The Jefferson Home Consortium includes:

• All of Jefferson Parish (incorporated and unincorporated), including Kenner

• St. Charles Parish
All programs and projects proposed must meet one of the goals outlined in the current consolidated plan.

The current consolidated plan is located at the following website:

- [https://www.hudexchange.info/programs/consolidated-plan/con-plans-aaps-capers/](https://www.hudexchange.info/programs/consolidated-plan/con-plans-aaps-capers/)

And

THE CONSOLIDATED PLAN GOALS

The priority goals for the 2018-2022 Jefferson HOME Consortium’s Consolidated Plan are:

- **Goal 1:** The reduction in severe housing costs. This will be undertaken through efforts to increase Quality and Affordable Housing with activities such as housing rehabilitation programs and new construction.

- **Goal 2:** is the increase in homeownership through various programs including the First Time Homebuyer Program.

- **Goal 3:** Support for programs designed to serve special populations, particularly the elderly and disabled. Towards this end, the members of the consortium will offer a variety of public services using approximately twenty sub recipients and in house staff.

- **Goal 4:** Support for “Non-Housing” priorities including: sewers, drainage, playgrounds and recreation facilities, health centers, community centers and other public facilities will be constructed and repaired. Other activities, such as streets will be funded where appropriate.

- **Goal 5:** Expansion of community and economic development targeted towards areas of need, such as Racially/Ethnically Concentrated Areas of Poverty (R/ECAP) target areas and LMI eligible tracts.

- **Goal 6:** Fair Housing
SOURCE OF FUNDS

Department of Housing and Urban Development (HUD)

• Community Development Block Grant (CDBG)
• HOME (with Match and Program Income funding)
• Emergency Solutions Grant (HESG)
• CPD CARES Act: CDBG-CV and HESG-CV (COVID-19)
COVID-19 ACTIVITIES

Funding is available for response to COVID-19 under the HESG-CV and CDBG-CV grant programs.

• The grantee is required to use all HESG-CV and CDBG-CV funds for eligible activities that are carried out to prevent, prepare for, and respond to coronavirus. CV grants cannot be used for any other purpose. This requirement is discussed more fully in slide 15 (for HESG) in this presentation and in Section III.B.5.(f), which discusses CDBG eligible activities.

• To elaborate, there are three criteria to describe in detail when applying for COVID-19 funding:

1. Will the activity assist in preventing the spread of COVID-19
2. Will the activity facilitate preparedness for and/or response to COVID-19
3. Does the activity assist eligible communities and/or households economically impacted by COVID-19
PROGRAM OR PROJECT BENEFICIARIES

All programs/projects must meet the Benefit low-to-moderate income (LMI) persons. Applicants may meet the LMI goal by one of the following types:

- Area Benefit
- Limited Clientele
- Jobs
- Housing
LMI-Area Benefit:

• Activities that benefit all residents of the area. Service area must be at least 51% LMI and primarily residential; (See Map Next Slide)

• Boundaries of the service area must be set in the application;

• Typically use census data to determine the LMI percentage;

• May use an income survey that meets HUD’s requirements.

LMI-Limited Clientele:

• Activities that benefit specific populations;

• Presumed clientele
  • (must exclusively serve elderly, severely disabled adults, homeless persons, illiterate adults, migrant farm workers, abused children, persons with AIDS, and battered spouses);

Documents limits and timeframe, income data, or nature and location of the service area.
LOW MOD INCOME: CURRENT LMI AREAS
PROGRAM OR PROJECT BENEFICIARIES

**LMI-Jobs:**
- In order to meet this criteria, activities must create or retain permanent jobs; and
- 50% of the jobs created/retained must be held by or available to LMI persons.

**LMI-Housing:**
- Structures must be occupied by LMI households:
  - One unit structures occupied by an LMI household
  - One unit of a duplex occupied by an LMI household
  - 51% of 3+ unit buildings occupied by LMI households
- Documentation of LMI Housing
  - Household income and timeframe of affordability
  - Rental Units
    - Rents charged
    - Information on affordability
<table>
<thead>
<tr>
<th>Eligible Activities</th>
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<tbody>
<tr>
<td>Public Facilities Improvement (CDBG)</td>
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<tr>
<td>Acquisition of Real Property (CDBG &amp; HOME)</td>
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<tr>
<td>Shelter Operations (HESG)</td>
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<tr>
<td>Planning/Administration (CDBG)</td>
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<tr>
<td>Economic Development (CDBG)</td>
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<td>Public Services* (CDBG)</td>
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<td>First Time Homebuyer Assistance (HOME and CDBG)</td>
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<td>Tenant Based Rental Assistance</td>
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<td>Rapid Re-Housing (HESG)</td>
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<tr>
<td>Housing Rehabilitation (HOME &amp; CDBG)</td>
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<tr>
<td>Homelessness Prevention</td>
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<tr>
<td>Street Outreach (HESG)</td>
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<tr>
<td>COVID Response (CDBG and HESG)</td>
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</tbody>
</table>

*Public Services are capped at 15% of the annual CDBG allocation*
PUBLIC SERVICES

If the awarded project is for public services, you will be asked to:

• Document that the proposed service is new or is a significant increase in the existing service.

