



## DGA CDBG Monthly Report Form Instructions

### Three Easy Steps

1. Go to <http://www.cityoftulsa.org/community-programs/grants/forms.aspx> to get the form: **DGA Monthly Report.xls**
2. Open the file; click on the **File > Save As** and rename the file  
Rename file: [agency name] [program name] [MM-YY] DGA MRep.xls  
**Example:** FCS Sch Mental Hlth 03-11 DGA MRep.xls
3. Complete and submit the form using the instructions listed on the following pages

### How to Complete and Submit the DGA Monthly Report Form

**Note:** Numbers marked with (\*) correspond to the numbered sections listed on the form.

#### \*1. New Participant Reporting

Month	Instructions
Oct	Report all participants in the program
Nov - Sept	Report only NEW (unduplicated) participants in the program <b>Note:</b> Each person is counted only one time each contract year.

#### \*2. Individual / Household Income Reporting

**Note:** This does NOT apply to grants providing an area benefit to specific census tract residents. If providing a service for a specific residential area, report census tracts served under Section 5 below.

Determine the reporting category using the following steps:

- Household Income** = gross amount of income of all adult (18+) household members.
- Number of Persons in Household** = number of persons currently living at the residence
- Take the two figures above and use the **FY 2011 Annual Income Limit** figures (below) to determine which income category applies:
  - **Extremely Low** (0% to 30% of MFI)
  - **Low** (31% to 50% of MFI)
  - **Moderate** (51% to 60% of MFI)
  - **NON Low/Mod** (greater than 81% of MFI)

#### FY 2011 Annual Income Limit (Effective as of November 17, 2011)

Category	Number of Persons in Household							
	1 Person	2 Person	3 Person	4 Person	5 Person	6 Person	7 Person	8 Person
Extremely Low Income (0-30% of MFI)	\$12,550	\$14,350	\$16,150	<b>\$17,900</b>	\$19,350	\$20,800	\$22,200	\$23,650
Low Income (31-50% of MFI)	\$20,900	\$23,850	\$26,850	<b>\$29,800</b>	\$32,200	\$34,600	\$37,000	\$39,350
Moderate Income (51-80% of MFI)	\$33,400	\$38,200	\$42,950	<b>\$47,700</b>	\$51,550	\$55,350	\$59,150	\$63,000
NON Low/Mod Income (> 80% of MFI)	>\$33,400	>\$38,200	> \$42,950	> <b>\$47,700</b>	> \$51,550	> \$55,350	> \$59,150	> \$63,000



### DGA Monthly Report Form Instructions, continued

#### \*2. Individual / Household Income Reporting

Examples:

Household Income	Number of Persons in Household	Category
\$15,000	1 adult and 3 children = 4	Extremely Low
\$32,454	2 adults and 2 children = 4	Moderate
\$20,000	1 adult and 1 child = 2	Low

If:	Then:
<p>Clients (participants) or their family members receive any of the following types of public assistance:</p> <ul style="list-style-type: none"> <li>• CCDF (child care payment assistance)</li> <li>• Public Housing/Section 8 Rental Assistance</li> <li>• Reduced/Free School Lunch</li> <li>• SNAP (foodstamps)</li> <li>• TANF</li> <li>• WIC</li> </ul>	<p>You should be able to acquire this documentation from the client.</p> <p>This would provide you with the figures and documentation you need (<b>Household Income and Number of Persons in Household</b>)</p>

#### \*3. Racial Information Reporting

**Note:** Each person must designate (1) a **racial** category (or combination) from one of the categories listed on the reporting form **AND** (2) an **ethnic** category (if applicable).

Agencies need to ensure that the number of Hispanic or Latino participants are also included in one of the racial categories so that the total number of participants reported in the “Total of ALL Participants by Race” number equals the total number of new participants in Section 1 and under either Section 2 or Section 5 (depending on what is required in the grant agreement).

Example: If 10 participants are served in one month and 2 of those participants are of Hispanic origin, the total in Section 1 for the New Participants should be 10. The total number served under either the income categories or census tract sections should also be 10. In Section 3 the total number of ALL Participants by Race should be 10, and the total Number of Hispanic or Latino should be 2.

