

SECTION I
2022-2023 UNIVERSAL APPLICATION CYCLE
GUIDELINES

Applicant organizations must be either a (1) public agency or (2) private, non-profit entity and must be in good standing with the State and the City of Jacksonville.

To be considered for funding, a project must primarily benefit low and moderate income persons or special needs populations as defined by HUD programmatic regulations.

Applicants must demonstrate they have attempted to obtain funding from other sources. Evidence (an award letter, statement, or other documentation) of this should be included as part of the project narrative and submitted with the proposal, with response from potential funding sources.

All applicant organizations **must** attend one of the following **Mandatory Workshops** to be eligible to apply for funding. Registration is required.

Mandatory Workshops:

- **Tuesday, November 30, 2021, 10:00 a.m. on Zoom**
- **Thursday, December 2, 2021, 2:00 p.m. at the Legends Community Center**

If after attending a workshop applicants need additional assistance, questions can be sent to HCDDcomments@coj.net.

A. FUNDING GUIDELINES:

- Proposed projects will only be eligible for funding beginning October 1, 2022, **pending Council Approval.**
- The minimum funding amount is \$25,000.00.
- Project goals should be attainable within a defined period of time (typically one year) and should achieve measurable results.
- Funds will not be granted to reduce existing deficits, entertainment, lobbying expenses, audits, or other ineligible expenses under the Universal Funding Application Guidelines.
- **Applicants will be required to execute a contract with the City before receiving any approved funds. Funding is disbursed on a reimbursement basis. If you do not have the capacity to work on a reimbursement basis, you are ineligible to proceed.**
- All applicants approved for funding **must** provide the City with Certificates of Insurance in a form acceptable to the City for all required insurance.
- Applicants must submit Conflict of Interest Disclosure Form (page 22 of this application) for **all** Board Members/Commission Members, Executive Management/Officers, and Program Staff associated with Delivery of Program.
- Projects **must** meet all applicable grant requirements of the U.S. Department of Housing and Urban Development (HUD).
- Applicants **must** demonstrate adequate management and fiscal controls within its current organization to undertake the proposed project.
- Applicants **must** demonstrate the ability to leverage or match the requested funds from other sources. The following leverage/match requirements apply:

- **PUBLIC SERVICE PROJECTS (CDBG ONLY)** – Minimum **100% MATCHING FUNDS** required (minimum of 50% cash match required and maximum of 50% of matching funds in the form of in-kind contributions and/or volunteer labor. The current rate for volunteer match time is **\$25.43 per hour**).
- **ACQUISITION, CONSTRUCTION, and REHABILITATION** – Minimum **100% MATCHING FUNDS** required, dedicated to the specific construction project. A minimum of 80% cash match required and a maximum of 20% match funds in the form of in-kind contributions.

All leverage/matching funds must be dedicated and documented to the requested project and available upon the start of the program year starting October 1, 2022.

B. APPLICATION CRITERIA

- Applicants **must** report the status of all funds that are requested or proposed from other sources.
- Applications must address one or more of the following priority needs set forth in the 2021-2025 Consolidated Plan Substantial Amendment:
 - ❑ Improvements to and Expansion of Public Facilities
 - ❑ Affordable Housing Preservation & Development
 - ❑ Expansion of Available Public Services
 - ❑ Addressing Homelessness
 - ❑ Increased Economic Development Opportunities
 - ❑ Planning & Disaster Preparedness
- **Davis-Bacon Act:** Agencies awarded construction or rehabilitation projects must ensure that they meet requirements specified under the Davis-Bacon Act. The Act requires that all laborers and mechanics employed by contractors or subcontractors in the performance of construction work financed in whole or in part with assistance received under HUD programs shall be paid wages at rates not less than those prevailing on similar construction in the locality as determined by the Secretary of Labor in accordance with the Davis-Bacon Act, as amended (40 U.S.C.276a—276a-5): Provided, that this section shall apply to the rehabilitation of residential property only if such property contains not less than 8 units.
- **Environmental Review Record:** Consideration should be taken in the selection of projects and in the preparation of applications to ensure that environmental and historic preservation impediments do not cause an application to be denied, or approval severely

delayed. **Applicants should canvas the service area and note any environmental concerns and address how their program will mitigate them.**

- **Section 3:** Contracts in excess of \$200,000 and Subcontracts in excess of \$100,000 awarded to sub-recipients must comply with Section 3 Program guidelines. Activities include (1) housing rehabilitation (2) housing construction and (3) other public construction projects. Applicants requesting \$100,000 or more for Section 3 covered activities must provide procurement policies and procedures that include Section 3 guidelines.
- **CDBG, ESG, AND HOPWA FUNDS MAY NOT BE OBLIGATED UNTIL THE CONTRACT IS ACCEPTED AND SIGNED BY ALL PARTIES.**

C. SUBMISSION INSTRUCTIONS:

- Applications must be received by the division no later than 5:00 p.m. EST on Thursday, January 6, 2022. **NO LATE APPLICATIONS WILL BE ACCEPTED.**

Applications turned in 12/3/2021 - 1/5/2022:
**Housing and Community Development
Division
2022-2023 Universal Applications Cycle
214 N. Hogan St., 7th Floor
Jacksonville, FL 32202**

Applications turned in on 1/6/2022:
**Housing and Community Development
Division
2022-2023 Universal Applications Cycle
214 N. Hogan St., 1st Floor
Old Vystar Location
Jacksonville, FL 32202**

- Applicants shall submit **one (1) signed original paper copy** of the entire application by hand delivery and **one (1) electronic copy** of the entire application on a USB Thumb Drive by hand delivery to the Ed Ball Building at the old Vystar location on the first floor. The application submission must meet the following requirements:
 - The paper copy will be submitted in a three-ring binder. The applicant will use divider tabs, labeled as described on the application checklist included in this application on page 23, to divide each section of the application response and each application attachment. Original signatures are required for all application documents.
 - The electronic copy will be submitted on a USB thumb drive. Each application attachment shall be saved as a separate file on the USB thumb drive and labeled as described on the application checklist included in this application on page 23. See Figure 1 on page 4 for a submission example of labeling instructions.
 - **Applicants must submit a separate and complete application for each project type for which funding is requested.**

