

Economic Development Department

Partnering with the City: Are You CDBG Ready?

October 17, 2016

10/17/2016



Welcome!

- Statement of Purpose
- Introductions
- What we will cover today:
 - Aligning with City's goals and objectives
 - Pre-Screening for Capacity (RFQ)
 - Upcoming CDBG Funding Opportunities
 - Tips and Tricks

Community Development Block Grants (CDBG)

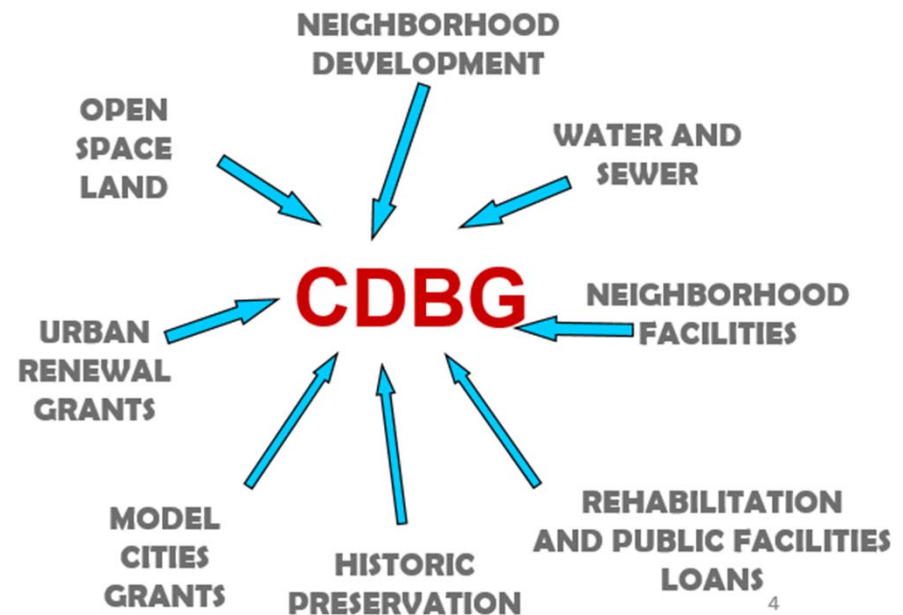
Primary objective: Improve living environment, expand economic opportunities, and provide decent housing for low- and moderate-income residents and areas.

Past funding categories have included:

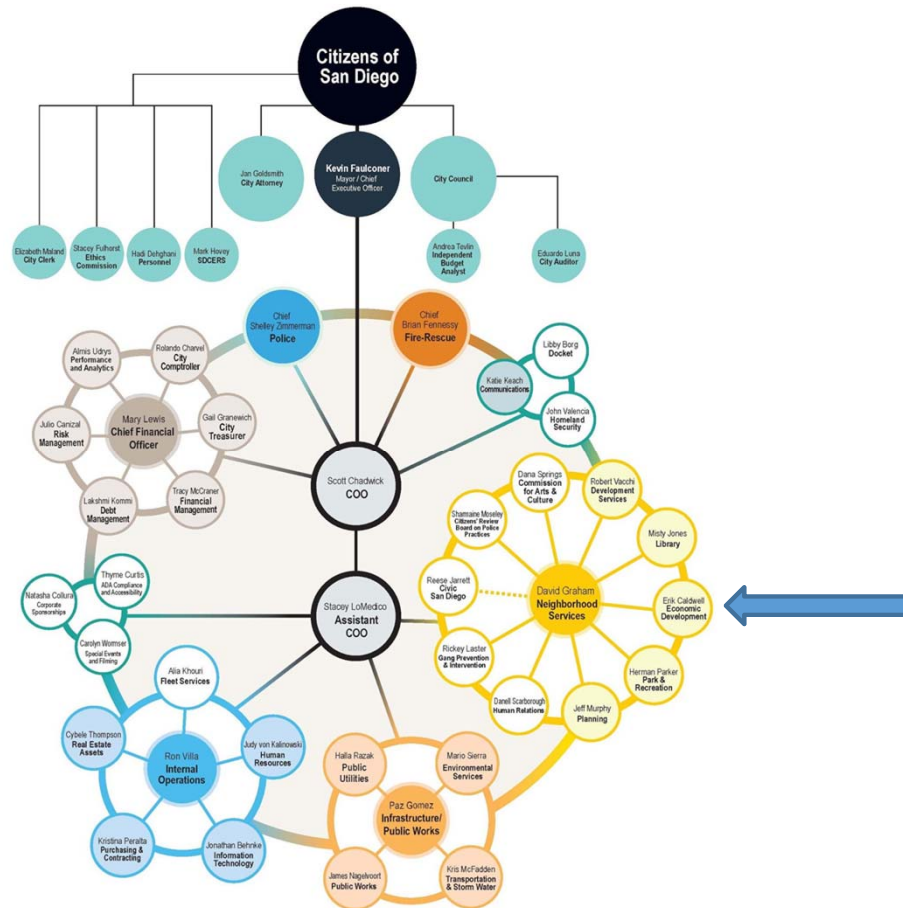
- Public Services
- Challenge Grants: Youth Workforce and Veterans Services
- Community and Economic Development
- Nonprofit Capital Improvement Projects & Housing Rehabilitation

Where does the money come from?

