Using the Completion Report Form

This job aid explains how to complete the Completion Report Form to comply with the closeout requirements of the Community Development Block Grant (CDBG) program.

Grantees should consult their Standard Agreement for agreed-upon submission deadlines.

As part of the closeout process, Grantees must prepare a Completion Report Form that contains the aggregate of all accomplishments realized through the activity being reported as complete. This report must be completed and reviewed by your Grant Administrator or HCD Representative prior to initiating closeout in the Grants Network portal.

Information Needed to Complete the Completion Report Form
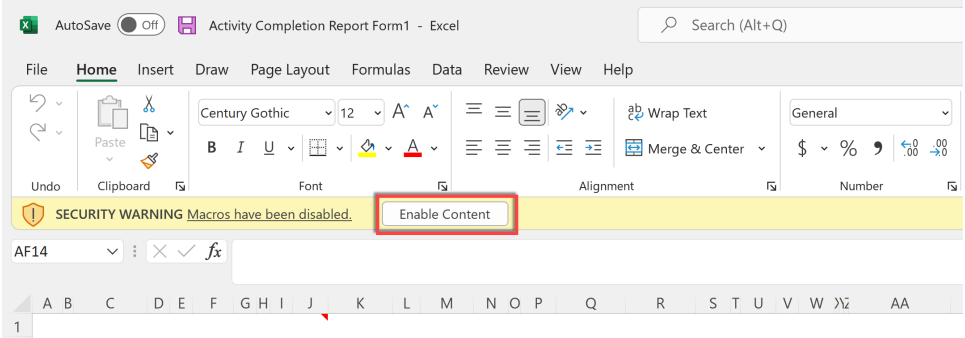
To complete the Completion Report Form, you will need:

1. The application submitted by the Grantee which identifies the eligibility matrix code and national objective met by the activity to be reported as complete.

2. The Standard Agreement associated with the activity to be reported as complete.

3. The completion date of the activity.

4. The total number of accomplishments (units of housing rehabbed, number of jobs created, etc.) realized through this activity which may be gathered from the activity's Annual Performance Report (APR) Form (or forms if the activity took place over multiple program years).

Completing the Completion Report Form

Exhibit 1, below, outlines the steps the Grantee should take to complete the Completion Report Form.

Step	Grantee Action
1	Once you have opened the Completion Report form, click the **Enable Content** button.
2	When you are ready, click the light blue **Activity Title** field and enter the name of the activity you would like to report as complete. ■ If you have completed more than one activity, you will need to fill-out a Completion Report Form for each activity separately.
3	Click the light blue **Program Year** field to enable the dropdown menu button.
4	Click the **Program Year** dropdown menu button and select the funding year for the activity.

5	Click the light blue **Funding Source** field to enable the dropdown menu button.
6	Click the **Funding Source** dropdown menu button and select the applicable grant.
7	Click the light blue **Award/Contract #** field and enter the contract number associated with this activity.
8	Click the light blue **Completion Date** field and enter the date using the following format: MM/DD/YYYY.

9	Click the light blue **Grantee Name** field and enter your jurisdiction's name.

Activity Title: "Enter Activity Title Here"
Program Year: 2020-2021   Funding Source: CDBG
Award/Contract#: CDBG-XX-XXXX   Completion Date: 6/30/2022

Grantee Information

Grantee Name:
Grantee Address:
(Number and Street)

(City)   *(State)*   *(Zip)*

10	Click the light blue **Grantee Address** fields and enter your jurisdiction's mailing address including street, city, state, and zip code. If your jurisdiction uses a P.O. Box, use the *Number and Street* field.

