

FY2028 CDBG Index of RFQ Supporting Documents

Upload these 11 documents to ED Grants with your RFQ response. Check each one off as you go.

Required

9 documents are required for every applicant.

If applicable

2 documents are required only if they apply to you (documents 7 and 8).

Before you upload

- Every document must be a **PDF**.
- Replace **[orgname]** with a short version of your organization's name (for example, "San Mateo Health Center" becomes **sanmateohc**).
- **Be consistent:** use the same short name on every file, with no spaces. Copy the rest of each file name exactly as shown, in lowercase.
- No ampersands (&) or other special symbols. If you need a space, use an underscore (_), but only sparingly.
- Questions? Email CDBG@sandiego.gov.

Organization Charts

Charts only need to list position titles. Incumbents' names are not necessary.

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| ☐ 1. Organization Chart: Entire Agency
<div style="background-color: #0056b3; color: white; padding: 2px; text-align: center; margin-top: 5px;">Required</div> | <p>Upload: A chart of your organization's general structure showing span of control and chain of command. If you have offices in different locations, include the chart for the office that will administer the CDBG-funded project. The chart needs to list only the position titles.</p> <p>Why: City staff look for capacity to implement the project and enough separation of duties for proper procurement and accounting controls (for example, the same person does not create and approve a purchase order).</p> <p>File name: [orgname]_orgchart_agency.pdf</p> |
| ☐ 2. Organization Chart: Division/Section
<div style="background-color: #0056b3; color: white; padding: 2px; text-align: center; margin-top: 5px;">Required</div> | <p>Upload: A chart of the programmatic and fiscal groups within your organization that will carry out the CDBG-funded project. The chart needs to list only the position titles.</p> <p>Why: Same as document 1: capacity to implement the project and separation of duties.</p> <p>File name: [orgname]_orgchart_div-sect.pdf</p> |

Tax-Exempt Status and Legal Standing

- | | |
|--|---|
| ☐ 3. Federal Tax-Exempt Status Affirmation Letter
<div style="background-color: #0056b3; color: white; padding: 2px; text-align: center; margin-top: 5px;">Required</div> | <p>Upload: The letter from the federal Internal Revenue Service (IRS) confirming your request for nonprofit status recognition.</p> <p>Why: Verifies your 501(c)(3) status before the CDBG agreement is executed. The City also uses it to set up your vendor profile.</p> <p>File name: [orgname]_federaltaxexemptltr.pdf</p> |
| ☐ 4. California Tax-Exempt Status Determination Letter
<div style="background-color: #0056b3; color: white; padding: 2px; text-align: center; margin-top: 5px;">Required</div> | <p>Upload: The letter from the California Franchise Tax Board confirming your request for nonprofit status recognition.</p> <div style="background-color: #fff9c4; padding: 10px; margin: 10px 0;"> <p>IMPORTANT: An "Entity Status Letter" is not a substitute for the determination letter.</p> </div> <p>Why: Verifies your status as a nonprofit entity before the CDBG agreement is executed. The City also uses it to set up your vendor profile.</p> <p>File name: [orgname]_statetaxexemptltr.pdf</p> |

Tax-Exempt Status and Legal Standing (continued)

- ☐ **5. Articles of Incorporation**
Required
- Upload:** The **document your nonprofit filed with the Secretary of State**. It outlines your organization's name, corporate structure, purpose, and contact information, and establishes it as a legally recognized entity.
- Why:** Verifies your organization officially exists and lets the City decide whether it has existed long enough to meet requirements.
- File name:** [orgname]_incorporationarticles.pdf

Financial and Audit Documents

- ☐ **6. Audited Financial Statements**
Required
- Upload:** Your **audited financial statements** for the RFQ phase. They must be **Board-approved**, include a **qualified or unmodified opinion**, and follow **generally accepted accounting principles**.
- Why:** Lets the City assess your financial capacity to receive CDBG funds on a reimbursement basis.
- File name:** [orgname]_auditedfinstatements.pdf
- ☐ **7. Single or Program-Specific Audit**
If applicable
- Upload:** Your **single or program-specific audit** for the RFQ phase.
- IF APPLICABLE:** Applies to organizations that have received federal funding.
- Why:** Lets the City determine your compliance with 2 CFR 200 requirements.
- File name:** [orgname]_single-progaudit.pdf
- ☐ **8. Federal Audit Clearinghouse Screenshot**
If applicable
- Upload:** A **screenshot proving you submitted your latest single or program-specific audit**, as 2 CFR 200 requires.
- IF APPLICABLE:** Applies to organizations that have received federal funding.
- Why:** Lets the City determine your compliance with 2 CFR 200 requirements.
- File name:** [orgname]_fedauditclearinghouse.pdf

Registration Screenshots

Each screenshot must clearly show the details listed.

- ☐ **9. System for Award Management (SAM) Screenshot**
Required
- Upload:** A **screenshot from www.sam.gov** showing (1) your registration is currently "**Active**" and (2) the **expiration date** of the "Active" status.
- Why:** Confirms you meet the federal requirement that all recipients of federal funds be registered with SAM.
- File name:** [orgname]_samregistration.pdf
- ☐ **10. California Secretary of State Business Search Screenshot**
Required
- Upload:** A **screenshot from the California Secretary of State Business Search database** showing (1) an "**Active**" status, (2) the **registration date**, (3) the **entity type**, and (4) the **entity number**.
- Why:** Confirms you are in good standing with California, officially recognized by the state, and authorized to carry out business activities.
- File name:** [orgname]_casecyofstatereregistration.pdf
- ☐ **11. California Attorney General's Registry of Charitable Trusts Screenshot**
Required
- Upload:** A **screenshot from the California Attorney General's Registry of Charitable Trusts** showing (1) a "**Current**" registration status, (2) the **renewal due date**, and (3) the **registration number and corporate/organization number**.
- Why:** Confirms you are in good standing with the State of California.
- File name:** [orgname]_caagcharityregistry.pdf