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Please join the City of Greenville Neighborhood & Business Services Community Development Division for a non-profit funding workshop for the 2024 funding year. This workshop is designed to advise and assist non-profit organizations with meeting US Housing and Urban Development guidelines. Non-profit organizations are required to follow these guidelines when applying for funds from the City of Greenville as sub-recipients. Any non-profit organization planning to complete an application must attend one mandatory workshop session to be eligible to apply.

Session 1: September 20, 2023 • 12:00 PM-2:00 PM Session 2: September 27, 2023 • 6:00 PM-8:00 PM

Session 1 will be held in-person in the 3rd Floor Conference Room of City Hall, 200 West Fifth Street. Session 2 will be held virtually via Zoom. Please RSVP to Gayla Johnson by phone at (252) 329-4295 or GAJohnson@GreenvilleNC.gov. Zoom link and additional information will be provided after RSVP.





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City of Greenville 2023 Non-Profit **Funding Workshop** 2024 CDBG Funds



Workshop Agenda

- Funds available
- CDBG Overview
- CDBG & Non-Profits (Sub-recipient)
- The Application Process
- The Approval Process
- Agency Monitoring and Reporting
- Questions and Answers



Funds Available

Approximately:

Public Service - \$140,000



HCDA

Housing and Community Development Act (HCDA) of 1974 created

Community
Development
Block
Grant





CDBG Objective

Preservation and development of viable communities by providing decent housing, a suitable living environment, and economic development opportunities, public services and public facility improvements principally for low and moderate income persons.



- Communities develop their own programs and funding priorities based on local needs.
- HUD has established guidelines to define the types of projects and activities that may be undertaken and to ensure each project or activity meets one of the national objectives of the CDBG Program.



THREE NATIONAL OBJECTIVES

- Benefit low-moderate income persons either individually or area-wide, or activities that benefit special populations.
- Aid in the prevention or elimination of slums and blight.





- Administration
- Housing Rehabilitation
- Public Facility Improvement
- Public Services
- Acquisition
- Clearance/ Demolition
- Infrastructure Improvement



Federal rules and regulations

 A minimum of 70% of the annual grant must support activities that benefit low-to-moderate-income (LMI) persons.



- Income must be documented and verified for each client or household. (some exceptions)
- A maximum of 15% of the total annual grant can be used for public service activities.
- A maximum of 20% of the total annual grant can be used for administrative activities.
- Administrative, Public Service, and Public Facility project records must be maintained for 5 years from the completion of the project.



■ CDBG funds generally may not be used for religious activities or provided to primarily religious entities for activities. CDBG funds may be used for eligible public services to be provided through a religious entity, provided that the entity enters into an agreement with the City stating that it will not discriminate on the basis of religion, and it will not provide any sort of religious services or activities as part of the project/ service.



 Monthly / Quarterly / Annual reports with supporting documentation are required, as well as monitoring visit(s) to ensure compliance with appropriate rules and regulations.

Documentation Record Keeping

- Eligibility
- National objective
- Citizen participation
- Fair housing
- Financial
- Other requirements



Non-profits



CDBG & Non-Profits

The City seeks to provide funding for projects and services that are innovative and meet the national objectives as identified by the CDBG Program:

- Housing Counseling
- Services that benefit low-moderate income households
- Homeless or special needs populations
- Job Training
- Youth Development



Choosing Projects or Services

Eligible Activities

Youth services (mentoring, after school programs)

Services for senior citizens

Employment services (job training)

Financial - Homebuyer Education / Counseling

Services for the homeless

Substance abuse services (counseling / treatment)

Crime prevention

Recreational services



Choosing Projects or Services

Eligible Activities (Cont.)

- CDBG funds may be used to pay for labor, supplies and material to maintain the portion of a facility in which the public service is located. This includes the purchase or lease of equipment & other property needed for the public service.
- To utilize CDBG funds the service must:
 - Be a new service, or an increase in the level of an existing service which is being provided by the grantee,
 - Service at least 70% low income; or provide service to a low income neighborhood in Greenville.



