



DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT

Division of Federal Financial Assistance

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CDBG Management Memo #21-03

Date: December 7, 2021

To: Community Development Block Grant (CDBG) and CDBG-CV Grantees

Subject: Activity Reporting

Purpose

The purpose of this memo is to document the process and requirements for activity reporting under CDBG programs. The process takes place entirely inside the eCivis Grants Management Network, where the Grantee is asked to enter a description of activities conducted during the reporting period and can upload supporting documentation when required. For example:

- Fair housing marketing plans
- Bid documents
- Executed contracts
- Debarment checks
- Inspection reports
- Other documents that substantiate the narrative provided

Background Requirements

The U.S. Department of Housing and Urban Development's (HUD) recordkeeping requirements for CDBG grant awards for funds administered by the Department are contained in 24 CFR Part 570. Specifically, 24 CFR 570.506 (a) states "Records providing a full description of each activity assisted (or being assisted) with CDBG funds, including its location (if the activity has a geographical locus), the amount of



CDBG funds budgeted, obligated and expended for the activity, and the provision in subpart C under which it is eligible.”

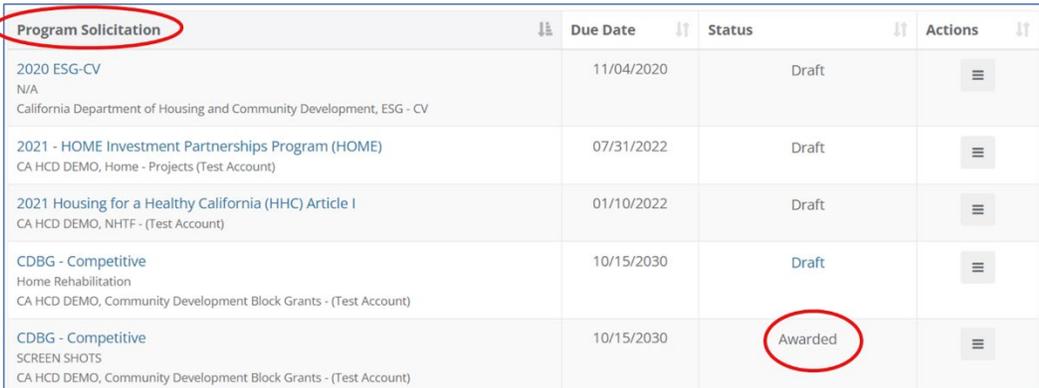
While a full description of the proposed activity is contained in the Standard Agreement and Financial Reports are a separate requirement outlined in CDBG Management Memo #21-01, activity reports are required to document and track progress against the proposed milestones.

Process

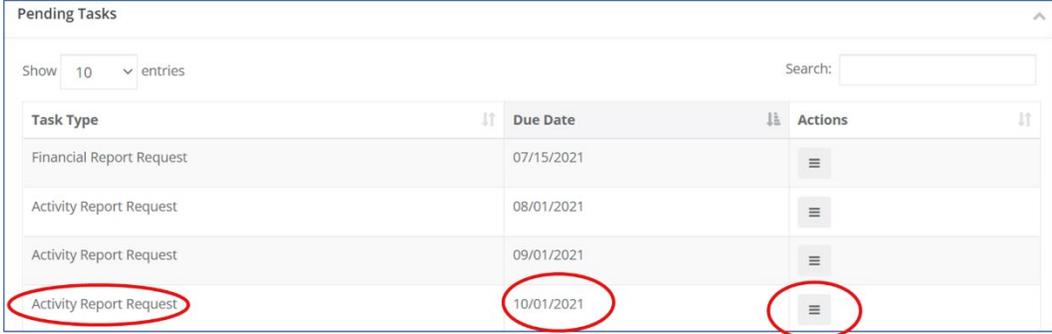
The CDBG activity reporting process consists of generating quarterly entries in the Grants Network Portal, documenting project progress and accomplishments during the reporting period.

Exhibit 1, below, outlines the steps the Grantee must take to complete reporting in the Grants Network Portal.