• Indicate if there are client charges for the proposed service and if so, the amount.

• Estimate the number of households to be served during the project.

• Answer whether the project will serve a special needs population (LMI, disabled, elderly, homeless, etc.).

• Calculate the percent of anticipated Jefferson Parish residents and non-Parish residents.

• Calculate the anticipated number of low/mod income persons or households to be served.
If the proposed project is for housing improvement, you will be asked to:

• Describe the type of housing rehabilitation.
• Will a special population be served (e.g. LMI, elderly, disabled, special needs)?
• Document your organizations experience in housing improvement programs.
• Whether your organization have credentials to test or remediate Lead Based Paint.
CPD CARES ACT: CORONAVIRUS CV FUNDS

CDBG-CV and HESG-CV Funds are Fiscal Year 2020 funds only:

The grantee is required to use all CDBG-CV and HESG-CV funds for eligible activities that are carried out to prevent, prepare for, and respond to coronavirus.

CV grant funds cannot be used for any other purpose.

CDBG-CV Economic Development Activities require HUD Technical Assistance prior to individual business loan activity approvals.

CDBG-CV grants have a 6 year spending deadline (9/04/2026) with an 80% requirement by no later than the end of the third year of the period of performance (9/04/2023).

HESG-CV grants have a 24 month spending deadline (9/04/2022).
COVID Criteria: Prevent, Prepare for, and Respond to Coronavirus. To assist recipients in ensuring that an activity being paid for with CV funds is eligible, or determining whether funding may follow the waivers and alternative requirements established by HUD, recipients and subrecipients should consider the following:

• (i) Prevent…coronavirus means an activity designed to prevent the initial or further spread of the virus. This includes preventing the virus spread to people experiencing homelessness, people at risk of homelessness, recipient or subrecipient staff, or other shelter or housing residents. This includes providing Personal Protective Equipment to staff and program participants, paying for non-congregate shelter options such as hotels and motels, paying for handwashing stations and portable toilets for use by people living in unsheltered situations, and providing rapid re-housing or homelessness prevention assistance to individuals and families who are homeless or at risk of homelessness (as applicable) to reduce their risk of contracting or further spreading the virus.

• (ii) Prepare for…coronavirus means an activity carried out by a recipient or subrecipient prior to or during a coronavirus outbreak in their jurisdiction to plan to keep people healthy and reduce the risk of exposure to coronavirus and avoid or slow the spread of disease. This includes updating written standards to prioritize people at severe risk of contracting coronavirus for shelter and housing consistent with fair housing and nondiscrimination requirements, adapting coordinated entry policies and procedures to account for social distancing measures or increased demand, developing a strategy and recruiting landlords to provide housing to people experiencing homelessness or at risk of homelessness, training homeless providers on infectious disease prevention and mitigation, and implementing a non-congregate shelter strategy to reduce the spread of coronavirus.

• (iii) Respond to coronavirus means an activity carried out once coronavirus has spread to people experiencing homelessness, provider staff, or once individuals and families lose or are at risk of losing their housing as a result of the economic downturn caused by coronavirus. This includes transporting individuals and families experiencing homelessness to medical appointments, paying for shelter to isolate individuals who have contracted coronavirus from other program participants and people experiencing homelessness, providing rental assistance to those who are at risk of losing their housing, have already become homeless, or continue to experience homelessness due to the economic downturn caused by coronavirus, and providing hazard pay to recipient or subrecipient staff who put their own health at risk to continue to provide necessary services to individuals and families experiencing and risk of homelessness.
LEVERAGED/MATCHING FUNDS

The Parish encourages applicants to seek funding and in-kind contributions from private and public sources to match Parish funding. No match is required for COVID funding. If your project budget includes matching funds they should be clearly identified by describing the following:

• Type of leveraged funds (e.g. match, in-kind, staff time, building, equipment, etc.)

• Source of matching funds (e.g. state, local, federal, corporate, public donations, etc.)

• Provide the amount/percentage of Matching Funds.

• Does the organization have experience with utilizing matching/leverage funding with federal funds?
GENERAL REQUIREMENTS

As a subrecipient, you are expending federal funds on behalf of the parish and must adhere to all federal regulations. Some of the most common are:

- Procurement
- Financial Management
- Recordkeeping
PROCUREMENT

• As a subrecipient, you are required to follow federal regulations when purchasing any items for which you intend to be reimbursed by your grant from Jefferson Parish.

