

Ozarks Alliance to End Homelessness
HUD CoC Grant Project Quarterly Monitoring Guide

Monitoring Overview

The Ozarks Alliance to End Homelessness (Continuum of Care for Springfield/Greene, Christian, and Webster counties) is required to monitor HUD-CoC funded projects at least annually. The Ozarks Alliance to End Homelessness will conduct monitoring via:

- A) Quarterly review of CES participation, spending, and System Performance
- B) Annual monitoring of expenditures and client files through agency submission of checklist completion
- C) Annual submission of HUD CoC Grant Application and Supplemental Data Forms

Agency/project success in each of these components will be shared with the OAEH NOFO Committee and will inform project scoring on the HUD CoC Grant Priority Listing.

Feedback to Agencies

The NOFO Committee will communicate any concerns with spending within 15 days of their review of spending reports.

The CoC Administrative Team will send written feedback to agencies regarding on-site desk monitoring within 30 days of the monitoring, including information on areas of concerns and/or compliance issues.

Scoring for Project Applications for the HUD-CoC grant will be shared with the agency within 7 days of completion of the Priority Listing.

Points of Contact

Bob Atchley, City of Springfield: batchley@springfieldmo.gov

Glenda Troop, City of Springfield: gtroop@springfieldmo.gov

Emily Fessler, Community Partnership of the Ozarks: efessler@cpozarks.org

Quarterly Review of CES Participation, Spending, and System Performance

Expectations

The Agency is expected to identify the appropriate primary contact person(s) each grant year. The primary contact person(s) for HUD CoC monitoring will communicate with the CoC Administrative Team as appropriate and be responsible for maintaining records in compliance with HUD regulations.

The OAEH expects projects to submit at least one drawdown per grant quarter in e-LOCCS AND for each renewal grant to have a less than 10% variance between grant funds remaining and grant period remaining.

- If a grant has more than 10% variance between grant funds remaining and grant period remaining, written documentation of explanation is required.
- The NOFO Committee may request spending updates from the agency or a corrective spending plan.

The CoC Administrative Team will conduct desk monitoring and expenditures and reports will be reviewed by the OAEH NOFO Committee.

Procedures

Agencies should submit e-LOCCS Drawdown reports AND HMIS monitoring reports for each HUD-CoC grant to Bob Atchley, Glenda Troop, and Emily Fessler by 5:00 p.m. on the following dates for 2023 quarters:

- April 21st, 2023 (Quarter January – March 2023)
- July 19th, 2023 (Quarter April – June 2023)
- October 18th, 2023 (Quarter July – September 2023)
- January 20th, 2024 (Quarter October – December 2023)

The HMIS Monitoring Report should be run for the individual quarter AND the grant year to date.

- Title attachments in the following format:
 - eLOCCS Drawdown Report: *Agency Name- Program Name-eLOCCS Current Month- Year*
 - HMIS Monitoring Reports
 - Quarter: *Agency Name-Program-HMIS Current Month-Year*
 - Year to Date: *Agency Name-Program-HMIS GYTD*

See Appendix A for the workflow for the Springfield Monitoring Report. Direct questions to Dandy Myles (dandy.myles@icalliances.org).

Appendix A: Springfield Monitoring Report Workflow in HMIS

Quarterly Monitoring

This report is a comparison report used to compare one date range to a previous date range. This tipsheet specifies a quarterly date range but the report can be used to compare month-to-month, year-to-year, etc.

BusinessObjects	
Connect to BusinessObjects	<ol style="list-style-type: none"> 1. Select Connect to BusinessObjects on the banner menu at the top right of the screen.
Home Page	<ol style="list-style-type: none"> 2. Click the Folders tile and navigate to Public Folders > missouri_live_folder > Springfield CoC and select the Springfield Monitoring Report.
Prompts	<ol style="list-style-type: none"> 1. Select Provider(s): Click in the search box to search and select the project being monitored. 2. EDA Provider: Click in the search box to search and select the project being monitored. 3. Enter effective date: Effective date is the same as End Date Plus 1 day. Determine when you want the report to end and add 1 day – this is the report end date and effective date. 4. Enter Current Year End Date PLUS 1 Day: This is the last day you want to be included in the report plus 1 day. The date should match the effective date. 5. Enter Prior Year Start Date: When running a quarterly report, select the first day of the quarter that preceded the quarter that has ended. Example: If you need the report for the first quarter (1/1/2023 – 3/31/2023) then the Prior Start Date is 10/01/2022 (the first day of the 4th quarter). 6. Enter Current Year Start Date: This is the start date of the most recent quarter that is being compared to the previous quarter. If you need the report for the first quarter 1/1/2023 – 3/31/2023 the Current Start Date is 1/1/2023. 7. Click Run
Export	<ol style="list-style-type: none"> 1. To download the report, click the Export button (arrow pointing down) in the tool bar. 2. Select the Excel format. 3. Check the box next to All reports to export all tabs in the report. 4. Click Export <p>The report will download to your computer for you to view.</p>