



# COMMUNITY PRIORITY FUND CONTRACTING PROCESS

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Data & Evaluation Managers

# INTROS: DATA & EVALUATION TEAM



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# AGENDA

- CPF & Federal award overview
- Data & Evaluation team roles and responsibilities
- Overview of contracting process
- Contract start & end dates
- Review contract documentation checklist
- Scope of work
- Budget
- Insurance requirements
- Financial management
- Organizational policies
- Capital expenditures
- Other documentation
- Q&A

# COMMUNITY PRIORITY FUND ~ \$8.0 MILLION



Community Violence  
Intervention



Direct Household  
Assistance



Addressing  
Educational  
Disparities

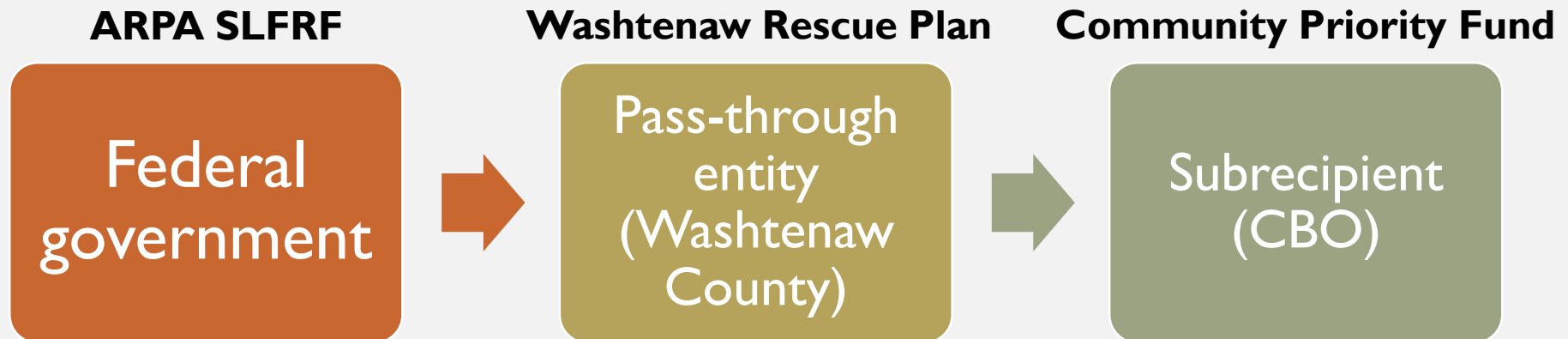


Addressing Housing  
& Homelessness



Expanding Early  
Childhood Education

# STATE & LOCAL FISCAL RECOVERY FUNDS & SUBRECIPIENT MONITORING



Pass-through entity is ultimately responsible for subrecipient performance and compliance with federal regulations (Uniform Guidance)

# DATA & EVALUATION TEAM ROLES & RESPONSIBILITIES

## **Before contract:**

- I-I meetings with awardees
  - Assess contract readiness
  - Develop scope of work & budget

## **During contract:**

- Monthly meetings
  - Subrecipient monitoring/reporting & technical assistance
  - Ongoing organizational and program evaluation capacity building
    - Performance measures
    - Evaluation plans: Facilitate data collection, data quality monitoring, and data analysis

WHAT COMMUNITY-BASED ORGANIZATIONS (CBOs) SHOULD EXPECT REGARDING...

# COMMUNITY PRIORITY FUND SUBRECIPIENT CONTRACTING PROCESS



## CONTRACT START & END DATES

- Contract period starts on the date the contract is fully signed by the CBO and the County and ends on December 31, 2024
- Award funds can only be used for expenses incurred after contract is signed
- All award funds must be expended no later than December 31, 2024



# CONTRACT DOCUMENTATION CHECKLIST

- Scope of work (SOW)
- Budget
- Insurance certificates
  - Workers' Compensation
  - Commercial General Liability (Wash. Cty included as insured)
  - Automobile Liability
- W-9 form or Wash. Cty vendor number
- ACH direct deposit form
- SAM.gov questionnaire or registration #
- Completed contracting questionnaire
- Latest two years' 990 forms or tax returns
- Most recent audit statement or report (if available)
- Organizational policies and procedures
  - Conflict of interest policy
  - Procurement policy / procedure
  - Financial policy / internal controls
  - Drug-free workplace policy
- Capital expenditures information form (if applicable)

# BUDGET

## DIRECT COSTS

- Expense categories
  - Payroll & fringe benefits; supplies; equipment; transportation; consultant services/fees; capital expenditures; indirect costs
- Description and/or justification
  - Show calculations or explain each budget amount.

