

**CONSOLIDATED PLAN ADVISORY BOARD (CPAB)  
MINUTES**

WEDNESDAY, NOVEMBER 09, 2016

SAN DIEGO CIVIC CONCOURSE – NORTH TERRACE ROOMS 207–208  
202 ‘C’ STREET, SAN DIEGO, CA 92101

<b>BOARD MEMBERS PRESENT</b>	<b>BOARD MEMBERS ABSENT</b>
<ul style="list-style-type: none"> <li>• Joe LaCava, Council District 1 representative</li> <li>• Sara Berns, Council District 2 representative</li> <li>• Vicki Granowitz, Council District 3 representative</li> <li>• Ken Malbrough, Council District 4 representative</li> <li>• Gary Wong, Council District 6 representative</li> <li>• Richard Thesing, Council District 7 representative</li> </ul>	N/A

<b>STAFF PRESENT</b>	<b>ATTENDANCE SHEET</b>
<ul style="list-style-type: none"> <li>• Stephen Maduli-Williams, Program Manager, Community Development Division</li> <li>• Cody Hooven, Chief Sustainability Officer, Economic Development</li> <li>• Michele Marano, Community Development Coordinator</li> <li>• Ulysses Panganiban, Community Development Specialist IV</li> <li>• Leo Alarcon, Community Development Project Manager</li> </ul>	8 people signed the attendance sheet

**Call to Order**

Ms. Vicki Granowitz called the meeting to order at 9:04 a.m. with six board members present. Quorum was achieved at the same time.

**Approval of Minutes**

Ms. Granowitz called for a motion to approve the minutes of the October 2016 meeting. Mr. Joe LaCava moved to approve the minutes; the motion was seconded by Mr. Ken Malbrough. The minutes were then approved unanimously.

## Board Announcements

- Mr. LaCava reiterated the importance of providing the Board the supporting materials to the agenda discussion and action items prior to the meeting with as much time as possible to ensure the Board has ample time to review the materials.
- Ms. Granowitz stated the Mayor's Office is working on recommending new CPAB members since positions for Council Districts 3, 5, and 9 are currently vacant.

## Staff Announcements

- Mr. Ulysses Panganiban reported the statistics from the pre-RFQ "Partnering with the City: Are You CDBG-Ready?" workshop held on Monday, October 17, 2016, in the City Concourse building. There were 77 attendees for the workshops, and staff was able to add 46 new email addresses to the distribution list, which is currently at over 600 emails. Of the 46 email addresses added, 25 represented new agencies that were not receiving CDBG-related notices prior to the workshop.
- Mr. Panganiban also mentioned that the Fiscal Year 2018 CDBG Request for Qualifications (RFQ) was released on Monday, October 24, and organizations have until 3:00 p.m. on Friday, November 18, 2016, to submit their RFQ responses via the SeamlessDocs website system. The first set of FAQs was released on November 2, and the second set of FAQs is scheduled to be released on November 10, 2016. Organizations were reminded to submit questions related to the RFQ by November 16. Organizations will be notified of their eligibility status ("Qualified" or "Not Qualified") by December 5.

## Non-Agenda Public Comment

N/A

## Agenda Item(s)

### Action Item 6a:

#### ***Approval of Fiscal Year (FY) 2018 Scoring Criteria***

Mr. Leo Alarcon and Ms. Michele Marano gave a brief presentation on the recommended revisions to the FY 2018 Scoring Criteria. *Please see attached presentation for more information.*

- Regarding "Leveraged Funding" in Section 3 (Budget), the Board requested additional time to evaluate the point-allocation tiers based on the percentage of leveraged funds.

- Regarding Section 4 (Geographic Targeting), the Board settled on allocating 1 point based on the location of the applicant's main office or proposed facilities/residential units to be improved and 3 points based on the delivery area of the service or improvements. Proposals impacting identified high-need areas (i.e., Barrio Logan, San Ysidro, Linda Vista, Encanto, Southeastern San Diego, and City Heights) by serving clients within those areas and/or having facilities/residential units or applicant offices in those areas will be scored higher.

*Public Comments Received:*

- Ms. Jackie Harris, representing the San Diego Housing Commission, stated that organizations may have difficulty properly showing leveraged funding since some organizations are currently applying for other sources of funding that will not have been secured by the time they submit their CDBG Request for Proposals (RFP) responses.
- Mr. Daniel Hernandez, representing San Ysidro Health Center, stated that smaller nonprofit organizations may not have the capacity to compete under the nonprofit capital improvement project RFP category and suggested that larger nonprofits collaborate with smaller nonprofits to build up their ability to compete for those funds.

Ms. Granowitz called for a motion to approve the FY 2018 Scoring Criteria as presented by staff for Section 1, Section 2, and Section 5, and with the Board's revisions for Section 4 (Section 3 will be reconsidered by the Board at the December 2016 meeting). Mr. Thesing made the motion, which was seconded by Mr. Malbrough. Motion passed unanimously.

Discussion Item 7a:

***Climate Action Plan (CAP)***

Ms. Cody Hooven gave a brief presentation on the City's Climate Action Plan. *Please see attached handout for more information.*

*Public Comment Received:*

- Mr. Hernandez would like more information regarding how the Climate Action Plan is being implemented throughout the City and how it would affect the San Ysidro community, specifically in relation with gas emissions associated with the border crossing. Ms. Hooven responded that there are some efforts to coordinate with SANDAG and with Border management to identify how to reduce truck emissions.

Discussion Item 7b:***Training Tutorial on SeamlessDocs System for FY 2018 CDBG Request for Qualifications (RFQ)***

Ms. Rosalia Hernandez gave a brief presentation on how organizations can navigate the SeamlessDocs system to submit their RFQ responses. *Please see attached handout for more information.*

Adjournment
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- Meeting adjourned at 10:33 a.m.

Economic Development

## Proposed Revisions to Fiscal Year 2018 Scoring Criteria

Consolidated Plan Advisory Board  
November 9, 2016



 Economic Development

### FY 2018 Scoring Criteria

- Revisions recommended by CPAB Ad Hoc committees and City staff
- Separate but similar
  - Public Services and Challenge Grants
  - Community and Economic Development
  - Nonprofit Capital Improvement Projects and Housing Rehabilitation
    - *Sustainability Projects*

**SD Economic Development**

## FY 2018 Scoring Criteria

CPAB Comments from FY 2017 Scoring Criteria:

- Breakdown larger point-award sections into more defined pieces worth fewer points
- Increase Geographic Targeting point value
- Review how the point system worked for budgeting and leveraging

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**SD Economic Development**

## FY 2018 Scoring Criteria


**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2017 CDBG APPLICATION EVALUATION FORM**  
Category: PUBLIC SERVICES

Applicant Agency: \_\_\_\_\_

Project Name: \_\_\_\_\_

Reviewer's Name: \_\_\_\_\_

Reviewer's Signature: \_\_\_\_\_



Overall Score: \_\_\_\_\_

Category	Criteria	Reviewer Score	Maximum Score
1. Project Characteristics	a. Applicant provides a clear project summary which includes: I. Brief description of the project including resulting activities and/or services to be provided;		5
	II. Characteristics of Population(s) to be served; and		5
	III. The critical need(s) that will be addressed including how other resources are not available to meet the need(s).		5
	b. Applicant clearly explains how the proposed project will result in the provision of a <b>new service</b> or the expansion of an <b>existing service</b> .		5
	c. Applicant clearly identifies the goal(s) of the project and describes how these goals will be met.		5
	d. Applicant clearly identifies the results of the project: I. Number of unduplicated City of San Diego individuals or households to be assisted.		5
	Comments:   		
	<b>Total:</b>		<b>Points Possible</b>  30

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Economic Development

## FY 2018 Scoring Criteria

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
Category: PUBLIC SERVICES

**Applicant Agency:** \_\_\_\_\_

**Reviewer's Name:** \_\_\_\_\_

**Project Name:** \_\_\_\_\_

**Reviewer's Signature:** \_\_\_\_\_

**Overall Score:**

Category	Criteria	Reviewer Score	Maximum Score
<b>1. Project Characteristics</b>	<b>a.</b> Applicant provides a clear project summary which includes: I. Brief description of the project including resulting activities and/or services to be provided; II. Characteristics of Population(s) to be served; and III. The critical need(s) that will be addressed including how other resources are not available to meet the need(s).		5
	<b>b.</b> Applicant clearly explains how the <u>expected results of the</u> proposed project <u>and how it</u> will result in the provision of a <u>new service</u> or the expansion of an <u>existing service</u> .		5
	<b>c.</b> Applicant clearly identifies the goal(s) of the project and describes how these goals will be met.		5
	<b>d.</b> Applicant clearly identifies the results of the project: I. Number of unduplicated City of San Diego individuals <u>or households</u> to be assisted.		5
	Comments:		
	<b>Total:</b>		

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Economic Development

## FY 2018 Scoring Criteria

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2017 CDBG APPLICATION EVALUATION FORM**  
Category: COMMUNITY & ECONOMIC DEVELOPMENT

**Applicant Agency:** \_\_\_\_\_

**Reviewer's Name:** \_\_\_\_\_

**Project Name:** \_\_\_\_\_

**Reviewer's Signature:** \_\_\_\_\_

**Overall Score:**

Category	Criteria	Reviewer Score	Maximum Score
<b>1. Project Characteristics</b>	<b>a.</b> Applicant provides a clear project summary which includes: I. Brief description of the project including resulting activities and/or services to be provided; II. Characteristics of Population(s) to be served; and III. The critical need(s) that will be addressed including how other resources are not available to meet the need(s).		5
	<b>b.</b> Applicant clearly explains how the proposed project will result in the provision of a <u>new program</u> or the expansion/improvement of an <u>existing program</u> .		5
	<b>c.</b> Applicant clearly identifies the goal(s) of the project and describes how these goals will be met.		5
	<b>d.</b> Applicant clearly identifies the results of the project: I. Number of unduplicated City of San Diego individuals or households to be assisted; or II. Number of unduplicated City of San Diego businesses to be assisted.		5
	Comments:		
	<b>Total:</b>		

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## FY 2018 Scoring Criteria

CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM  
 Category: COMMUNITY & ECONOMIC DEVELOPMENT

Applicant Agency: \_\_\_\_\_
Project Name: \_\_\_\_\_

Overall Score:

Reviewer's Name: \_\_\_\_\_
Reviewer's Signature: \_\_\_\_\_

Category	Criteria	Reviewer Score	Maximum Score
1. Project Characteristics	a. Applicant provides a clear project summary which includes: i. Brief description of the project including resulting activities and/or services to be provided;		5
	ii. Characteristics of Population(s) to be served; and		5
	iii. The critical need(s) that will be addressed including how other resources are not available to meet the need(s).		5
	b. Applicant clearly explains <u>how</u> the <u>expected results of the proposed project</u> and <u>how it will result in the provision of a new program</u> or the expansion/improvement of an <u>existing program</u> .		5
	c. Applicant clearly identifies the goal(s) of the project and describe how these goals will be met.		5
	d. Applicant clearly identifies the results of the project: i. Number of unduplicated City of San Diego individuals or households to be assisted; <u>or</u> ii. Number of unduplicated City of San Diego businesses to be assisted.		5
	Comments:		
	<b>Total:</b>		

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## FY 2018 Scoring Criteria

FY 2017 Section 2: c.

c. Describe efforts to collaborate with other service agencies including organizations that provide similar services and resources.	5
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FY 2018 Section 2: c. & d.

c. Do you collaborate with other service agencies, including organizations that provide similar services and resources?	1
d. If so, describe HOW your agency collaborates with other service agencies and with whom.	4

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**SD Economic Development**

## FY 2018 Scoring Criteria

FY 2017 Section 3: d.