- Federal Entitlement Program
- Administered by U.S. Department of Housing and Urban Development (HUD)
- 24 CFR Part 570



CITY OF SAN DIEGO ORGANIZATION



10/17/2016

REVISED: 07/15/2016

The City of San Diego
Strategic
Plan

Mission

To effectively serve and
support our communities

Vision

A world-class city for all

The City of San Diego
Strategic
Plan

Values
Integrity
Service
People
Excellence

Goals

Goal 1: Provide high-quality public services

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

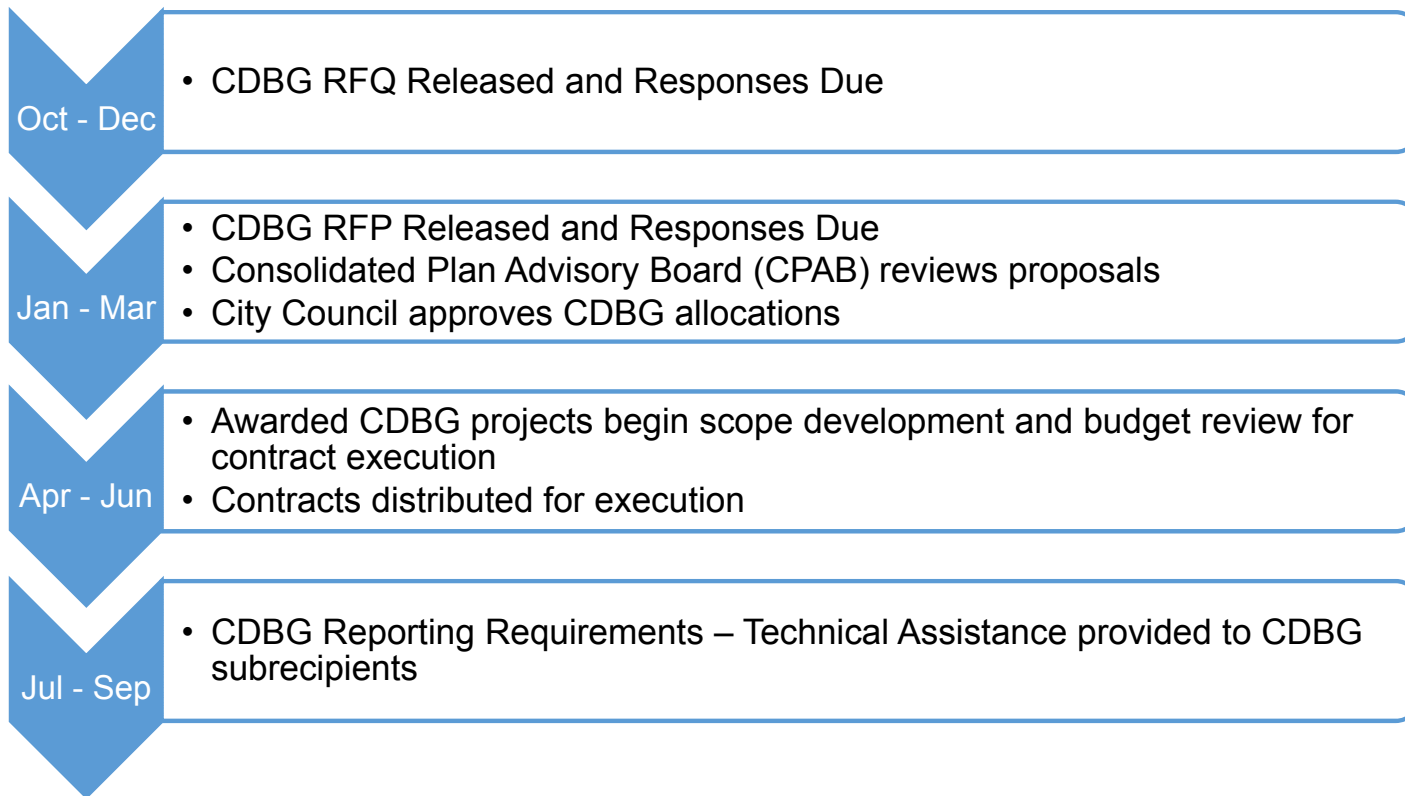
Economic Development Department Mission:

To strengthen communities by establishing strategic partnerships that cultivate a sustainable, dynamic economy and create community development opportunities.

Take a Moment

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

Schedule of Opportunities [City Fiscal Year runs from July 1 through June 30]



Pre-Screening / RFQ

When responding to a Request for Qualifications (RFQ), you will be need to provide information such as:

- Organizational Info: EIN, Address and Contact Information
- Mission Statement
- Organizational Experience and Major Accomplishments (serving LMI clients or communities)
- Description of Current Target Population Served
- Annual Operating Budget
- Calculation of Liquidity

Pre-Screening / RFQ

Organizations who want to partner with the City are required to have the following:

Charity Registration (nonprofits only) and Status Requirements

- **CA Dept. of Justice Charity Registration:** <http://rct.doj.ca.gov>
 - Status Needed: Current
- **Department of Industrial Relations:** <http://www.dir.ca.gov/dlse/debar.html>
 - Organization is not listed as Debarred.
- **CA Secretary of State:** <http://kepler.sos.ca.gov/>
 - Status Needed: ACTIVE
- **System for Awards Management:** www.sam.gov
 - Status Needed: ACTIVE or No Results

Pre-Screening / RFQ

DUNS Number: Dun & Bradstreet (D&B) provides a **D-U-N-S Number**, a unique nine-digit identification **number**, for each physical location of your business. **D-U-N-S Number** assignment is FREE for all businesses required to register with the U.S. federal government for contracts or grants. Applicants must have an ACTIVE D-U-N-S Number.

