

2020 CDBG Developing Tasks and Deliverables

Housing and Community Development
CDBG Grants Management Division



Overview

- Activity Descriptions vs Tasks and Deliverables
- Identifying Tasks and Deliverables – Where to Start?
- Organizing Tasks and Deliverables
- Task and Deliverable Examples
- Documenting Deliverables

Activity Description

- Activity Description
 - Think “Who, What, Where, When, Why”
 - The Activity Description section is included in our report to HUD, so try to keep it under 4,000 characters (the allowed data field)
 - This is your opportunity to pitch your activity
 - Help us understand why this activity is important to your community
 - Include info about who the activity will help

Tasks and Deliverables

- These sections are intended to give you an opportunity to show us how well you know your activity
- It also allows us to identify potential knowledge gaps and areas where we can focus training
- There is no limit on the characters – provide as much detail as you are comfortable describing
 - Within reason!

Identifying Tasks and Deliverables

- Where to Start?
 - Start with Deliverables
 - Identify the full list of potential products/reports that need to be prepared
 - Use Monitoring Checklists if you need assistance
 - Prepare a list of basics using the Federal Cross-Cutting requirements
 - Prepare and outline a public information binder to help identify and organize deliverables
 - Try to organize deliverables chronologically through the lifecycle of the activity

Pro-tip! This is a really good way to build a RFP or similar procurement document and will help prevent obscure tasks that can be difficult to cost

Deliverables

- Every activity has deliverables
- 2 types of deliverables
 - Grantee deliverables to HCD
 - Financial reports, activity reports, NEPA clearance, desk monitoring documents, semi- and annual reports, etc.
 - Activity deliverables to Grantee
 - Subrecipient reports, construction progress reports, labor standards documentation, invoices/statements, cost allocation/budget management reports, planning report milestones, etc.
 - Think about what you want to see to prove your activity is successful

Planning Activity Deliverables

- Use milestones
 - Identify when specific planning report components or summaries are due and use them as milestones
 - Require regular updates with official memos or presentations
 - Be prepared to review drafts and use draft management to validate work
 - Include milestones and deadlines for sections/products in your planning RFP/RFQ and budgets with consultants

Organize Your Deliverables

- Organize deliverables chronologically – it will help you identify if you are missing anything
- Typical chronology:
 - Pre-Application
 - Application
 - Activity Kick-off
 - Activity Implementation
 - Activity Completion and Close-out
- Use deliverables to help manage contractor or subrecipient performance and set clear expectations
- Include deliverables that you will list as eligible pre-agreement costs – these are legitimate parts of your activity and will be subject to monitoring

Application and Pre-Application Deliverables Examples

- Procurement Package (and contracts if applicable)
- Procurement and Contract Management Policy
- NEPA Clearance (You will need NEPA Clearance for everything – including GA and Planning – Ask about a Statement of Exemption if you are unfamiliar)
- Plans and Specs
- Guidelines
- Program Forms and Document Templates
- Operating Plans
- Loan Underwriting/Servicing Plans
- Strategic Plans
- Planning RFP/RFQ

Activity Kick-off Through Closeout Deliverables Examples

- Sealed Bids
- Timelines with Milestones
- Beneficiary Reports
- Progress Reports
- Financial Reports
- Financial Management Policy
- Plan Drafts/Data
- Labor Compliance Reports
- Semi-Annual and Annual Reports
- Progress Presentations/Memos
- Final Reports (Financial, Activity, Labor Compliance)
- Notice of Completion
- Certificate of Occupancy
- Monitoring! (both you and HCD)

Identifying and Organizing Tasks

- Start with your chronological list of deliverables
 - List out the tasks necessary to complete each deliverable
 - Organize the tasks in chronological order to help make sure you capture everything
 - Think through tasks that will be required for both you as a grantee and your subrecipient or contractor
 - Make sure each deliverable is supported with tasks
 - Orphan deliverables = incomplete task lists

Pro-tip! Tasks and Deliverables can be grouped as like items
Example, quarterly reports, labor standards – you don't have to list each incidence

Task and Deliverable Examples: Generic

- Deliverable: Construction Contract
 - Task 1. Prepare Bid Package
 - Task 2. Public Bid Process
 - Task 3. Sign contract
- Some questions we will ask:
 - Did you include labor compliance info in the bid package?
 - Did you have a pre-bid meeting?
 - Did you market the bid to MBE/WBE and Section 3 contractors?
 - Where is your public bid process documented?
 - Did you have a cost estimate?
- Questions take up time and can delay the award process.

Task and Deliverable Examples: Detailed

- Deliverable: Consultant Procurement and Contract
 - Task 1. Prepare Consultant RFP
 - Task 2. Identify Consultant Scope of Work and Deliverables
 - Task 3. Prepare Independent Cost Estimate
 - Task 4. Document Appropriate Procurement Type
 - Informal small purchase, RFP, RFQ, etc.
 - Task 5. Solicit Proposals
 - via email, online posting, job board, etc.
 - Task 6. Collect questions and share answers via solicitation process
 - Task 7. Review proposals, complete interviews, and Select Consultant
 - Task 8. Execute Contract

Tasks and Deliverables Examples Cont.

- Not every deliverable will have a long list of tasks
- Deliverable: Quarterly Activity Reports
 - Task 1. Collect report(s) from subrecipient(s)
 - Task 2. Review report(s)
 - Task 3. Enter report(s) in Grants Network and submit to HCD
- Deliverable: Quarterly Financial Reports
 - Task 1. Collect invoices for reimbursement
 - Task 2. Enter invoice data in Financial Report
 - Task 3. Upload back-up invoices and submit to HCD for payment via Grants Network

What is the Right Level of Detail?

- Include enough detail that we can tell you understand what is required to complete your activity
 - Indicate that you are aware of and understand the federal cross-cutting requirements
 - Show that you intend to actively manage your activity and will meet program timelines and deadlines
 - Describe how you will document compliance, what documentation will be included and where it will be filed (Public Info Binders/Files are 😊)

Pro-Tip! With each task and deliverable think about what federal requirements might be triggered, such as records retention, federal reporting, cross-cutting compliance documentation, financial management, asset management, long-term monitoring, etc.

Documenting Deliverables

- Plan in advance how you will document your deliverables
 - Public Info Binder
 - Public File
 - Private Files (Personally Identifying Information)
 - Job Reports
- Project management tools are great, but also have a plan for paper files
- Use monitoring lists to structure your files
- Keep files current
 - The public can ask to look at your public data at any time, be ready!

Questions?
Comments?
Concerns?