Name	Date modified	Type	Size
 1_Application.pdf	10/18/2021 10:39 AM	Microsoft Edge P...	17 KB
 2_Match and Leverage Form.pdf	10/18/2021 10:39 AM	Microsoft Edge P...	17 KB
 3_Budget Worksheet.pdf	10/18/2021 10:39 AM	Microsoft Edge P...	17 KB
 4_Authorization Resolution.pdf	10/18/2021 10:40 AM	Microsoft Edge P...	17 KB
 5_Resolution for Signature Authority.pdf	10/18/2021 10:41 AM	Microsoft Edge P...	17 KB
 6_Organization Chart.pdf	10/18/2021 10:41 AM	Microsoft Edge P...	17 KB
 7_Program Staff.pdf	10/18/2021 10:41 AM	Microsoft Edge P...	17 KB
 8_Job Descriptions.pdf	10/18/2021 10:41 AM	Microsoft Edge P...	17 KB
 9_Resumes.pdf	10/18/2021 10:41 AM	Microsoft Edge P...	17 KB
 10_Confidentiality Procedures.pdf	10/18/2021 10:42 AM	Microsoft Edge P...	17 KB
 11_Board of Directors.pdf	10/18/2021 10:42 AM	Microsoft Edge P...	17 KB
 12_Conflict of Interest.pdf	10/18/2021 10:42 AM	Microsoft Edge P...	17 KB
 13_Other Funding Sources.pdf	10/18/2021 10:42 AM	Microsoft Edge P...	17 KB
 14_Financial Statement.pdf	10/18/2021 10:42 AM	Microsoft Edge P...	17 KB
 15_Audit.pdf	10/18/2021 10:42 AM	Microsoft Edge P...	17 KB
 16_Organization Bylaws.pdf	10/18/2021 10:43 AM	Microsoft Edge P...	17 KB
 17_Certificate of Nonprofit Status.pdf	10/18/2021 10:43 AM	Microsoft Edge P...	17 KB
 18_Articles of Incorporation.pdf	10/18/2021 10:43 AM	Microsoft Edge P...	17 KB
 19_Selection Procedures.pdf	10/18/2021 10:43 AM	Microsoft Edge P...	17 KB
 20_Letter of Endorsement.pdf	10/18/2021 10:43 AM	Microsoft Edge P...	17 KB
 21_Liability Coverage.pdf	10/18/2021 10:44 AM	Microsoft Edge P...	17 KB
 22_Sunbiz Agency Report.pdf	10/18/2021 10:44 AM	Microsoft Edge P...	17 KB
 23_Sam.gov.pdf	10/18/2021 10:44 AM	Microsoft Edge P...	17 KB
 24_Workshop Certificate.pdf	10/18/2021 10:44 AM	Microsoft Edge P...	17 KB
 25_Other.pdf	10/18/2021 10:44 AM	Microsoft Edge P...	17 KB

Figure 1 – Submission example of USB labeling instructions.

D. REVIEW PROCESS:

- The following must be met or the application will not be reviewed for funding:
 - Application complete, approved, and submitted by Board of Directors or designated representative.
 - Proposed service/program/project meets one of the National Objectives.
 - Complete program year 2022-2023 Match and Leverage Form and Budget.
- All applicants will be notified of the funding recommendations in writing, on or about September 1, 2023. **Receipt of an award letter is not a guarantee of funding.** Final approval by the Mayor's Budget Review Committee and City Council is required. All awards are subject to further pre-contract negotiation, an award of the annual entitlement appropriation by the U.S. Department of Housing and Urban Development to the City of Jacksonville and an Environmental Review.

It is the responsibility of the City of Jacksonville to ensure that City funds are disbursed and managed in accordance with funding regulations. To fulfill this responsibility, the City of Jacksonville will conduct a review of all applicants applying for funding to evaluate their operations, services, projects, and budgets. Any project and/or organization not receiving **a minimum score of 75** is not eligible for further review. Receipt of maximum scoring points is not a guarantee of funding. Receipt of an award letter is NOT a guarantee of funding. **Prior funding awards do not guarantee continued or future funding.**

The City, in its sole and absolute discretion, with or without cause, and without liability of any kind to any applicant, reserves the right to accept or reject any and/or all applications either in whole or in part, waive any informalities or irregularities of any applications, cancel this Universal Funding Application at any time and/or take any action in the best interest of the City. The City's decision in all matters shall be final. The City reserves the right to contact an applicant if additional information is required.

Agencies who have received prior funding through the City of Jacksonville will also be evaluated on past performance in carrying out programmatic activities and contractual compliance.

Factors to be considered are:

- agency ability to meet service delivery goals
- timely expenditure of funds
- timely reporting
- accuracy of reporting
- ability to meet audit requirements
- other programmatic and fiscal contractual requirements.

SECTION II
2022-2023 UNIVERSAL APPLICATION CYCLE
APPLICATION

A. AGENCY INFORMATION

Fed. I.D. # _____

System for Award Management (SAM) CAGE Code# _____ EXP Date _____

Organization or Agency Legal Name: _____

Applicant's Legal Name: _____

Street Address: _____

Council District: _____

City: _____ State: _____ Zip Code: _____

Primary Contact: _____ **Title:** _____

Telephone No: _____ E-mail: _____

President/Executive Director: _____

Telephone No: _____ E-mail: _____

Location of proposed service/program/project (if different than stated above):

Street Address: _____

City: _____ State: _____ Zip Code: _____

Council District(s) if different than stated above: _____

B. PROJECT DESCRIPTION, AGENCY SUMMARY, AND STATEMENT OF NEED

1. Project Description - All Applicants: Provide a detailed description of your proposed project. This should include a summary of the project and the objectives that the agency/organization will accomplish during the fiscal year. *Type your response in the text box below. 200 maximum word count.*

2. Project Description: Service Delivery – CDBG Applicants ONLY: Select one service delivery area:

Public Facilities Improvements (rehabilitation including acquisition and construction)

Public Services (select one primary beneficiary below):

homeless; must also meet ESG homeless service requirements

victims of abuse

special needs population (elderly, disabled adults, illiterate adults)

low-to-moderate income

3. Project Description - Service Delivery - CDBG Applicants ONLY: Select the box below that best describes the project:

This project is a new service not already available in the community.

This project is a new service for this organization, but the service is already available in the community by another organization.

This project is expanding an existing service. This must be documented through the program year.

4. Project Description - Service Delivery - HOPWA Applicants ONLY: Select the primary service that this project will provide for:

Permanent Housing Placement (PHP)

Short-Term Rental, Mortgage, and Utilities (STRMU)

Supportive Services. This is mandatory and must be documented though the program year.

5. Project Description - Service Delivery - ESG Applicants ONLY: Select the primary service that this project will provide for:

Emergency Shelter

Street Outreach

Services Only

Day Shelter

Homelessness Prevention

Rapid Rehousing

Domestic Violence

Coordinated Assessment; This is mandatory and must be documented though the program year.

6. Project Description - Service Delivery - CDBG Applicants selecting Homeless Public Service and ESG Applicants: This organization currently uses HMIS.

Please note this is threshold criteria.

Yes

No

7. Project Description - Service Delivery - CDBG Applicants selecting Homeless Public Service and ESG Applicants: This organization participates in the Continuum of Care Coordinated Entry Process.

Please note this is threshold criteria.

Yes

No

8. Project Description - Service Delivery - CDBG Applicants selecting Homeless Public Service and ESG Applicants: This organization has adopted a Housing First policy.

Please note this is threshold criteria.

Yes

No

9. Project Description - Service Delivery - CDBG Applicants selecting Homeless Public Service and ESG Applicants: Does your application include a project specific endorsement from the Continuum of Care Governing Council? If so, you must include a copy of the endorsement with the application.

Please note this is threshold criteria.

Yes

No

10. Agency Summary – Program Services - All Applicants: Summarize the relevant *professional expertise* of project staff members responsible for implementation of *this project* in their ability to manage or provide program services. If the staff member does not have prior experience in providing the proposed service, please indicate experience and successes carrying out similar programs. Remember to attach all project-relevant staff resumes to this application. Resumes *must include current position* at agency applying for this project.
Type your response in the text box below. 200 maximum word count.

