# QUARTERLY PROGRESS REPORT

# INSTRUCTIONS

Quarterly reports are required for all CDBG-funded subrecipient agreements regardless of whether an activity took place. Information obtained in the reports will be used to evaluate a subrecipient’s progress in meeting federal program requirements and contractual obligations. The cumulative data is included in the Consolidated Annual Performance and Evaluation Report (CAPER) submitted by the City at the end of the program year to the federal Department of Housing and Urban Development (HUD). HUD will review this information for consistency with federal regulations and the City’s Consolidated Plan.

City staff will also use the quarterly reports as a tool to evaluate the program’s effectiveness in providing services to low- and moderate-income persons and households and to ensure that the program is being carried out consistent with the contract.

Reports are due fifteen (15) days after the end of each quarter. Reports must be current in order for the City to release payment under the subrecipient agreement. A separate sheet is to be completed for each CDBG-funded activity (i.e., one for Rehab Administration, one for Public Services, etc.) as reflected in the subrecipient agreement. Instructions for completing the quarterly report are outlined below.

## Name of Organization

Indicate the name of the organization.

#### Contract Number

Enter the number assigned by DHCD and shown on the subrecipient agreement’s cover letter.

#### Period Covered

Enter the beginning date and the ending date of the subrecipient agreement (July 1 – June 30).

#### Prepared By

Enter the name of the person who should be contacted for information regarding the report.

#### Title

Enter the title of the person who should be contacted for information regarding the report.

#### Activity Title

Enter the activity for which the report is being prepared. **Note a separate sheet must be completed for each eligible activity**

APPENDIX C, PART I

Reporting Instructions

(Page 1 of 2)

**identified in the CDBG contract.**

#### Submission Date

Enter the date the report is being completed.

## Reporting Period

Indicate the specific quarter being reported based on the date shown under the “Period Covered”.

## Benchmarks/Outcomes

Identify the “benchmarks” shown under the CDBG Contract’s “Schedule of Completion”. Under the “target” indicate the proposed number of persons or households to be served during the quarter. Under “actual” indicate the number of persons or households that ultimately benefited from the CDBG-funded activity.

## Activity Narrative

Report non-statistical information on this form such as other activities associated with the project, difficulties in reaching benchmarks and any unforeseen problems with project implementation.

## Race, Ethnicity and Income Data

Data must be reported for all persons or households assisted during the quarter. Only the categories listed can be used. The persons or households count in the data section must equal the total number of persons or households benefiting.

#### Performance Measurement Data

HUD developed a standardized methodology to demonstrate the outcomes of the CPD formula grant programs. Federal requirements dictate that agencies track and document the results of taxpayer investments in particular programs. Given the limited level of federal resources, it is particularly important to demonstrate results in order to describe how the CPD programs benefit low-income families and communities.

In order to measure the results of outcomes, the City must track and collect data on pre-determined “***specific output indicators***” based on the type of activity. Report only the indicator that best describes the results of the individual activity for which the report is being prepared. Noted below is a description of the output indicators.

|  |  |
| --- | --- |
| Public Services/Public Facilities & Improvements | Use this form to report on whether persons served by public services and public facilities and improvements will have new access, improved access, or will receive a benefit or service that is no longer substandard. |
| Construction of Rental Housing Units  | Use this form to report on rental units constructed with CDBG assistance. |
| Rehabilitation of Rental Units | Use this form to report on rental units rehabilitated with CDBG assistance. |
| Acquisition/Construction New Homeowner | Use this form to report on new homeowner units that are acquired and/or constructed with CDBG assistance. |

APPENDIX C, PART I

Reporting Instructions

(Page 2 of 2)

#### Funding Sources

Indicate all funding sources received for the year for the project being report. As this information is subject to change, updated data should be provided each quarter.

QUARTERLY PROGRESS REPORT

Name of Organization: Contract Number:

Period Covered: Prepared by: Title:

Activity Title: Submission Date:

Eligible Activity: CDBG National Objective:

Report Period:

 First Quarter Third Quarter

 Second Quarter Fourth Quarter

Identify the activity being undertaken and the “Benchmarks” and “Outcomes” for the reporting period specified above:

|  |
| --- |
| Benchmark/OUTCOMES (Indicate the “benchmark” as reflected in the CDBG Contract’s “Schedule of Completion”) |
| APPENDIX C, PART IActivity Summary Form 1(Page 1 of 2) |
| Target to be Served: |  |
| Number Actually Benefiting this Quarter:  |  |
| TOTAL SERVED TO DATE |  |

|  |
| --- |
| **Activity narrative**: describe accomplishments RELATED TO THE SPECIFIED BENCHMARK achieved during the quarter. If activity has not achieved proposed goals, an explanation must be provided.  |
| APPENDIX C, PART IActivity Summary Form 1(Page 2 of 2) |