<b>d. Budget clearly lists all other funding sources secured for project, submits documentation for each source listed, and percent of funds leveraged (calculated by: other secured funding/total project costs) is:</b>	<b>CDD confirmed % &amp; pts</b>	<b>5</b>
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*Existing:*

- 0%-5% (0 points)
- 6%-20% (1 points)
- 21%-40% (2 points)
- 41%-60% (3 points)
- 61%-80% (4 points)
- 81%-100% (5 points)

*Proposed:*

- 0%-29% (0 points)
- 30%-40% (2 points)
- 41%-60% (3 points)
- 61%-80% (4 points)
- 80%-100% (5 points)

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**SD Economic Development**

## FY 2018 Scoring Criteria

FY 2017 Section 3: d.

Challenge Grant Agency	Leverage calculation	FY 17 Points	Proposed FY 18 Points
<b>Agency A</b>	<b>33.3%</b>	<b>2</b>	<b>2</b>
Agency B	12.03%	1	0
<b>Agency C</b>	<b>65.78%</b>	<b>4</b>	<b>4</b>
<b>Agency D</b>	<b>54.46%</b>	<b>3</b>	<b>3</b>
Agency E	0%	0	0
<b>Agency F</b>	<b>42.08%</b>	<b>3</b>	<b>3</b>
Agency G	18.96%	1	0
<b>Agency H</b>	<b>61%</b>	<b>4</b>	<b>4</b>
Agency I	0%	0	0
Agency J	0%	0	0

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 **Economic Development**

## FY 2018 Scoring Criteria

FY 2017 Section 3: d.

CED Agency	Leverage calculation	FY 17 Points	Proposed FY 18 Points
<b>Agency A</b>	<b>55.53%</b>	<b>3</b>	<b>3</b>
<b>Agency B</b>	<b>36.35%</b>	<b>2</b>	<b>2</b>
Agency C	30.82%	2	2
Agency D	60.13%	3	3
<b>Agency E</b>	<b>22%</b>	<b>2</b>	<b>0</b>
<b>Agency F</b>	<b>58.88%</b>	<b>3</b>	<b>3</b>
<b>Agency G</b>	<b>0%</b>	<b>0</b>	<b>0</b>
Agency H	0%	0	0
<b>Agency I</b>	<b>82.59%</b>	<b>5</b>	<b>5</b>
Agency J	21.88%	2	0

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 **Economic Development**


## FY 2018 Scoring Criteria

FY 2017 Section 3: d.

PS Agency	Leverage calculation	FY 17 pts	FY 18 proposed
Agency A	70.06%	4	
Agency B	9.21%	1	
Agency C	0%	0	
Agency D	27.35%	2	
<b>Agency E</b>	<b>62.23%</b>	<b>4</b>	<b>4</b>
Agency F	0%	0	
Agency G	0%	0	
Agency H	17.39%	1	
<b>Agency I</b>	<b>72.71%</b>	<b>4</b>	<b>4</b>
Agency J	57.34%	3	

PS Agency	Leverage calculation	FY 17 pts	FY 18 proposed
<b>Agency K</b>	<b>27.74%</b>	<b>2</b>	<b>0</b>
Agency L	0%	0	
Agency M	26.45%	2	
Agency N	81%	5	
Agency O	78.43%	4	
Agency P	62.95%	4	
Agency Q	12.2%	1	
Agency R	19.55%	1	
<b>Agency S</b>	<b>36.76%</b>	<b>2</b>	<b>2</b>

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 **Economic Development**


## FY 2018 Scoring Criteria

FY 2017 Section 3: d.

NCIP Agency	Leverage calculation	FY 17 Pts	FY 18 proposed
Agency A	35.84%	2	
Agency B	0%	0	
Agency C	0%	0	
<b>Agency D</b>	<b>81.01%</b>	<b>5</b>	<b>5</b>
Agency E	24.83%	2	
Agency F	6.6%	1	
Agency G	3.65%	0	
Agency H	0%	0	
<b>Agency I</b>	<b>21.69%</b>	<b>2</b>	<b>0</b>
<b>Agency J</b>	<b>45.81%</b>	<b>3</b>	<b>3</b>

NCIP Agency	Leverage calculation	FY 17 Pts	FY 18 proposed
Agency K	12.59%	1	
Agency L	0%	0	
<b>Agency M</b>	<b>7.08%</b>	<b>1</b>	<b>0</b>
Agency N	38.58%	2	
<b>Agency O</b>	<b>41.23%</b>	<b>3</b>	<b>3</b>
Agency P	41%	3	
Agency Q	21%	2	
Agency R	0%	0	
<b>Agency S</b>	<b>7.62%</b>	<b>1</b>	<b>0</b>
<b>Agency T</b>	<b>35.68%</b>	<b>2</b>	<b>2</b>

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 **Economic Development**

## FY 2018 Scoring Criteria

For CPAB Consideration:

- Keep leveraged points the same for Public Services and Community/Economic Development
- Adjust points for Nonprofit Capital Improvement Projects

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**SD Economic Development**

## FY 2018 Scoring Criteria

CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM		SD		
Category: NONPROFIT CIP & HOUSING REHABILITATION				
Category	Criteria	Reviewer Score	Maximum Score	
4. Project Benefits	<b>Non-profit Capital Improvement Projects, including Housing Activities</b> <i>(Applicant should either answer a, <u>and</u> d, <u>and</u> e, b, <u>and</u> d, <u>and</u> e, or c, <u>and</u> d, <u>and</u> e.)</i>			
	a. Applicant clearly describes how the project will provide services to high need populations and provides the references used for this determination. Public Projects must be considered a Low and Moderate Income Limited Clientele Activity (LMC) by serving one of the following populations: <ul style="list-style-type: none"> <li>i. Presumed low income clientele as defined by HUD*; or</li> <li>ii. Direct Benefit to Low Income Persons based on compliance with HUD* income limits through documented family size and income.</li> </ul>		40	
	OR b. low and Moderate Income Housing (LMH): Units occupied by low and moderate income persons.			
	OR c. Low and Moderate Income Area Benefit (LMA): Facility or improvements will provide activities that are available to benefit all the resident of an area which is primarily residential <u>and</u> that has a service area that qualifies with a majority of HUD eligible census block groups*.			
	d. Geographic Targeting: Proposed facility or housing improvements are located in at least one of the <u>three</u> the <u>best</u> efforts or strategies for Community Planning areas targeted for outreach to the <u>one</u> Community Planning areas identified as high need: Barrio Logan, San Ysidro, Linda Vista, Encanto, Southeastern, City Heights*.			2
	<i>*Please see the Applicant Handbook for further definitions.</i>			
	e. Geographic Targeting: Applicant has presented clear service delivery to clients located at or near one of more of the six Community Planning areas identified as high need: Barrio Logan, San Ysidro, Linda Vista, Encanto, Southeastern, City Heights*.		2	
	Comments:			
		Total:	Points Possible	

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**SD Economic Development**

## FY 2018 Scoring Criteria

CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM		SD		
Category: PUBLIC SERVICES				
Category	Criteria	Reviewer Score	Maximum Score	
4. Project Benefits	<b>Public Services</b> <i>(Applicant should answer a, and b, <u>and</u> c.)</i>			
	a. Applicant clearly describes how the project will provide services to high need populations and provides the references used for this determination. Public Service projects must be considered a Low and Moderate Income Limited Clientele Activity (LMC) by serving one of the following populations: <ul style="list-style-type: none"> <li>i. Presumed low income clientele as defined by HUD*; or</li> <li>ii. Direct Benefit to Low Income Persons based on compliance with HUD* income limits through documented family size and income.</li> </ul>		40	
	b. Geographic Targeting: Proposed facility or housing improvements are located in at least one of the <u>three</u> the <u>best</u> efforts or strategies for Community Planning areas targeted for outreach to the <u>one</u> of the six Community Planning areas identified as high need: Barrio Logan, San Ysidro, Linda Vista, Encanto, Southeastern, City Heights*.			2
	<i>*Please see the Applicant Handbook for further definitions.</i>			
	c. Geographic Targeting: Applicant has presented clear service delivery to clients located at or near one or more of the six Community Planning areas identified as high need: Barrio Logan, San Ysidro, Linda Vista, Encanto, Southeastern, City Heights*.			2
	Comments:			
		Total:	Points Possible	

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Economic Development

## FY 2018 Scoring Criteria

For CPAB Consideration:

- Public Services and Community/Economic Development would be 4 points for service delivery to targeted areas
- Nonprofit CIP would be split:
  - 2 points for location
  - 2 points for service delivery

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Economic Development

## FY18 Scoring Criteria

CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM  
 Category: PUBLIC SERVICES

Category	Criteria	Reviewer Score	Maximum Score
5. Project Specifics	a. Applicant provides a listing of the services to be provided and a clear description of each of these services which includes, as applicable, the following details:		23
	i. The quantity and duration of each of these services;		23
	ii. The method of delivery;		23
	iii. Details regarding whether each of these services will be provided on an individual basis and/or group settings; and		25
	iv. Explain and justify the total amount of CDBG funds requested in relation to the services provided and any fees charged.		45
	b. Project Scope & Schedule		
	i. The Scope of Work and Budget, <del>in its entirety,</del> demonstrates compliance with CDBG eligibility requirements, National Objective and other HUD and City requirements, and	[Missed] confirmed points: ...	21
	ii. The Scope of Work and Budget demonstrates compliance with National Objective and other HUD and City requirements, and	[Local confirmed points: ...]	1
iii. Applicant has clearly described how the project will be completed within the required 12-month timeline.		10	
Comments:			
	<b>Total:</b>		<b>Points Possible</b>
			22

