

CDBG Grantee Workshop

Congratulations on your CDBG Award!

Now What?



Who is funding your project?

PROVO

Community Action
Rocky Mountain University Foundation
Centro Hispano
Provo Bicycle Collective
Boys & Girls Club
Friends of the Coalition
Project Read
RAH Services

Orem

Family Haven
Kids on the Move
Community Health Connect

Utah County

Tabitha's Way
Big Brothers Big Sisters
The Refuge
Friends of the UCCJC

All Three (!!!)

Mountainlands Community Health Center

What does it mean for you?

- ONE CONTRACT – If you are receiving funds from only one program, that CDBG staff person will be your point of contact for everything. Mountainlands Community Health: Melissa will be your point of contact for your contract.
- QUARTERLY REPORTS – Required for every project. Your report should include data for all three jurisdictions, regardless of funding entity.
- ONE REIMBURSEMENT REQUEST – Your reimbursement requests will be submitted through Neighborly. If you are receiving funds from more than one program, your reimbursement requests should cover expenses being requested from those jurisdictions. **Your matching funds must cover expenses for beneficiaries outside of your funding program's jurisdiction(s). Ex: If your project is being funded by Provo, the Provo CDBG program will only reimburse expenses proportional to the number of beneficiaries in Provo.**
- ONE MONITORING – We will coordinate to do one monitoring regardless of which programs are funding your project.

Contacts

We are always happy to discuss your project and related requirements at any time.

Provo: Melissa McNalley/ mmcnalley@provo.utah.gov / 801-852-6164

Orem: Kena Mathews / kjmathews@orem.org / 801-229-7023

Utah County: Claudia Saldana / csaldana@mountainland.org / 801-229-3673

Program Structure

1. Designate a Local Project Manager
2. Identify Local Requirements That May Affect or Be Affected by Project Implementation
3. Prepare Grantee File

Contracts

- Contracts will begin 7-01-22 at the very earliest. ***Any expenses incurred prior to contract start day will NOT be reimbursed.***
- 12 Month Contracts for Non-Construction Projects
- 18 Months for Construction Projects
- Sub-recipients are contractually obligated to spend the matching dollars that they committed to.

Contracts

NO SPENDING \$\$\$\$ OR DOING ANY WORK UNTIL:

- You have an environmental release letter
- You have an executed contract

A contract is not executed until ALL parties have signed

Contract Amendments

- Extensions
- Scope
- Budget

Request submitted in writing.

Report, Report, Report!

Performance Reports are due at least quarterly:
15th of October, January, April, and July

How many clients served?

Procurement Records

How many project beneficiaries?

Davis-Bacon

Proof of Income

Receipts

Race

Bank Statements

Proof of Residency in the Service Area
(not related to immigration status)

Document all expenditures

Invoices

Copies of Checks

Timesheets and job descriptions

Income and Residency Verification

2021 Income and Residency Verification



Please complete the shaded sections of this form

Name of person in the program/receiving assistance			
Address	City	Zip Code	Phone

List each household member who lives in the home (including yourself):

	Name	Age	Sex	Race (White, Asian, American Indian, Black, Pacific Islander)	Hispanic/Latino Ethnicity (Yes or No)	Relationship
1			M / F		Y / N	
2			M / F		Y / N	
3			M / F		Y / N	
4			M / F		Y / N	
5			M / F		Y / N	
6			M / F		Y / N	
7			M / F		Y / N	
8			M / F		Y / N	

* List any additional household family members on the back of this form.

Is the head of the household a single female?

Does anyone in the household have a physical or mental disability?

Note: All information given on this form will be kept in COMPLETE CONFIDENCE and used only for reporting general statistics to the U.S. Department of Housing and Urban Development.

How many people are in your household?

Find your household size in the table below, then circle the annual household income you make LESS THAN in that row.

1	\$17,600	\$29,300	\$46,900	Over \$46,900
2	\$20,100	\$33,500	\$53,600	Over \$53,600
3	\$22,600	\$37,700	\$60,300	Over \$60,300
4	\$25,100	\$41,850	\$66,950	Over \$66,950
5	\$27,150	\$45,200	\$72,350	Over \$72,350
6	\$29,150	\$48,550	\$77,700	Over \$77,700
7	\$31,150	\$51,900	\$83,050	Over \$83,050
8	\$33,150	\$55,250	\$88,400	Over \$88,400

In some cases, you may be required to attach a copy of last year's Federal Income Tax form or a copy of a current paycheck stub or another approved proof/verification of income.

I/We understand that the information provided on this document may be verified for accuracy and confirmation of eligibility to participate in this program funded by the U.S. Department of Housing and Urban Development. I/We certify that to the best of my/our knowledge this information is accurate and correct. The Administrators of this program may rely upon this information as confirmation of My/Our family's eligibility to participate.

Form completed by:

Name (please print) _____ X _____ Date _____
Signature

Direct Benefit Activities Summary Report

- Beneficiary reporting will be done in Neighborly
- Reimbursement requests will not be processed without beneficiary reporting for public service activities.
- Your beneficiary numbers should be similar to those included in your application. If you aren't serving as many people as expected, why not? Time to problem solve or make adjustments.
- For public service organizations, you will need to report on beneficiaries from all entitlement areas (Provo, Orem, Lehi, and Utah County) regardless of your funding source.

Reimbursement Protocol

- Reimbursement requests can be submitted as frequently as monthly, though quarterly is preferred.
- Requests are submitted via Neighborly. Must include supporting documents (progress/beneficiary report, invoices, proof of payment, etc).
- Requests must be submitted by the last day of the month. Checks will be issued within 30 days.
- Inadequate or missing request documentation can delay your reimbursement.

