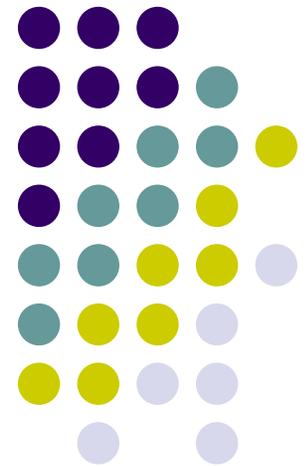


2009 Consolidated Grant Application Training

City of Plano
Planning Department
Neighborhood Services Division
October 16, 22, & 27, 2008



WELCOME



- Introductions
- Review of process and requirements tying directly to application instructions.
- Section headings of presentation show page numbers of instructions for reference.
- Questions

Grant Types & Funding (p. 1 – 2)



Funding includes:

- Federal Funds = Approx. \$1.6 million
 - Community Development Block Grant (CDBG)
 - HOME Investment Partnership
 - American Dream Downpayment Initiative (ADDI)
 - 15% of CDBG for Public Services (approx. \$200K)
 - All other money for either construction or homebuyer/homeowner assistance
 - **NEW - Grant year: July 1, 2009 – September 30, 2010**

Grant Types & Funding (p. 1 – 2)



Funding includes:

- City Funds = Approx. \$520,000
 - Buffington Community Service Grant (BCSG)
 - Focus on Emergency Services (50% of funding)
 - Limited to 25% of agency budget
 - Not more than 50% of award to salaries
 - Definition of Emergency Service Providers
 - Grant year: October 1, 2009 – September 30, 2010



Eligibility (p. 2)

1. Must use proposed funds for Plano residents
2. Non-profit or public agency
3. Must be in compliance with any previous City of Plano contracts
4. Operation for a minimum of three years

Ineligible applications will not be processed.

Application Types (p. 2 – 3)



THREE APPLICATION TYPES

1. Program Services/Program Support
2. Permanent Housing
3. Site Improvement/Equipment Acquisition

Use of wrong application type will disqualify the request from funding consideration.



Application Types (p. 2 – 3)

- May submit more than one application for one or more application types.
- NEW - Must submit separate application for each program, project, activity, or equipment purchase over \$1,000. Do not combine two or more programs in one application.
- Each agency is limited to one five-minute presentation to Commission, regardless of number of applications.

Application Types (p. 2 – 3)



Program Services/Program Support

- Funding of public services through specific programs or activities
- Requests may include salaries, benefits, supplies, equipment less than \$1,000 total, and materials.
- Be especially careful not to include site improvements or equipment requests over \$1,000 in your Program Services application.
- Administrative costs allowed.

Application Types (p. 2 – 3)



Permanent Housing

- Funding of permanent housing construction or rehabilitation for low-income persons.
- Requests may include construction costs and direct service costs.
- Administrative costs allowed.

Application Types (p. 2 – 3)



Site Improvement/Equipment Acquisition

- Funding of either:
 1. Repair or construction of a non-profit's facility
 2. Equipment acquisition totaling more than \$1,000.
- Requests may include direct costs relating to the project.
- Requires three bids

Application Format (p. 3)



Cover Sheet:

- Basic information common to all grant types with one exception, Attachment 8 varies by application type.
- Original signatures required on both copies
- City staff will make a copy of signed and dated cover sheet if you are delivering and would like a receipt.

Application Format (p. 3)



Commissioner Summary:

- Provided for your information. Do not complete.
- Standard for all three application types.
- Allows agencies to see what the Commissioners will be evaluating on the applications.

Application Overview (p. 3)



- Forms are MS Word templates provided online
- Must download and save form from the City website to your local PC to complete
- Be sure to save the form as provided in a “.dot” format, not “.doc”
- Form allows limited space for answers
- Application forms provides automatic calculations for budget tables. (To see instructions, click the “show all” button which looks like ¶ on the toolbar.)
- Be sure to enable macros to calculate tables.

Application Overview (p. 4)



Tables including financial information:

Program Specific – Section 3

- Program/project budget summary (Table A)
- Funding sources other than City of Plano (Table B). Provide updates at hearing.

Organization Stewardship – Section 6

- Organization budget summary – general organization stewardship over 3 years.