Example: “Part-time staff member: \$18/hour x 20 hours/week x 2 years = \$37,440”

- Provide as much detail as possible
  - Example: “Training costs”



Registration costs for training;  
Hiring external training facilitator (\$2,000);  
Purchasing food for trainees (10-12 trainees, \$10/each);  
Printing training materials (\$10/trainees); etc.

# BUDGET

## **CAPITAL EXPENDITURES**

- Capital expenditures include purchases of land, property, vehicles or other large equipment
- Capital expenditures are allowable under the CPF
- However, specific regulations apply:
  - Must reimburse federal government proportional to the initial investment if the property/equipment is sold or used for a different purpose in the future

# BUDGET

## **INDIRECT COSTS**

- 10% of Direct Costs

(Template provided)

## INSURANCE REQUIREMENTS

### Insurance Requirements\*

#### ❑ Workers' Compensation Insurance

Michigan statutory limits and Employers Liability Insurance with a minimum limit of **\$100,000** each accident for any employee

#### ❑ Commercial General Liability Insurance

**Combined single limit of \$1,000,000** each occurrence for bodily injury and property damage, with Washtenaw County added as "additional insured" with respect to the services provided under this agreement

#### ❑ Automobile Liability Insurance

Covering all owned, hired and non-owned vehicles being used for any organization-related business with Personal Protection Insurance and Property Protection Insurance to comply with the provisions of the Michigan No Fault Insurance Law, including residual liability insurance with a **minimum combined single limit of \$1,000,000 each accident for bodily injury and property damage**

\*In limited circumstances, may submit request for waiver to be reviewed by Washtenaw County Risk Management

# FINANCIAL MANAGEMENT & ORGANIZATIONAL POLICIES

- Financial management or accounting system (e.g., QuickBooks)
  - Ability to identify and track federal funds received and expended
- Written organizational policies and procedures
  - Financial policy/internal controls
  - Conflict of interest\*
  - Procurement\*
  - Drug-free workplace\*
- Federal, State & Local regulations
  - OSHA / MIOSHA
  - Nondiscrimination (Title VI Civil Rights Act, Americans with Disabilities Act, & more)
  - Washtenaw County Living Wage Ordinance

\*template available

## OTHER REQUIRED DOCUMENTATION



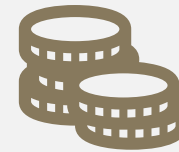
ACH direct deposit  
form



SAM.gov  
questionnaire or  
registration number



W-9 form (or vendor  
number)