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## FY 2018 Scoring Criteria

CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM  
 Category: NONPROFIT CIP & HOUSING REHABILITATION

Category	Criteria	Reviewer Score	13 Maximum Score
5. Project Specifics	<b>a. Applicant clearly describes Contract Execution Readiness: Extent to which a project is ready to proceed by detailing that:</b> I. Total amount of CDBG funds requested is justified by accurate cost estimations; <i>-if the facility has received CDBG funds for improvements/expansions in the past, applicant must explain the outcome and justification for the request of additional CDBG funds.</i>	4	4
	II. The level of Environmental Review (City, State and Federal) needed has been identified and planned for, as demonstrated by HUD Programs staff verification; and	2	2
	III. Clearly describe all applicable permits have been identified, planned for, and/or secured. If permits not needed, applicant clearly describes basis of that determination.	2	2
	<b>b. Project Scope &amp; Schedule</b> I. The CDBG eligible Scope of Work and Budget, <u>in its entirety</u> , demonstrates compliance CDBG eligibility requirements, with meeting National Objectives and other HUD requirements, as demonstrated by HUD Programs staff verification.	3	3
	c. The eligible Scope of Work and Budget demonstrates compliance with meeting National Objectives and other HUD requirements, and:	1	1
	II. Applicant has clearly described how the project will be completed and funds expended (thin the required 3624-month timeline (12) specifying key milestones: <ul style="list-style-type: none"> <li>1) <u>Permitting and design completion</u></li> <li>2) <u>Project will be released for bid</u></li> <li>3) <u>Construction contract awarded</u></li> <li>4) <u>Anticipated Construction Timeline</u></li> <li>5) <u>100% expenditure level</u></li> <li>6) <u>Project completion, beneficiaries reported (National Objective met), and close out report approved by HUD Programs staff</u></li> </ul>	4	4
	Comments:		
<b>Total:</b>			<b>Points Possible</b>


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SD Economic Development

## FY 2018 Scoring Criteria

- Sustainability Criteria
- Subset of NCIP criteria
- Minor edits to identify sustainability projects

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## FY 2018 Scoring Criteria

CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM  
 Category: NONPROFIT CP & HOUSING REHABILITATION (Sustainability)


Applicant Agency: \_\_\_\_\_ Project Name: \_\_\_\_\_

Reviewer's Name: \_\_\_\_\_ Reviewer's Signature: \_\_\_\_\_

Overall Score:

Category	Criteria	Reviewer Score	Maximum Score	
1. Project Characteristics	a. Applicant provides a clear project summary which includes: i. Brief description of the project including resulting activities and/or services to be provided; ii. Characteristics of Population(s) to be served; and iii. The critical need(s) that will be addressed including how other resources are not available to meet the need(s). <i>Applicants should either answer B, I, and II, or III, or B, IV, V, and VI.</i>		5	
	b. Applicant clearly explains how the proposed project will result in <del>new facility expansion of an existing facility or</del> <u>will result in energy efficiency, water efficiency, and/or waste diversion improvements to an existing facility or housing:</u> i. <u>Facility Improvements:</u> <u>Number and type of major</u> Describe and quantify the sustainability improvements <u>proposed</u> to facility; <del>or AND</del> ii. <del>Explain the methodology used to quantify the proposed sustainability improvements of energy and cost savings as a result of the proposed improvements; AND</del> iii. <u>Describe applicant's investment plan for the "cost savings" or "cost avoidance" resulting from the proposed improvements; OR</u> iv. <u>Housing Rehab:</u> <u>Number and type of housing stabilization</u> Describe and quantify the proposed sustainability improvements proposed for the housing units; v. <u>Explain the methodology used to quantify the proposed sustainability improvements; AND</u> vi. <u>Describe the anticipated energy and "cost savings" or "cost avoidance" (per household) as a result of the proposed improvements.</u>		5	
	c. Applicant clearly identifies the goal(s) of the project and describes how these goals will be met <u>in relation to the Climate Action Plan.</u>			5
	d. Applicant clearly identifies the results of the project: i. Number of unduplicated City of San Diego individuals or households to be assisted; or ii. Number of unduplicated City of San Diego businesses to be assisted.			5
				5

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## Requested Action

The CPAB approves the revisions to the FY 2018 RFP Scoring Criteria.

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**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: PUBLIC SERVICES**



**Applicant Agency:** \_\_\_\_\_

**Project Name:** \_\_\_\_\_

**Overall Score:**  
 \_\_\_\_\_

**Reviewer's Name:** \_\_\_\_\_

**Reviewer's Signature:** \_\_\_\_\_

Category	Criteria	Reviewer Score	Maximum Score
1. Project Characteristics	a. Applicant provides a clear project summary which includes: i. Brief description of the project including resulting activities and/or services to be provided;		5
	ii. Characteristics of Population(s) to be served; and		5
	iii. The critical need(s) that will be addressed including how other resources are not available to meet the need(s).		5
	b. Applicant clearly explains <del>how</del> the <u>expected results of the</u> proposed project <u>and how it</u> will result in the provision of a <u>new service</u> or the expansion of an <u>existing service</u> .		5
	c. Applicant clearly identifies the goal(s) of the project and describes how these goals will be met.		5
	d. Applicant clearly identifies the results of the project: i. Number of unduplicated City of San Diego individuals <del>or households</del> to be assisted.		5
	Comments:		
	<b>Total:</b>		<b>Points Possible</b>
			<b>30</b>

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Reviewer Initials: \_\_\_\_\_



**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: PUBLIC SERVICES**



Category	Criteria	Reviewer Score	Maximum Score
<b>2. Organizational Capacity</b>	a. Applicant clearly describes their experience in successfully implementing projects of similar scope and of comparable complexity.		5
	b. Applicant has experience in providing services to low and moderate income residents or presumed low and moderate income CDBG beneficiaries such as seniors, illiterate adults, homeless persons, abused children and/or battered spouses.		5
	c. <u>i. Do you collaborate with other service agencies, including organizations that provide similar services and resources? describe efforts to collaborate with other service agencies including organizations that provide similar services and resources. ["Collaborate" is defined in the RFP Handbook]</u>		<u>15</u>
	<u>ii. If so, describe HOW your agency collaborates with other service agencies and with whom.</u>		<u>4</u>
	Comments:		
		<b>Total:</b>	<b>Points Possible</b>
			<b>15</b>
<b>3. Budget</b>	a. Applicant identifies alternative future sources of funding to support the proposed project and demonstrates that the project will not rely on CDBG funds for program sustainability.		5
	b. Budget for project clearly identifies all sources of funding for the total project costs.		5
	c. Budget clearly details uses of funds (City of SD CDBG funds and non-City of SD CDBG funds) by eligible budget line items.		5
	d. Budget clearly lists all other funding sources secured for project, submits documentation for each source listed, and percent of funds leveraged (calculated by: other secured funding/total project costs) is:  <b>TBD</b>	(HPA-CDD confirmed: % & points)	5
	Comments:		
		<b>Total:</b>	<b>Points Possible</b>
			<b>20</b>

Reviewer Initials: \_\_\_\_\_

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: PUBLIC SERVICES**



Category	Criteria	Reviewer Score	Maximum Score
4. Project Benefits	<b>Public Services</b>  <i>(Applicant should answer a. and b. <u>and c.</u>)</i>		
	<ul style="list-style-type: none"> <li>a. Applicant clearly describes how the project will provide services to high need populations and provides the references used for this determination. Public Service projects must be considered a Low and Moderate income Limited Clientele Activity (LMC) by serving one of the following populations:                             <ul style="list-style-type: none"> <li>i. Presumed low income clientele as defined by HUD*; or</li> <li>ii. Direct Benefit to Low Income Persons based on compliance with HUD* income limits through documented family size and income.</li> </ul> </li> </ul>	129	
	<ul style="list-style-type: none"> <li><del>b. Geographic Targeting: smain office is within</del> Describe efforts and strategies to target within one or more of the six Community Planning areas identified as high need: Barrio Logan, San Ysidro, Linda Vista, Encanto, Southeastern, City Heights.*</li> </ul> <p><i>*Please see the Applicant Handbook for further definitions.</i></p>		1
	<ul style="list-style-type: none"> <li><del>c. b. Geographic Targeting: Applicant has presented clear service delivery to clients located at or near one or more of the six Community Planning areas identified as high need: Barrio Logan, San Ysidro, Linda Vista, Encanto, Southeastern, City Heights.*</del></li> </ul>		4
	Comments:		
		<b>Total:</b>	<b>Points Possible</b>
			<b>13</b>

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Reviewer Initials: \_\_\_\_\_

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: PUBLIC SERVICES**



Category	Criteria	Reviewer Score	Maximum Score	
5. Project Specifics	a. Applicant provides a listing of the services to be provided and a clear description of each of these services which includes, as applicable, the following details:		23	
	i. The quantity and duration of each of these services;		23	
	ii. The method of delivery;		25	
	iii. Details regarding whether each of these services will be provided on an individual basis and/or group settings; and		45	
	iv. Explain and justify the total amount of CDBG funds requested in relation to the services provided and any fees charged.			
	<b>b. Project Scope &amp; Schedule</b>		<i>(HRA-CDD confirmed points: __)</i>	21
	i. The Scope of Work and Budget, <del>in its entirety,</del> demonstrates compliance with CDBG eligibility requirements, <del>National Objective and other HUD and City requirements; and</del>	<i>(CDD confirmed points: __)</i>	1	
	ii. <del>The Scope of Work and Budget demonstrates compliance with National Objective and other HUD and City requirements; and</del>			
iii. Applicant has clearly described how the project will be completed within the required 12-month timeline.		104		
Comments:				
	<b>Total:</b>		<b>Points Possible</b>	
			<b>22</b>	

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Reviewer Initials: \_\_\_\_\_

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: PUBLIC SERVICES**



Category	Criteria	Reviewer Score	Maximum Score
<b>6. Performance Indicators</b>	<p>City of San Diego Track Record: Rating based on past performance of applicant agency on projects previously funded by the City of San Diego under the CDBG program*. <i>These are subtractive points from maximum 100 point score, determined by performance levels:</i></p> <ul style="list-style-type: none"> <li>• Minor deficiencies (-1)</li> <li>• Moderate deficiencies (-2)</li> <li>• Significant deficiencies (-3)</li> </ul> <p>Performance Indicator data collected from FY <a href="#">2015-2016</a> forward for use in <a href="#">FY 18 Evaluations FY 2018 evaluations</a></p>	<p align="center"><a href="#">CDD confirmed score:</a></p>	<p align="center">-3</p>

