

Prequalification Requirements*

for Non-Profit Organizations

Organizational Information

- Narrative of organization mission & vision
NOTE: Mission/vision must match proposed project
- Overview of organizational structure
Include:
 - 1) Key personnel list & resumes
 - 2) List of board of directors and bios
- Organization's written fiscal policies/procedures
- Organization's written personnel policies/procedures

Legal Documents

- IRS 501(c)3 designation letter
- Articles of incorporation
- Bylaws
- Authorizing governing board resolution (and roll call vote)
– authorizing organization's signatory
- Liability, Auto & Worker's Comp insurance certificate(s)

Financial Records

- Current year (plus 2 previous years) pro forma financial statements
 - Income & Expenses (P&L), Cash Flow, Balance Sheet
NOTE: Pro forma statements must demonstrate the following four requirements:
 - 1) No operational deficits in current year
 - 2) No debt service deferment or forbearance in last 3 years
 - 3) Maximum 30% average administration/overhead over 3 years
 - 4) Balance sheet must show assets equal to or greater than liabilities*NOTE: Organizations are eligible to submit proposals for project funding up to 150% of 3-year average annual revenues*
- IRS Form 990 (previous 2 years)

Experience

- Narrative of organization history & legacy
 - Number of years in existence, growth, etc.
- Narrative of experience (e.g., serving low/moderate income populations)
- 2 letters of reference (or reference contact info)

* Prequalification does not guarantee funding.
For a detailed Participatory Budgeting rulebook, visit:
<http://www.ci.vallejo.ca.us/common/pages/DisplayFile.aspx?itemId=160934>

To apply, go to:

<https://cityofvallejo.formstack.com/forms/prequalification>