Exhibit 1. Grantee Activity Reporting in the Grants Network Portal

Step	Action																								
1	Log in to the portal with your credentials.																								
2	<p>Scroll to Program Solicitation and click the link for the award that needs an activity report.</p> <ul style="list-style-type: none"> Make sure to select the option that shows Awarded in the status column.  <table border="1" data-bbox="365 1323 1404 1711"> <thead> <tr> <th>Program Solicitation</th> <th>Due Date</th> <th>Status</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>2020 ESG-CV N/A California Department of Housing and Community Development, ESG - CV</td> <td>11/04/2020</td> <td>Draft</td> <td>☰</td> </tr> <tr> <td>2021 - HOME Investment Partnerships Program (HOME) CA HCD DEMO, Home - Projects (Test Account)</td> <td>07/31/2022</td> <td>Draft</td> <td>☰</td> </tr> <tr> <td>2021 Housing for a Healthy California (HHC) Article I CA HCD DEMO, NHTF - (Test Account)</td> <td>01/10/2022</td> <td>Draft</td> <td>☰</td> </tr> <tr> <td>CDBG - Competitive Home Rehabilitation CA HCD DEMO, Community Development Block Grants - (Test Account)</td> <td>10/15/2030</td> <td>Draft</td> <td>☰</td> </tr> <tr> <td>CDBG - Competitive SCREEN SHOTS CA HCD DEMO, Community Development Block Grants - (Test Account)</td> <td>10/15/2030</td> <td>Awarded</td> <td>☰</td> </tr> </tbody> </table>	Program Solicitation	Due Date	Status	Actions	2020 ESG-CV N/A California Department of Housing and Community Development, ESG - CV	11/04/2020	Draft	☰	2021 - HOME Investment Partnerships Program (HOME) CA HCD DEMO, Home - Projects (Test Account)	07/31/2022	Draft	☰	2021 Housing for a Healthy California (HHC) Article I CA HCD DEMO, NHTF - (Test Account)	01/10/2022	Draft	☰	CDBG - Competitive Home Rehabilitation CA HCD DEMO, Community Development Block Grants - (Test Account)	10/15/2030	Draft	☰	CDBG - Competitive SCREEN SHOTS CA HCD DEMO, Community Development Block Grants - (Test Account)	10/15/2030	Awarded	☰
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3	<p>Scroll to Pending Tasks and look for the report you would like to complete.</p> <ul style="list-style-type: none"> This will be an Activity Report for the appropriate reporting period. 																								