11. Agency Summary - Program Services - All Applicants: Select the response that best describes the project-relevant staff members’ experience with program management of grant programs.

Multiple staff members associated directly with the project have relevant program management experience, reflected on their resumes attached to this application.

No other staff members, besides the manager, associated directly with the project have relevant program management experience.

12. Agency Summary – Program Services – All Applicants: Select the response that best describes the project-relevant manager’s years of experience managing programs and services. This will reflect on the project manager’s resume attached to this application.

5+ years experience in relevant program management

3-5 years experience in relevant program management

1-3 years experience in relevant program management

0-11 months experience in relevant program management

13. Agency Summary – Program Services – All Applicants: Pursuant to Chapter 435, F.S., does this agency conduct a Level 2 State and National background check for employees?

Yes

No

14. Agency Summary – Program Services – All Applicants: Does this agency have client confidentiality procedures to ensure confidentiality of client files? These procedures must be included in application submission in Section 10 Confidentiality Procedures.

Yes

No

15. Agency Summary – Program Services - All Applicants: The overall number of staff dedicated to implementation of this project: _____

16. Agency Summary – Program Services - All Applicants: The number of staff dedicated to implementation of this project who have experience with City of Jacksonville grant programs: _____

17. Agency Summary – Program Services - All Applicants: The number of staff dedicated to implementation of this project who have experience with non-City of Jacksonville grant programs: _____

18. Agency Summary - All Applicants: The number of staff dedicated to implementation of this project with no grant experience: _____

19. Agency Summary – All Applicants: Provide a detailed project management plan.

Type your response in the text box below. 200 maximum word count.

20. Agency Summary – Financial Management - All Applicants: Identify and describe grant administration software and financial management capabilities, and financial grant management policies and procedures the organization possesses in order to manage this project consistent with Federal financial management requirements as set forth in 2 CFR 200. *Type your response in the text box below. 200 maximum word count.*

21. Agency Summary - Financial Management – All Applicants: Describe grant management experience of key staff responsible for financial management of the project. *Type your response in the text box below. 200 maximum word count.*

25. Statement of Need – Narrative Response - All Applicants - Describe the project’s target population and service delivery area. Support the urgency of meeting this need using current data. *Type your response in the text box below. 200 maximum word count.*

26. Statement of Need - Narrative Response – All Applicants: Describe the community problem or need that this project is designed to address. *Type your response in the text box below. 200 maximum word count.*

27. Statement of Need - CDBG Applicants ONLY: Select one population that best describes the project’s primary target population:

Homeless

Victims of domestic violence or victims of abuse

Elderly, disabled, or illiterate adults

Low-to-Moderate Income population, including PHA residents

28. Statement of Need - ESG Applicants ONLY: Select one population that best describes the project’s primary target population:

The target population of this project are victims of domestic violence.

The target population of this project are youth.

The target population of this project are veterans.

This project provides a mental health or substance abuse service.

This project provides other target population or service.

29. HOPWA Applicants ONLY: Select one that best describes the project’s primary target population’s housing situation within the last 3 months:

Homeless

Transitioning from a substance/mental health facility

Transitioning from a hospital or residential care facility

30. All Applicants – Describe how use of your match and leverage funds will improve implementation of your program. *Type your response in the text box below. 200 maximum word count.*

C. CONSTRUCTION PROJECTS ONLY: PROJECT DESCRIPTION AND DELIVERY

PART A: Check the following construction project items that have been completed **and include documentation in the Required Documents section under “Other”** as indicated in the Section III Appendix, Required Document Checklist and Labeling Procedures on page 23 of this document.

Construction Estimates

Preliminary Construction Plans and/or Architectural Designs

Proof of Proper Zoning and Building Codes

Phase 1 Environmental Review

Phase 2 Environmental Review (if needed)

Survey

Appraisal

Evidence of site control. Required.

PART B: For all acquisition, construction and/or rehabilitation projects complete the following Project Implementation Schedule. List the key steps or activities required and check the month(s) in which each step or activity will occur on the table below:

Implementation Steps	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.
Step 1:												
Step 2:												
Step 3:												
Step 4:												
Step 5:												

D. REHABILITATION PROJECTS (INCLUDING ACQUISITION) ONLY: PROJECT DESCRIPTION AND DELIVERY

PART A: Check the following acquisition project items that have been completed **and include documentation in the Required Documents section under “Other”** as indicated in the Section III Appendix, Required Document Checklist and Labeling Procedures on page 23 of this document.

- Additional Funding Secured
- Proof of Proper Zoning and Building Codes
- Plans for any modifications
- Physical Needs Assessment (if needed)
- Inspection Reports (if needed)
- Appraisal (required)
- Evidence of site control (required)

PART B: For all acquisition, construction and/or rehabilitation projects complete the following Project Implementation Schedule. List the key steps or activities required and click to check the month(s) in which each step or activity will occur on the table below:

Implementation Steps	Oct.	Nov.	Dec.	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.
Step 1:	<input type="checkbox"/>											
Step 2:	<input type="checkbox"/>											
Step 3:	<input type="checkbox"/>											
Step 4:	<input type="checkbox"/>											
Step 5:	<input type="checkbox"/>											

E. COMPLIANCE

Please note that if any of the following issues are found your project will not be funded:

- Unresolved Compliance Findings as of January 1, 2022.
- Unresolved Davis-Bacon or Section 3 Notice of Discrepancies as of January 1, 2022.
- Unresolved Monitoring Findings as of January 1, 2022.

F. CERTIFYING REPRESENTATIVE

A Resolution of the Board of Directors authorizing the submission of the 2022-2023 Universal Cycle Application is required. A Resolution of the Board of Directors authorizing the party or parties which shall have executory authority for any grant contracts awarded is also required with this application. Both of these requirements may be met in a single Resolution of the Board of Directors specifically listing both requirements.

G. REPRESENTATIONS AND WARRANTIES OF RECIPIENT

- (i) The Applicant is not in breach of any prior donation agreement or City Ordinance Code provisions by which the City donated property to the Applicant for the development of affordable housing; and
- (ii) The Applicant is not on the Council Auditor's noncompliance list pursuant to Chapter 118, or the Vendor Debarment List pursuant to Chapter 126, Ordinance Code; and
- (iii) The Applicant is not in breach of any of the conditions or requirements of a City grant award or program; and
- (iv) The Applicant is not delinquent on taxes or payment of liens, including code enforcement, nuisance liens, demolition liens, or other municipal liens or fines, on real property owned by the Applicant and incurred after the Applicant took ownership of the real property; and
- (v) The Applicant is not in litigation against the City other than as an agent, attorney, guardian, or personal representative of an estate.

To the best of my knowledge and belief, information in this proposal is true and correct and the governing body of the Applicant has duly authorized the document.

NAME:	
<i>(Please Type)</i>	<i>(Signature)</i>
TITLE:	DATE SIGNED:

MATCH AND LEVERAGE FORM

Amount of Funding Requested: _____ Total Project Cost: _____

Projected/Approximate # of Persons/Participants to be Served: _____

Projected/Approximate # of Units to be Served: _____

Matching/Leveraged: _____ Pending (Applied for): _____

List funding sources, including amounts, which are committed and properly documented for the proposed project. Indicate the amount, by source in the appropriate column (i.e. match, leverage or applied for amounts).