Apply here: <http://fedgov.dnb.com/webform/index.jsp> (*updated link*)

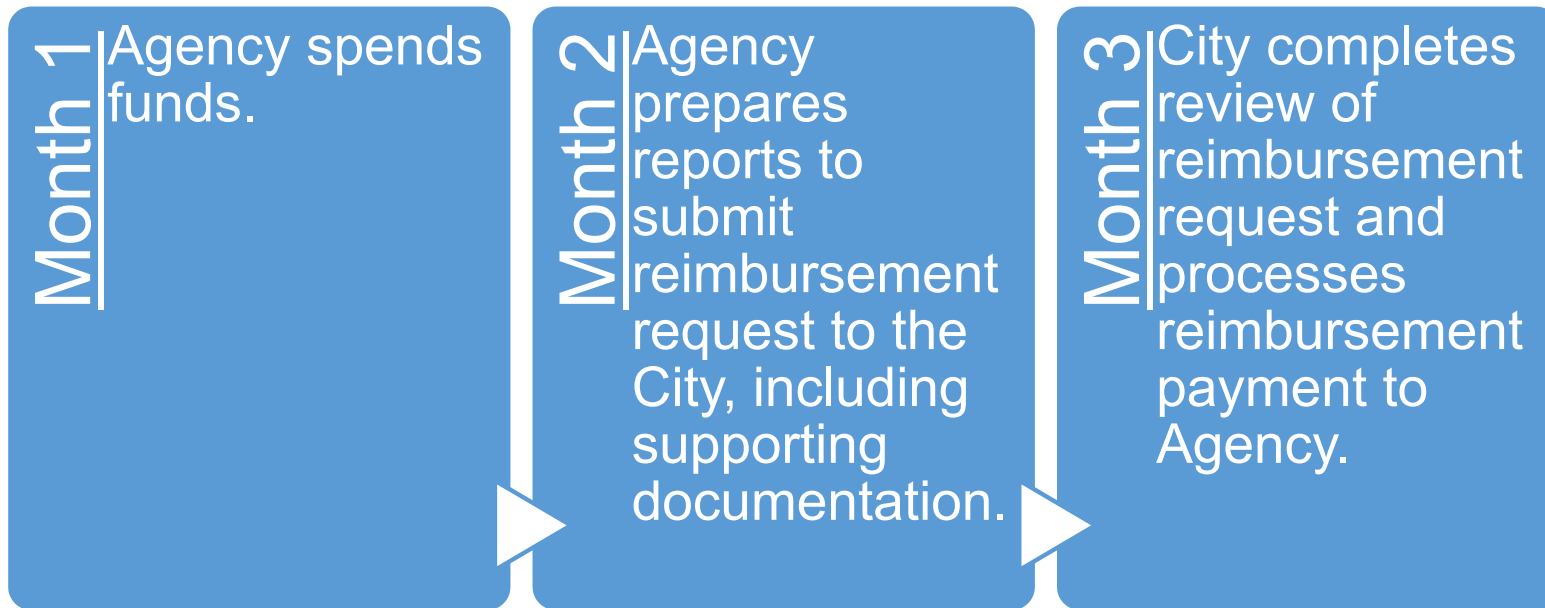
Learn more here: <http://fedgov.dnb.com/webform/displayFAQPage.do>
or here: https://www.sam.gov/sam/SAM_Guide/SAM_User_Guide.htm

Pre-Screening/ RFQ

- Audit Certificate of Compliance Form
2 CFR Part 200 Subpart F / OMB Circular A-133
- Audited Financial Statements
 - Fiscal year end date of 6/30/2015 or later
 - Unqualified/Unmodified Opinion
 - Cash balance from Balance Sheet used to calculate maximum request threshold
- Single Audit (if applicable)
 - Most recently completed fiscal year end date on or before June 30, 2015
 - Agency expended \$750,000 or more in federal funds

Rule of Thumb

- Three-Month Cash Rule
Agency should have a cash reserve to cover three (3) months of operations.



Pre-Screening/ RFQ

- Maximum funding request threshold
 - Determined by Audited Financial Statement Cash Balance x 4
 - Amount confirmed in the RFQ notification/results letter
 - Amount is limited by the overall budget in the proposed project category

Pre-Screening/ RFQ

- Internal Controls
 - No single person should have sole authority over all steps of a financial or budget transaction
 - Clearly outline roles and responsibilities
 - If funded, agency will be required to submit its internal control procedures
- Procurement Methods
 - Ensure a fair and open competitive process
 - Ensure fair market pricing and comply with all governing regulations
 - Purchases made with federally awarded funds must be made with 1 of the 5 procurement methods outlined by HUD regulations

Pre-Screening/ RFQ

- Certifications
 - Lobbying
 - Debarment, Suspension, Proposed Debarment, Ineligibility and Other Responsibility Matters
 - Drug-Free Workplace
 - Civil Rights Act and ADA Compliance
 - Conflict of Interest and Procurement Policies Compliance
- Additional Documents
 - Agency Tax Determination Letters (nonprofits)
 - Organization Charts

Pre-Screening / RFQ

COMMON DISQUALIFIERS

- Incomplete or Incorrect Audit Certificate of Compliance Form
- Single Audit, when required, was not submitted or does not meet all requirements
- Audited financial statements not submitted or do not meet all requirements
- Maximum Funding Request Threshold does not meet minimums required by Council Policy
- Internal Control Weakness
- Procurement Method Weakness
- DUNS Number not active in the SAM.gov system
- Negative status with State of California

FY 2018 CDBG RFQ

How to apply

FY 2018 CDBG RFQ Online

<http://www.sandiego.gov/cdbg>



The City of SAN DIEGO

66° SAN DIEGO WEATHER

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DOING BUSINESS Fix, Plan + Build

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CITY HALL City Officials + Departments

Applications, Forms, and Regulations

 Community Development Block Grant (CDBG) Program

City of San Diego
1200 Third Ave.
Suite 1400, MS 560
San Diego, CA 92101

Phone: 619-236-6700
Fax: 619-533-3219

Email:
CDBG@sandiego.gov

FY 2018 NEW AND ENHANCED CDBG FUNDING OPPORTUNITIES

Event: PARTNERING WITH THE CITY: ARE YOU CDBG-READY?
Where: City Concourse - North Terrace Rooms 207-208
When: October 17, 2016

Two convenient times available: 9:30 AM - 11:30 AM (Session 1)
1:30 PM - 3:30 PM (Session 2)

 No RSVP needed!