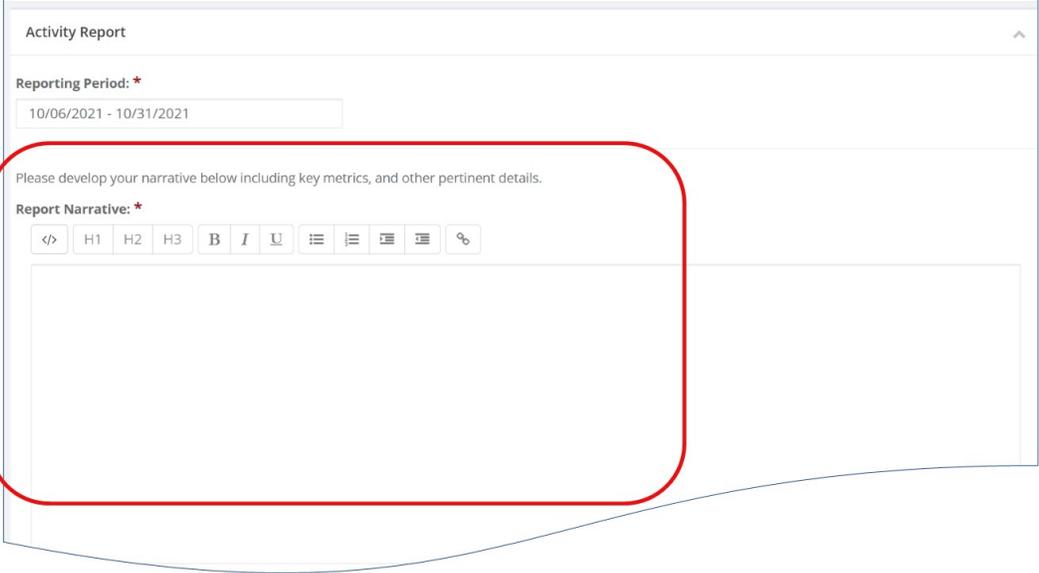


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	 <p>Pending Tasks</p> <p>Show 10 entries Search: <input type="text"/></p> <table border="1"><thead><tr><th>Task Type</th><th>Due Date</th><th>Actions</th></tr></thead><tbody><tr><td>Financial Report Request</td><td>07/15/2021</td><td>⋮</td></tr><tr><td>Activity Report Request</td><td>08/01/2021</td><td>⋮</td></tr><tr><td>Activity Report Request</td><td>09/01/2021</td><td>⋮</td></tr><tr><td>Activity Report Request</td><td>10/01/2021</td><td>⋮</td></tr></tbody></table>	Task Type	Due Date	Actions	Financial Report Request	07/15/2021	⋮	Activity Report Request	08/01/2021	⋮	Activity Report Request	09/01/2021	⋮	Activity Report Request	10/01/2021	⋮
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4	<p>Click on the corresponding three lines  under Actions and select Create Activity Report in the pop-up window.</p> 															
5	<p>Under Activity Report, find the Reporting Period field. Click in the field and use the calendar to select the reporting period. Click Apply.</p>															

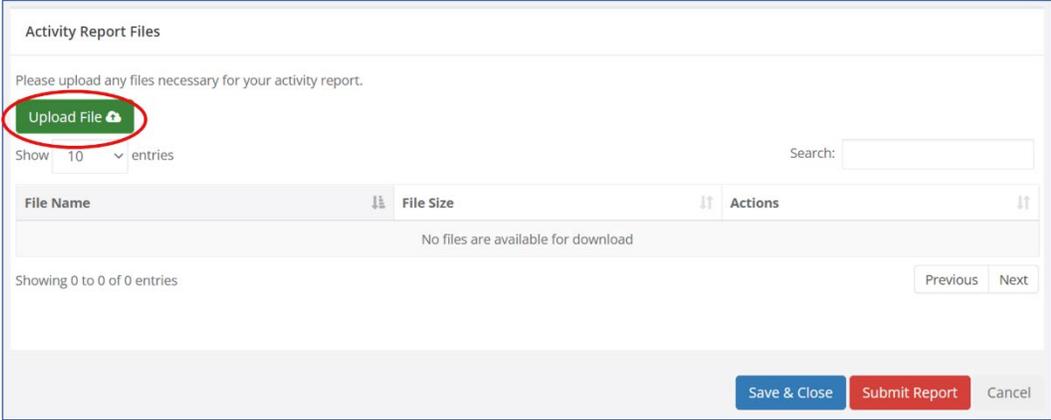
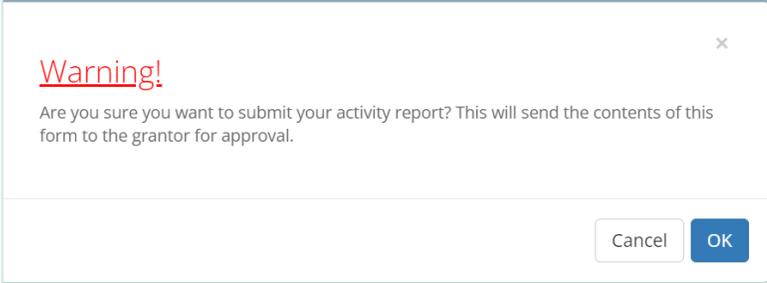


