

Sample of Reporting Requirements

for

Housing Counseling Grant Recipients

This SAMPLE is an excerpt from a previous grant award document and will be changed for grants awarded in 1995 and subsequent years. Grantee reporting requirements are set forth in the Grant Document for each grant. Grantees must comply with Grant Document reporting requirements. DO NOT use this sample as a guide. Also, references to "counseling units" in this sample apply only to HUD counseling grants for 1994 and earlier years.

ARTICLE VIII - REPORTS OF WORK IN SUPPORT OF PAYMENTS

A. Quarterly performance reports. A grantee must submit a quarterly performance report in an original and two copies to the Government Technical Monitor (GTM). The report is due no later than the 30th of the month following the end of each quarter of the term of the grant. The report must accompany the invoice, Standard Form 270, Request for Advance or Reimbursement, for the third month of the quarter. The quarterly performance report must also accompany the final invoice and final report. The quarterly performance report must contain the following:

1. Six digit identification number for each client counseled during the quarter
2. Total number of counseling units, opposite the client identification number, delivered for the quarter and the type of counseling (homebuyer, default, etc.)
3. Total number of counseling units for each client. The total must agree with the total units of the three invoices for the quarter.

The Grantee agrees to provide HUD with a quarterly report for each quarter of the term of the grant and for the final invoice. If events occur during the performance of the grant that could affect the grant, the Grantee must include a narrative statement of these events with the monthly invoice.

B. Final Report. The Grantee shall submit a Final Narrative Report which describes and evaluates the Grantee's counseling activities. The report should address program problems and recommend courses of action for improvement. The narrative need not exceed five double-spaced typewritten letter-size pages.

The Grantee is required to submit the final invoice (clearly identified "FINAL") and quarterly performance report together with the final report to the GTM no later than thirty days after the expiration date of the grant or when all funds are expended.

1.The grantee must submit three originals to the GTM.

2.The GTM will process the final invoice only after receiving a quarterly performance report and complete final report.

3.The final invoice, quarterly performance report and final report must also contain the name, address, and grant number of the Grantee as shown on the face of the grant document.

4.After review of these documents, the GTM must forward the final invoice, quarterly performance report, and final report to the GTR and Grant Officer for final payment approval and closeout of the grant.

5.The Grant Officer must forward the final invoice to the Office of Finance and Accounting for payment.