The City of SAN DIEGO

68° SAN DIEGO WEATHER

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LIBRARY Learn, Connect + Discover

PUBLIC SAFETY Police, Fire

Applications, Forms, and Regulations

CDBG Funding Applications

(updated 10/14/2016)

Fiscal Year 2018 Request for Qualifications (RFQ)

The City of San Diego's Economic Development Department is accepting statements of qualifications from agencies interested in applying for CDBG funds for projects beginning implementation on July 1, 2017. This Request for Qualifications (RFQ) is the first phase of the application process. Agencies that fail to submit their qualifications by the deadline, or are subsequently deemed "not qualified" through this RFQ process, will be precluded from submitting project proposals for Fiscal Year 2018 CDBG funding consideration. **The City will accept statements of qualifications from October 24, 2016 until 3:00 p.m. on November 18, 2016.**


All applicant agencies are required to submit their qualifications in response to this RFQ by completing an online application at the following site:

FY 2018 CDBG RFQ ON LINE APPLICATION

There will also be supporting documents that need to be uploaded. In addition, agencies will be required to certify that they have reviewed and understand the following documents:

SD Partnering with the City

- Complete all required fields.
- Fields include:
 - Fill in
 - Choose One
 - Check Box
 - Text Area Box
 - Yes/No
 - Date Selector
 - Signature
- Important Tool Icons:
 - Download Original – allows you to save a PDF copy to your computer.
 - Attach file(s) to doc
 - Print without submitting
 - Save and Continue Later
 - Submit & Sign



The City of
SAN DIEGO

Fiscal Year 2018
Community Development Block Grant
Request for Qualifications (RFQ)

I. Applicant Organization: General Information

Provide complete and accurate responses to the information requests below.

Applicant Full Legal Name *			
Street Address *			
City	State *	Zip Code	*
Type of Organization	Choose One		
Applicant Tax ID (FEIN) Number *			
Applicant DUNS* Number *			

*A Data Universal Number System (DUNS) number is required by the federal government. You may obtain a number by calling 1-866-705-5711 or by registering for a DUNS number via the website dedicated to serve US Federal Government Contractors and Grantees for this purpose. Applicants must have a valid DUNS number and it must be registered with System for Award Management (sam.gov). The DUNS number must be in an "Active" status with sam.gov at the time of the RFQ submittal and throughout the application and contract period.





Head of Agency Contact Information	
Title	*
First Name	*
Last Name	*
Email	*
Phone Number	*



Head of Fiscal/Financial Contact Information (If same as Head of Agency click here <input type="checkbox"/>)	
Title	*
First Name	*
Last Name	*
Email	*
Phone Number	*

RFQ Contact Information** (If same as Head of Agency click here <input type="checkbox"/>, if same as Head of Fiscal click here <input type="checkbox"/>)	
Title	*
First Name	*
Last Name	*
Email	*
Phone Number	*

**Ensure that the RFQ Contact listed above is available during the RFQ process to respond to inquiries from the Community Development Division (CDD).

Agency's Mission Statement: (475 Characters)



SUBMIT & SIGN

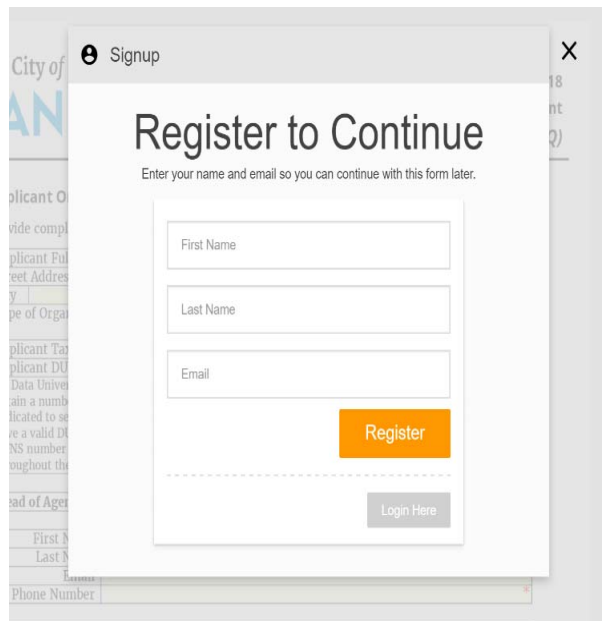
IMPORTANT –

DO NOT CLICK SUBMIT AND SIGN UNTIL YOU ARE READY TO SUBMIT THE RFQ APPLICATION!

APPLICATION CANNOT BE RETRIEVED ONCE ITS BEEN SUBMITTED.

FY 2018 CDBG RFQ Online

Register to Save and Continue Later



City of **Signup** X

Register to Continue

Enter your name and email so you can continue with this form later.

First Name

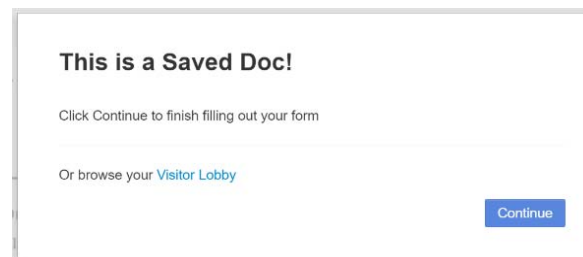
Last Name

Email

[Register](#)

[Login Here](#)

Receive Confirmation

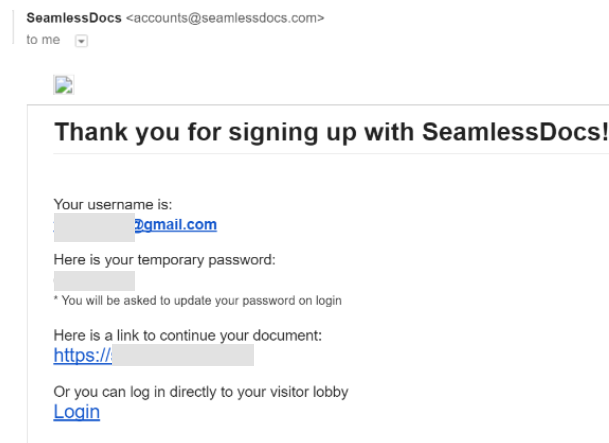


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Click Continue to finish filling out your form