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Reviewer Initials: \_\_\_\_\_

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: COMMUNITY & ECONOMIC DEVELOPMENT**



**Applicant Agency:** \_\_\_\_\_

**Project Name:** \_\_\_\_\_

**Overall Score:**

**Reviewer's Name:** \_\_\_\_\_

**Reviewer's Signature:** \_\_\_\_\_

Category	Criteria	Reviewer Score	Maximum Score
1. Project Characteristics	a. Applicant provides a clear project summary which includes: i. Brief description of the project including resulting activities and/or services to be provided;		5
	ii. Characteristics of Population(s) to be served; and		5
	iii. The critical need(s) that will be addressed including how other resources are not available to meet the need(s).		5
	b. Applicant clearly explains <u>how</u> the <u>expected results of the</u> proposed project <u>and how it</u> will result in the provision of a <b>new program</b> or the expansion/improvement of an <b>existing program</b> .		5
	c. Applicant clearly identifies the goal(s) of the project and describes how these goals will be met.		5
	d. Applicant clearly identifies the results of the project: i. Number of unduplicated City of San Diego individuals or households to be assisted; <del>or</del> <u>or</u> ii. Number of unduplicated City of San Diego businesses to be assisted.		5
	Comments:		
	<b>Total:</b>		<b>Points Possible</b>
			<b>30</b>

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Reviewer Initials: \_\_\_\_\_

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: COMMUNITY & ECONOMIC DEVELOPMENT**



Category	Criteria	Reviewer Score	Maximum Score
<b>2. Organizational Capacity</b>	a. Applicant clearly describes their experience in successfully implementing projects of similar scope and of comparable complexity.		5
	b. Applicant has experience in providing services to low and moderate income residents or presumed low and moderate income CDBG beneficiaries such as seniors, illiterate adults, homeless persons, abused children and/or battered spouses.		5
	c. <del>Describe efforts to collaborate with other service agencies, including organizations that provide similar services and resources. Do you collaborate with other service agencies, including organizations that provide similar services and resources? ["Collaborate" is defined in the RFP Handbook]</del>		5
	d. <del>If so, describe HOW your agency collaborates with other service agencies and with whom.</del>		4
	Comments:		
		<b>Total:</b>	<b>Points Possible</b>
			<b>15</b>
<b>3. Budget</b>	a. Applicant identifies alternative future sources of funding to support the proposed project and demonstrates that the project will not rely on CDBG funds for program sustainability.		5
	b. Budget for project clearly identifies all sources of funding for the total project costs.		5
	c. Budget clearly details uses of funds (City of SD CDBG funds and non-City of SD CDBG funds) by eligible budget line items.		5
	d. Budget clearly lists all other funding sources secured for project, submits documentation for each source listed, and percent of funds leveraged (calculated by: other secured funding/total project costs) is:  <b>TBD</b>	(HPA-CDD confirmed: % & points)	5
	Comments:		
		<b>Total:</b>	<b>Points Possible</b>
			<b>20</b>

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Reviewer Initials: \_\_\_\_\_

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: COMMUNITY & ECONOMIC DEVELOPMENT**



Category	Criteria	Reviewer Score	Maximum Score
4. Project Benefits	<p><b>Community &amp; Economic Development</b></p> <p><i>(Applicant should either answer a. and c. or b. and c.)</i></p> <p><b>a.</b> Applicant clearly describes how the project will provide services to high need populations and provides the sources used for this determination. CED projects must be considered a Low and Moderate Income limited Clientele Activity (LMC) by serving one of the following populations:</p> <p>i. Presumed Low Income Clientele as defined by HUD* or</p> <p>ii. Direct Benefit to Low Income Persons based on compliance with HUD* income limits through documented family size and income.</p> <p><b>OR</b></p> <p><b>b.</b> Low to Moderate Income Housing (LMH): Units occupied by Low and Moderate Income persons.</p>		<del>12</del> 129
	<p><b>c.</b> Geographic Targeting: <u>Applicant has presented clear service delivery to clients located at or near</u> <del>Describe efforts and strategies to target within one</del> or more of the six Community Planning areas identified as high need: Barrio Logan, San Ysidro, Linda Vista, Encanto, Southeastern, City Heights*.</p> <p><i>*Please see the Applicant Handbook for further definitions.</i></p>		<del>14</del> 14
	<p>Comments:</p>		
		<b>Total:</b>	<b>Points Possible</b>
			<b>13</b>

Reviewer Initials: \_\_\_\_\_

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: COMMUNITY & ECONOMIC DEVELOPMENT**



Category	Criteria	Reviewer Score	Maximum Score
5. Project Specifics	a. Applicant provides a listing of the services to be provided and a clear description of each of these services which includes, as applicable, the following details:		23
	i. The quantity and duration;		23
	ii. The method of delivery;		25
	iii. Details regarding whether each of these services will be provided on an individual basis and/or group settings ; and		45
	iv. Explain and justify the total amount of CDBG funds requested in relation to the services provided and any fees charged.		21
	<b>b. Project Scope &amp; Schedule</b>		<i>(HRA-CDD confirmed points: __)</i>
	i. The Scope of Work and Budget, <u>in its entirety</u> , demonstrates compliance with CDBG eligibility <u>requirements, National Objectives and other HUD and City requirements; and</u>		<i>(CDD confirmed points: __)</i>
	ii. <u>The Scope of Work and Budget demonstrates compliance with National Objectives and other HUD and City requirements; and</u>		1
iii. Applicant has clearly described how the project will be completed within the required 12-month timeline, including project close out and final reporting.		104	
Comments:			
	<b>Total:</b>		<b>Points Possible</b>
			<b>22</b>

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Reviewer Initials: \_\_\_\_\_



**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: COMMUNITY & ECONOMIC DEVELOPMENT**



Category	Criteria	Reviewer Score	Maximum Score
<b>6. Performance Indicators</b>	<p>City of San Diego Track Record: Rating based on past performance of applicant agency on projects previously funded by the City of San Diego under the CDBG programs -<i>These are subtractive points from maximum 100 point score, designed by documented performance level:</i></p> <ul style="list-style-type: none"> <li>• Minor deficiencies (-1)</li> <li>• Moderate deficiencies (-2)</li> <li>• Significant deficiencies (-3)</li> </ul> <p><b>Performance Indicator data collected from FY <a href="#">2015-2016 forward</a> for use in FY <a href="#">2018 evaluations</a></b></p>		-3

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Reviewer Initials: \_\_\_\_\_

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: NONPROFIT CIP & HOUSING REHABILITATION**



**Applicant Agency:** \_\_\_\_\_

**Project Name:** \_\_\_\_\_

<b>Overall Score:</b>
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**Reviewer's Name:** \_\_\_\_\_

**Reviewer's Signature:** \_\_\_\_\_

Category	Criteria	Reviewer Score	Maximum Score
<b>1. Project Characteristics</b>	<b>a.</b> Applicant provides a clear project summary which includes: <b>i.</b> Brief description of the project including resulting activities and/or services to be provided;		5
	<b>ii.</b> Characteristics of Population(s) to be served; and		5
	<b>iii.</b> The critical need(s) that will be addressed including how other resources are not available to meet the need(s).		5
	<b>b.</b> Applicant clearly explains how the proposed project will result in a <b>new facility, expansion</b> of an existing facility, or <b>improvements</b> to an existing facility or housing: <b>i.</b> Number and type of major improvements to facility; or <b>ii.</b> Housing stabilization improvements.		5
	<b>c.</b> Applicant clearly identifies the goal(s) of the project and describes how these goals will be met.		5
	<b>d.</b> Applicant clearly identifies the results of the project: <b>i.</b> Number of unduplicated City of San Diego individuals or households to be assisted; or <b>ii.</b> Number of unduplicated City of San Diego businesses to be assisted.		5
	Comments:		
	<b>Total:</b>		<b>Points Possible</b>
			<b>30</b>

Reviewer Initials: \_\_\_\_\_

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: NONPROFIT CIP & HOUSING REHABILITATION**



Category	Criteria	Reviewer Score	Maximum Score
<b>2. Organizational Capacity</b>	a. Applicant clearly describes their experience in successfully implementing projects of similar scope and of comparable complexity.		5
	b. Applicant has experience in providing services to low and moderate income residents or presumed low and moderate income CDBG beneficiaries such as seniors, illiterate adults, homeless persons, abused children and/or battered spouses.		5
	c. <del>Describes efforts to collaborate with other service agencies including organizations that provided similar services and resources. Do you collaborate with other service agencies, including organizations that provide similar services and resources? [Collaborate is defined in the RFP handbook.]</del>		5
	d. <u>If so, describe HOW your agency collaborates with other service agencies and with whom.</u>		4
	Comments:	<b>Total:</b>	<b>Points Possible</b>
		<b>15</b>	
<b>3. Budget</b>	a. Applicant identifies alternative future sources of funding to support the proposed project and demonstrates that the project will not rely on CDBG funds for maintenance of improvements.		5
	b. Budget for project clearly identifies all sources of funding for the total project costs.		5
	c. Budget clearly details uses of funds (City of SD CDBG funds and non-City of SD CDBG funds) by eligible budget line items.		5
	d. Budget clearly lists all other funding sources secured for project, submits documentation for each source listed, and percent of funds leveraged (calculated by: other secured funding/total project costs) is:  <b>TBD</b>	(HPA-CDD confirmed: % & points)	5
	Comments:	<b>Total:</b>	<b>Points Possible</b>
		<b>20</b>	

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Reviewer Initials: \_\_\_\_\_

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: NONPROFIT CIP & HOUSING REHABILITATION**



Category	Criteria	Reviewer Score	Maximum Score
4. Project Benefits	<p><b>Non-profit Capital Improvement Projects, including Housing Activities</b></p> <p><i>(Applicant should either answer a., <del>and</del> d. <u>and e.</u>, b., <del>and</del> d. <u>and e.</u>, or c. <del>and</del> d. <u>and e.</u>)</i></p> <p>a. Applicant clearly describes how the project will provide services to high need populations and provides the references used for this determination. Public Projects must be considered a Low and Moderate Income Limited Clientele Activity (LMC) by serving one of the following populations:</p> <ul style="list-style-type: none"> <li>i. Presumed Benefit low income clientele as defined by HUD*;</li> <li>ii. Direct Benefit to Low Income Persons based on compliance with HUD* income limits through documented family size and income.</li> </ul> <p><b>OR</b></p> <p>b. Low and Moderate Income Housing (LMH): Units occupied by low and moderate income persons.</p> <p><b>OR</b></p> <p>c. Low and Moderate Income Area Benefit (LMA): Facility or improvements will provide activities that are available to benefit all the resident of an area which is primarily residential <b>and</b> that has a service area that qualifies with a majority of HUD eligible census block groups*.</p> <p>d. Geographic Targeting: <u>Proposed facility or housing improvements are located in at least one of the Describe any efforts or strategies for Community Planning areas targeted for outreach to the six Community Planning areas</u> identified as high need: Barrio Logan, San Ysidro, Linda Vista, Encanto, Southeastern, City Heights*.</p> <p><i>*Please see the Applicant Handbook for further definitions.</i></p> <p><del>a.</del> <u>e. Geographic Targeting: Applicant has presented clear service delivery to clients located at or near one of more of the six Community Planning areas identified as high need: Barrio Logan, San Ysidro, Linda Vista, Encanto, Southeastern, City Heights*.</u></p>		129
			12
			2
		Comments:	
	<b>Total:</b>		<b>Points Possible</b>

