

Jacob R. Day, Secretary
Julia Glanz, Deputy Secretary

dhcd.maryland.gov



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
TOTALS	\$25,000	\$	\$		\$25,000

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



MARYLAND
Department of Housing and
Community Development



NEIGHBORHOOD REVITALIZATION
DHCD Project Portal
GRANTS MANAGEMENT SYSTEM

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

Login

Username

Username

Password

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

tag

Type

Community Development and Services Application FY2026

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.

The screenshot shows a web application interface for a document landing page. On the left is a vertical sidebar with a red header containing the text "OAG-TAG-2026-DFP-00104". The sidebar menu includes items like "Status History", "Attachment Repository", "Document Validation", "Print Document", "Document Messages", "Status Options" (with a dropdown arrow), "Award Active", "Related Documents" (with a dropdown arrow), and a red button labeled "Initiate Related Doc" with a document icon. A large green arrow points from the left towards this button. The main content area is titled "Document Landing Page" and contains instructions to "View document details." Below this, there are two columns of information: Template (Community Development and Services Application FY2026), Instance (Community Development FY2026), Document Name (OAG-TAG-2026-DFP-00104), Document Status (Award Agreement NR Fina), Organization (Downtown Frederick Partnership, Inc.), and 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

[SAVE](#) [PRINT VERSION](#) [ADD NOTE](#) [CHECK GLOBAL ERRORS](#)

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
<input type="button" value="Choose File"/> No file chosen <input type="checkbox"/> DELETE	
212083_8079992-DecemberQuarterlyReportMIP-2022-BrunswickMS-000428.docx	4th Quarter Report for MIP-2022-BrunswickMS

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
<input type="button" value="Choose File"/> No file chosen <input type="checkbox"/> DELETE	
212083_8080001-BrunswickMainStreetContractorPayments-2022-07-09-to-2022-10-08(1).pdf	Brunswick Main Street Marketing Contractor Payments
<input type="button" value="Choose File"/> No file chosen <input type="checkbox"/> DELETE	
212083_8080001_2-BrunswickMainStreetContractorPayments-2022-10-07-to-2022-12-14.pdf	Brunswick Main Street Marketing Contractor Payments
<input type="button" value="Choose File"/> No file chosen	
<input type="button" value="Choose File"/> No file chosen	
<input type="button" value="Choose File"/> 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.

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Request for Payment

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



 **Maryland** Department of Housing and Community Development

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[My Training Materials](#) | [My Organization\(s\)](#) | [My Profile](#) | [Logout](#)

[PRINT VERSION](#) [ADD NOTE](#) [CHECK GLOBAL ERRORS](#)

[Back](#)

Document Information: [OAG-MIP-2020-BrunswickMS-00018-RFP-003](#)
Parent Information: [OAG-MIP-2020-BrunswickMS-00018](#)
[Details](#)

You are here: > [Community Development and Services RFP Menu](#) > [Forms Menu](#) > Request for Payment Form

REQUEST FOR PAYMENT FORM

Award Program Type: Operating Assistance Grant - Main Street Improvement Program
Award ID: OAG-MIP-2020-BrunswickMS-00018
Alternate Award ID: OAG-MIP-2020-BrunswickMS-00165
Program/ProjectName: Strengthening the Organization
Award Term: Start: 12/20/2019 End: 12/20/2020
Awardee Name: Brunswick Main Street, Inc.
Awardee Legal Name: Brunswick Main Street, Inc.
Awardee Payment Mailing Address: P.O. Box 72, Brunswick, MD 21716
Current W-9 On File: https://projectportal.dhcd.state.md.us/Upload/19069_8061156-BMSW-9.pdf
DHCD Project Manager: Christine McPherson

CURRENT AWARD SUMMARY

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 - AMOUNTS, EVIDENCE, AND DESCRIPTION

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

☐ Advance ☒ Reimbursement

Award Budget and Request for Payment Amounts:

Instruction: Enter the total payment request amount and then enter request amount per Activity/Use of Funds line item below.

Payment Request Amount: *

Activity/Use of Funds	Award Amount	Disbursed Amount	Award Balance	Payment Request Amount	Payment Approved Amount
Consultant: Board/Organization Development and Fundraising Plan	\$13,850.00	\$9,500.00	\$4,350.00	<input type="text" value="\$2,250.00"/>	\$0
Application Fee: Standards of Excellence	\$150.00	\$0	\$150.00	<input type="text" value="\$0"/>	\$0
	\$0	\$0	\$0	<input type="text" value="\$0"/>	\$0
	\$0	\$0	\$0	<input type="text" value="\$0"/>	\$0
	\$0	\$0	\$0	<input type="text" value="\$0"/>	\$0
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	\$0	\$0	\$0	<input type="text" value="\$0"/>	\$0
	\$0	\$0	\$0	<input type="text" value="\$0"/>	\$0
	\$0	\$0	\$0	<input type="text" value="\$0"/>	\$0
	\$0	\$0	\$0	<input type="text" value="\$0"/>	\$0
REQUEST FOR PAYMENT TOTALS	\$14,000.00	\$9,500.00	\$4,500.00	\$2,250.00	\$0

Request for Payment Evidence

Instruction: Upload any supporting materials in the Request for Payment Evidence upload section if required by the program. For each file attached, provide a brief description of the attachment. When you click on "Save" additional upload rows will appear on the page (up to 20 rows).

Uploaded files are limited to a maximum file size of 25 Megabytes (Mb) per page save.

Request Evidence Upload

No file chosen

119385_8066032-Invoice-TWW-2020-025.pdf

No file chosen

File Description

Request for Payment

- You must provide a summary of activities and payment in this section
- **NOTE:** Be sure to click **SAVE** at the top of the page before clicking the submit button



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: Julie Martorana *

Contact Title: Chairman, Board of Directors *

Contact Email: brunswickms@gmail.com *

Contact Phone: (301) 785-9859 *

CLICK HERE TO SUBMIT OR CANCEL THIS RFP

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

Schedule 1:1 support here:

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