SOURCE TYPE	MATCH AMOUNT	LEVERAGE AMOUNT	APPLIED FOR AMOUNT	TO BE USED FOR
TOTALS				

Reminder – Failure to attach required documentation of funding sources clearly identified for the funding period of the application will result in the source(s) not being considered in scoring.

**UNIVERSAL FUNDING APPLICATION FISCAL YEAR 2022-2023
BUDGET FORM**

SOURCES OF REVENUES	PROPOSED FY 2022-2023
A. FUNDS REQUESTED	_____
B. SOURCES OF MATCHING FUNDS	_____
1. Match Funds	_____
2. Leverage Funds	_____
3. Donations / In Kind	_____
TOTAL SOURCES OF REVENUE	_____

Agency Name: _____

Project Name: _____

Project Type: _____

ITEM #	DESCRIPTION OF WORK	TOTAL PROJECT COST	A	B		
			FUNDS REQUESTED	SOURCES OF MATCHING FUNDS		
				Match Funds 1	Leverage Funds 2	Donations / In Kind 3
01	_____	_____	_____	_____	_____	_____
02	_____	_____	_____	_____	_____	_____
03	_____	_____	_____	_____	_____	_____
04	_____	_____	_____	_____	_____	_____
05	_____	_____	_____	_____	_____	_____
06	_____	_____	_____	_____	_____	_____
07	_____	_____	_____	_____	_____	_____
08	_____	_____	_____	_____	_____	_____
09	_____	_____	_____	_____	_____	_____
10	_____	_____	_____	_____	_____	_____
11	_____	_____	_____	_____	_____	_____
12	_____	_____	_____	_____	_____	_____
13	_____	_____	_____	_____	_____	_____
14	_____	_____	_____	_____	_____	_____
15	_____	_____	_____	_____	_____	_____
16	_____	_____	_____	_____	_____	_____
17	_____	_____	_____	_____	_____	_____
18	_____	_____	_____	_____	_____	_____
19	_____	_____	_____	_____	_____	_____
20	_____	_____	_____	_____	_____	_____
21	_____	_____	_____	_____	_____	_____
22	_____	_____	_____	_____	_____	_____
23	_____	_____	_____	_____	_____	_____
24	_____	_____	_____	_____	_____	_____
25	_____	_____	_____	_____	_____	_____
	TOTAL PROJECT COST	_____	_____	_____	_____	_____

FORM OF RESOLUTION

At a meeting held on the following date _____, the Executive Committee/Board of Directors of the following agency: _____ passed the following resolution:

The Board of Directors authorizes the application for and use of funds from the City of Jacksonville's Neighborhood's Department, Housing and Community Development Division for activities described in the proposal and, if awarded funds, shall implement the activities in a manner to ensure compliance with all applicable federal and local laws and regulations.

Signature of Board President

Date

Printed Name of Board President

Telephone Number

Form of Corporate Resolution

CORPORATE RESOLUTION CERTIFICATION

The undersigned Secretary of _____, a Florida non-profit corporation (“Corporation”), does hereby certify that the following Resolution was adopted by the corporation at a meeting of the Board of Directors of the Corporation held on _____, 20____.

RESOLVED that _____, the _____ of the Corporation is hereby authorized and empowered to execute on behalf of the Corporation any and all documents, contracts and/or grant agreements between the City of Jacksonville and the Corporation (“Authority”).

FURTHER RESOLVED that in addition and without limiting the foregoing, that the Authority of the Corporation be, and hereby is, authorized to take or cause to be taken, such further action, and to execute and deliver or cause to be delivered, for in the name and on behalf of the Corporation, all such instruments and documents as the Authority may deem appropriate in order effectuate any documents or instruments executed in accomplishment of any action or actions authorized as stated herein shall be deemed to be conclusive approval thereof by this Corporation and the binding act and obligation of this Corporation.

DATED: _____

Printed Name: _____

CONFLICT OF INTEREST DISCLOSURE FORM

Federal Law prohibits persons who exercise or who have exercised any functions or responsibilities with respect to the funding sources administered through this jurisdiction ⁽¹⁾ or who are in the position to participate in a decision making process or to gain inside information with regard to such activities, may obtain a financial interest or benefit from an assisted activity, either for themselves or those whom they have family or business ties, during their tenure or for one year thereafter.

Therefore, please answer the following disclosure questions:

1. Are you currently a (Please Check One):

Board Member

Commission Member

Officer

Executive Management Staff

Staff directly associated with delivery of program

2. State position held: _____

3. Are you a business partner of any City of Jacksonville employee(s), member of City Council or member of the Jacksonville Housing and Community Development Commission (JHCDC)?

(Please Check One): No Yes

If yes, please state the name of the City employee(s) and the Department, City Council Member(s) or JHCDC Board Member:

4. Are you, or any immediate family member, a City of Jacksonville employee(s), member of City Council, or member of the JHCDC?

(Please Check One): No Yes

If yes, please state the name of the City employee(s) and the Department, City Council Member(s) or JHCDC Board Member and the relationship:

Signature: _____ Name: _____

Name of Current Employer: _____ Date: _____

(1) 24 C.F.R. §570.611 (CDBG); 24 C.F.R. §92.356 (HOME); 24 C.F.R. §574.625 (HOPWA); 24 C.F.R. §576.404 and 2 C.F.R. §200.112 (ESG) and/or any other citations applicable to any future funding that may be awarded to this jurisdiction.