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Reviewer Initials: \_\_\_\_\_

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: NONPROFIT CIP & HOUSING REHABILITATION**



Category	Criteria	Reviewer Score	Maximum Score
			<b>13</b>
<b>5. Project Specifics</b>	<b>a. Applicant clearly describes Contract Execution Readiness: Extent to which a project is ready to proceed by detailing that:</b>		
	i. Total amount of CDBG funds requested is justified by accurate cost estimations; -If the facility has received CDBG funds for improvements/expansions in the past, applicant must explain the outcome and justification for the request of additional CDBG funds.		<u>6</u>
	ii. The level of Environmental Review (City, State and Federal) needed has been identified and planned for, as demonstrated by HUD Programs staff verification; and	<i>(HPA-CDD confirmed score: __)</i>	2
	iii. Clearly describe all applicable permits have been identified, planned for, and/or secured. If permits not needed, applicant clearly describes basis of that determination.		2
	<b>b. Project Scope &amp; Schedule</b>		
	i. The <del>CDBG eligible</del> Scope of Work and Budget, <u>in its entirety</u> , demonstrates compliance <del>CDBG eligibility requirements with meeting National Objectives and other HUD requirements, as demonstrated by HUD Programs staff verification;</del>	<i>(HPA-CDD confirmed score: __)</i>	<u>2</u>
	c. <u>The eligible Scope of Work and Budget demonstrates compliance with meeting National Objectives and other HUD requirements; and</u>		<u>1</u>
ii. Applicant has clearly described how the project will be completed and funds expended within the required <del>18</del> <u>24</u> -month timeline ( <del>12</del> ) specifying key milestones: <u>1) Permitting and design completion</u> <del>1</del> <u>2</u> Project will be released for bid <del>2</del> <u>3</u> Construction contract awarded <del>3</del> <u>4</u> Anticipated Construction Timeline <del>4</del> <u>5</u> 100% expenditure level <del>5</del> <u>6</u> Project completion, beneficiaries reported (National Objective met), and close out report approved by HUD Programs staff		<u>10</u>	
Comments:			
	<b>Total:</b>		<b>Points Possible</b>

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Reviewer Initials: \_\_\_\_\_

CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM  
 Category: NONPROFIT CIP & HOUSING REHABILITATION



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Category	Criteria	Reviewer Score	Maximum Score
6. Performance Indicators	<p>City of San Diego Track Record: Rating based on past performance of applicant agency on projects previously funded by the City of San Diego under the CDBG programs*. <i>These are subtractive points from maximum 100 point score, designed by documented performance levels:</i></p> <ul style="list-style-type: none"> <li>• Minor deficiencies (-1)</li> <li>• Moderate deficiencies (-2)</li> <li>• Significant deficiencies (-3)</li> </ul> <p>Performance Indicator data collected from FY 2015 <del>forward</del> for use in FY 2018 evaluations</p>		-3

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Reviewer Initials: \_\_\_\_\_

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: NONPROFIT CIP & HOUSING REHABILITATION (Sustainability)**



Applicant Agency:

Project Name:

Overall Score:

Reviewer's Name:

Reviewer's Signature: \_\_\_\_\_

Category	Criteria	Reviewer Score	Maximum Score
1. Project Characteristics	a. Applicant provides a clear project summary which includes: i. Brief description of the project including resulting activities and/or services to be provided;		5
	ii. Characteristics of Population(s) to be served; and		5
	iii. The critical need(s) that will be addressed including how other resources are not available to meet the need(s).		5
	<i>(Applicant should either answer B. i. and, ii and iii. OR B. iii, v. and vi.)</i>		
	b. Applicant clearly explains how the proposed project will result in <u>a new facility, expansion of an existing facility, or will result in energy efficiency, water efficiency, and/or waste diversion improvements</u> to an existing facility or housing : i. <u>Facility Improvements: Number and type of major improvements proposed to facility; <del>OR</del> AND</u> ii. <u>Anticipate Explain the methodology used to quantify the proposed sustainability improvements <del>and energy and cost savings as a result of the proposed improvements</del>; AND</u> iii. <u>Describe applicant's reinvestment plan for the "cost savings" or "cost avoidance" resulting from the proposed improvements; OR</u> iv. <u>Housing Rehab: Number and type of Hhousing stabilization-Describe and quantify the proposed sustainability improvements proposed for the housing units;-</u> v. <u>Explain the methodology used to quantify the proposed sustainability improvements; AND</u> vi. <u>Describe the Anticipated energy and "cost savings" or "cost avoidance" (per household) as a result of the proposed improvements.</u>		5
	c. Applicant clearly identifies the goal(s) of the project and describes how these goals will be met; <u>in relation to the Climate Action Plan.</u>		5
	d. Applicant clearly identifies the results of the project: i. Number of unduplicated City of San Diego individuals or households to be assisted; or ii. Number of unduplicated City of San Diego businesses to be assisted.		5

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Reviewer Initials: \_\_\_\_\_

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: NONPROFIT CIP & HOUSING REHABILITATION ([Sustainability](#))**



	Comments:	<b>Total:</b>	<b>Points Possible</b>
			<b>30</b>

Category	Criteria	Reviewer Score	Maximum Score
<b>2. Organizational Capacity</b>	a. Applicant clearly describes their experience in successfully implementing projects of similar scope and of comparable complexity.		5
	b. Applicant has experience in providing services to low and moderate income residents or presumed low and moderate income CDBG beneficiaries such as seniors, illiterate adults, homeless persons, abused children and/or battered spouses.		5
	c. <del>Describes efforts to collaborate with other service agencies including organizations that provided similar services and resources. Do you collaborate with other service agencies, including organizations that provide similar services and resources? [Collaborate is defined in the RFP handbook.]</del>		<u>5</u>
	d. <u>If so, describe HOW your agency collaborates with other service agencies and with whom.</u>		<u>4</u>
	Comments:		
		<b>Total:</b>	<b>Points Possible</b>
			<b>15</b>
<b>3. Budget</b>	a. Applicant identifies alternative future sources of funding to support the proposed project and demonstrates that the project will not rely on CDBG funds for maintenance of improvements.		5
	b. Budget for project clearly identifies all sources of funding for the total project costs.		5
	c. Budget clearly details uses of funds (City of SD CDBG funds and non-City of SD CDBG funds) by eligible budget line items.		5

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Reviewer Initials: \_\_\_\_\_



**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: NONPROFIT CIP & HOUSING REHABILITATION ([Sustainability](#))**



	<p><b>d.</b> Budget clearly lists all other funding sources secured for project, submits documentation for each source listed, and percent of funds leveraged (calculated by: other secured funding/total project costs) is:</p> <p align="center"><b>TBD</b></p>	( <del>HPA-CDD</del> confirmed: % & points)	5
	Comments:	<b>Total:</b>	<b>Points Possible</b>
			<b>20</b>
<b>Category</b>	<b>Criteria</b>	<b>Reviewer Score</b>	<b>Maximum Score</b>
<b>4. Project Benefits</b>	<p><b>Non-profit Capital Improvement Projects, including Housing Activities</b></p> <p><i>(Applicant should either answer a., <del>and</del> d. <u>and e.</u>, b., <del>and</del> d. <u>and e.</u>, or c., <del>and</del> d. <u>and e.</u>)</i></p> <p><b>a.</b> Applicant clearly describes how the project will provide services to high need populations and provides the references used for this determination. Public Projects must be considered a Low and Moderate Income Limited Clientele Activity (LMC) by serving one of the following populations:</p> <p>i. Presumed Benefit low income clientele as defined by HUD*; or</p> <p>ii. Direct Benefit to Low Income Persons based on compliance with HUD* income limits through documented family size and income.</p> <p><b>OR</b></p> <p><b>b.</b> Low and Moderate Income Housing (LMH): Units occupied by low and moderate income persons.</p> <p><b>OR</b></p> <p><b>c.</b> Low and Moderate Income Area Benefit (LMA): Facility or improvements will provide activities that are available to benefit all the resident of an area which is primarily residential <b>and</b> that has a service area that qualifies with a majority of HUD eligible census block groups*.</p>		<u>129</u>

Reviewer Initials: \_\_\_\_\_

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: NONPROFIT CIP & HOUSING REHABILITATION (Sustainability)**



	<p><b>d.</b> Geographic Targeting: <u>Proposed facility or housing improvements are located in at least one of the Describe any efforts or strategies for Community Planning areas</u> targeted for outreach to the <u>six Community Planning areas</u> identified as high need: Barrio Logan, San Ysidro, Linda Vista, Encanto, Southeastern, City Heights*.</p> <p><i>*Please see the Applicant Handbook for further definitions.</i></p>		42
	<p><b>e.</b> Geographic Targeting: Applicant has presented clear service delivery to clients located at or near one of more of the six Community Planning areas identified as high need: Barrio Logan, San Ysidro, Linda Vista, Encanto, Southeastern, City Heights*.</p>		2
	Comments:		
		<b>Total:</b>	<b>Points Possible</b> 13
<b>Category</b>	<b>Criteria</b>	<b>Reviewer Score</b>	<b>Maximum Score</b>
<b>5. Project Specifics</b>	<p><b>a. Applicant clearly describes Contract Execution Readiness: Extent to which a project is ready to proceed by detailing that:</b></p> <p><b>i.</b> Total amount of CDBG funds requested is justified by accurate cost estimations; <i>-If the facility has received CDBG funds for improvements/expansions in the past, applicant must explain the outcome and justification for the request of additional CDBG funds.</i></p>		64
	<p><b>ii.</b> The level of Environmental Review (City, State and Federal) needed has been identified and planned for, as demonstrated by HUD Programs staff verification; and</p>	<i>(HPA-CDD confirmed score: __)</i>	2
	<p><b>iii.</b> Clearly describe all applicable permits have been identified, planned for, and/or secured. If permits not needed, applicant clearly describes basis of that determination.</p>		2
	<p><b>b. Project Scope &amp; Schedule</b></p> <p><b>i.</b> The <u>CDBG eligible</u> Scope of Work and Budget, <u>in its entirety</u>, demonstrates compliance <u>CDBG eligibility requirements with meeting National Objectives and other HUD requirements, as demonstrated by HUD Programs staff verification;</u></p>	<i>(HPA-CDD confirmed score: __)</i>	21

