UNITED WAY
Greater New Haven

REIMAGINE & REVITALIZE TECHNICAL ASSISTANCE QUICK GUIDE

Post-Contracting Requirements

*Funding is contingent upon an execution of a formal agreement with the grant manager and satisfaction of all contractual and programmatic requirements

1. **Mandatory CBO Onboarding & Tow Youth Justice Institute Canvas Trainings**
   a. To promote consistency, accountability, and compliance with the Council expectations, all applicants awarded under this NoFo were required to participate in an in-person formal onboarding training. The training for the New Haven region took place 10/26/26.
   b. Tow Youth Justice Institute (TYJI) trainings take place once a month, either in-person or virtually. One person maximum per CBO must participate, though the selected participant may change monthly depending on the training type. **Each training has its own unique registration link and registration deadline.** **The New Haven region is part of Cohort 3**. For a comprehensive overview including dates, course overviews and recommended attendees, links to register and more, please visit the **TYJI's welcome packet.**
2. **Compliance with appropriate uses of funds**
   a. Administrative costs are capped at 10% of the amount awarded and must be detailed
      i. Administrative costs might include a portion of: rent, utilities, payroll expenses, internet, phone, etc.
   b. The following is a non-exhaustive list of services, activities, goods, and other costs that cannot be supported by the R2 grant:
      i. Loan fund (create/replenish)
      ii. Lobbying
      iii. Payment of taxes
      iv. Subsidizing a business
      v. Refinancing or restructuring existing debt
      vi. Relocation of a business
      vii. Personal loans
      viii. Fundraising events
      ix. Contracts to individuals
      x. Research & Development (limited data collection, surveys, or community feedback activities directly related to program evaluation and measuring outcomes are allowable expenses).
      xi. Political campaigns
      xii. Fines or penalties
      xiii. International or Out-of-state Travel
      xiv. *Any other activities are subject to the Council's approval at its sole discretion

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3. **Reporting & Site Visits**
    a. **Monthly fiscal reporting:** due via SurveyMonkey Apply no later than the fifteenth (15th) day of each month for the preceding month
    b. **Quarterly programmatic reporting**: due via SurveyMonkey Apply no later than fifteen (15) days after the close of each calendar quarter
    c. **Performance Goals**
        i. To ensure accountability, transparency, and alignment with the Council's R2 priorities, all CBOs awarded funding under this NoFo will be required to comply with ongoing reporting and monitoring obligations. These reporting and compliance requirements include but are not limited to the following:
            1. Completion and submission of monthly financial reporting. Form to be completed using the grant management system, SurveyMonkey Apply
                a. Platform will allow CBOs to upload statements, receipts, etc. It is expected if writing in a line such as supplies that it is detailed what supplies were purchased. Back-up documentation is required for each reported expenditure
            2. Completion of quarterly programmatic reporting. Form to be completed using the grant management system, SurveyMonkey Apply
            3. Annual completion and submission of the consolidated fiscal and programmatic reporting templates. To be completed using the grant management system, SurveyMonkey Apply
                a. Annual documentation may include submission of annual audits or related alternative documentation to ensure organizations are financially stable for the remainder of the contract term
            4. Participation in annual site visits conducted by the Grant Manager. Grant Managers may conduct additional site visits as determined necessary.

Please see NoFo Addendum 3 for full descriptions, and example reporting data. As noted, all reporting will take place via the grant management system, SurveyMonkey Apply. Depending on where we are in the grant cycle, the platform should automatically show CBOs either fiscal reporting, programmatic, or both. Each CBO will have their own unique login. Upon submission, CBOs will get a notice of completion. CBOS must stay compliant with all requirements. If issues arise, corrective action templates may be instituted.

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d. **Program Reporting**

i. Broadly, data may be collected in the following areas* (*with specific requirements subject to change):

1. General: identifying characteristics of the organziation, organizational statistics as related to staff operations and capacity changes, and demographic information of clients served
    a. For example, it is assumed CBOs collect basic contact information and demographics regarding clientele. They may be subject to audits to confirm the veracity of their statement [that 90+% of clients served are from the DIA]
2. Economic Development: general information on services provided, including employment trends, funds disbursed, etc., programs encouraging collaboration with employers in the target regions, programs that increase job-readiness for target region residents, etc.
3. Re-Entry Initiatives: overall trends of target region justice impacted clients, programs increasing employability for target region justice impacted residents, educational programs for target region justice impacted residents, legal representation and assistance for target region justice impacted residents, etc.
4. Youth Initiatives: total amount of clients served, programs increasing post-secondary knowledge and skills, programs that encourage youth employability/entrepreneurship, etc.