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?