SECTION III APPENDIX
REQUIRED DOCUMENT CHECKLIST AND LABELING PROCEDURES

✓	Required Document	Divider Tabs Labeled in Binder As:	Document Labeled on USB Thumb Drive As:
	Completed Application (Section II, pages 5-14, 17; Construction projects pages 5-15, 17; Acquisition projects pages 5-14, 16-17).	Application	1_ Application
	Completed Match and Leverage Form (Section II, page 18)	Match and Leverage Form	2_ Match and Leverage Form
	Completed Budget Worksheet (Section II, page 19)	Budget Worksheet	3_ Budget Worksheet
	Resolution from the Board of Directors authorizing the application for and use of funds from the City of Jacksonville (Section II, page 20 of this document).	Authorization Resolution	4_ Authorization Resolution
	Corporate Resolution from the Board of Directors authorizing an individual the authority to sign the application (Section II, page 21 of this document).	Signature Resolution	5_ Resolution for Signature Authority
	Organization Chart with employee names and titles.	Organization Chart	6_ Organization Chart
	List of all current or proposed staff names and titles directly associated with proposed grant/program.	Program Staff	7_ Program Staff
	Job descriptions with pay scales for Executive Director, Fiscal Officer, Program Administrator, and Program Staff and any other proposed positions to be funded.	Job Descriptions	8_ Job Descriptions
	Resumes of Executive Director, Fiscal Officer, Program Administrator, Program Staff, copies of certifications, and consultant contract (if applicable).	Resumes	9_ Resumes
	Client confidentiality procedures to ensure confidentiality of client files.	Confidentiality	10_ Confidentiality Procedures
	List of Current Board Members	Board of Directors	11_ Board of Directors
	Conflict of Interest Disclosure Forms for all Board Members/Commission Members, Executive Management/Officers, <i>and</i> Program Staff associated with Delivery of Program (Section II, page 22 of this document).	Conflict of Interest	12_ Conflict of Interest
	Letters of commitment and/or awards from other funding sources for this project	Other Funding Sources	13_ Other Funding Sources
	Year-to-Date Financial Statement	Financial Statement	14_ Financial Statement
	Most recent Certified Audit, Management Letter, and Agency Response	Audit	15_ Audit
	Most recent Organization By-Laws	Organization By-Laws	16_ Organization Bylaws
	Certificate of Non-profit Status	Certificate of Non-Profit Status	17_ Certificate of NonProfit Status
	Articles of Incorporation	Articles of Incorporation	18_ Articles of Incorporation
	Procedures for selecting contractors and consultants, and agency purchasing policies.	Selection Procedures	19_ Selection Procedures
	Letter of Endorsement from the Northeast Florida Continuum of Care (ESG applicants only)	Letter of Endorsement	20_ Letter of Endorsement
	Proof of General Liability Coverage	Liability Coverage	21_ Liability Coverage
	Copy of Sunbiz Agency Report (Submit the page showing Officers and Active Status, etc.)	Sunbiz Agency Report	22_ Sunbiz Agency Report
	SAM.gov Registration Confirmation	SAM.gov	23_ SAM.gov
	Mandatory Virtual Workshop Attendance Certificate	Workshop Certificate	24_ Workshop Certificate
	Other documents as applicable (i.e., construction or acquisition related project documents)	Other	25_ Other

City of Jacksonville
2022-2023 Universal Application Scoring Guide

Applicant Agency: _____

Project Name: _____

Grant Program (circle one): CDBG ESG HOPWA _____

Funds Requested: _____

Scoring Summary

Project Description (up to 25 Points): _____

Agency Summary and Capacity (up to 30 Points): _____

Statement of Need (up to 15 Points): _____

Budget and Financial Analysis (up to 30 Points): _____

Total Score: _____

Reviewer Name: _____

Reviewer Signature: _____

Review Date: _____

Project Description (up to 25 Points)

Item	Comments	Points Awarded
<p>Question 1: ALL APPLICANTS: Does the applicant provide a detailed project description describing how the project will serve the target population within the narrative responses? (15 Points Maximum)</p> <ul style="list-style-type: none"> • Yes = up to 15 Points 		
<p>Question 2: CDBG ONLY: Applicant selects the service delivery area for the project.</p>		n/a Threshold requirement
<p>Question 3: CDBG Service Delivery Information (10 Points Maximum) Is the agency providing a new service or expanding an existing service?</p> <ul style="list-style-type: none"> • New Service not already available in the community = 10 Points • A New Service (for this agency) but the service is already available in the community (provided by another agency) = 5 Points • Expanding an Existing Service = 5 Points 		
<p>Question 4: HOPWA ONLY - Service Delivery Information (10 Points Maximum) Does the applicant's program primarily provide for:</p> <ul style="list-style-type: none"> • Permanent Housing Placement = 10 Points • STRMU = 5 Points • Supportive Services only = 2 Points 		
<p>Question 5: ESG ONLY - Service Delivery Information</p> <ul style="list-style-type: none"> • Applicant selects the service delivery area for the project. <ul style="list-style-type: none"> ○ Street Outreach = 5 points ○ Domestic Violence = 5 points 		
<p>Questions 6-9: ESG AND CDBG SELECTING HOMELESSNESS ONLY - Service Delivery Information</p> <ul style="list-style-type: none"> • Question 6: Does the organization use HMIS? • Question 7: Does the organization participate in CoC organized Coordinated Entry? • Question 8: Has the organization adopted "Housing First" policy? • Question 9: Does the applicant have a letter of endorsement from the CoC Board of Directors, included as an attachment as outlined in document checklist and labeling procedures? 		n/a Threshold requirement

Total Points for Project Description & Delivery	
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Project Description - Additional Comments:

Reference

Agency Summary and Capacity (up to 30 points)

Item	Comments	Points Awarded
<p>Question 10: ALL APPLICANTS: Does key staff have the professional expertise to undertake the proposed program (resumes of COI of Board Member/Commissioners, Executive Management/Officers, and Program Staff) attached?</p> <ul style="list-style-type: none"> • Yes = up to 4 Points <p>Are specific staff members identified for the project in which funding is being requested?</p> <ul style="list-style-type: none"> • Yes = 1 Point 		
<p>Question 11: ALL APPLICANTS: Do multiple staff members associated with the project have relevant grants management experience?</p> <ul style="list-style-type: none"> • Yes = 1 Point 		
<p>Question 12: ALL APPLICANTS: Does the project manager have at least 5 years of relevant grants management experience?</p> <ul style="list-style-type: none"> • Yes = up to 3 Points • <u>OR</u> 3 to 5 years of experience = up to 2 Points • <u>OR</u> 1 to 3 years of experience = 1 Point 		
<p>Question 13: ALL APPLICANTS: Does the agency conduct a Level 2 State and National background check for employees, pursuant to Ch. 435, F.S.?</p>		Yes or No Threshold requirement
<p>Question 14: ALL APPLICANTS: Does the agency have client confidentiality procedures to ensure confidentiality of client files?</p>		Yes or No Threshold requirement
<p>Question 15: ALL APPLICANTS: Applicant included the overall number of staff dedicated to implementation of the project.</p>		Yes or No Threshold requirement
<p>Question 16: ALL APPLICANTS: Applicant included the number of staff dedicated to implementation of the project who have experience with City of Jacksonville grant programs.</p>		Yes or No Threshold requirement
<p>Question 17: ALL APPLICANTS: Applicant included the number of staff dedicated to implementation of this project who have experience with non-City of Jacksonville grant programs.</p>		Yes or No Threshold requirement
<p>Question 18: ALL APPLICANTS: Applicant included the number of staff dedicated to implementation of the project with no grant experience.</p>		Yes or No Threshold requirement
<p>Question 19: ALL APPLICANTS: Does the applicant provide a detailed project management plan?</p> <ul style="list-style-type: none"> • Yes = up to 10 Points 		

<p>Question 20: ALL APPLICANTS: Has the agency described their grant administration capabilities, financial grant management policies and procedures, and software for financial grant management?</p> <ul style="list-style-type: none"> • Yes = up to 2 Points 		
<p>Question 21: ALL APPLICANTS: Does the agency have and describe experience of key financial management staff dedicated to the specific program for which funds are being requested?</p> <ul style="list-style-type: none"> • Yes = up to 2 Points 		
<p>Question 22: ALL APPLICANTS: The applicant describes previous experience with grant programs:</p> <ul style="list-style-type: none"> • More than 3 years previous experience with City of Jacksonville grant programs = 3 Points • OR one to two years previous experience with City of Jacksonville grant programs = 2 Points • OR Previous experience with similar grant programs outside of City of Jacksonville = 1 Points 		
<p>Question 23: ALL APPLICANTS: Does the agency have and describe proper internal controls and separation of duties to properly manage public funds (administrative capabilities)?</p> <ul style="list-style-type: none"> • Yes = up to 2 Points 		
<p>Question 24: ALL APPLICANTS: Does the agency have a dedicated CFO or similar staff position?</p> <ul style="list-style-type: none"> • Yes = 2 Points 		
<p>Total Points for Agency Summary & Capacity Analysis</p>		

