

SPONSORS INSTRUCTIONS FOR COLLECTING DATA

Who is required to report?

Basically, all grant recipients.

- Grantees must provide proof as to how the activity meets the National Objective.
- Proof applies to the expenditure of grant funds during the term of the agreement.

National Objective: At least 51% of the activity’s beneficiaries are L/M income persons.

- This does not mean - the activity (program) serves exclusively low and moderate-income beneficiaries.
- Does mean - the grantee’s program primarily benefits low-income and moderate-income persons (51% of the program participants are low–moderate income persons).

COLLECT AND MAINTAIN ACCURATE DOCUMENTATION

- MONTHLY SUBMISSION TO EDA - COPIES OF 1st 200 SELF-CERTIFICATIONS, 25% THEREAFTER/
10% INCOME VERIFICATIONS / DIRECT BENEFIT FORMS
- MAINTAIN ORIGINALS IN-HOUSE

Self-certification Form: provides information for monthly reporting (one time collection).

Income Verifications: 10% sampling of those providing Self Certification (one time collection).

Self-certification Forms - Only for programs that fall under the sub-category of limited clientele. Collect from all participants, file originals and copy EDA. Certification needs to be clear that the income verification counts the total income for all persons included in the household.

Note: Collect only one Self-certification Form per client or household during the CDBG fiscal year (July 1st - June 30th).

Programs that do not need income certification are Area benefit program and Presumed

Exception - youth programs must always collect Self-certification Forms.

Provide PROOF of serving 51% L/M clientele.

DIRECT BENEFIT FORM

There are ONLY two race categories: Single race and Multi-race
(Select only one from either of the two race categories)

NO LONGER a Hispanic single race category.

OTHER (multi-race category) has been added.

To be used ONLY when the beneficiary is not comfortable with any of the listed multi-race categories.

How to report -

- Use the Direct Benefit Report form provided.
- Record ONLY unduplicated numbers.
- Should no new clients be enrolled for the month being reported, note NO NEW CLIENTS above in the income category section.

SUBMIT MONTHLY

- Direct Benefit Form, and copies of the Self-certification Forms/Income Verifications if applicable.
- Reimbursement request.

SUBMIT QUARTERLY

Activity Report

At the end of every three months: September, December, March, and June
The Activity Report covers.

- Project accomplishments.
- Increase or decrease in clientele. Why?
- Goals set for the next 3-months.