• Federal procurement requirements are outlined in 2 CFR 200.318-326

• All subrecipients are required to have federal procurement policies and procedures approved by JPDCD which outline the process for which you will procure items with federal funds.
PROCUREMENT

• In general, procurement must be:
  • Designed to achieve maximum free and open competition; and
  • Compliant with standards of conduct and small and minority business outreach.

Types of Procurement

• Micro Purchase
• Small Purchase
• Formal Sealed Bids
• Competitive Proposals
PROCUREMENT

Micro Purchases
• Micro purchase is the acquisition of supplies or services, the aggregate dollar amount of which does not exceed the micro-purchase threshold of $3,000.

Small Purchases
• Small purchases are relatively simple and informal procurements that do not exceed the Simplified Acquisition Threshold of $150,000.

• If small purchase procedures are used, price or rate quotations must be obtained from an adequate number (three) of qualified sources.
PROCUREMENT

Formal Sealed Bids

• Bids are publicly solicited and a firm fixed price contract (lump sum or unit price) is awarded to the lowest responsive and responsible bidder.

Competitive Proposals

• A Request for Proposals (RFP) is normally conducted with more than one source submitting an offer and either a fixed price or cost-reimbursement type contract is awarded.
RECORDKEEPING

• Recordkeeping is critical to establishing a thorough and consistent record keeping system.

• Records are the only method of verifying compliance with the program requirements.

• All records must be retained for a period of three to five years after grant closeout.
HUD generally accepts either paper or electronic files as the file of record for a program or project.

In instances where subrecipients are managing Personal Identifiable Information (PII) such as addresses, income information, and social security numbers, the information must be securely maintained.

- Locked cabinet or office if a paper file
- Password protected if an electronic file
RECORDS TO BE KEPT

Project or Program Files

• Subrecipient agreement with the Parish
• Notice to Proceed from the parish
• Special Program or project requirements
• Documentation to determine the LMI benefit of the program
• All procurements related to the program
• All files related to the beneficiaries of the program
• Budgets Expenditures and source documentation
• Project Status Updates
As part of recordkeeping, all subrecipients must maintain documentation in their files which demonstrate that the project benefits LMI persons.

Most common forms of documentation are:

- **Area Benefit**: Census data for the area which the project benefits
- **Limited Clientele**: Documentation of income for clientele
- **Housing (individual benefit)**: Documentation of household income
- **LMI Jobs**: Employee income documentation
CALCULATING INCOME

• For projects with DIRECT BENEFICIARIES, the income of Beneficiary (household or individual) must be determined and verified before assistance is provided.

• Income and Asset Calculations and Verification are determined using the definition outlined in 24 CFR Part 5 (i.e. Part 5 method).

• Part 5 requires source documentation for all income and assets for all household members. This includes pay stubs, bank statements, award letters, mortgage statements, etc.

• Subrecipients will be given direct Technical Assistance when calculating income.
FINANCIAL MANAGEMENT

• As a subrecipient, you are required to implement effective financial management systems that comply with the financial management requirements outlined in 2 CFR 200. In general, subrecipients must have policies and procedures which contain the following:
  • Internal controls
  • Audit functions
  • Provide a process to collect and maintain source documentation
  • Determine cost expended with federal funds are reasonable
FINANCIAL MANAGEMENT

- Record all transactions
- Relate all expenditures to activities
- All expenditures must be for eligible costs
- Records must be supported by source documentation:
  - Explain basis for cost incurred
  - Actual dates of expenditure
- Examples include:
  - Paid invoices, cancelled checks, paid bills, payroll
FINANCIAL MANAGEMENT - REIMBURSEMENT FOR COSTS INCURRED

Allowable Costs

• Cost must meet the following thresholds to be deemed allowable:
  • Must be reasonable
  • Must conform to all regulatory limitations
  • Must be eligible per 2 CFR 200
  • Must not be included in another federally funded program, or replace general governmental costs
  • Must be adequately documented
COST REASONABLENESS

Cost is considered reasonable when it does not exceed what a prudent person would incur under similar circumstances.