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	<div data-bbox="396 386 1377 1255"> <p>Activity Report</p> <p>Award Detail</p> <p>CDBG - Competitive Awarded</p> <p>Awarded by: CA HCD DEMO</p> <p>Approved amount: \$21,000.00</p> <p>Match type:</p> <p>Performance period: 07/01/2021 -06/30/2022</p> <hr/> <p>Activity Report</p> <p>Reporting Period: *</p> <div style="border: 2px solid red; padding: 5px; display: inline-block;"> <input type="text" value="10/29/2021"/> </div> <div style="margin-left: 20px;"> <input type="text" value="10/29/2021"/> Apply Cancel </div> <table border="1" style="font-size: small; border-collapse: collapse; width: 100%;"> <thead> <tr> <th colspan="7">Oct 2021</th> <th colspan="7">Nov 2021</th> </tr> <tr> <th>Su</th><th>Mo</th><th>Tu</th><th>We</th><th>Th</th><th>Fr</th><th>Sa</th> <th>Su</th><th>Mo</th><th>Tu</th><th>We</th><th>Th</th><th>Fr</th><th>Sa</th> </tr> </thead> <tbody> <tr> <td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>1</td><td>2</td> <td>31</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td> </tr> <tr> <td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td> <td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td> </tr> <tr> <td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td> <td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td> </tr> <tr> <td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td> <td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td> </tr> <tr> <td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td style="background-color: #0056b3; color: white;">29</td><td>30</td> <td>28</td><td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td> </tr> <tr> <td>31</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td> <td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td> </tr> </tbody> </table> </div>	Oct 2021							Nov 2021							Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	26	27	28	29	30	1	2	31	1	2	3	4	5	6	3	4	5	6	7	8	9	7	8	9	10	11	12	13	10	11	12	13	14	15	16	14	15	16	17	18	19	20	17	18	19	20	21	22	23	21	22	23	24	25	26	27	24	25	26	27	28	29	30	28	29	30	1	2	3	4	31	1	2	3	4	5	6	5	6	7	8	9	10	11
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<p style="font-size: 2em; font-weight: bold; color: #0056b3;">6</p>	<p>Under Report Narrative, the Grantee should provide a detailed narrative about the project activity that has taken place during the reporting period. (See the next section for more information about report contents.)</p> <ul style="list-style-type: none"> ■ Grantees should take care to proofread the narrative before submitting to make sure their information is captured correctly. 																																																																																																																



Step	Action
	
7	<p>Below the Narrative field, Grantees will find the Activity Report Files section. If documentation is needed to provide evidence that a particular milestone has been met or deliverable has been completed, the Grantee must upload additional activity documentation here by using the Upload file function.</p> <ul style="list-style-type: none">■ Some file uploads are optional. For example, some Grantees choose to attach brochures, newsletters, photos of project progress, or other documents related to the project.■ Some file uploads are mandatory under certain circumstances. See the <i>Activity Report Contents</i> section below for a partial list of circumstances under which supporting documentation is required.



Step	Action																		
	 <p>Activity Report Files</p> <p>Please upload any files necessary for your activity report.</p> <p>Upload File </p> <p>Show 10 entries Search: <input type="text"/></p> <table border="1"> <thead> <tr> <th>File Name</th> <th>File Size</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td colspan="3" style="text-align: center;">No files are available for download</td> </tr> </tbody> </table> <p>Showing 0 to 0 of 0 entries Previous Next</p> <p>Save & Close Submit Report Cancel</p>	File Name	File Size	Actions	No files are available for download														
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8	<p>When the report is ready to submit, the Grantee clicks the red Submit Report button at the bottom of the page.</p>																		
9	<p>A warning box will pop up. The Grantee should click OK if they are ready to submit the report.</p> <ul style="list-style-type: none"> Clicking Cancel will take the Grantee back to the reporting screen.  <p>Warning!</p> <p>Are you sure you want to submit your activity report? This will send the contents of this form to the grantor for approval.</p> <p>Cancel OK</p>																		
10	<p>After selecting OK, the Grantee will be taken to the Award Dashboard.</p>																		
11	<p>Check status before exiting. Scroll to Award Activities and your submitted report status should say Pending Approval.</p>  <p>Award Activities</p> <p>Show 10 entries Search: <input type="text"/></p> <table border="1"> <thead> <tr> <th>Report</th> <th>Reporting Period</th> <th>Created By</th> <th>Date Created</th> <th>Current Status</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>Activity Report</td> <td>10/01/2021 -- 11/01/2021</td> <td>Ineeda House</td> <td>10/29/2021</td> <td>Draft</td> <td>Edit Report</td> </tr> <tr> <td>Activity Report</td> <td>09/30/2021 -- 10/30/2021</td> <td>Ineeda House</td> <td>10/28/2021</td> <td>Pending Approval</td> <td>View Report</td> </tr> </tbody> </table>	Report	Reporting Period	Created By	Date Created	Current Status	Actions	Activity Report	10/01/2021 -- 11/01/2021	Ineeda House	10/29/2021	Draft	Edit Report	Activity Report	09/30/2021 -- 10/30/2021	Ineeda House	10/28/2021	Pending Approval	View Report
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12	<p>If the Grantee needs to save the report before it is ready to submit, they can click Save and Close to return to the report later.</p> <ul style="list-style-type: none">■ The Grantee can locate the unfinished report under Award Activities on the Award Dashboard.■ The Current Status of the incomplete report should show as Draft, and Edit Report should appear in the Actions column.  <p>The screenshot shows a table titled 'Award Activities' with columns: Report, Reporting Period, Created By, Date Created, Current Status, and Actions. A red box highlights the 'Current Status' and 'Actions' columns for the first row, which shows 'Draft' and 'Edit Report' respectively.</p>

