarred/suspended parties; How to conduct selection procedures; How to handle and resolve disputes	If awarded funds, your organization will need to formally address any identified deficiencies in its policies and procedures. City staff will be available to provide guidance at that time.	CDBG

**Instruction:**

The standards and procedures for procurement are intended to ensure that services, supplies, materials and/or equipment purchased in whole or in part with federal funds are: (1) obtained as efficiently and economically as possible; (2) procured in a manner that includes, to the maximum extent practical, an open and free competition process; and (3) that records and/or documents related to procurement are properly maintained.

**NOFA Column:****CDBG**

Field applicable to the FY 2025 CDBG NOFA.

Section Name	Field Name	Field Type	Response Options	Annotation (Help Text)	NOFA
Certification Regarding Lobbying	[See language in ED Grants]	Checkbox	N/A	None	CDBG
Certification Regarding Debarment, Suspension, Proposed Debarment, Ineligibility, and Other Responsibility Matters	[See language in ED Grants]	Checkbox	N/A	None	CDBG
Certification for a Drug-Free Workplace	[See language in ED Grants]	Checkbox	N/A	None	CDBG
Certification Regarding Compliance with Civil Rights Act and American with Disabilities Act	[See language in ED Grants]	Checkbox	N/A	None	CDBG
Certification of Compliance with Conflict of Interest and Procurement Policies	[See language in ED Grants]	Checkbox	N/A	None	CDBG
Audit Certificate of Compliance	Enter the month of the start date of your organization's most recently completed fiscal year.	Dropdown	January; February; March; April; May; June; July; August; September; October; November; December	None	CDBG
Audit Certificate of Compliance	Enter the year of the start date of your organization's most recently completed fiscal year.	Dropdown	2022/2023	None	CDBG
Audit Certificate of Compliance	Non-federal entities that expend \$750,000 or more in federal awards during the non-federal entity's fiscal year must have a single or program-specific audit conducted for that year in accordance with the provisions of 2 CFR Part 200 Subpart F – Audit Requirements. The calculation of the total federal awards expended by the entire organization should include the parent company and any subsidiaries. For purposes of determining the amount of total federal awards expended, all federal awards should be included, such as those that were received directly from a federal agency, or passed through a state or local government, or through nonprofit organizations, or any combination of these sources. If an organization expends less than \$750,000 per year in federal awards, it is exempt from the federal audit requirements. However, the organization must still have records available for review by HUD or the City or other required auditor. Select which of the following options is applicable to your organization.	Checkbox	<p>OPTION 1: The applicant organization's Primary Representative as registered in ED Grants attests that its organization expended \$750,000 or more in federal awards during its most recently completed fiscal year, and therefore a Single Audit was required. The applicant organization's Primary Representative as registered in ED Grants also attests that its organization submitted the completed Single Audit report to the Federal Audit Clearinghouse (FAC) within the earlier of thirty (30) calendar days after receipt of the auditor's report or nine (9) months after the end of the audit period.</p> <p>OPTION 2: The applicant organization's Primary Representative as registered in ED Grants attests that its organization expended less than \$750,000 in federal awards during the most recently completed fiscal year as defined above, and therefore a Single Audit is not required.</p>	Click on Option 1 or 2.	CDBG
Audit Certificate of Compliance	I selected Option 1 above, and the Single Audit or Program-Specific Audit I have attached to this RFQ response has an end date of 06/30/2022 or later.	Checkbox	Yes; N/A - Per the Audit Certificate of Compliance I completed as part of this RFQ response, my organization was not required to undergo a Single Audit or Program-Specific Audit.	The end date of your organization's Single Audit or Program-Specific Audit must be 06/30/2022 or you will not be able to submit an RFQ response.	CDBG
Audit Certificate of Compliance	I selected Option 1 above, and the Single Audit or Program-Specific Audit I have attached to this RFQ response has been submitted to the Federal Audit Clearinghouse (FAC) website.	Checkbox	Yes; N/A - Per the Audit Certificate of Compliance I completed as part of this RFQ response, my organization was not required to undergo a Single Audit or Program-Specific Audit.	If your organization was required to undergo a Single Audit or Program-Specific Audit, the audit must have been submitted to the Federal Audit Clearinghouse (FAC) website or you will not be able to submit an RFQ response.	CDBG
Audit Certificate of Compliance	The applicant organization's Primary Representative as registered in ED Grants hereby certifies he or she has the authority to sign for the applicant organization named in this Request for Qualifications (RFQ) response and that the applicant organization will comply with the provisions of 2 CFR Part 200 Subpart F – Audit Requirements and any other applicable federal and state laws and regulations hereinafter enacted.	Checkbox	N/A	None	CDBG
RFQ Response Submission	The applicant organization's Primary Representative as registered in ED Grants hereby acknowledges and confirms this submission to the City of San Diego in response to the Fiscal Year 2025 CDBG RFQ and certifies that, to the best of his or her knowledge and belief, all factual information provided is true and correct.	Checkbox	N/A	None	CDBG

**Instruction:** Your organization must subscribe to the terms below to be considered for and awarded CDBG funds. A check mark next to the terms, along with the submission of this RFQ response via ED Grants, will serve as acknowledgement by your organization that you

**NOFA Column:**

**CDBG** Field applicable to the FY 2025 CDBG NOFA.