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to me

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[redacted]@gmail.com

Here is your temporary password:
[redacted]

* You will be asked to update your password on login

Here is a link to continue your document:
[https://\[redacted\]](https://[redacted])

Or you can log in directly to your visitor lobby
[Login](#)

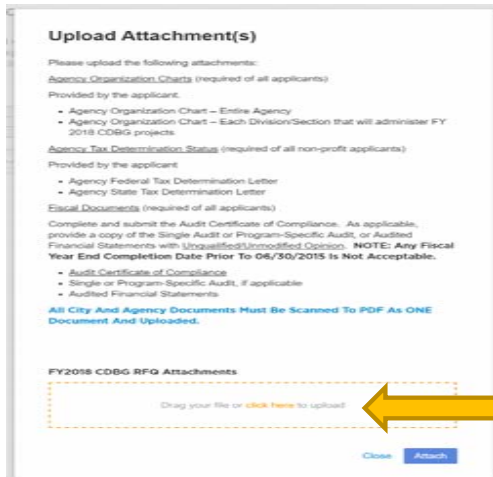
FY 2018 CDBG RFQ Online

Required Attachments

- Click on Attach file icon

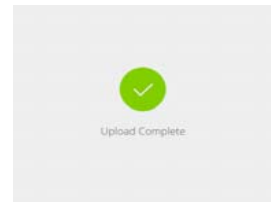


- Upload Attachment(s) box opens



Submission Confirmation

- Upload Complete box -



- Icon Submission -



DO NOT SUBMIT MORE THAN ONE PDF DOCUMENT – the first document you submit is the only one we'll open.

DO NOT SUBMIT PDF DOCUMENT VIA E-MAIL or HAND-DELIVER IT – it will not be accepted.

DO NOT SUBMIT ANY OTHER TYPE OF DOCUMENT – i.e. Word, Excel, PowerPoint – it will not be accepted.

FY 2018 CDBG RFQ Online

Certification

CITY OF SAN DIEGO FY 2018 CDBG RFQ

CERTIFICATION

As an Authorized Official/Representative for my Organization, I hereby acknowledge and confirm submittal of a response to the FY 2018 CDBG RFQ to the City of San Diego Community Development Division and certify that, to the best of my knowledge and belief, all factual information provided is true and correct.

First Name: [Field]
 Last Name: [Field]
 Title: [Field]

Signature: *Signature Here* [Field] Date: 08/08/2016 [Field]

SUBMIT & SIGN

- Read Declaration, Complete fields, then click Signature Here

First Name: Rosalia
 Last Name: Hernandez
 Title: Fiscal Analyst

Signature: *Signature Here* [Field] Date: 7/14/2016 [Field]

- Create Your Signature box

Create Your Signature

Please fill in your name and email and then either draw or type your signature below.

Full Legal Name: [Field] Your Initials: [Field] Email: [Field]

Signature Type: Type Draw Upload Custom

Apply Signature

I agree to electronically sign and to create a legally binding contract between the other party and myself, or the entity I am authorized to represent.

- Complete form to create your electronic signature
- Read and Check "I agree...."
- Click Apply Signature

Create Your Signature

Please fill in your name and email and then either draw or type your signature below.

Full Legal Name: Rosalia Hernandez Your Initials: RH Email: fy18rfqtest@gmail.com

Signature Type: Type Draw Upload Custom

Rosalia Hernandez [Field] **Apply Signature**

Signature will be applied to the page. You will have a chance to review after signing.

I agree to electronically sign and to create a legally binding contract between the other party and myself, or the entity I am authorized to represent.

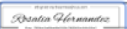
FY 2018 CDBG RFQ Online

Finalize & Submit


CERTIFICATION

As an Authorized Official/Representative for my Organization, I hereby acknowledge and confirm submittal of a response to the FY 2018 CDBG RFQ to the City of San Diego Community Development Division and certify that, to the best of my knowledge and belief, all factual information provided is true and correct.

First Name	Rosalia
Last Name	Hernandez
Title	Fiscal Analyst

Signature  Date 10/14/2016

ONCE RFQ IS SUBMITTED IT CANNOT BE RETRIEVED!

 **Finalize & Submit**

You will be able to save a copy after your submission.