Agency Summary and Capacity - Additional Comments:

<u>Statement of Need (up to 15 points)</u>		
Item	Comments	Points Awarded
Question 25: ALL APPLICANTS: Does the applicant describe the project's target population and service delivery area, while using data to support the urgency of meeting this need? <ul style="list-style-type: none"> • Yes, Description = 4 Points • Yes, Includes Data = 1 Point 		
Question 26: ALL APPLICANTS: Does the applicant clearly describe the community problem or need that the project is designed to address? Up to 5 points		
Question 27: CDBG ONLY: Does the applicant's program primarily serve an eligible target population? <ul style="list-style-type: none"> • Homeless = 5 Points • Victims of Domestic Violence and/or Abuse = 4 Points • Elderly, Disabled Adults, Illiterate Adults = 3 Points • Primarily LMI population including PHA residents = 2 Points 		
Question 28: ESG ONLY: Does the applicant's program primarily serve an eligible target population? (Up to 5 Points Maximum) <ul style="list-style-type: none"> • Veterans = 5 Points • Persons with a Mental Health disorder and/or Substance Abuse issues = 3 Points 		
Question 29: HOPWA ONLY: Does the applicant's program primarily serve an eligible target population coming from one of the following housing situations within the last three months? <ul style="list-style-type: none"> • Homeless = 5 Points • Substance Abuse or Mental Health Facility = 3 Points • Hospital or Residential Care Facility = 2 Points 		
Question 30: The applicant clearly describes how the use of math and leverage funds improves implementation of the program.		Yes or No Threshold requirement
Total Points for Statement of Need		

Statement of Need - Additional Comments:

Budget and Financial Analysis (30 Points)

Item	Comments	Points Awarded
<p>Financial Ratios & Prior Performance (up to 10 points)</p> <ul style="list-style-type: none"> • Current Ratio – 1 Point • Months of Cash – 1 Point • Cash Expense Ratio – 1 Point • Months of Net Assets – 1 Point • Expense Margin – 1 Point • Equity Ratio – 1 Point • Return of Assets – 1 Point • Previous Three Fiscal Years Review – 3 Points <ul style="list-style-type: none"> ○ Were prior funds returned/unspent? <ul style="list-style-type: none"> ▪ If no – award one point for each year (up to 3) ▪ If yes – subtract one point for each year funds were return (last 3 years only) 		
<p>Proposed Project Budget (up to 10 points)</p> <ul style="list-style-type: none"> • Is budget complete? <ul style="list-style-type: none"> ○ Yes = 2 Points • Is budget accurate? <ul style="list-style-type: none"> ○ Yes = 2 Points • Is budget appropriate for project type? <ul style="list-style-type: none"> ○ Yes = 2 Points • Are costs reasonable for project type? <ul style="list-style-type: none"> ○ Yes = 2 Points • Is all related supporting documentation provided? <ul style="list-style-type: none"> ○ Yes = 2 Points 		
<p>Match/Leverage Funds (up to 5 points)</p> <ul style="list-style-type: none"> • Funding Commitment Letters Provided <ul style="list-style-type: none"> ○ 4:1 = 4 points ○ 3:1 = 3 points ○ 2:1 = 2 points ○ 1:1 = 1 points • Match Identified but Pending = 1 point (regardless of ratio) 		
<p>Agency Audit (up to 5 points)</p> <ul style="list-style-type: none"> • Was audit on time? <ul style="list-style-type: none"> ○ Yes = 1 Point • Did audit have questioned costs? <ul style="list-style-type: none"> ○ No = 1 Point • Did audit contain significant deficiencies? <ul style="list-style-type: none"> ○ No = 1 Point • Did audit contain material weaknesses? <ul style="list-style-type: none"> ○ No = 1 Point • Did audit contain reportable conditions? <ul style="list-style-type: none"> ○ No = 1 Point 		
Total Points for Budget & Financial Analysis		

Reference



Program Year 2022
Universal Application
for
CDBG, ESG and HOPWA funding
Application Guidelines & Instructions



Program Guidelines

- Eligible Applicants:
 - public agency or
 - private, non-profit entity
 - must be in good standing w/ State & COJ
- Minimum Funding Request = \$25,000
- Minimum Score of 75 is required
- Separate application is required for each grant and each program for which your organization is requesting funding.
- Application Materials will be posted to the City's website following this workshop:

<https://www.coj.net/hcdd>

<https://www.coj.net/hcdd>

NOTICE TO PUBLIC FEDERAL GRANT APPLICATION AVAILABLE

The City of Jacksonville's Neighborhoods Department, Housing and Community Development Division (HCDD), announces that the 2022 – 2023 Universal Application will be available beginning Friday, December 3, 2021 for the following City of Jacksonville Consolidated Plan federal grant programs:

Community Development Block Grant (CDBG)
Housing Opportunities for Persons with AIDS (HOPWA)
Emergency Solutions Grants (ESG)

Applications for the above-mentioned funds are available online at www.coj.net/hcdd and search words "universal application". Proposals for non-housing related activities will be accepted from public and private nonprofit agencies on **Thursday, January 6, 2022 8:30AM - 5:00PM.**

Projects must meet the CDBG national objectives of:
**benefiting low and moderate income persons, or
aiding in the elimination or prevention of slum and blight.**

MANDATORY TECHNICAL ASSISTANCE and BUDGET WORKSHOP

All non-profit agencies applying for funds are required to attend one technical assistance and budget workshop. The technical assistance and budget workshop must be attended by the agency's financial staff responsible for managing the grant. During the workshops, Housing and Community Development Division staff will review the grant application process, project eligibility, and provide information to assist with application preparation.

Applicants must pre-register to attend the Zoom workshop on November 30, 2021.

Technical Assistance and Budget Workshops will be held on:
Tuesday, November 30, 2021 – 10:00 a.m., virtual on Zoom
Thursday, December 2, 2021 – 2:00 p.m., in-person at the Legends Community Center, [5130 Soutel Drive](#), Jacksonville, FL 32208

WORKSHOP REGISTRATION

To register for the Zoom workshop on 30 NOV 2021, please visit:

<https://us02web.zoom.us/join/zoom/register/tZ0tde6grzqiHFzE5cnxRhoggxRHgNe1BiC>

No applications will be accepted from agencies that have not attended one mandatory virtual technical assistance and budget workshop. If, after attending a workshop, applicants need additional assistance, please send questions to

HCDDCOMMENTS@COJ.NET.

Applications will be accepted by HCDD staff at the old Vystar location at [214 N. Hogan Street](#), 1st Floor on Thursday, January 6, 2022 by 5:00PM.



Application Questions

SEE PDF



Conflict of Interest Form

- All Board Members
- All Senior Staff
- All Direct Program Staff
- Scanned copies of pen-signed Conflict of Interest forms are acceptable.



