

Multifamily Housing Service Coordinator Budget Tool

Multifamily Housing Service Coordinator Budget Tool Instructions	
<p>The purpose of this budget tracking tool is to assist Service Coordinator Grantees to track eligible budget expenditures, determine budget variances and project need for future grant renewals. Instructions for completing the tool are outlined below for each tab. This tool is intended to be an optional supplement to other forms and reports required such as the HUD-50080-SCMF, HUD-92456, and Quality Assurance Reports. The most up-to-date versions of these HUD forms can be found here: .</p> <p style="text-align: center;">http://portal.hud.gov/hudportal/HUD?src=/program_offices/administration/hudclips/forms/hud9</p>	
Tab Name	Instructions
Grantee Dashboard	<p>Complete all applicable grantee/project information in the yellow cells. Make sure to enter the Grant Start Date since this populates column headings in other tabs. If the service coordinator position serves multiple projects, ensure that additional project information is provided. The Progress to Date Section pulls information from the Budget YTD tab to show total grant expenditures, remaining balances, monthly average expenditures, and burn rate.</p>
Budget YTD	<ol style="list-style-type: none"> 1. If you have an approved indirect cost rate, enter the percentage in B2. 2. Enter the projected program expenditures for each budget line item in Column B (B4-B12) based on your approved budget. Ensure the amount of Quality Assurance does not exceed 10% of Service Coordinator salary. Additionally, ensure the amount of Indirect Costs does not exceed do not exceed 10% of Modified Total Direct Costs or your approved Indirect Cost Rate. An error message will occur if amounts entered exceed applicable caps for QA and Indirect Costs. 3. Enter the budgeted amounts for each funding source in Column B (B15-B18) based on your approved budget. 4. Enter actual expenditures for each month in Columns C-N in Rows 4-12. These amounts should match amounts entered on the 50080-SCMF. Column P denotes the remaining balance of funds for each budget line item based on the approved budget. Column Q calculates the variance between the approved budget amount and the actual expenditures. 5. In Rows 15-18, enter the drawdown amounts for each funding source for the particular month. Use the negative sign (-) or parenthesis surrounding the figure to show the drawdown amount. For example, if you draw \$4000 from the Service Coordinator grant in Month 1, this figure should be entered as (4000) or -4000 in C16.
Renewal Budget	<p>At the end of Month 8 in Quarter 3, use the Renewal Budget Tab to determine your budget request to HUD for the renewal grant. Begin first by entering the applicable COLA increase, if any, in cell B2 (click on link to access effective COLA). The maximum allowable renewal amount will calculate automatically in cell B4.</p> <p>The renewal budget is based on actual expenditures for Months 1-8 and estimated expenditures for months 9-12. Actual expenditures for Months 1-8 are calculated automatically in Column C from amounts inputted in Budget YTD tab. Estimated Expenditures are based on the average expenditures from Months 1-8 excluding any Start-Up Costs. If the Projected Final Budget (E16) is less than the Approved Budget (B16), the projected renewal offset will show in cell E2. Any amount in the Projected Renewal Offset will be subtracted from the Maximum Allowable Renewal Amount to determine the Final Renewal Amount in E4.</p>
Eligible & Ineligible Costs	Please review this Tab for a complete list of eligible costs within your grant.
Cell Protection	To remove cell protection, use the following case-sensitive password: SC-TOOL.

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Multifamily Housing Service Coordinator Grant Dashboard					
Grantee/Project Information					Today's Date
Grant Term	From (mm/dd/yyyy)	To (mm/dd/yyyy)		#FTE for SC Position	
Annual SC Budget Amount					
Multiple projects served?	No			# Annual Hours	
FHA or Project #1 Number		IREMS ID			
FHA or Project #2 Number		IREMS ID			
FHA or Project #3 Number		IREMS ID			
Progress to Date					
Total Spent			Total Remaining Funds		
<input type="text"/>			<input type="text"/>		
	Remaining	% Drawn			
Service Coordinator Grant	<input type="text"/>	<input type="text"/>	Average Monthly Expenditures		
Section 8 Operating Funds	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Residual Receipts	<input type="text"/>	<input type="text"/>			
Excess Income	<input type="text"/>	<input type="text"/>			