Submittal Confirmation

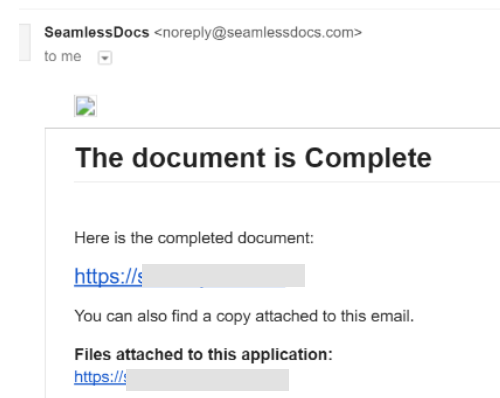
- Pop-up Box



- Thank you PDF



- E-mail Confirmation

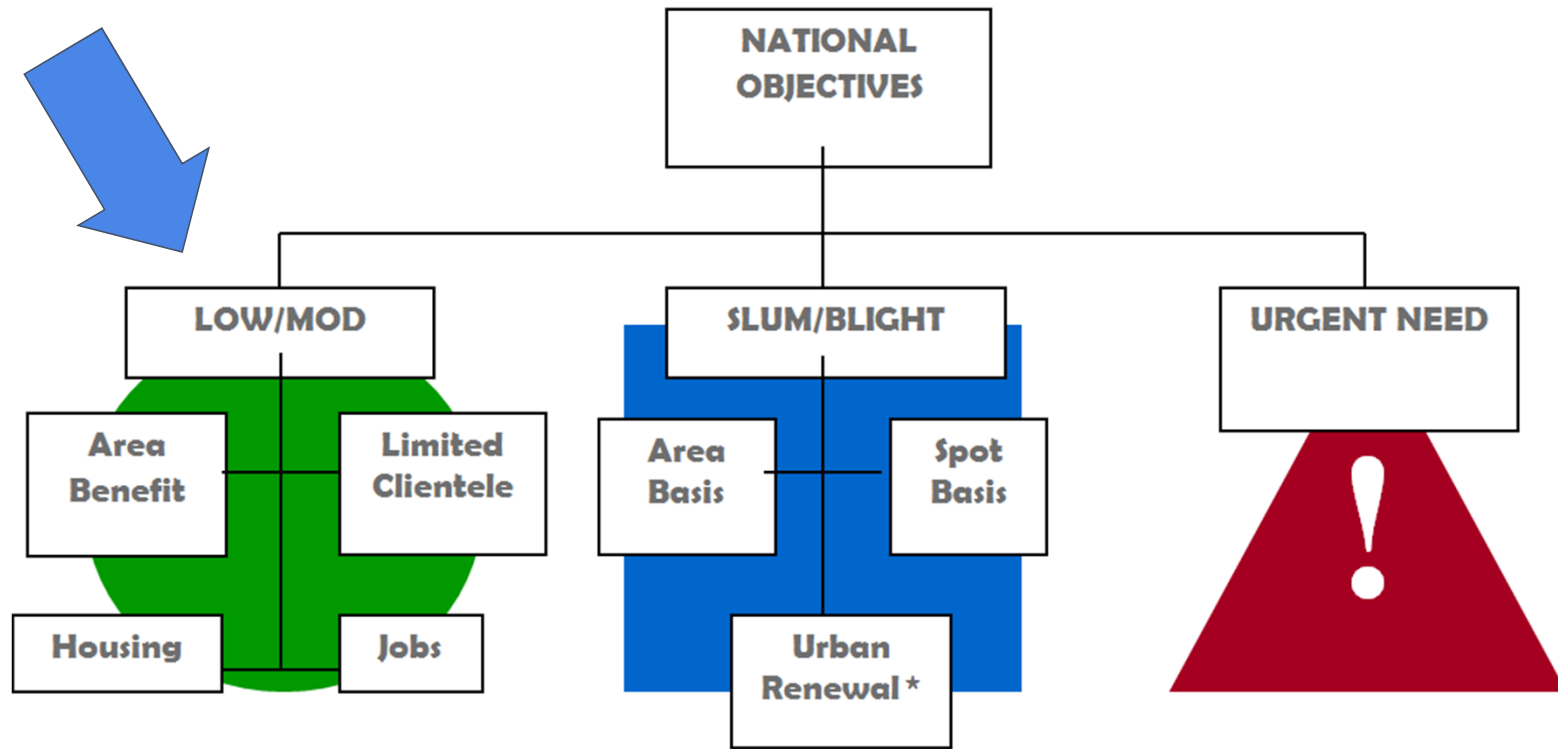


- **YOUR RFQ IS SUBMITTED!**

FY 2018 CDBG Categories

Is your proposed project CDBG-eligible?

Eligibility for CDBG



Eligibility for CDBG - continued

The City's Consolidated Plan (ConPlan) informs HUD and the community how the City plans to invest its CDBG funds over the course of 5 years.

The ConPlan identifies six (6) GOALS in which CDBG funds may be invested:

GOAL 1 Enhance the City's economic stability and prosperity by increasing opportunities for **job readiness** and investing in **economic development programs**.

GOAL 2 Strengthen neighborhoods by investing in the City's **critical infrastructure** needs.

GOAL 3 Improve housing opportunities by **creating and preserving affordable rental and homeowner housing** in close proximity to transit, employment and community services.

Eligibility for CDBG - continued

GOAL 4 Assist individuals and families to stabilize in permanent housing after experiencing a housing crisis or **homelessness** by providing client appropriate housing and supportive service solutions.

GOAL 5 Invest in **community services** and **nonprofit facilities** that maximize impact by providing new or increased access to programs that serve **highly vulnerable populations** such as youth, seniors and food insecure households.

GOAL 6 Meet the needs of **persons with HIV/AIDS and their families** through the provision of housing, health, and support services.

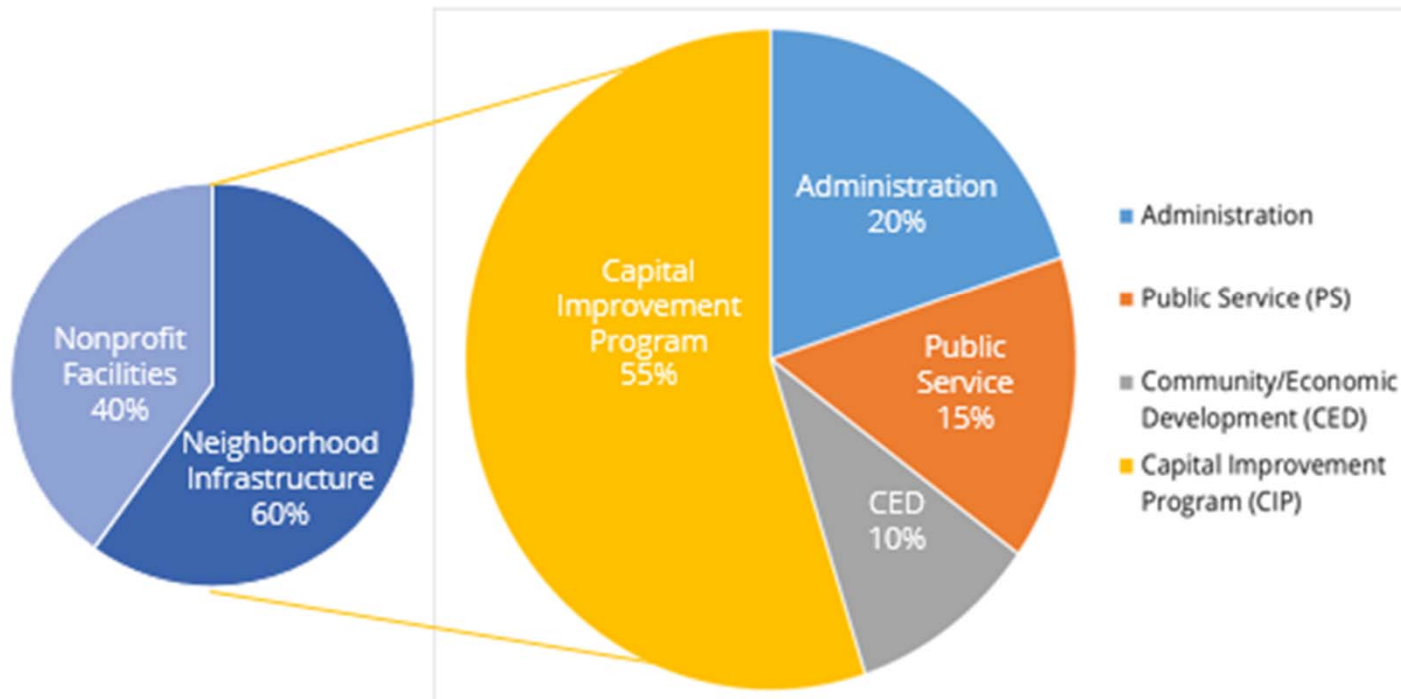
Projects are evaluated based upon approved **scoring criteria** which also consider past performance and geographic targeting initiatives.