The five main racial categories and the two ethnic categories are defined below:

RACIAL Category	Definition
1. American Indian/Alaska Native	<p>A person having origins in any of the original peoples of:</p> <ul style="list-style-type: none"> <li>• North America Central America South America</li> </ul> <p>AND who maintain tribal affiliation or community attachment</p>



### DGA Monthly Report Form Instructions, continued

#### \*3. Racial Information Reporting, continued

2. Asian	A person having origins in any of the original peoples of: <ul style="list-style-type: none"> <li>• Far East</li> <li>• Southeast Asia</li> <li>• Indian subcontinent, including: <ul style="list-style-type: none"> <li>▪ Cambodia</li> <li>▪ China</li> <li>▪ India</li> <li>▪ Japan</li> <li>▪ Korea</li> <li>▪ Malaysia</li> <li>▪ Pakistan</li> <li>▪ Philippines</li> <li>▪ Thailand</li> <li>▪ Vietnam</li> </ul> </li> </ul>
3. Black/African American	A person having origins in any of the black racial groups of Africa
4. Native Hawaiian/Other Pacific Islander	A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands
5. White	A person having origins in any of the original peoples of: <ul style="list-style-type: none"> <li>• Europe</li> <li>• Middle East</li> <li>• North Africa</li> </ul>

ETHNIC Category	Definition
1. Hispanic/Latino	A person with a culture or origin, <b>regardless of race</b> from <ul style="list-style-type: none"> <li>▪ Cuba</li> <li>▪ Central America</li> <li>▪ Mexico</li> <li>▪ Puerto Rico</li> <li>▪ South America</li> <li>▪ Other Spanish culture/origin</li> </ul>
2. Not Hispanic/Latino	A person not of the culture or origin listed above
If:	Then:
More than 1% of participants select <b>Other Multi-Racial</b> AND the same racial combination	Reporting must indicate the racial combination and percentage <b>Examples:</b> Native Hawaiian/Other Pacific Islander AND White 10 (5%) Native Hawaiian/Other Pacific Islander AND Asian 12 (6%)

#### \*4. Census Tract – Area Benefit Projects

CDBG Projects that provide activities/services that benefit a residential neighborhood where at least 51% of the residents are LMI persons, enter the census tract or census block served. Area benefit projects do not need to report income information.

#### \*5. Female Head of Household

From the TOTAL reported under Individual / Household Income, designate number headed by a female.

#### \*6A and \*6B. Program Reporting

Customize the report form for each program so the services you are providing can be evaluated.

- A. Refer to the Grant Agreement/Contract, Exhibit B



### DGA Monthly Report Form Instructions, continued

#### \*6A and \*6B, Program Reporting, continued

- B. Add the criteria listed in Exhibit B to the reporting form in section **6A** when the data you are reporting will be numeric (numbers of repeat participants, referrals to other agencies, etc.)
- C. Add the criteria listed in Exhibit B to the reporting form in section **6B** when the data you are reporting will NOT be numeric (listing of workshops/seminars or monthly activities)

#### Example (see below):

##### \*6A. Numeric information:

- New Households Served
- Repeat Households Served
- Referrals to Other Agencies
- Volunteers Recruited

##### \*6B. Non-numeric

- Workshop listing (includes title, date, time, location, and facilitator)

### EXAMPLE

Reporting Requirements: Report information to evaluate services per Grant Agreement/Contract, Exhibit B												
6A. Program Information	Oct-10	Nov-10	Dec-10	Jan-11	Feb-11	Mar-11	Apr-11					
New Households Served												
Repeat Households Served												
Referrals to Other Agencies												
Volunteers Recruited												
<b>6B. Program Information</b>												
Workshops Held	Days	Date	Time	Location	Facilitator							
Anger Management	M	04/04-04/25	10-11 am	On-site	Staff (include name)							
Nutrition Classes	W	04/06-05/27	1:30-3 pm	Tulsa County Health Dept	Tulsa Co Health Dept (include name)							
Money Management	T&Th	04/05-04/21	7-8 pm	On-site	Staff (include name)							
Interviewing Skills	M&W	04/18-04/28	9-10:30 am	TCC Northeast Campus	TCC (include name)							

### Submitting the Report

**Report Deadline:** The report deadline is stated on Exhibit B of your Contract.

**Where to Send:** Email Address: [grantsadmin@cityoftulsa.org](mailto:grantsadmin@cityoftulsa.org)

**Note:** We prefer reports via email if at all possible

**Mailing Address:** Division of Grants Administration  
One Technology Center  
175 E. 2nd Street, Suite 480  
Tulsa, Oklahoma 74103