Activity Report Contents

A typical report is direct and to the point and consists of **one to two paragraphs**. Lengthy reports are generally **NOT** warranted and are **NOT** desired unless required to explain atypical project circumstances or activities during the reporting period.

Complete, detailed narrative reports will include:

- Project status
- Updates about project activity that has taken place during the reporting period
- Details about participants
- Timeline for continued activity
- Goals or next steps for the following reporting period

For specific milestones, documentation to support the narrative is required. Exhibit 2, below, shows a partial list of examples.



Exhibit 2. Examples of **Required** Documentation

Milestone Accomplished	Supporting Documentation
Construction stage completed	Construction Progress Report, Photos
Completed Fair Housing Marketing Plan	Copy of Fair Housing Marketing Plan
Project out to bid	RFP, RFQ
Contractor Selected	Executed Contract, debarment checks
Construction Milestone Met	Inspection report

If the project has not yet started, the Grantee should provide details on the preliminary activities, planning the rollout, and the expected implementation process.

HCD Representative or Grant Administrator Follow-up

If Grantees do not provide sufficient details, HCD Representatives or Grant Administrators may approve the Activity Report but provide additional guidance to Grantees as comments in the eCivis Grants Management Network. Grantees should take any comments received into consideration when drafting future Activity Report narratives.

Common issues include:

- Need to provide additional details regarding the timeline of completion
- Need to provide goals or next steps for the next reporting period to ensure continued success.
- Need to upload documentation to support the narrative detail.
- Statements to the effect of “no activity to report”. **There is always something to report!**

Frequency

Activity reports must be submitted at least quarterly. For CDBG-CV, HCD recommends submitting them monthly since these are short term projects. For CDBG, quarterly reporting is sufficient. An Activity Report should be submitted **ANY TIME** a Financial Report is submitted. Quarterly reports are due on the 15th of the month following the close of the quarter.



Quarterly due dates are as follows once an award is received:

Quarter	Due Date
Quarter 1	October 15
Quarter 2	January 15
Quarter 3	April 15
Quarter 4	July 15

HCD Representatives or Grant Administrators can grant an extension of the Activity Report due date **up to 30 days from the end of the reporting period**. To accomplish this, the HCD Representative or the Grant Administrator should extend the due date manually in the eCivis Grants Management Network.

Effective Date

This memo is effective immediately as of December 7, 2021. This Management Memo applies to all active grants, program income, past year grants that are still open and are still drawing funds, new grant awards that have not yet been put into a Standard Agreement, and future grant awards.

Questions

If you have general process questions, please contact your Grant Administrator or HCD Representative. A map of Representatives' areas is located at: [Representative Areas Map](#).

If you have specific questions about the information in this Management Memo, or any other questions regarding the CDBG Program, please contact Felicity Gasser at felicity.gasser@hcd.ca.gov or 916-820-1187.