Neighborly Subrecipient User Guide

<https://mountainland.org/reporting-and-reimbursement/>



Neighborly Software:
Subrecipient User Guide

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Accessing the Subrecipient Portal

The Subrecipient Portal is hosted by Neighborly Software and is accessible available via any internet connected device. The recommended browser is Google Chrome, but will work with any modern web browser (i.e. Internet Explorer v10+, FireFox, Safari).

Application Portal Link: <https://portal.neighborlysoftware.com/mountainland/Participant>

The Accomplishments screen provides a summary of Accomplishment data entered via Monthly and Annual Reports. Note that this screen is Read Only – accomplishment data can only be added/modified via the Monthly and Annual reports. Also note the scroll bar at the bottom of each section of Accomplishments to view multiple months.

TOTAL NUMBER OF PERSONS ASSISTED		AUG 2017	SEP 2017	OCT 2017	NOV 2017	DEC 2017	JAN 2018	FEB
Total Number of Unique Persons Assisted this Month		20	6					

BENEFICIARIES - INCOME		AUG 2017	SEP 2017	OCT 2017	NOV 2017	DEC 2017	JAN 2018	FEB
Number of Extremely Low Income persons assisted (>=30% AFI)		5	3		2	5	0	
Number of Low Income persons assisted (30%-50% AFI)		5	2		1	5	0	
Number of Moderate Income persons assisted (50% - 80% AFI)		5	1		0	5	0	
Number of persons assisted who are NOT Low to Moderate Income		5			0	0	0	
Totals		20	6	0	3	15	0	

Monitoring and Project Closeout

- All projects are desk monitored and subject to on site monitoring.

Project Closeout complete when:

- The project is complete
OR
- All of the funds have been spent by grantee.

Files Must be Maintained for 4 Years after Closeout

Project Spending and FY20

- In order to apply for FY23 funding 50% of your grant award must be drawn down by January 2023.
- Federal Regulation requires that all CDBG programs have no more than 1.5 times their allocation in their treasury account in May of each year.

Questions before Procurement and Construction Training?



Procurement

OMB Guidance

§ 200.318 General procurement standards.

(a) The non-Federal entity must use its own documented procurement procedures which reflect applicable State and local laws and regulations, provided that the procurements conform to applicable Federal law and the

Regulations are shown in 2 CFR 200.318 through 200.326. Some highlights;

- 200.318a – Must have written procurement procedures
- 200.318b – Must maintain oversight to ensure selected contractors perform
- 200.318i – Must maintain records of procurement activities

Simplified Acquisition Threshold

The Value Tiers of SAT guides how an entity conducts procurement from RFP selection to engagement of a contractor.

- **Less than or equal to \$3,500** – very informal procurement process
- **Between \$3,501 and \$150,000** – informal procurement process
- **Greater than \$150,000** – formal procurement process
- That said – you must follow the procurement policies of the funding entity, whose limits may be lower for a more rigorous procurement method

Procurement By Sealed Bid

To facilitate a sealed bid procurement, you need to have:

- An adequate specification and/or scope of work description;
- For contracts in excess of \$2,000, solicitation needs to have a provision for contractor to comply with Davis-Bacon Act, including placing a copy of the current wage determination issued by the Dept of Labor in each solicitation. Part 200, App. II(D)
- Two or more responsible bidders are willing and able to compete for the business
- Awarded to lowest responsible bidder
- Firm fixed-price contract. Cost-plus-percentage-of-cost or percentage of construction cost methods cannot be used. 2 CFR 200.323(d)
- You can reject any or all bids as long as you have a sound, documented reason for doing so. 2 CFR 200.320(c)(2)(v)

Procurement By Non-Competitive Proposals

You may procure through solicitation of a single source only if:

- A public emergency will not allow the time to perform competitive solicitation; and/or
- The needed item or service is available from only a single source; and/or
- After soliciting from a number of sources, there is only one respondent (i.e. competition is inadequate); and/or
- You make a written request to the Federal awarding agency to allow sole-source, and that agency expressly authorizes it.

Selection Procedures

All procurement will be conducted in a manner providing full and open competition. Procurement may not restrict or eliminate competition by:

- Placing unreasonable requirements
- Requiring unnecessary experience and excessive bonding
- Specifying only “brand name” products instead of allowing “an equal” product.
- Noncompetitive awards to consultants on retainer contracts
- Having an organizational conflict of interest

Construction Projects

- Your contact for Davis Bacon compliance is as follows:
 - Provo: Cindy Sweeten (801-852-6176)
 - Orem: Kena Mathews
 - Utah County: Jess Bedingfield
- You will receive specific instructions for the environmental review process from your point of contact. NO WORK (final design, bid announcement, digging, contracting ,etc) may begin until the environmental review is complete AND you have an executed agreement. **Start the environmental review now!!!**
- You will receive specific instructions for the Davis Bacon compliance process from your point of contact AFTER your agreement is fully executed. NO WORK may begin before that.

Construction Projects

All that said – We are always happy to discuss your project and related requirements at any time. We can help you prepare NOW for the environmental review process, bidding, project implementation, and reporting. If you'd like further assistance or instruction, contact us!

Provo: Melissa McNalley / mmcnalley@provo.utah.gov / 801-852-6164

Orem: Kena Mathews / kjmathews@orem.org / 801-229-7023

Utah County: Claudia Saldana / csaldana@mountainland.org / 801-229-3673

Jess Bedingfield / jbedingfield@mountainland.org / 801-229-3691

Jessica DeLora / jdelora@mountainland.org / 801-229-3831

Questions?