CDBG RFQ/RFP Categories – FY 2018

- Public Services
- Community and Economic Development
- Nonprofit Capital Improvement Projects & Housing Rehabilitation
- Challenge Grants
- Sustainability Rehabilitation

Eligibility for CDBG - continued

FY 15-19 Con Plan CDBG Established Budgetary Priorities



Public Services

Estimated FY 2018 Budget: \$1,875,000
\$1,318,078 Homeless Services Set-Aside
\$ 556,922 Available for Public Services Projects

Eligible Activities:

- Employment Training
- Senior Services*
- Health Services
- Homeless Services
- Disability Services*
- Domestic Violence Services
- Tenant/Landlord Counseling
- Substance Abuse Services
- Mental Health Services
- Transportation Services
- Housing Counseling
- Food Banks

Minimum Allocation: \$50,000

Outcome Measures: Low/Moderate-Income Clientele, *presumed LMI possible

Community/Economic Development

Estimated FY 2018 Budget: \$1,250,000

Eligible Activities:

- Microenterprise Assistance
- Direct Homeownership Financial Assistance
 - Closing Cost Assistance
 - Down Payment Assistance

Minimum Allocation:

\$50,000

Outcome Measures:

Low/Moderate-Income Clientele (Microenterprise)

Low/Moderate-Income Household (Direct Homeownership)

Nonprofit Capital Improvement / Housing Rehab

Estimated FY 2018 Budget: \$2,750,000

Eligible Activities:

- New Construction or Rehabilitation of Public Facilities
ADA Improvements
Health/Safety Hazards

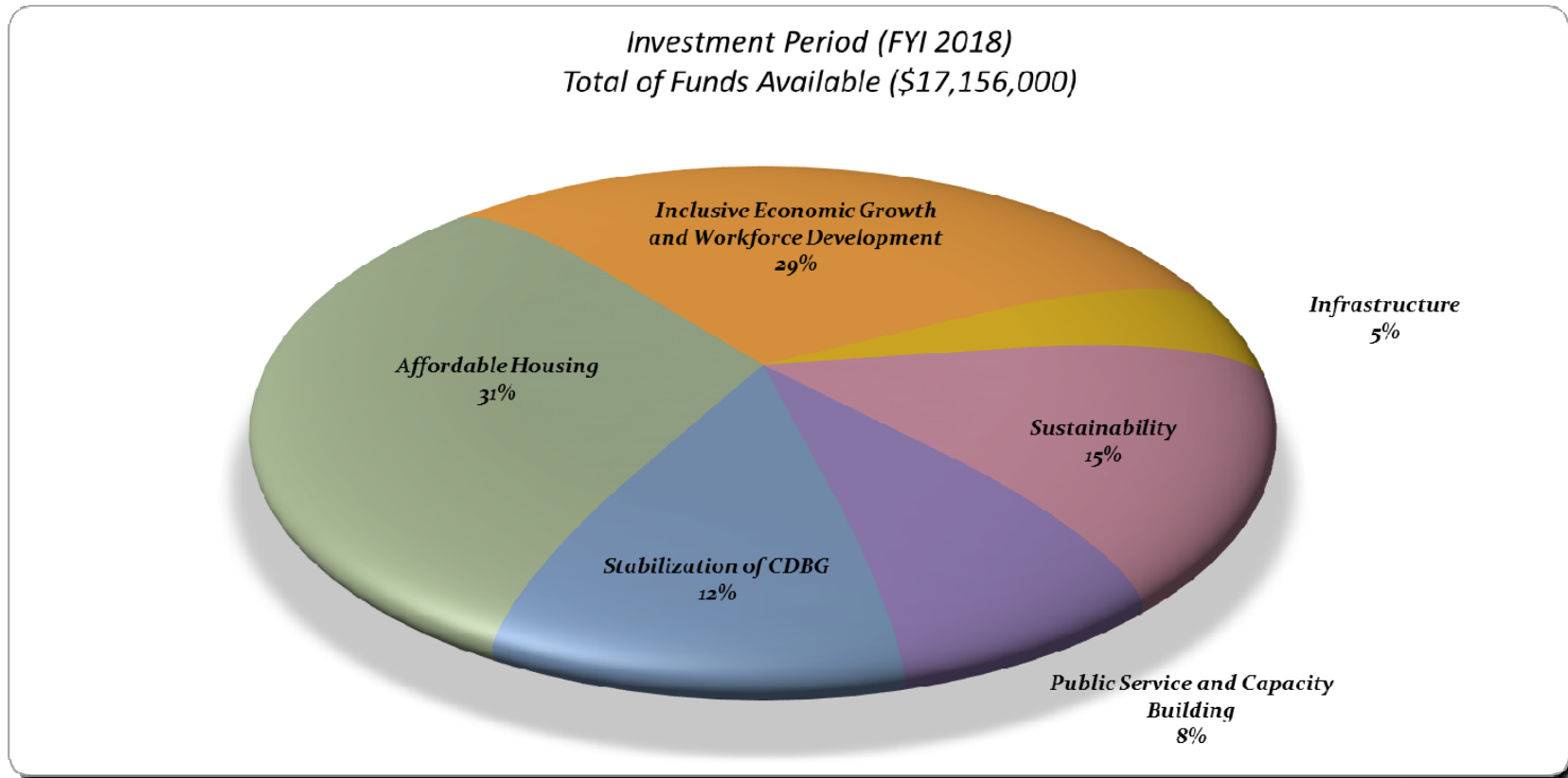
Examples: Senior Centers, Homeless Facilities, Youth Centers, Neighborhood Facilities, Health Facilities