Choosing Projects or Services

Ineligible Activities

There are certain expenses or projects that nonprofits will seek funding for which are ineligible expenses for CDBG funds. (Please note that this is not an all-inclusive list).



Ineligible Activities

Organizations Administrative Cost

- Salaries and Benefits
- Rent, Utilities, Telephone

Political Activities

Income Payments to clients (food, clothing, rent, mortgage, etc.)

Activities outside the City of Greenville corporate limits

Acquisition of Real Property for a Religious Facility or improvement to a religious facility or other projects that are for a religious nature purpose

Any Organization or Service not benefiting Low-Moderate income households



Application Process



Required Documentation

Application from the Community Development Division

Proof of:

- 501c(3) Status
- Articles of Incorporation
- Current Audit Documentation
- Board Member Lists
- Program Information & Explanation
- Valid lease (during funding year)





Application from the CDD Division









501c(3) Status

 501c(3) status, a copy must be provided that documents your LEGAL status from the IRS as an established nonprofit.

 You must be recognized legally as a non-profit by Charter or Articles of Incorporation.



 You must have at least two years experience as a nonprofit in the area for which you are requesting funding.

Current Audit Documentation

- A copy must be provided for the 2021 & 2022 calendar years. (two most recent)
- The audits must be clean and free of findings.
- The audit must have been completed by a <u>Certified Public Accountant</u>.





Board Members List

- Complete list of all board members with home mailing addresses and phone numbers
- Total number of required board members
- Affiliations (COG, Retired, ECU, etc.)
- Length of Time on Board





Board Members List

- Conflict of Interest: Board members must
 not be related to anyone in the decision-making process.
 (CDD Division Staff, COG Staff, AHLC, City Council, HUD, etc.)
- Furthermore, Board members must not be employed by the City of Greenville (CDD/CMO/CAO/etc.) or HUD
 - Exception: City of Greenville divisions not a part of the review or decision process.





Program Information

- Organization Information
- Program Types and Descriptions
- Any Additional Information
- Funding Sources
- Staff Listing and Staff Resumes





Application Do's & Don'ts

- Be innovative

 - We're looking for new and innovative projects
 If your project has been funded before how can you increase your level of service
- Funds are limited so be realistic in your request
 - Is it a project you can complete within 12 months?Do you have other funds available?
 - - CDBG funds are "gap" funds. We cannot fund a project 100%.
- Don't forget the Basics
 - Complete ALL questions in the application (use N/A)
 - Use the application checklist to verify all requested information has been provided



Application Due Date

Applications must be in the Neighborhood & Business Services

Department

CDD Division office by 12:00 PM on Friday, December 29, 2023.

Applications received after the deadline for any reason will NOT be accepted.

Must provide one (1) signed original & one (1) copy, to include the application and all attachments.



Each must be in a separate bound folder or notebook.

Approval Process



Internal Process

- Grant applications go through a four step approval process:
 - 1. Staff Review (Non-compliant organizations are notified.)
 - 2. Affordable Housing Loan Committee reviews the requests and makes funding recommendations to City Council. (Compliant organizations present projects to the AHLC.)
 - 3. City Council reviews the Committee's recommendation and may adopt or change the funding allocations.
 - 4. The Council's funding decision is then sent to HUD as part of the City of Greenville's Annual Action Plan for HUD approval or denial.



Internal Process

- Organizations notified of awards
- A greements signed & work begins



Presentations to the Affordable Housing Loan Committee (AHLC)

- Prepare a 10-minute presentation for the AHLC
 - Overview of your program
 - Overview of your project / service and why it is needed
- Come prepared for a brief question & answer period with the AHLC about your project/ service



AHLC Proposal Scoring

	Need for the service	30
	Internal & External Consistency	10
	Leveraging	15
•	Self Sufficiency	10
	Innovation & Partnerships	10
	Financial Feasibility	5
	Performance	10
	Direct Benefit	10
•	New/ Previous Applicant	<u>10</u>
	Total points	110



Agency Background

- Prior work experience with CDBG and other grant funds
- A dequate staff
- Key staff experience/ capability
- A gency capacity
- Debarment
- Insurance



Target Population

- Service area identified (Greenville City Limits)
- Any special attention to target population
- A re gaps and barriers identified?