Consideration should be given to:

• Is the cost necessary and ordinary?
• What are market prices for comparable goods and services?
• Are you able to document that the cost is reasonable?
TIMELINESS

By April 1, 2021, the SUBRECIPIENT shall notify the GRANTEE as to how much of the herein stated budget should be encumbered to cover costs incurred but not paid by the SUBRECIPIENT. This “no cost extension” of the contract is allowed but will not increase the budget of this contract, or the budget for any succeeding contract. The SUBRECIPIENT must submit all such requests for payment to the GRANTEE by August 31, 2021 and the GRANTEE should pay all such encumbered and/or accrued costs thereafter. Funds not expended by June 30, 2021 and/or submitted to the GRANTEE by the stated time frame may be reprogrammed to other activities.
REQUESTING REIMBURSEMENT

Jefferson Parish Department of Community Development (JPDCD)
FIRST TIME RECEIVING FUNDING FROM JPDCD?

Vendor Setup From

JPDCD requests the following forms to be submitted prior to being invoiced. A completed vendor setup form is required in order for the vendor to be properly paid.

Please call or send to 1221 Elmwood Park Blvd., Suite 605, Jefferson, LA 70123

W-9

Request for Taxpayer Identification Number and Certification

Vendor Setup Form

Direct Deposit

Jefferon Parish Accounting Department
Vendor Direct Deposit Application

Supporting Information for New or Changes/Changes

Financial Institution Name

Vendor Identification

Authorized Signer

Description

Form No.

1. Payee number or other tax identification number as stated in the certification

2. Certification must be mailed to the address indicated on the form, or faxed to the Jefferon Parish Accounting Department.

3. To receive a new direct deposit form, please call the Jefferon Parish Accounting Department.

4. Invoices received without an assigned purchase order number will be returned until the correct purchase order number is submitted to the Jefferon Parish Accounting Department.

5. Vendor Setup Form must be completed and returned to the Jefferon Parish Accounting Department within 7 days of receipt.

6. Invoices received without an assigned purchase order number will be returned until the correct purchase order number is submitted to the Jefferon Parish Accounting Department.

7. Invoices received without an assigned purchase order number will be returned until the correct purchase order number is submitted to the Jefferon Parish Accounting Department.
REQUEST FOR PAYMENT

• When your organization is submitting for reimbursement the first page is the Request for Payment (professional services) or Certificate of Payment and Account Services page.

• These forms can be found on the Jefferson Parish Accounting Department website.

• IMPORTANT: the signature of the authorized person to sign for your organization must be original (preferably in blue ink). Original Request for Payment documents should be mailed or hand delivered (copies will not be accepted).
CERTIFICATE OF PAYMENT

• For construction contracts ONLY
• Contracts
  • Under $500,000.00 subject to a 10% retainage
  • Over $500,000.00 are subject to a 5% retainage
• Payments will NOT be processed if Certified Payrolls are not submitted to the Project Coordinator to review.
AFFIDAVIT AFTER FIRST APPLICATION OF PAYMENT

• This does not need to be submitted if your organization is utilizing G702 and signed by the Vendor/Contractor.
• This budget form should reflect the budget your organization submitted in your proposal.

• Based on your organization’s agreement with Jefferson Parish, the budget can be modified throughout the duration of agreement, but it has to be approved by JPDCD beforehand.
• This checklist should be completed by the person preparing the request for payment package.

• Does not have to be signed by the authorized signor.

• Disregard the adding machine tape.
BACKUP DOCUMENTATION

• The Parish shall only allow reimbursement with the submission of sufficient documentation that must include, at a minimum, a copy of the invoice and proof of vendor payment.
  • If requesting reimbursement for salaries, than paystubs and timesheets MUST be submitted.

• Proof of Payment
  • Bank Statements
  • Copy of cleared checks (front and back)

• For construction contracts
  • Certified Payrolls
  • Project status reports
  • Photos of the project’s progress
IF YOU HAVE ANY QUESTIONS OR CONCERNS, PLEASE FEEL FREE TO CONTACT:

JPDCD PHONE: (504)736-6262

OR BY EMAIL AT:
JPCDPROGRAMS@JEFFPARISSH.NET
JEFFERSON PARISH SUBRECIPIENT APPLICATION

• Applications are available on the Jefferson Parish Department of Community Development Website https://www.jeffparish.net/departments/community-development/community-development-planning-program

• All applicants are required to submit two copies of the application and supporting documentation
  • One electronic copy e-mail to: JPCDprograms@jeffparish.net

• Electronic copies only and must be received by 4:00pm on February 5th 2021
WHAT YOU WILL NEED TO APPLY

• DUNS Number and active [www.sam.gov](http://www.sam.gov) account
• Organization Chart
• Resume(s)
• Last IRS Statement
• Copies of any required license(s) or certification(s)
• Articles of Incorporation and By-Laws
• Non-Profit Determination (tax exempt letter from IRS)
• Authorization to Request Funds
CONTACTS

• Nicole A. Fontenot, Director
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• Stephanie W. Brumfield, Assistant Director
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• Lee Floyd, Project Coordinator
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• Don Lapeyrolerie, AMS III
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