Required Attachments (p. 4)

1. Detailed organization budget for Plano or Collin County operations.
2. List of Officers/Board members – City of residence, profession, ethnicity AND Annual schedule of Board meetings
3. Resume of director
4. IRS Letter of Determination
5. Certificate of Good Standing from State Comptroller



Required Attachments (p. 4 – 5)

6. Current ACORD Certificate of Liability Insurance meeting City requirements
7. One copy of most recent audit, including management letter or the like, and Audit Information Certification form
 - Single Audit if more than \$500K in federal funds
 - If audit is of regional/national parent agency, include financial statement of local organization
 - If no audit, financial statements including profit/loss and balance sheet or accounting method and IRS 990 tax return



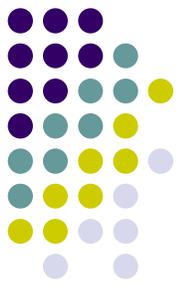
Required Attachments (p. 5 – 6)

8. Varies depending on application type:
 - Program Services/Program Support – Detailed annual program budget on the Program Specific Budget form in MS Excel
 - Site Improvement/Equipment Acquisition – Minimum two of three bids for construction or equipment costs. Third must be submitted to City staff one week prior to public hearing.
 - Permanent Housing – No Attachment #8.



Submittal Requirements (p. 6)

- Training session attendance – COMPLETE!
- Packet Preparation:
 - Two complete copies required including cover sheet, application, and all attachments, except one copy of the audit is allowed
 - Note specific requirements on page six of instructions (single-sided, unbound, no staples, paper size, etcetera)
 - No additional pages, tabs, or unrequested information. Additional information will not be distributed to the Commission for consideration.



Submittal Requirements (p. 6 – 7)

- Received by 5 p.m., Monday, December 1, 2008. No exceptions.
- Completeness check by staff offered to applications received on or before 5 p.m., Friday, November 14, 2008. Results available within one week of submission.
- Incomplete applications submitted after 11/14 will be returned to applicants and will not be considered for funding.

Submittal Requirements (p. 6 – 7)



- Staff review is limited to:
 - Applicant eligibility
 - Completeness check
 - Staff evaluation form
- Staff will not review content for quality or accuracy of information. Content is strictly the responsibility of the applicant.
- Staff will supply technical assistance to applicants either by phone, email, or appointment up to the December 1 deadline.

Application Instructions (p. 7 – 17)



Critical detail included in the application instructions.

To complete an application accurately, you must be familiar with the specifics in the instructions.

- Cover Sheet – page 7
- Program Services/Program Support – pages 8-11
- Permanent Housing – pages 12-14
- Site Improvement/Equipment Acquisition – pages 15-17

QUESTIONS?



Staff contacts:

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- Dianne Landen – diannel@plano.gov
- Shanette Brown – shanetteb@plano.gov

972-941-7151

Application Instructions (p. 8 - 11)



Program Services/Program Support

Budgets must include totals and should be consistent between the budget summary and budget detail spreadsheet.

Verify numbers – Commissioners pay close attention to the accuracy of your agency's financial data.

Application Instructions (p. 8 - 11)



Program Services/Program Support

Performance Measures for Programs and Services - Define your clientele

- Staff prefers that you use unduplicated clients or households since that is the reporting method required for all grants.
- However, you may choose another definition as allowed by the application.

Application Instructions (p. 9 - 10)



Program Services/Program Support

Performance Measures for Programs and Services:

- Provide cost per client per unit of service
- Provide measurable, quantitative goals
- Results-oriented emphasis – describe specific outcomes where possible



Application Instructions (p. 9 - 10)

Program Services/Program Support

Performance Measures Example - Rent assistance

- A. Client = one household
- B. Units of Service = One time financial payment to landlord or mortgage holder

C. Table:

Funding	Clients	Units of Service	Cost/Client/Unit
\$10,000	8	2	\$625

- D. Goal = Avoid homelessness for 3 months for 75% of households assisted.
- E. Tools = Follow up phone call or home visit 3 months after assistance to ensure client(s) remain in residence.
- F. Outcomes = In 2007, 69% of clients assisted were identified as being in their same residence at the 3-month follow up.

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City of Plano, 10/15/2008



Application Instructions (p. 9 - 10)

Program Services/Program Support

Performance Measures Example – Medical services

- A. Client = one unduplicated patient
- B. Units of Service = One visit to clinic where medical services provided

C. Table:

Funding	Clients	Units of Service	Cost/Client/Unit
\$10,000	100	2	\$50

- D. Goal = At least 50% of clients served should be below 80% of area median income and not have health insurance coverage.
- E. Tools = Track client insurance coverage or lack thereof, including Medicare, Medicaid, and CHIP. Verify income using federal standards.
- F. Outcomes = In 2007, 52% of clients met both criteria, were below 80% of median income and were not covered by any type of health insurance.