- Single-Unit Residential Rehab
Non-sustainability scope
Owner-occupied
- Multi-Unit Residential Rehab
Non-sustainability scope
Rental housing

Minimum Allocation: \$100,000

Outcome Measures: Low/Moderate-Income Clientele; Low/Moderate-Income Area if primarily residential and activity benefits all residents; Low/Moderate-Income Household

Reinvestment Initiative



Challenge Grants (4)

Estimated FY 2018 Budget: \$1,000,000 (Total for all four Challenge Grant Categories)

Eligible Activities:

Youth Services Challenge Grant

- Low/Moderate Income; 14 – 24 years
- Work Experience with Education
- Tutoring/Homework Assistance
- Literacy (reading, health, financial)
- Science/Technology Engineering; Math Instruction
- Mentoring
- Nutrition
- Teen Depression
- Violence Prevention
- Life Skills
- Music and Arts Programs

Minimum Allocation:

\$50,000

Outcome Measures:

Low/Moderate-Income Clientele

Challenge Grants (4)

Estimated FY 2018 Budget: \$1,000,000 (Total for all four Challenge Grant Categories)

Eligible Activities:

Veterans Services Challenge Grant

- Low/Moderate Income Veterans
- Direct Services

Financial Literacy Challenge Grant (NEW)

- Creating a Financial Plan
- Saving, Investing, Managing Personal Finance, Budgeting
- Financial Markets
- Avoiding Money Scams
- Reduction of Student Loan Debt

Minimum Allocation:

\$50,000

Outcome Measures:

Low/Moderate-Income Clientele

Challenge Grants (4)

Estimated FY 2018 Budget: \$1,000,000 (Total for all four Challenge Grant Categories)

Eligible Activities:

Social Enterprise Challenge Grant (NEW)

Limited to nonprofit organizations

- Temporary Worker/Office Staff
- Commercial Janitorial Service
- Catering/Restaurant Industry
- Landscaping
- Food Distribution
- Below-Market Debt Financing
- Transportation Services
- Mobile Food Delivery Services

Minimum Allocation:

\$50,000

Outcome Measures:

Low/Moderate Income Clientele

Sustainability Rehabilitation

Estimated FY 2018 Budget: \$1,000,000

Eligible Activities:

*Owner-Occupied Single Residential Unit;
Multi-Unit; or Public (nonprofit) Facility*

- Solar Installation
- Effective Insulation Systems (wall, attic)
- High-Performance Windows and Doors
- Tight Construction and Ducts
- Efficient Heating and Cooling Equipment (furnaces, water heaters)
- Energy Star-Certified Lighting
- Water-Saving Faucets, Shower Heads, Toilets
- Repair of Water Leaks

Minimum Allocation: **\$100,000**

Outcome Measures: Low/Moderate-Income Clientele, Low/Moderate-Income Household or Low/Moderate-Income Area (dependent upon proposed project)

Guidelines, Handbooks and Instructions

Guidelines, handbooks, and instructions are advertised online, on social media, and through e-mail.

Sign up for CDBG-related communications!

www.sandiego.gov/cdbg or CDBG@sandiego.gov

Responding to the RFQ: Tips and Tricks

- Choose one person to be the lead contact at your organization.
- Read all instructions and provided documents before calling City staff with questions.
- But if you do have questions—call or e-mail! We are here to help.
- Take advantage of opportunities for help, such as TA sessions, office hours, etc.
- Start the process early and allow enough time to review the quality and accuracy of the required documents before submittal.
- Have someone proofread and review your application before submittal.

What comes next?

Next Steps

- RFQ Released: October 24, 2016
- Technical Assistance Appointments available: October 26, 2016 – November 16, 2016
- RFQ Responses Due: November 18, 2016
- Agencies will be notified “Qualified” or “Not Qualified”: November 30 – December 5, 2016

- RFP Released: January 5, 2017
- RFP Responses Due: January 26, 2017
- CPAB Reviews and Scoring of Applications: February 2017
- Allocation Approval by City Council: March or April 2017

- Contracting Period Start: July 1, 2017

Other Upcoming Opportunities

Housing and Homeless Programs

- Revolving Loan Fund / Administered by the Housing Commission
- Focus on Multi-family Rehabilitation for Permanent Supportive Housing

Inclusive Economic Growth and Workforce Development

- TechHire Academy
- Early-Stage Accelerator
- Early-Stage Seed Fund
- Small Business Loan Fund
- Business Assistance Fund
- Summer Hire Internship Program

The City is dedicated to:

- Integrity
- Service
- People
- Excellence

We are here to serve and assist you.

Thank you! Please contact us!

Michele Marano, Community Development Coordinator

e: mmarano@sandiego.gov

p: 619.236.6381

Kimberly Vance, Senior Management Analyst

e: kdvance@sandiego.gov

p: 619.236.6408

Rosalia Hernandez, CDD Fiscal Analyst

e: hernandezr@sandiego.gov

p: 619.533.4748