Form of Resolutions *(see templates)*

- 1) Form of Board Resolution Authorizing Application Submission
- 2) Form of Corporate Resolution identifying authorized Signatory



Application Checklist

SEE PDF



Application Submission

Applicants shall submit **one (1) signed original paper copy** of the entire application by hand delivery and **one (1) electronic copy** of the entire application on a USB Thumb Drive by hand delivery to:

Housing and Community Development
2022-2023 Universal Applications Cycle
Ed Ball Building
214 N. Hogan Street
Jacksonville, Florida 32202



Application Submission Continued

Early submissions are received on the 7th Floor, Housing and Community Development, during normal business hours, **Monday-Friday 8:30AM-5:00PM**, except for Holidays when City Offices are closed.

All applications **must be received by 5:00PM EST on Thursday, January 6, 2022.**

No late applications will be accepted.



Binder Format

- The paper copy will be submitted by hand in a three-ring binder.
- The applicant will use divider tabs, labeled as described on the application checklist.
- Original signatures are required for all application documents.



Electronic File Submission

- The electronic copy will be submitted on a USB Thumb Drive.
- Each application attachment shall be saved as a separate file on the USB Thumb Drive and labeled as described on the application checklist (see next slide).

Example of USB Labeling Instructions:

Name	Date modified	Type	Size
 1_Application.pdf	10/18/2021 10:39 AM	Microsoft Edge P...	17 KB
 2_Match and Leverage Form.pdf	10/18/2021 10:39 AM	Microsoft Edge P...	17 KB
 3_Budget Worksheet.pdf	10/18/2021 10:39 AM	Microsoft Edge P...	17 KB
 4_Authorization Resolution.pdf	10/18/2021 10:40 AM	Microsoft Edge P...	17 KB
 5_Resolution for Signature Authority.pdf	10/18/2021 10:41 AM	Microsoft Edge P...	17 KB
 6_Organization Chart.pdf	10/18/2021 10:41 AM	Microsoft Edge P...	17 KB
 7_Program Staff.pdf	10/18/2021 10:41 AM	Microsoft Edge P...	17 KB
 8_Job Descriptions.pdf	10/18/2021 10:41 AM	Microsoft Edge P...	17 KB
 9_Resumes.pdf	10/18/2021 10:41 AM	Microsoft Edge P...	17 KB
 10_Confidentiality Procedures.pdf	10/18/2021 10:42 AM	Microsoft Edge P...	17 KB
 11_Board of Directors.pdf	10/18/2021 10:42 AM	Microsoft Edge P...	17 KB
 12_Conflict of Interest.pdf	10/18/2021 10:42 AM	Microsoft Edge P...	17 KB
 13_Other Funding Sources.pdf	10/18/2021 10:42 AM	Microsoft Edge P...	17 KB
 14_Financial Statement.pdf	10/18/2021 10:42 AM	Microsoft Edge P...	17 KB
 15_Audit.pdf	10/18/2021 10:42 AM	Microsoft Edge P...	17 KB
 16_Organization Bylaws.pdf	10/18/2021 10:43 AM	Microsoft Edge P...	17 KB
 17_Certificate of Nonprofit Status.pdf	10/18/2021 10:43 AM	Microsoft Edge P...	17 KB
 18_Articles of Incorporation.pdf	10/18/2021 10:43 AM	Microsoft Edge P...	17 KB
 19_Selection Procedures.pdf	10/18/2021 10:43 AM	Microsoft Edge P...	17 KB
 20_Letter of Endorsement.pdf	10/18/2021 10:43 AM	Microsoft Edge P...	17 KB
 21_Liability Coverage.pdf	10/18/2021 10:44 AM	Microsoft Edge P...	17 KB
 22_Sunbiz Agency Report.pdf	10/18/2021 10:44 AM	Microsoft Edge P...	17 KB
 23_Sam.gov.pdf	10/18/2021 10:44 AM	Microsoft Edge P...	17 KB
 24_Workshop Certificate.pdf	10/18/2021 10:44 AM	Microsoft Edge P...	17 KB
 25_Other.pdf	10/18/2021 10:44 AM	Microsoft Edge P...	17 KB



Scoring Criteria (see rubric)

- Agency Summary 30 Points
- Project Description 25 Points
- Statement of Need 15 Points
- Budget & Financial Analysis 30 Points



Updates & Questions

If after attending a workshop applicants need additional assistance, questions can be sent to:

HCDDcomments@coj.net

Questions and Answers will be compiled and distributed to all attendees via email.

Check back to City of Jacksonville website for regular posting of all questions and answers:

<https://www.coj.net/hcdd>



Questions





Neighborhoods Department

Finance and Operations Section



Universal Application Process

Budget & Financial Analysis



COMPLIANCE/THRESHOLD REVIEW

An application will NOT be reviewed if the Recipient is NOT in compliance with the City of Jacksonville.

- **Representations and Warranties of Recipient**
- (i) The Applicant is not in breach of any prior donation agreement or City code provisions by which the City donated property to the Recipient for the development of affordable housing; and
- (ii) The Applicant is not on the Council Auditor's noncompliance list pursuant to Chapter 118, or the Vendor Debarment List pursuant to Chapter 126, Ordinance Code; and
- (iii) The Applicant is not in breach of any of the conditions or requirements of a City grant award or program; and
- (iv) The Applicant is not delinquent on taxes or payment of liens, including code enforcement, nuisance liens, demolition liens, or other municipal liens or fines, on real property owned by the Applicant and incurred after the Applicant took ownership of the real property; and
- (v) The Applicant is not in litigation against the City other than as an agent, attorney, guardian, or personal representative of an estate.



SCORING CRITERIA

Maximum points – 30

- Financial ratios & prior performance (10 points)
- Proposed project budget (10 points)
- Match / leverage funding (5 points)
- Agency audit (5 points)



MATCH

“Agency’s Internal Resources”

The Agency’s contribution toward the costs of the Project

- Can be cash, in-kind or donated resources.
- Must be identified, tracked and verifiable in Agency’s financial records.
- Match committed to one award cannot be used for any other project or program.
- Match resources must be supported by a letter from the Agency’s Board designating the resources to the project.
- **If an award is made, the City treats cash match resources as a legal obligation that the Agency must produce before the Grant Agreement will be executed (documented in a separate account). Commitment must coincide with activity applied for and City’s fiscal year (October 1, 2022-September 30, 2023).**
- Agency will be required to document match on each reimbursement request.



MATCH FUNDING GUIDELINES

▶ **Public Service Projects**

- ▶ Minimum **100% MATCHING FUNDS** required
- ▶ Minimum of 50% cash match required and maximum of 50% of matching funds in the form of in-kind contributions and/or volunteer labor.
- ▶ The maximum rate for volunteer match time is \$25.43 per hour.

▶ **Rehabilitation and Construction Projects**

- ▶ Minimum of 80% cash match required and maximum of 20% of matching funds in the form of in-kind contributions and/or volunteer labor.
- ▶ The maximum rate for volunteer match time is \$25.43 per hour.