Service Need

- Is the need adequately described?
- Will the project address program & service gaps?
- Will the project improve the quality of life?
- Does the applicant indicate outcomes?



Approach to Service/Work Plan

- Short term goals
- Does the applicant define goals?
- Is the process adequately described?
- Outcomes and success measureable?



Coordination & Collaboration

- What National Objective is being met?
- Any efforts to coordinate and collaborate with other agencies?
- Any MOU or agreements in application?
 (MOU = Memorandum of Understanding)



Current Financial & Other Resources

- Budget included on forms.
- Is budget focused on services not admin?
- Is the budget reasonable?
- At least 85% of funds must be utilized directly for your program, project, or service.



Projected Timeline

January 2024 Applications reviewed by CDD Staff

End of Jan 2024 Organizations notified (application status)

Organizations notified of Affordable Housing

Loan Committee (AHLC) presentation

February 2024 Organizations present projects/ answer questions (AHLC)



April 2024 City Council reviews the AHLC recommendation and may adopt or change the funding allocations.

Projected Timeline

May 2024 The Council's funding decision is then sent to HUD as part of the City of Greenville's Annual Action Plan for their approval.

June 2024 Organizations Notified of Awards



July 2024 Contracts signed / Work Begins

Working With CDBG Grant Funds

- Funds are distributed by <u>reimbursement only</u>.
- Please do not begin ANY work until your contract has been signed (Greenville City Manager) and your scope of work approved.
 - We cannot and will not reimburse for any expenses incurred prior to the date of the Greenville City Manager's signature.



 Provide monthly reports by the 15th of each month for compliance.

Working With CDBG Grant Funds

- Submit Monthly Request for expended funds by the 15th of each month for reimbursement.
- Funds are to be expended within the 12-month contract period.
- All funded non-profits will be required to submit quarterly beneficiary data reports.



 A cumulative final report will be required at the end of the funding year.

Quarterly Report Timeline

- July September Due on: October 15th
- October December Due on: January 15th
- January March Due on: April 15th
- April June Due on: July 15th





- What is the purpose of a sub-recipient monitoring?
 - It's a HUD Requirement.
 - Sub-recipient monitoring is a key part of the CDBG program. The City bears the responsibility to ensure that Sub-recipients follow federal regulations, conduct the projects / services and accomplish the goals as established in the sub-recipient agreement.
 - Monitoring also provides opportunities for both the City and the Subrecipients to identify issues that may hinder efforts to successfully accomplish the goals and address these issues in a timely manner.
 - Monitoring is also used by the City as a way to identify sub-recipient needs and provide technical assistance if necessary.



Items to have available

- Administrative files
- Client/ project files
- Audit/financials
- Board minutes
- File cabinet
- Insurance certificate
- Policies and procedure manual
- Knowledgeable Staff
- IRS forms
- State (NC) forms



What happens during a monitoring visit?

- Progress of Project/ Service reviewed
- Client Files reviewed for compliance
- Administrative Files reviewed
- Monthly reports are reviewed
- Site/ project visit
- Staff & Sub-recipients will have the opportunity to discuss any concerns or issues



Use of Monthly Reports for Monitoring:

- Monthly reports are used to track progress of your project / service.
 - Reports are designed to capture information needed for reporting purposes by the City.
 - Reporting forms will be provided by the City and are due by the 15th of each month.
- Monthly reports also give Subrecipients an opportunity to "shine" by sharing with the City all the activities and events happening within their agency.
- Beneficiary Data reports collected quarterly and used for documentation into HUD's Íntegrated Disbursement Management System (IDIS).



Questions and Answers



Staff Contact Information

Gayla A. Johnson, Program Specialist (252) 329-4295 office (252) 329-4631 fax gajohnson@greenvillenc.gov

