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# Technical Assistance Grant Program

FY26 Grant Compliance Training

*Great Places* **WIN**



# Meeting Recording Disclaimer

This meeting will be recorded for documentation and training purposes.

Your participation in this session implies your consent to be recorded.

The recording will be posted as a training resource on the MD DHCD website. If you do not want your image on screen, you are welcome to turn off your camera.

# What We'll Discuss Today

- Compliance Requirements
  - Reporting
  - Request for Payments
- Change Orders
- Recaptures/Relinquishments
- Project Portal (IGX) & related documents
- Grant Management: Best Practices
- Questions & Answers



# Overview of Compliance Requirements

- Progress report within six months  
**(check your execution date on pg. 11 of the grant agreement)**
- Final report due within 30 days of the end of the grant term
- Request for Payment (RFP) for any draw **(minimum \$1,000)**



# REPORTING

## Progress & Final Reports

# Progress Report

- One progress report for the grant term is due (no quarterly reports!)
  - A six-month progress report (mark your calendars)
- Progress reports and RFP go together
  - Therefore, the more RFP's you submit, the more progress reports are needed



# Final Report Overview

- Due within 30 days of the end of the grant term.
- Check the execution date on your grant agreement. **The grant term is one year from the date of the Department's signature.**
- Example: grant agreement is signed by the Department on 12/05/25, so the grant term expires on 12/05/2026.



# Progress & Final Report Template

- A Word document is uploaded to the form in the Project Portal (IGX)
- It is emailed to you when you are notified that your award is active by your Project Manager.
- The final report has 3 additional questions.
- Be sure to mark the Project Portal form if it's the final report.

MARYLAND DEPARTMENT OF HOUSING AND COMMUNITY DEVELOPMENT  
OPERATING ASSISTANCE GRANT PROGRAM  
PROGRESS REPORT

**Purpose:** This Progress / Final report documents your project's progress, demonstrates its impact on the community, and maintains compliance with program requirements.

**Instructions:** Please thoroughly complete this form and submit it, along with the required documents, in the [DHCD Project Portal](#). All grantees are required to complete a Progress Report six months into the grant term and a Final Report within 30 days of the end of the grant term.

→ Note: Timely submission of Progress Reports is mandatory for compliance with the Operating Assistance Grant program. Failure to meet reporting deadlines will lead to payment processing delays, potential agreement termination, or the recapture of grant funds.

For All Progress Reports:

1. Provide a detailed description of the specific activities and work completed during the reporting period.
2. Explain how the project activities have contributed to achieving the goals outlined in your application.
3. What is the project's current status relative to the timeline provided in your application? If there are any delays, please explain why.

For Final Reports Only:

4. If your project included hiring a consultant or professional service provider, describe how you complied with [DHCD's Minority Business Enterprise program](#). Was the consultant a minority or woman-owned business? If not, what efforts did you make to identify a minority or woman-owned business to hire?
5. Describe at least three measurable positive changes that have resulted from the project and the impact on the community. Provide specific data or evidence to support these results
6. Explain how the project aligns with and reflects the core objectives of DHCD's overarching priorities which includes to: increase housing for all, create lovable places, and right the wrongs of

# What makes a ~~good~~ *great* progress/final report...

- Tells us how your organization used the grant, the outcomes produced, and the impact the funding had in your community.
- Activity does not necessarily equal achievement: a long list of meetings you've attended doesn't tell us much.
- Include specific data that demonstrates the results.
  - For example, if it's consultant costs for a study, what changed as a result of the funding? Did the study get published? What are the next steps? How will the results of the study be used by the organization and for the community it serves?
  - If it's salary, what position did it support? How did that position contribute to a project/activity? How many hours were contributed? How is the community or project better off because of the staff's contribution?
  - Include relevant documentation to demonstrate that the funded activities occurred. For consultant costs, you will provide the signed proposal/contracts, copies of draft materials, and final deliverables.

> NO receipts, paid invoices, or cancelled checks with your report, only RFPs.

# REQUEST FOR PAYMENT

**Request for Reimbursement**

# Request for Payment (RFP)

- Initiate an RFP in the Project Portal and submit the form there.
- Minimum request for reimbursement is \$1,000.
- Can request for reimbursement **back to date of application.**



# What do I include in an RFP?

- Show **how the money was spent**.
- Provide **proof that payments were made**.
- Include **paid invoice(s) or receipt(s) plus** cancelled checks or bank transactions showing the funds were transferred from you to the service provider.