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Reviewer Initials: \_\_\_\_\_

**CONSOLIDATED PLAN ADVISORY BOARD FISCAL YEAR 2018 CDBG APPLICATION EVALUATION FORM**  
**Category: NONPROFIT CIP & HOUSING REHABILITATION (Sustainability)**



<p><b>c.</b> <u>The eligible Scope of Work and Budget demonstrates compliance with meeting National Objectives and other HUD requirements; and</u></p>		1
<p><b>ii.</b> Applicant has clearly described how the project will be completed and funds expended within the required <del>18</del>24-month timeline (<del>12</del>) specifying key milestones:</p> <p><u>1) Permitting and design completion</u></p> <p><del>1</del>2) Project will be released for bid</p> <p><del>2</del>3) Construction contract awarded</p> <p><del>3</del>4) Anticipated Construction Timeline</p> <p><del>4</del>5) 100% expenditure level</p> <p><del>5</del>6) Project completion, beneficiaries reported (National Objective met), and close out report approved by HUD Programs staff</p>		<del>10</del> 12
<p>Comments:</p>	<b>Total:</b>	<b>Points Possible</b>
		<b>22</b>

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Category	Criteria	Reviewer Score	Maximum Score
<p><b>6. Performance Indicators</b></p>	<p>City of San Diego Track Record: Rating based on past performance of applicant agency on projects previously funded by the City of San Diego under the CDBG programs*. <i>These are subtractive points from maximum 100 point score, designed by documented performance levels:</i></p> <ul style="list-style-type: none"> <li>Minor deficiencies (-1)</li> <li>Moderate deficiencies (-2)</li> <li>Significant deficiencies (-3)</li> </ul> <p>Performance Indicator data collected from FY 2015 forward for use in FY 2018 evaluations</p>		-3

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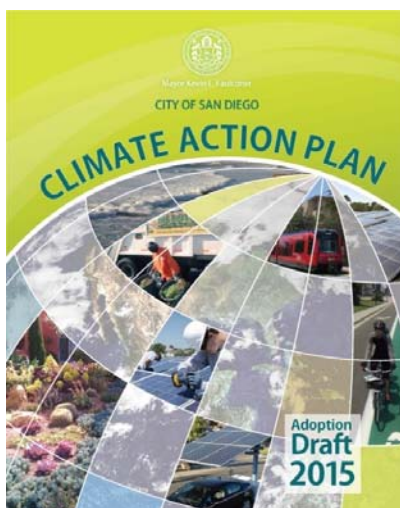
Reviewer Initials: \_\_\_\_\_

# Smart and Beautiful: Climate Action in San Diego

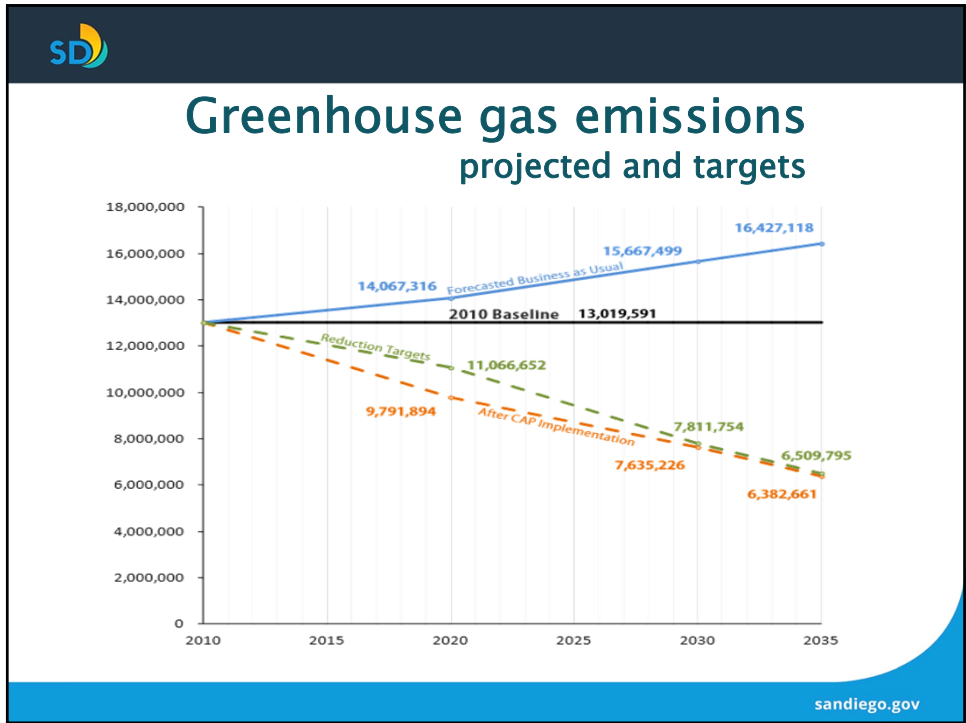
Cody Hooven  
Chief Sustainability Officer  
Economic Development  
[chooven@sandiego.gov](mailto:chooven@sandiego.gov)  
619-236-6563



## Ambitious new plan

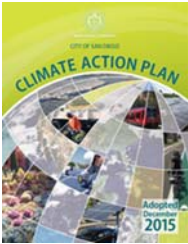


sandiego.gov

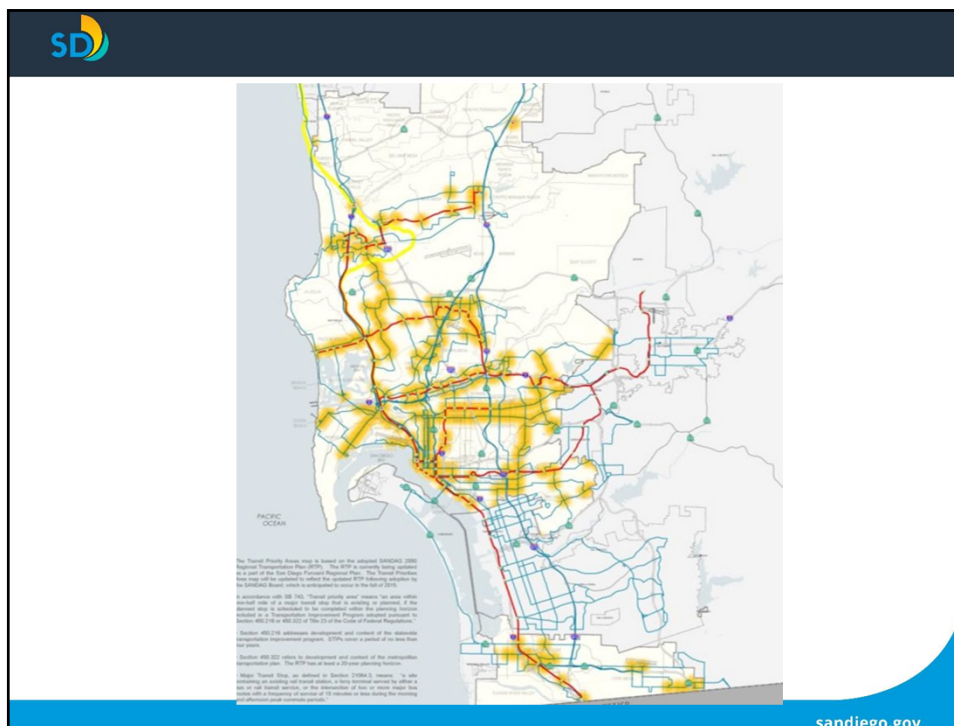


## San Diego Climate Action Plan

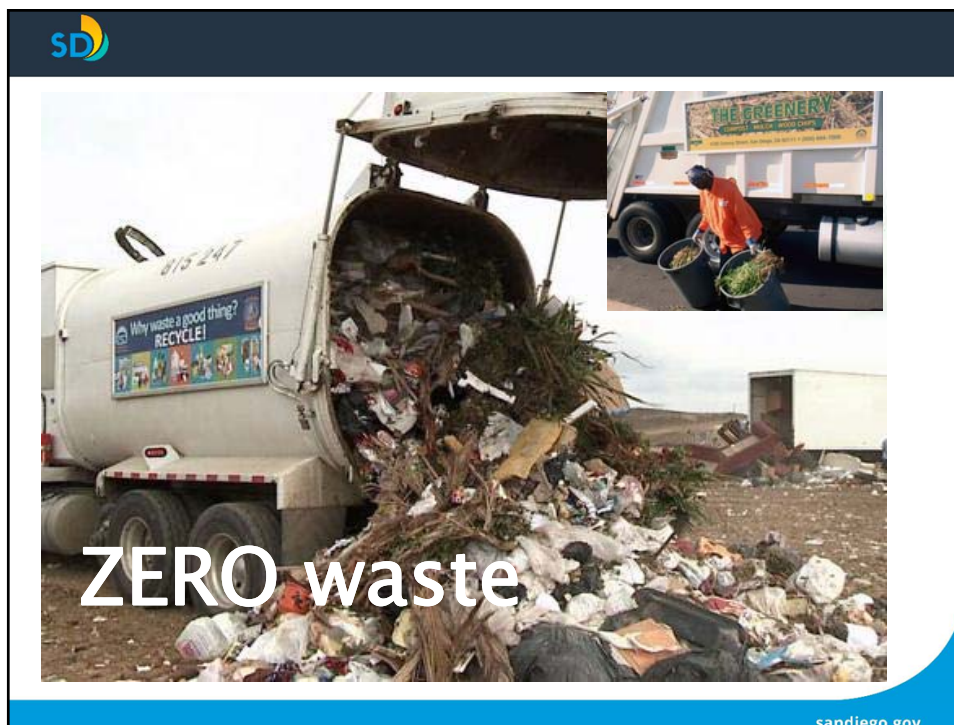
- Emission reduction targets are citywide
- Multiple strategies to achieve reduction targets
- Works in concert with other policy documents
- Annual monitoring to ensure downward trajectory
- Flexibility to evolve strategies