LEVERAGE

“Other People’s Money”

A 3rd party commitment toward the cost of the project

- Can be cash or in-kind resources.
- Must be identified, tracked and verifiable in Agency’s financial records.
- Leveraged resources committed to one award cannot be used for any other project or program.
- Leveraged resources must be documented by a commitment letter from the 3rd party source on the entity’s letterhead in order to be scored.



Match / Leverage (5 points)

- If greater than:
 - 4:1 = 4 points
 - 3:1 = 3 points
 - 2:1 = 2 points
 - 1:1 = 1 points
 - Pending = 1 point
- If less than 1:1 or not **Properly** documented, no points will be awarded

Examples

Agency “A” applies for \$25,000 in Universal Application Funding for a project with a total budget of \$100,000. The Agency’s Board of Directors designates \$50,000 in available resources toward the project.

Agency “A” would receive a score of 2 points for a 2:1 match (\$50,000 / \$25,000)

Agency “B” applies for \$25,000 in Universal Application funding for a project with a Total Budget of \$100,000 but does not document any match or leverage funding.

Agency “B” would receive a score of 0



FINANCIAL RATIOS

Designed to evaluate an applicant's financial capacity to deliver a proposed project under the guidelines of the Division's timeliness and reimbursement-only contract provisions.



FINANCIAL RATIO SCORES

- Current Ratio – Measure of current liquidity
 - Calculation - Current Assets / Current Liabilities
 - Benchmark = 1.50
- Months of Cash – Measure of current liquidity
 - Calculation – Cash / (Total Expenses / 12)
 - Benchmark = 1.00
- Cash Expense Ratio – Measure of current liquidity
 - Calculation – Cash / Payables & Deferrals
 - Benchmark = 1.00
- Months of Net Assets – Measure of short term capacity
 - Calculation – Unrestricted Net Assets / (Total Expenses/12)
 - Benchmark = 1.00



FINANCIAL RATIO SCORES

- Expense Margin – Measure of short term capacity
 - Calculation – $\text{Change in Unrestricted Net Assets} / \text{Total Expenses}$
 - Benchmark = 0.03 (3%)
- Equity Ratio – Measure of long term capacity
 - Calculation – $\text{Total Net Assets} / \text{Total Assets}$
 - Benchmark = 0.50
- Return on Assets – Measure of long term sustainability
 - Calculation – $\text{Change in Total Net Assets} / \text{Change in Total Assets}$
 - Benchmark = 1.00



AUDITED FINANCIAL STATEMENTS

- The audit must be on-time.
- Required to be provided to the City no later than 120 days from the Agency's fiscal year end.
- Compiled or reviewed financial statements will be accepted for Agencies that have been in operation for less than one year.
- Single Audit Requirements.



AUDIT PERFORMANCE

▶ Management Letter

- A letter from the Agency's CPA that accompanies the Audited Financial Statements and identifies any issues related to the Audit that were not significant enough to be separately identified with the body of the audit.

If a management letter is issued, that letter, and the Agency's response, **MUST** be included with the audit (**Threshold Requirement**).



AUDIT PERFORMANCE

▶ Significant Deficiencies

Specific concerns or findings identified in the Audited Financial Statements that do not allow management or employees to prevent, detect or correct deficiencies in a Timely Manner.

...We did not identify any deficiencies in internal control over compliance that we consider to be significant deficiencies...

OR

...We identified certain deficiencies in internal control over compliance that we consider to be significant deficiencies as described in the accompanying schedule of findings and questioned costs as Item 2017-1...



AUDIT PERFORMANCE

▶ Material Weaknesses

Specific concerns or findings identified in the Audited Financial Statements that do not allow Management or employees to prevent, detect or correct material deficiencies in a Timely Manner.

...We did not identify any deficiencies in Internal Control over compliance that we consider to be material weaknesses...

OR

...We identified certain deficiencies in internal control over compliance that we consider to be material weaknesses as described in the accompanying schedule of findings and questioned costs as Item 2017-1...



AUDIT PERFORMANCE

► Reportable Conditions

Tests of an Agency's compliance with certain laws, regulations, contracts and grants.

...The results of our tests disclosed no instances of noncompliance that are required to be reported under Government Auditing Standards...

OR

...The results of our tests disclosed instances of noncompliance that are required to be reported under Government Auditing Standards and which are described in the accompanying schedule of findings and questioned costs as Items 2017-1 and 2017-2...



AUDIT PERFORMANCE

Scoring Criteria 5 pts

- Was audit on time?
 - Yes = 1 Point
- Did audit have questioned costs?
 - No = 1 Point
- Did audit contain significant deficiencies?
 - No = 1 Point
- Did audit contain material weaknesses?
 - No = 1 Point
- Did audit contain reportable conditions?
 - No = 1 Point



AUDIT PERFORMANCE

Important Notes

- ▶ The City must approve the accounting system for each Agency PRIOR to the execution of any contract to verify that it meets the requirements of 2 CFR 200 which states, in part:

...Financial Systems shall provide accurate, current and complete disclosure of the financial results of each Federally sponsored project...

Comingling of Federal funds is not allowed with other funding sources



BUDGET PREPARATION

10 Points



BUDGET

Detailed Budget Form

- Complete for each proposed Universal Application funded project.
- Shows anticipated expenditures for the proposed project and how expenses are funded.
- Use the budget forms provided within application.
- All costs must be documented.
- The information must reconcile to other elements of the application.
- The budget must accurately represent the match amounts.
- Detailed budget forms must be submitted for Public Service Grants (CDBG, ESG and HOPWA), Construction (CDBG) and Acquisition (CDBG).

The Budget is worth 10 points total and is scored on its completeness, accuracy, appropriateness, reasonableness and documentation.



BUDGET

Public Service Grants- 10 points

- ***Services To Clients Expenditures*** – Costs related to the delivery of services to clients.

Note – the percentage of administrative expenditures to total budget is an important factor in determining the reasonable nature of the proposed budget.



BUDGET

Construction Budget - 10 points

Applicants requesting Universal Application funds for Capital Improvement Projects (construction, rehabilitation and infrastructure improvement projects) must complete the Construction Budget Form and provide the required attachments.

A. **Sources of Revenue** - Using the format structure provided, show the anticipated revenues for the proposed Universal Application construction project on the form on the appropriate lines.

B. **Description of Work** - Using the format structure provided, show the description of work and anticipated expenditures for each cost item to be charged to the proposed project in the appropriate columns.



BUDGET

Acquisition with Rehabilitation

Budget - 10 points

Applicants requesting Universal Application funds for Property Acquisition Projects (for the purchase of real property) must complete the Acquisition Budget Form and provide the required attachments.

A. **Sources of Revenue** Using the format structure provided, show the anticipated revenues for the proposed universal application construction project on the form on the appropriate lines.

B. **Description of Work** Using the format structure provided, show the description of work and anticipated expenditures for each cost item to be charged to the proposed project in the appropriate columns.



Technical Assistance

- If applicants need additional assistance, questions should be sent to HCDDcomments@coj.net.



Questions





Thank You

Thank you for your attendance and participation in our efforts to improve the Quality of Life for the citizens of Jacksonville!

Don't forget to pick up your Certificate of Attendance!