In short, it's **both**: a record of what was spent **and** proof the funds actually went out the door.

# How many RFPs do I have to submit?

Short answer: One!

- At the end of your grant term, one reimbursement RFP.
- You can, if you choose, submit more so long as the request is \$1,000 or more.
- Remember, for every RFP you have to submit a Progress Report ahead of it.

# What do I include in an RFP?

- Budgeted activities only as outlined in your grant agreement in Exhibit B.
- You can also check the Project Portal under Award Summary.

FY26 Operating Assistance Grant Agreement

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## EXHIBIT B

### OPERATING ASSISTANCE GRANT PROGRAM

#### PROJECT BUDGET

| USES OF FUNDS | DHCD            | Grantee   | Other     | Name of Other Sources | TOTALS          |
|---------------|-----------------|-----------|-----------|-----------------------|-----------------|
| Salary        | \$25,000        |           |           |                       | \$25,000        |
| <b>TOTALS</b> | <b>\$25,000</b> | <b>\$</b> | <b>\$</b> |                       | <b>\$25,000</b> |

# We cannot reimburse for...

- Alcohol or legal controlled substances
- Entertainment
- Personal souvenirs, excursions, toiletries
- Fines or parking tickets
- Costs for travel companions not on your team



# How do I request an advance?

- Submit an RFP (no progress report needed) in the Project Portal.
- Request up to 25% of your award as an advance at the start of the grant term. **The first RFP.**
- One advance allowed per grant term for budgeted activities.

**Note: Subsequent payment request must include proof of payment for the advance and a progress report.**

# Change Orders

Change orders are required when an awardee requests a modification to their approved budget or an extension to the award's expiration date.

To initiate a change order, the awardee must email their assigned project manager to request a Change Order Form. The completed form must be returned to the project manager for review and approval.

## Eligible Change Requests:

- Modifications to budgeted activities, including changes to activity amounts or the activities themselves
- Grant period extensions of 30, 60, or 90 days only
- Requirements and Limitations
- All change order requests must include a written explanation
- Change orders are reviewed only for active, unexpired awards
- One change order is permitted per grant term (for an extension and/or budget modification) — plan accordingly

# Recaptures, Relinquishments, & Non-Compliance

**Recapture:** DHCD takes back awarded funds due to grantee noncompliance, preventing the organization from drawing on the grant.

**Relinquishment:** The grantee voluntarily returns the award because they are unable to use the funds.

**Non-compliance:** Failure to adhere to the grant terms outlined in the legal agreement, which could impact current or future awards from DHCD.

# NAVIGATING THE PORTAL



Welcome to the State of Maryland's Department of Housing and Community Development Project Portal Grants Management System

The DHCD Project Portal is a grant management system used by **local governments** and **nonprofit** organizations for the submission of grant applications, requests for payment, and progress reports, supporting the funding programs offered by the Division of [Neighborhood Revitalization](#) (NR) and the Division of [Homeless Solutions](#) (HS). *Not all programs offered by the Department are managed in this portal.* Applicants and awardees are encouraged to contact Division staff with questions related to specific program schedules, eligibility, policies and procedures.

Individuals seeking direct housing assistance: DO NOT register for this Project Portal -- instead, visit DHCD's direct housing assistance website for contacts and information at <https://dhcd.maryland.gov/HomelessSolutions/Pages/default.aspx>

New Users can click the "New User?" link to register a new account for this website.

Returning Users can login to this site, using your account's username (not email address) and your password. If your credentials were forgotten or expired, click on the "Forgot Username/Password?" to reset your account.

Note: If your account has been "locked" due to 3 failed login attempts, the system will allow you to try again after 20 minutes.

Click here for information and instructions about [Registration and Login](#), or contact technical assistance at [NRSystemSupport.dhcd@maryland.gov](mailto:NRSystemSupport.dhcd@maryland.gov)

## Login

Username

Password

**Log In**

[Forgot Username/Password?](#)

[New User? Register Here.](#)



**<https://projectportal.dhcd.state.md.us/IGXLogin>**

# Use the Search Tab

- Click **Search** and select “application” from the drop down menu
- Under **Name**, enter “TAG”
- Under **Type**, select “Community Development and Services Application FY2026”
- Click, **Search**
- Award ID/Project Name is: OAG-TAG-2026-ORG NAME-#####

## Applications

### Instructions:

- Fill out the Search Criteria and click Search to search for a specific document.
- Leave the Search Criteria blank and click Search to show all your documents.