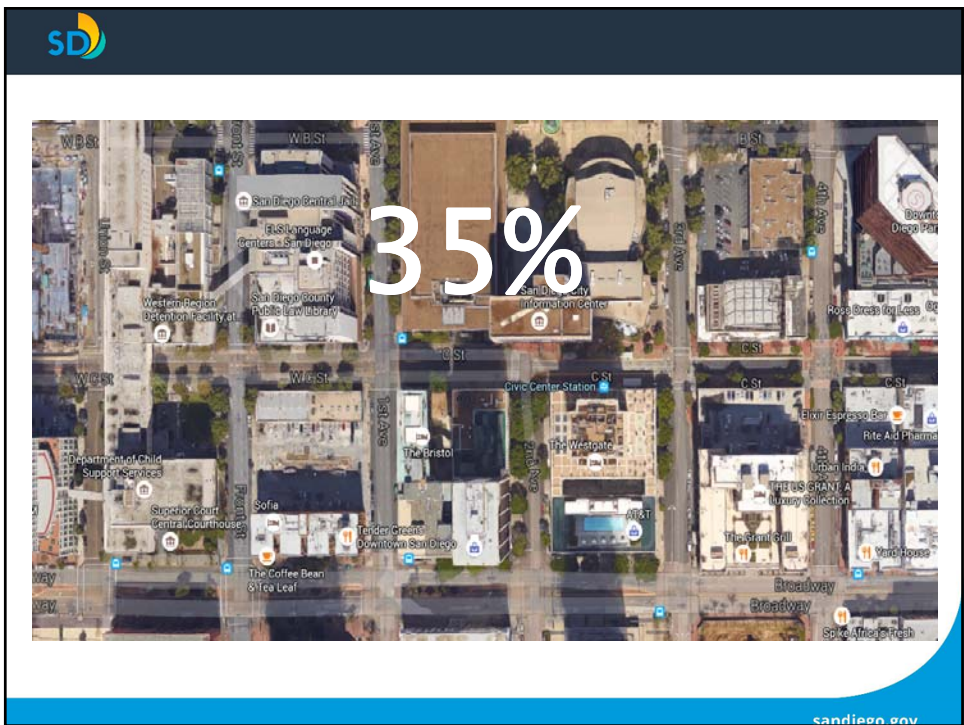




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...And create a separate  
Climate Resilience Plan...


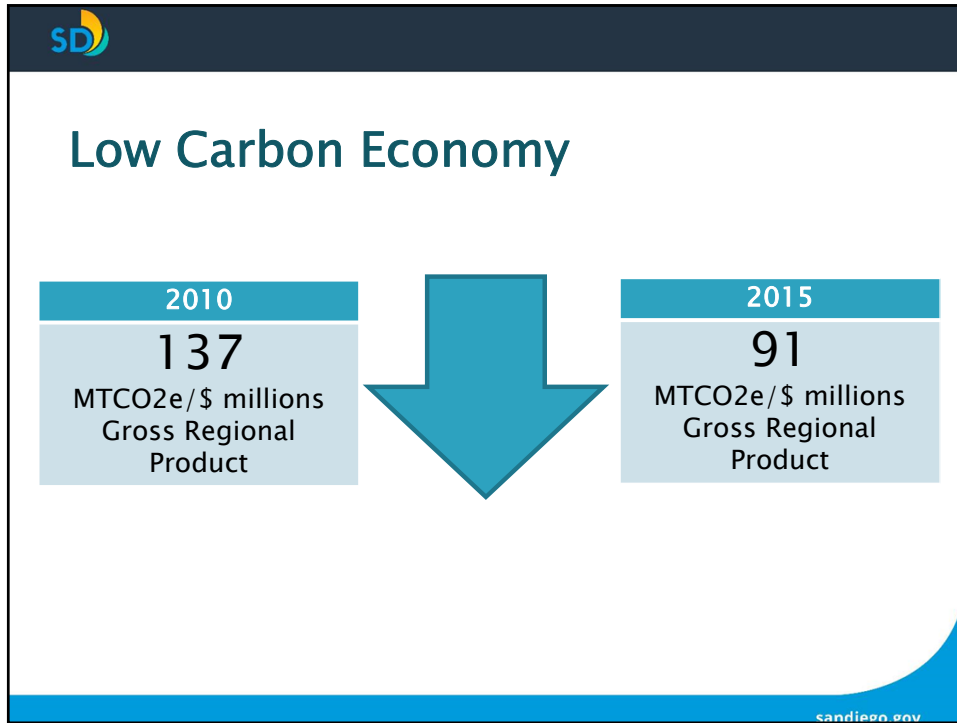
sandiego.gov



**“In theory there’s no difference between  
theory and practice; in practice there is.”**


– Yogi Berra (?)

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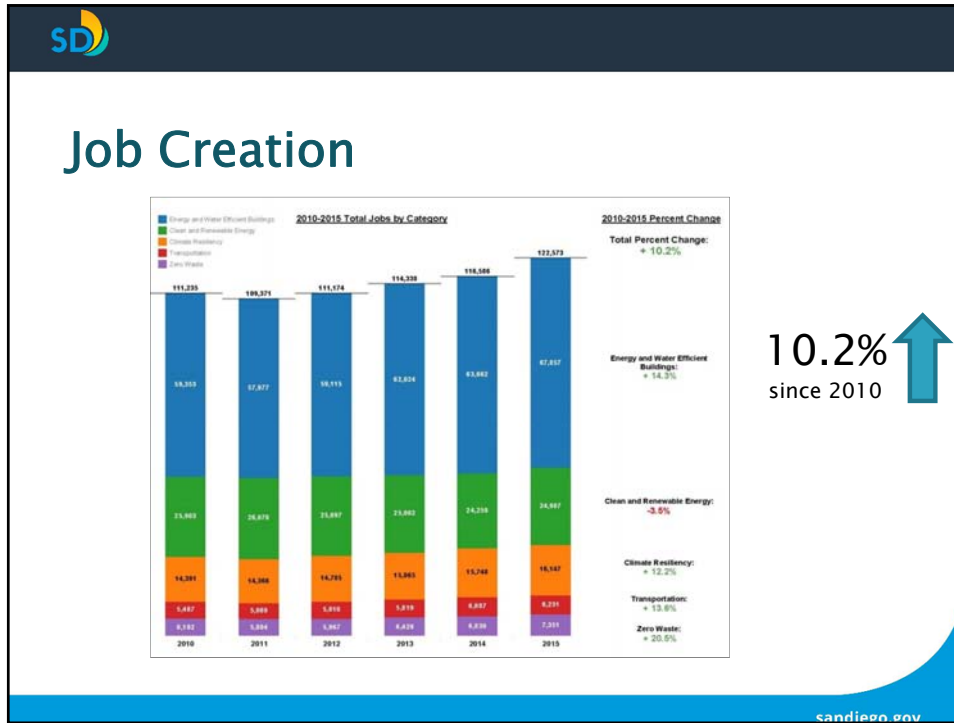


## Social Equity

- Over \$3,500,000 of Community Development Block Grant (CDBG) Program funds invested in sustainability efforts
  - 68 photovoltaic solar systems were installed
  - 335 improvements to increase the safety and energy efficiency for homeowners
  - Street improvements such as new walkways/sidewalks, pedestrian countdown timers, traffic calming, etc.



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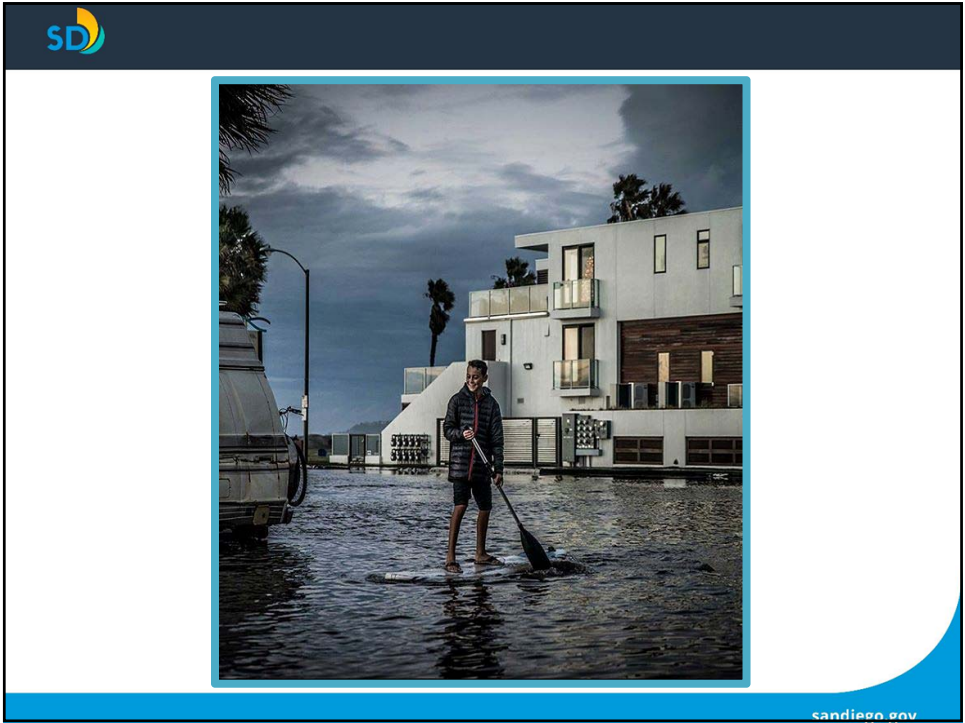


## FY17 Budget and Implementation

CAP Strategy	FY17 Proposed CAP Budget**		
	CAP-Direct	CAP-Indirect	Total
1. Energy & Water Efficient Buildings	\$2,463,349	\$0	\$2,463,349
2. Clean & Renewable Energy	\$7,167,298	\$0	\$7,167,298
3. Bicycling, Walking, Transit & Land Use	\$19,050,032	\$12,722,500	\$31,772,532
4. Zero Waste	\$2,200,089	\$250,000	\$2,450,089
5. Climate Resiliency	\$1,721,200	\$81,621,399	\$83,342,599
Overarching CAP Implementation	\$105,936	\$0	\$105,936
<b>Grand Total</b>	<b>\$32,707,904</b>	<b>\$94,593,899</b>	<b>\$127,301,803</b>

\*\* Funding amounts are estimates of new funding based on the FY17 Proposed Budget.

sandiego.gov



[www.sandiego.gov/sustainability](http://www.sandiego.gov/sustainability)

Cody Hooven  
Chief Sustainability Officer  
Economic Development  
[chooven@sandiego.gov](mailto:chooven@sandiego.gov)  
619-236-6563



## HOW TO OPEN FY 2018 CDBG RFQ APPLICATION FOR THE **FIRST** TIME.

- The application is optimized for the following browsers: Mozilla Firefox, Google Chrome, and Apple Safari. You can use Internet Explorer, however some functions may be unusable.
- Go to the City of San Diego CDBG website at <https://www.sandiego.gov/cdbg/>.
- Click on Applications, Forms, And Regulations tab:

The screenshot shows the City of San Diego website header with the logo, weather (66°), and search bar. Below the header is a navigation menu with tabs: LEISURE, RESIDENT RESOURCES, DOING BUSINESS, LIBRARY, PUBLIC SAFETY, and CITY HALL. A large banner for the 'Community Development Block Grant (CDBG) Program' is displayed, featuring the SD logo and contact information: City of San Diego, 1200 Third Ave., Suite 1400, MS 56D, San Diego, CA 92101. To the right of the banner, there is a section for 'FY 2018 NEW AND ENHANCED CDBG FUNDING OPPORTUNITIES' with event details: 'PARTNERING WITH THE CITY: ARE YOU CDBG-READY?' at City Concourse - North Terrace Rooms 207-208 on October 17, 2016. Two convenient times are listed: 9:30 AM - 11:30 AM (Session 1) and 1:30 PM - 3:30 PM (Session 2). A yellow arrow points to the 'Applications, Forms, And Regulations' tab in the navigation menu.