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Multifamily Housing Service Coordinator Budget Year to Date																
Approved Indirect Cost Rate		Quarter 1			Quarter 2			Quarter 3			Quarter 4					
Budget Line Item	Approved Annual Budget	Jan-00	Jan-00	Feb-00	Mar-00	Apr-00	May-00	Jun-00	Jul-00	Aug-00	Sep-00	Oct-00	Nov-00	Year to Date Total	Remaining Balance	Projected vs. Actual Variance
Salary																
Fringe Benefits																
Quality Assurance																
Training																
Travel																
Supplies & Materials																
Start-Up Costs																
Other Direct Costs																
Indirect Costs																
Grand Total																
Funding Sources	Annual Budget	Month 1 Drawdown	Month 2 Drawdown	Month 3 Drawdown	Month 4 Drawdown	Month 5 Drawdown	Month 6 Drawdown	Month 7 Drawdown	Month 8 Drawdown	Month 9 Drawdown	Month 10 Drawdown	Month 11 Drawdown	Month 12 Drawdown	Total YTD Drawdown	Remaining Balance	% Drawn to Date
Service Coordinator Grant																
Section 8 Operating Funds																
Residual Receipts																
Excess Income																
Total																

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Multifamily Housing Service Coordinator Renewal Budget

<u>Effective Cost of Living Adjustment (COLA)</u>		Projected Renewal Offset	
Maximum Allowable Renewal Amount		Final Renewal Amount	

Budget Line Item	Approved Annual Budget	Month 1-8 Expenditures	Month 9-12 Estimated Expenditures	Projected Final Budget
Salary				
Fringe Benefits				
Quality Assurance				
Training				
Travel				
Supplies & Materials				
Start-Up Costs				
Other Direct Costs				
Indirect Costs				
Total				

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Multifamily Housing Service Coordinator Eligible & Ineligible Costs	
Eligible Costs	<ul style="list-style-type: none"> • Salary, fringe benefits, and related administrative costs • Quality assurance • Training • Travel • Creation of office space • Purchase of office furniture <ul style="list-style-type: none"> • Equipment • Supplies • Computer hardware & software • Internet services • Indirect administrative costs.
Quality Assurance Restrictions	<p>Quality Assurance (QA) can not exceed 10 percent of the Service Coordinator’s salary. Eligible QA activities are those that evaluate your program to assure that the position and program are effectively implemented.</p> <p>A qualified, objective third party must perform the program evaluation work and must have work experience and education in social or health care services. Your QA activities must identify short- and long-term program outcomes and performance indicators that will help you measure your performance. On-site housing management staff cannot perform QA and you may not augment current salaries of in-house staff for this purpose.</p> <p>If QA costs are budgeted, the grantee must provide one annual report from the QA provider. This report must be submitted with the HUD-92456 for the reporting period of 4/1-9/30 and due October 30.</p>
Training Requirements	<p>All service coordinators working in HUD-assisted multifamily housing designated for the elderly and people with disabilities must conform to the Office of Multifamily Housing’s Training Guidelines.</p> <p>During the first year of employment, Service Coordinators are required to complete a minimum of 36 training hours of classroom/seminar time before hiring, OR completion of these minimum training requirements within 12 months of initial hiring. The 36 hours MUST cover nine specific subject areas. In addition, HUD requires that Service Coordinators attend at least 12 hours of continuing education in each successive year.</p> <p>The Department’s Training Guidelines also contain recommended coursework for Service Coordinators working in HUD-assisted housing for families.</p> <p style="text-align: center;">See Multifamily Guidelines for additional info: http://portal.hud.gov/hudportal/documents/huddoc?id=DOC_25245.pdf</p>
Start-up Cost Restrictions	<p>Reasonable costs associated with setting up a confidential office space for the Service Coordinator are allowable. Such expenses must be one-time only start-up costs. Such costs may involve acquisition, leasing, rehabilitation, or conversion of space.</p> <p>The office space must be accessible to people with disabilities and meet the Uniform Federal Accessibility Standards (UFAS) requirements of accessibility. HUD field office staff must approve both the proposed costs and activity and must perform an environmental assessment on such proposed work prior to grant award.</p>
Ineligible Costs	<ul style="list-style-type: none"> • Food • Coffee/creamer/ sugar/cups • Eating utensils/plates/ • Beverages • Gifts to residents/or staff • Costs associated with parties or meals (even for residents) • Restaurant meals/travel not associated with approved training and/or not included in the approved budget • Entertainment/classes for residents • Computer hardware/software or other equipment not used/required by the service coordinator <p>Additional ineligible costs per the NOFA:</p> <ul style="list-style-type: none"> • Supervision performed by property management staff. (Management fees already pay for such supervision.) • Cost overruns associated with creating private office space; • Usual audit and legal fees; • Application preparation and submission; • Increasing management fees. • Service Coordinator-related training courses for property management staff who do not directly provide Service Coordination. Owners must use their management fees to pay this expense. • Pay PAC members for their services.