### Document Search

Name

Type

Organization



# Find Your Award

- Click on the document name to go into your award.

## Document Search

Name

Type

Organization

### ▼ Documents

| Name                   | Organization                         | Type  |
|------------------------|--------------------------------------|---|
| OAG-TAG-2026-DFP-00104 | Downtown Frederick Partnership, Inc. | Community Development and Services Application FY2026 |



# How to Start A Report

- On the document landing page, use the left side tool bar to locate initiate related doc, click on it.

OAG-TAG-2026-DFP-00104

Status History

Attachment Repository

Document Validation

Print Document

Document Messages

▼ Status Options

Award Active

▼ Related Documents

Initiate Related Doc

## Document Landing Page

Instructions:  
View document details.

**Template**  
Community Development and Services Application  
FY2026

**Document Name**  
OAG-TAG-2026-DFP-00104

**Instance**  
Community Development  
FY2026

**Document Status**  
Award Agreement NR Fina

**Organization**  
Downtown Frederick Partnership, Inc.

**Your Role**  
NR Assistant Director

# Progress Report

- Fill in the reporting period
- Attach the Word document, report form
- Attach supporting documentation
- **NOTE:** Be sure to click SAVE at the top of the page before clicking the submit button



PROGRESS REPORT TIME PERIOD:  
*Please note: Compliance with program requirements, such as progress reporting, will be considered when reviewing requests for payment.*  
Fill in reporting period beginning and end date for this Progress Report (month and year)

Reporting Period Start Date: Month:  Year:   
Reporting Period End Date: Month:  Year:   
Check this box if this is your Final Progress Report:

PROGRESS REPORT UPLOADS AND ATTACHMENTS  
Contact your DHCD Project Manager to obtain a copy of the program-specific Progress Report template. Upload the completed Progress Report template below and provide a short file description, including the reporting period:

Progress Report Upload File Description  
 No file chosen  DELETE 4th Quarter Report for MIP-2022-BrunswickMS.docx  
212083\_8079992-DecemberQuarterlyReportMIP-2022-BrunswickMS-000428.docx

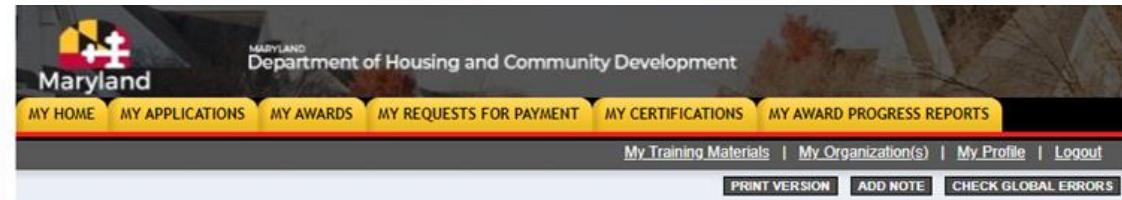
Upload any additional or supporting documents below and provide a short description of each file:  
*More uploads fields will appear upon page-Save. Uploaded files are limited to a maximum file size of 25 Megabytes (Mb) per page save.*

Supporting Uploads File Description  
 No file chosen  DELETE Brunswick Main Street Marketing Contractor Pa  
212083\_8080001-BrunswickMainStreetContractorPayments-2022-07-09-to-2022-10-08(1).pdf  
 No file chosen  DELETE Brunswick Main Street Marketing Contractor Pa  
212083\_8080001\_2-BrunswickMainStreetContractorPayments-2022-10-07-to-2022-12-14.pdf  
 No file chosen  
 No file chosen  
 No file chosen

Provide any detailed notes concerning the attached Progress Report and Additional or Supporting Documents:  
*Our marketing for outdoor recreations for this time period focused on the following events Railroad Days, Holiday Marketplace, Penny Farthing, Fall In Love with Brunswick, Farmers Markets, July 4th Bike Parade, and Romp at Rivers Edge. A lot of effort was put forth on promoting our natural resources which includes the C&O canal, Towpath, and Potomac River. We also supported our local campground - Brunswick Family Campground and their many amenities. Some printed materials were created and distributed highlighting outdoor experiences here in our Brunswick community. We also partnered with our other Frederick Main Street and did a joint campaign.*

# Request for Payment

The request for payment form in the portal provides basic award information and award balance.