- Click on FY 2018 CDBG RFQ application link:

The screenshot shows the 'Applications, Forms, and Regulations' page on the City of San Diego website. The page title is 'Applications, Forms, and Regulations' with a subtitle 'CDBG Funding Applications' and a date '(updated 11/02/2016)'. The main heading is 'Fiscal Year 2018 Request for Qualifications (RFQ)'. The text explains that the City of San Diego's Economic Development Department, Community Development Division, 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 26, 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 APPLICATION](#). A yellow arrow points to the 'FY 2018 CDBG RFQ APPLICATION' link.

➤ FY 2018 CDBG RFQ Application opens:

**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 ( <a href="http://sam.gov">sam.gov</a> ). The DUNS number must be in an "Active" status with <a href="http://sam.gov">sam.gov</a> at the time of the RFQ submittal and throughout the application and contract period.					

<b>Head of Agency Contact Information</b>	
Title	*
First Name	*
Last Name	*
Email	*
Phone Number	*

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

<b>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"/>)</b>	
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).	

<b>Agency's Mission Statement: (475 Characters)</b>	*



**SUBMIT & SIGN**

FAMILIARIZE YOURSELF WITH THE APPLICATION

- Fields marked with an asterisk are mandatory. Complete as appropriate.
- All fields are restricted by format and/or character limits.
- Types of fields include:
  - Single-line Fill-in Text Box

Applicant Full Legal Name \*

- Choose One/Dropdown

Type of Organization	Choose One
Applicant Tax ID (FEIN)	Non-Profit
Applicant DUNS* Number	For Profit
*A Data Universal Number obtain a number by calling	Public Agency
	Government

- Multi-line Text Box Area

2. Describe the Target Population currently served by your organization. (2,000 Characters)

- Yes/No Selection

Do your organization's written procedures address all of the following*:	YES	NO
Staff qualifications and duties?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lines of authority?	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Separation of duties?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Access to assets and sensitive documents?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
System of approving and recording transactions?	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- Select All That Apply Checkbox

1. Please select from the following the type(s) of procurement method(s) used by the applicant. (Select all that apply)\*.

Procurement by Micro-Purchase: The acquisition of supplies or services, the total dollar amount of which doesn't exceed \$3,000 (or \$2,000 in the case of acquisition for	<input checked="" type="checkbox"/>
----------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------

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.	<input type="checkbox"/>
Procurement by Small Purchase: The acquisition of supplies, services or other property not to exceed \$150,000. An adequate number of price or rate quotations must be documented.	<input type="checkbox"/>
<b>For purchases in excess of \$150,000</b>	
Procurement by Sealed Bid: This is the preferred method for procuring construction services. Bids are publicly solicited and a firm fixed price contract is awarded.	<input checked="" type="checkbox"/>
Procurement by Competitive Proposal: This method is normally conducted with more than one source submitting an offer, and either a fixed price or cost-reimbursement type contract is awarded.	<input type="checkbox"/>
Procurement by Noncompetitive Proposal: This method is conducted when an item is	

- o Date Selector/Calendar

Enter the date of when the organization's financial management policies and procedures were last updated:	
Do your organization's written procedures address all of the following *:	
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?	

- o E-Signature Field

Signature  

CLICK TO SIGN

- At the bottom of the screen are icons that can be accessed throughout the application process. However, some caution is noted for two icons.



What do these Icons do?



**Download Original**

Click on this icon to download a copy of the application to your computer or other device.



**Attach file(s) to Doc**

Click on this icon to attach required documents (as one PDF document) – see



**Print Document Without Submitting**

Click on this icon to print a copy of the application without submitting.



**Save and Continue Later**

Click on this icon to save application without submitting, and return to work on



**Decline to Sign**

DO NOT USE THIS ICON – If you refuse to sign the application, your application will not be accepted.

**SUBMIT & SIGN**

CAUTION – once an application is submitted, it cannot be retrieved, reopened, or deleted. Your first submittal is your only submittal.



➤ The Application contains several hyperlinks to external webpages

- Dun & Bradstreet D-U-N-S Request Service for Federal Government Contractors and Assistance Awardees (<http://fedgov.dnb.com/webform/index.jsp>)

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.	

- General Services Administration System for Award Management (SAM) (<https://www.sam.gov/portal/SAM/##11/maintenance.html#1>)

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.	

- Audit Certificate of Compliance – is to be downloaded, completed, signed, and uploaded along with all other required supporting documentation.

Fiscal Documents (required of all applicants)

Complete and submit the Audit Certificate of Compliance (which can be downloaded and provided). As applicable, provide a copy of the Single Audit or Program-Specific Financial Statements with Unqualified/Unmodified Opinion. **NOTE: Any fiscal year date prior to 06/30/2015 is not acceptable.**

- ➔ • [Audit Certificate of Compliance](#)
- [Single or Program-Specific Audit, if applicable \(provided by applicant\)](#)

- Certifications – these documents are to be read and acknowledged

### CERTIFICATION

As an Authorized Official/Representative for the Applicant, I hereby acknowledge, by placing a check mark in each box below, that I have read and understand the following Certification Forms posted on the City's website and directly linked electronically to this Request for Qualifications (RFQ).

- \* Certification Regarding Lobbying
- \* Certification Regarding Debarment, Suspension, Proposed Debarment, Ineligibility, and Other Responsibility Matters
- \* Certification for a Drug-Free Workplace
- \* Certification Regarding Compliance with Civil Rights Act and American with Disabilities Act
- \* Certification of Compliance with Conflict of Interest and Procurement Policies

## Attachments

- The listed documents are required attachments to the Application. Failure to submit required documents may result in application being deemed “not qualified.” All documents are to be saved and submitted as one PDF document.

### **ATTACHMENTS**

The following listed documents are required attachments to the RFQ application. Failure to submit all required documents may result in your application being deemed “not qualified.”

Agency Organization Charts (required of all applicants)  
Provided by the applicant.

- Agency Organization Chart – Entire Agency
- Agency Organization Chart – Each Division/Section that will administer FY 2018 CDBG projects

Agency Tax Determination Status (required of all nonprofit applicants)  
Provided by the applicant

- Agency Federal Tax Determination Letter
- Agency State Tax Determination Letter

Fiscal Documents (required of all applicants)

Complete and submit the Audit Certificate of Compliance (which can be downloaded from the link provided). As applicable, provide a copy of the Single Audit or Program-Specific Audit, or Audited Financial Statements with Unqualified/Unmodified Opinion. **NOTE: Any fiscal year end completion date prior to 06/30/2015 is not acceptable.**

- [Audit Certificate of Compliance](#)
- Single or Program-Specific Audit, if applicable (provided by applicant)
- Audited Financial Statements (provided by applicant)

**All ATTACHMENTS must be scanned to PDF as ONE document and uploaded.**

## Certification

- Certification Forms (Checkbox fields) are to be opened, read, and acknowledged by the Authorized Official/Representative for the Applicant.
- Fill in Applicant's Authorized Official/Representative information:
- Sign Application with e-Signature. Note: Date is auto-generated and cannot be modified.

### CERTIFICATION

As an Authorized Official/Representative for the Applicant, I hereby acknowledge, by placing a check mark in each box below, that I have read and understand the following Certification Forms posted on the City's website and directly linked electronically to this Request for Qualifications (RFQ).

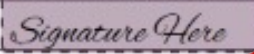
- \* Certification Regarding Lobbying
- \* Certification Regarding Debarment, Suspension, Proposed Debarment, Ineligibility, and Other Responsibility Matters
- \* Certification for a Drug-Free Workplace
- \* Certification Regarding Compliance with Civil Rights Act and American with Disabilities Act
- \* Certification of Compliance with Conflict of Interest and Procurement Policies

I acknowledge that, if the Applicant is awarded FY 2018 CDBG funds, it will be required to submit signed copies of these Certification Forms to the City of San Diego at, or prior to, contract execution in order to receive FY 2018 CDBG funds. I also acknowledge additional Certification Forms may be required at that time.

I further hereby acknowledge and confirm this submission to the City of San Diego in response to the FY 2018 CDBG RFQ and certify that, to the best of my knowledge and belief, all factual information provided is true and correct.

First Name		*
Last Name		*
Title		*



Signature		Date	10/21/2016
-----------	-------------------------------------------------------------------------------------	------	------------

#### Create Your Signature

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

Full Legal Name	Your Initials	Email
<input type="text"/>	<input type="text"/>	<input type="text"/>

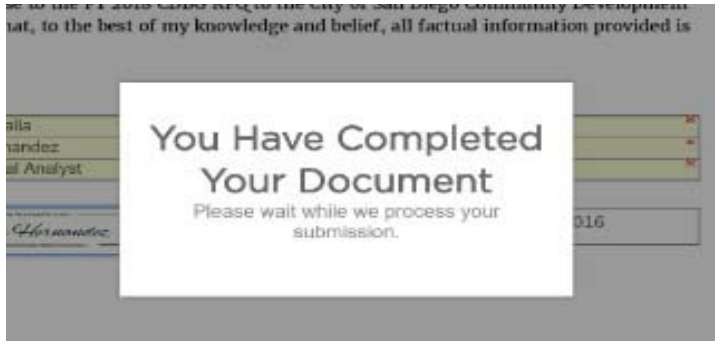
Signature Type  Type  Draw  Upload Custom



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.

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

- You Have Completed Your Document Confirmation Box appears.



- PDF copy of Application is generated.



- E-Mail Confirmation is sent.