Capital expenditure  
information form

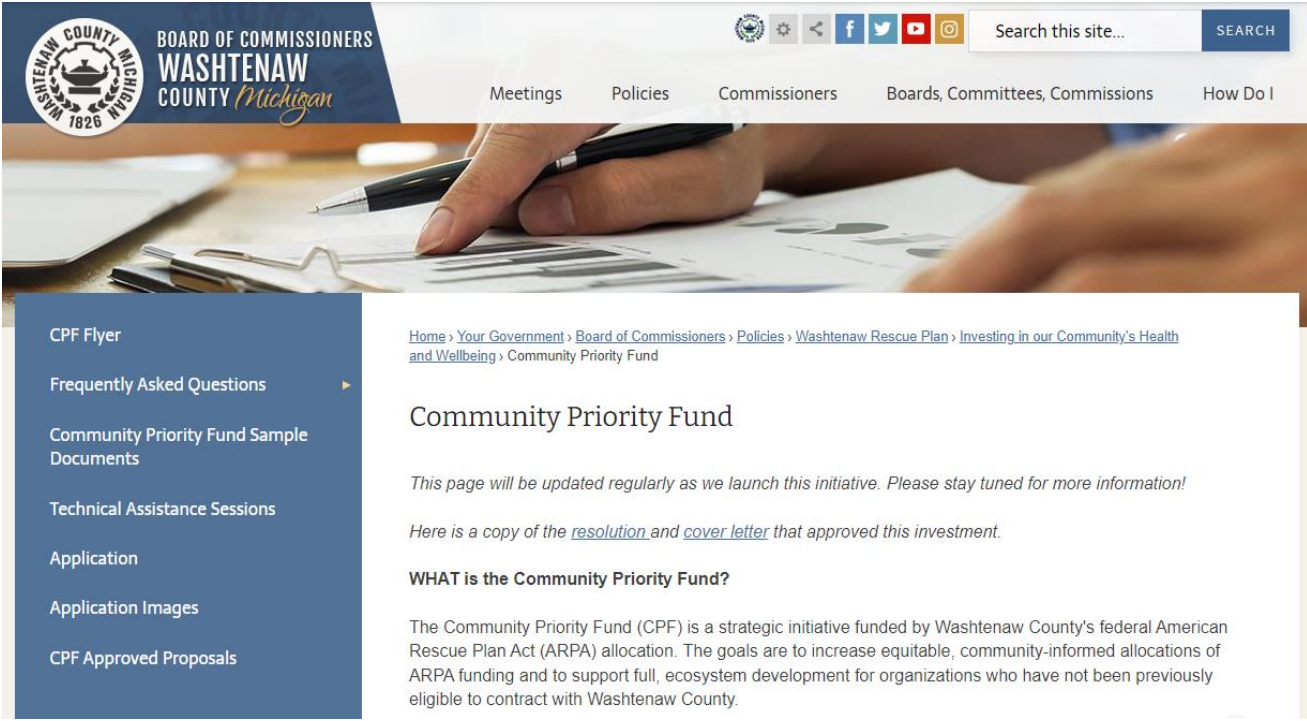
## SAM.GOV

- SAM is the official government-wide database with which to register in order to do business with the U.S. government.
- All Federal financial assistance recipients/subrecipients **must register** on [SAM.gov](https://sam.gov) and renew their SAM registration annually to maintain an active status to be eligible to receive Federal financial assistance.
- There is no charge to register or maintain an entity's SAM registration.



# COMMUNITY PRIORITY FUND WEBSITE

- Contract templates
- Downloadable documents & forms
- Checklists
- Webinar recordings
- Frequently Asked Questions (FAQs)
- Links to external resources
  - Federal regulations
  - Example policies & procedures



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Search this site... SEARCH

Home > Your Government > Board of Commissioners > Policies > Washtenaw Rescue Plan > Investing in our Community's Health and Wellbeing > Community Priority Fund

## Community Priority Fund

*This page will be updated regularly as we launch this initiative. Please stay tuned for more information!*

*Here is a copy of the [resolution](#) and [cover letter](#) that approved this investment.*

### WHAT is the Community Priority Fund?

The Community Priority Fund (CPF) is a strategic initiative funded by Washtenaw County's federal American Rescue Plan Act (ARPA) allocation. The goals are to increase equitable, community-informed allocations of ARPA funding and to support full, ecosystem development for organizations who have not been previously eligible to contract with Washtenaw County.

<https://www.washtenaw.org/3544/Community-Priority-Fund>

## EVALUATION & REPORTING

- After the contract is signed:
  - Monthly financial reports / invoices
  - Quarterly financial reports
  - Quarterly programmatic reports
- Eval team will provide reporting templates
- Kickoff retreat in early December focused on outcome evaluation

## NEXT STEPS

- Schedule intro meeting with data & evaluation team via [Doodle poll](#)
- Review contract boilerplate and materials on [CPF webpage](#) (coming soon!)
- Complete [contracting questionnaire](#)

# QUESTIONS?

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