

CDBG Grantee Performance Report

INSTRUCTIONS

Community Development Block Grant (CDBG) Grantees must report on performance measure indicators for each activity funded with federal funds (Federal Register notice FR 4970 N 02).

The GPR is designed to collect information at the “activity level” for each grant activity funded through a Standard Agreement or by Program Income. Each Standard Agreement may include a number of activities that have a short description and matrix code. Information collected using the GPR is entered into HUD’s Integrated Disbursement and Information System (IDIS). Each activity has an assigned IDIS identification number that is used to fund and track the progress of the activity. All activities must report performance measurement data except for planning activities with a matrix code 20 or general program administration with a matrix code 21A.

The Department requires a jurisdiction to submit a GPR annually for each Standard Agreement. The Annual GPR is due on July 31st of each year. . For those jurisdictions that are administering revolving loan accounts (RLA) indicate “Program Income” in the field titled Standard Agreement. Each RLA will be an activity in the “Program Income” GPR report (i.e. Matrix: 14A Housing Rehabilitation RLA or 13 Homebuyers Assistance RLA). A second report is required if the project or activity is completed at another time during the year, this would represent a Final GPR.

A Final GPR is required when funding is all spent, the activity is completed, or the contract has expired and/or was cancelled. Final GPR’s are due 90 days after the close of a contract. At the top of the Introduction and Summary page, indicate if the report is either an Annual or Final GPR.

The revised GPR is designed as an interactive Excel workbook and may be electronically copied and saved. Access to a computer with Excel or similar spreadsheet program is required to complete the electronic version of the workbook. Before beginning, make a copy of the workbook and rename it using the Standard Agreement number and year being reported (i.e. 05STBG1530.2007-08). **DO NOT ALTER OR EDIT THE FORMAT.** Additional workbooks are required for each contract currently being administered by the local jurisdiction.

The GPR includes an Introduction and Summary page to identify all activities in the report. There are nine (9) pages (sheets) available to report on a specific activity. There are also five (5) appendices located on the bottom of each activity page. The following list represents the pages (sheets) in the GPR:

1. Acquisition and Preparation
2. Home Buyers Assistance
3. Public Improvements In Support of Housing
4. Housing Rehabilitation (All)
5. Housing Services
6. Public Facility-Improvement
7. Public Service
8. Business Assistance & Infrastructure

9. Micro Enterprise

The pages were developed based on the screen paths in IDIS that is organized by the National Objective Code. At the bottom of the Excel workbook are tabs that represent the different pages (sheets) of the workbook. The appendix sections are at the bottom of the page because each appendix is associated with a specific activity. This retains all the information about a single activity in one location.

From the Introduction and Summary page, check boxes for all activities included in this report. After checking off the applicable activities, click on the page number to the right of the activity to be directed to the worksheet page to report on this activity. The new page will list all the activities that maybe reported using this page. Simply check the box for the correct activity and begin addressing the questions provided. One worksheet page is required for each activity. There are a number of similar questions at the beginning of each page, but the pages differ in terms of performance measurement data and requests specific information for the particular activity. Be sure the year and standard agreement number are transferred to the top of the page being completed. If the year and standard agreement number are missing, the information must be inserted to allow the Department to process the report.

On each page there is a reference number on the right side of the form. This represents the computer screen number HUD has assigned in IDIS (i.e. **IDIS cdbg 01**). The reference was placed in the form to help the Department place information into IDIS. This number may also be used as a reference for any questions about the information being requested. Chapter eight (8) of the HUD IDIS Reference Manual explains the data required in the fields using the same screen numbers. This information may be of assistance and can be accessed at HUD's web site at: www.hud.gov/offices/cpd/systems/idis/library/refmanual/index.cfm#8. The Department has also drafted more detailed instructions for this form that is available in the Grant Management Manual. The Grant Management Manual is available at the Department's web site under the CDBG program.

Completed forms may be forward to the Department by email attachment. Retain all supporting documentation used for the report in your file. If the GPR is submitted by email attachment, print and mail a hard copy of the Introductory and Summary page with an original signature signed in blue ink on the certification.

It is important to provide numbers and dollar amounts when requested. Providing a written explanation does not allow the State to enter the data into IDIS. Please contact the CDBG Program Representative assigned to your jurisdiction with any questions that you may have regarding this report. A list of the CDBG Representatives can be found on the Department's website at <http://www.hcd.ca.gov/fa/cdbg/info.html> or by calling (916) 552-9398.