

Checklist for RFS's to OPC
Community Development
Technical Assistance Program

U.S. Department of Housing
and Urban Development Exhibit 4-4
Office of Community Planning
and Development

Name of Applicant or Proposer

Date Approved by Secretary

TAD File Number

Date of Letter to Proposer

TAD Reviewer Name

Date of Memo to GTR

TAD Reviewer Signature

Date Revised Budget and
Proposal Due to TAD

Date(s) Revised Budget &
Proposal Submitted to TAD

Provisos

Yes No

- a. Has the GTR submitted and signed a memo describing how the Secretary's provisos have been satisfied?
- b. Does the GTR memo satisfactorily and persuasively describe how the provisos have been satisfied?
- c. In your opinion, have all provisos been satisfactorily resolved?

CDBG Nexus

In your opinion, does the revised final Statement of Work adequately demonstrate a sufficient legal nexus to the CDBG Program?

SOW Clarity

In your opinion, does the revised Statement of Work provide a clear statement of the work that is to be done and provide a sufficient basis for estimating the project's costs?

Level-of-Effort Analysis

- a. In your opinion, has the GTR conducted an adequate level-of-effort analysis in accordance with the instructions in the GTR and TA handbooks?
- b. With respect to the applicant's/proposer's budget:
 - 1. Have PMP preparation costs been deleted?
 - 2. Have city selection and agreement negotiation tasks been deleted?
 - 3. Have all direct costs for reporting and/or administration been deleted?
 - 4. Are the evaluation costs (if any) reasonable?
 - 5. Has the proposer provided an adequate justification for the proposed level-of-effort for the major tasks, including an identification of the workload factors?

6. Do the costs appear to be reasonable for the level-of-effort proposed?

Comments:

page 1 of 2

form HUD-40080 (10/90)

Project Management Plan (form HUD-441.1)	Yes	No
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|---|--|--|
| a. Has the proposer prepared a complete and accurate form HUD-441.1 showing: 1. Cumulative planned costs of work by task for each reporting period over the life of the agreement? | | |
| 2. A planned project schedule that traces, by reporting period, the task and major sub-task start dates, periods of work in progress. and completion dates? | | |
| 3. Costs for the tasks in the PMP identical to those in the budget analysis approved by you and the GTR? | | |
| 4. That the form HUD-441.1 has been signed by both the proposer and the GTR? | | |
| b. Is the form HM-441.1 supplemented by a narrative which satisfactorily identifies the steps in the work process required for completing the work, the period of time needed to accomplish each step expressed in calendar days, and the staff assignments and financial and other resources required to accomplish each step? | | |

Special Instructions to OPC. Are any special instructions to OPC required to this project? If yes, describe:

GTR Training. Date the GTR was trained: _____
If not trained, action taken:

In your opinion, should the GTR receive additional or refresher GTR training?	Yes	No
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Completeness of the RFS Package	Yes	No
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- | | | |
|---|--|--|
| a. Does the RFS package contain the following items?: | | |
| RFS signed by the GTR | | |
| Secretary's approval memo | | |
| GTR's signed memo regarding provisos | | |
| GTR's signed budget approval | | |
| PMP signed by proposer and GTR | | |
| Affirmative action statement | | |
| Statement of Work | | |
| Form HUD-718 | | |

Comments:

page 2 of 2

form HUD-40080