The screenshot shows the Maryland DHCD website with a navigation bar including 'MY HOME', 'MY APPLICATIONS', 'MY AWARDS', 'MY REQUESTS FOR PAYMENT', 'MY CERTIFICATIONS', 'MY AWARD PROGRESS REPORTS', 'My Training Materials', 'My Organization(s)', 'My Profile', and 'Logout'. Below the navigation is a 'PRINT VERSION', 'ADD NOTE', and 'CHECK GLOBAL ERRORS' button. The main content area displays 'REQUEST FOR PAYMENT FORM' details for an Operating Assistance Grant - Main Street Improvement Program. It includes fields for Award Program Type, Award ID, Alternate Award ID, Program/Project Name, Award Term, Awardee Name, Awardee Legal Name, Awardee Payment Mailing Address, Current W-9 On File, and DHCD Project Manager. A 'CURRENT AWARD SUMMARY' table shows Capital Amount (\$0), Disbursed Amount (\$0.00), and Award Balance (\$0.00). A note states: 'Instruction: The table below displays the award amounts, disbursed amounts, and award balance. Disbursed amounts will not include amounts currently pending until they have been fully approved and processed by DHCD staff.' A 'REQUEST FOR PAYMENT - AMOUNTS, EVIDENCE, AND DESCRIPTION' section asks if the request is for an Advance or Reimbursement, with 'Reimbursement' selected. The bottom right features the 'Great Places WIN' logo with house icons.



Instruction: The table below displays the award amounts, disbursed amounts, and award balance. Disbursed amounts will not include amounts currently pending until they have been fully approved and processed by DHCD staff.

|                               | Award Amount | Disbursed Amount | Award Balance |
|-------------------------------|--------------|------------------|---------------|
| Capital Amount:               | \$0          | \$0.00           | \$0.00        |
| Operating/Non-Capital Amount: | \$14,000.00  | \$11,750.00      | \$2,250.00    |
| Total Amounts:                | \$14,000.00  | \$11,750.00      | \$2,250.00    |

[Click here to view the complete AWARD PAYMENT ACTIVITY REPORT](#)

## REQUEST FOR PAYMENT - AMOUNTS, EVIDENCE, AND DESCRIPTION

Is this request for payment an Advance or a Reimbursement? \*

Advance  Reimbursement

# Request for Payment

- Select if the request is an advancement or reimbursement
- Enter payment request amount
- Enter requested amount per line item
- Upload evidence of expenses

# Request for Payment

- You must provide a summary of activities and payment in this section



## Request for Payment Description

*Instruction:* Provide a summary of the funded activity and how funds assisted with the project goals and objectives. Please include dates, locations, and payment descriptions of related expenditures.

Attached is the paid invoice for April, 2020. we are currently finalizing our fundraising plan and prioritizing the methods best for pandemic considerations.

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## REQUEST FOR PAYMENT - CONTACT INFORMATION

*Instruction:* Review the Request for Payment Form to make sure all required questions have been answered and documents attached, and then enter your name, title, email and phone number in the fields below. The Department may contact this person for more information as needed. [Click "Save"](#) prior to submitting the Request for Payment.

Contact Name:  \*

Contact Title:  \*

Contact Email:  \*

Contact Phone:  \*

**CLICK HERE TO SUBMIT OR CANCEL THIS RFP**

- **NOTE:** Be sure to click **SAVE** at the top of the page before clicking the submit button



# Grant Management

# Best Practices

- Stay organized
  - Keep clearly labeled files
- Set calendar reminders of reporting due dates
  - Six-month progress report
  - Final report within 30 days of the end of the grant term
- Review your grant agreement
  - Understand the terms of your award
    - Budget
    - Timeline
    - Contact info for DHCD Project Manager



# QUESTIONS?

## Contact Information:

Alyssa Clemons, Project Manager

EMAIL: [Alyssa.Clemons@maryland.gov](mailto:Alyssa.Clemons@maryland.gov)

Schedule 1:1 support here:

<https://calendly.com/alyssa-clemons/30min>