Activity Title: "Enter Activity Title Here"
Program Year: 2020-2021   Funding Source: CDBG
Award/Contract#: CDBG-XX-XXXX   Completion Date: 6/30/2022

Grantee Information

Grantee Name: "Enter Grantee Name Here"
Grantee Address:
(Number and Street)

(City)   *(State)*   *(Zip)*

11	Click the light blue **National Objective** field to enable the dropdown menu button.

Activity Title: "Enter Activity Title Here"
Program Year: 2020-2021   Funding Source: CDBG
Award/Contract#: CDBG-XX-XXXX   Completion Date: 6/30/2022

Grantee Information

Grantee Name: "Enter Grantee Name Here"
Grantee Address: "123 Address Street"
(Number and Street)
"City"   "CA"   "12345"
(City)   *(State)*   *(Zip)*

Activity Information

National Objective:
Matrix Code:

12	Click the **National Objective** dropdown menu button and select the national objective met by the activity you are reporting as complete. ■ To navigate through the options, click on the dropdown button and scroll through the options.
13	Click the light blue **Matrix Code** field to enable the dropdown menu button.

14	Click the **Matrix Code** dropdown menu button and select the eligibility matrix code that corresponds with the activity you are reporting as complete. ■ To navigate through the options, click on the dropdown button and scroll through the options.
15	Confirm the National Objective and Matrix Code you selected are correct. Red text will appear immediately below the Matrix Code indicating which box you need to check based on your selections.
⚠️	If an error was made when choosing the National Objective or Matrix Code, revise your selections **before** clicking the Activity Checkbox.

Once verified, click the **Activity Checkbox** that corresponds with the instructions that appear in red text. For example, if you implemented a microenterprise assistance activity that met the low- and moderate-income limited clientele, the instructions would guide you to click the **LMC 11** activity checkbox. Alternatively, if your jurisdiction carried out a health services activity that met the low- and moderate-income area national objective, you would be instructed to click the **Matrix Code 5** activity checkbox.

- If you select the wrong the Activity Checkbox, you will need to start over by closing the current Completion Report form and opening a new Completion Report form.

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This will load the Activity Accomplishments tab. Complete all light blue fields. In the **Accomplishments Narrative** field, enter a brief summary of your project or program's accomplishments.

In the **Performance Measurement Types** field(s), enter the total accomplishments by type (number of businesses or people served, number of housing units, etc.) Scroll down the page to complete additional fields.

■ Grantees are encouraged to review the data in their activity's Annual Performance Report (APR) Form to ensure the accomplishments reported are accurate and complete.

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18	If your activity resulted in relocation or displacement, click the Relocation and Displacement tab, and continue to the next step. If your activity did not result in relocation or displacement, advance to step 20. ◄ ► Activity Information Activity Accomplishments **Relocation and Displacement** ⊕
19	Identify where all displacement occurred (all addresses). Based on the most efficient way to capture all displacement locations, determine if you choose to report by Census Tracts or Cities. If displacement occurred in more than one Census Tract or City, duplicate and complete the Relocation and Displacement tab for each Census Tract / City in which displacement occurred. Each displacement should only be reported once. Fill in the light blue fields. The information entered should be an aggregate of all one-for-one replacements and displacements in the Census Tract / City.

Relocation and Displacement

One-for-One Replacement

Unit Type	Address	0/1	2	3	4	5+	Total	Agreement Executed (mm/dd/yy)	Available (mm/dd/yy)
				Number of Bedrooms					
Demolished/ Converted									
Replacement									

Description:

CDBG Displacement

City* _____ OR Census Tract* _____

Race	Displaced		Remained In		Relocated To	
	Total	Hispanic/Latino	Total	Hispanic/Latino	Total	Hispanic/Latino
White						
Black/African American						
Asian						
American Indian/ Alaskan Native						
Native Hawaiian/ Other Pacific Islander						
American Indian/ Alaskan Native & White						
Asian & White						
Black/ African American & White						
American Indian/ Alaskan Native & Black/ African American						
Other/ Multi-Racial						

20	Once all of the applicable tabs are complete, click on **File** followed by **Save As** and use the following naming convention: [Grantee Name]-[FY]-[Standard Agreement #]-Closeout ■ If you have completed more than one activity, complete a Completion Report for each activity separately.
21	When you are ready to submit your Completion Report Form(s), contact your Grant Administrator or HCD Representative. ■ Grantees should not begin closeout in the Grants Network Portal until they have received notification from their Grant Administrator or HCD Representative that they can initiate closeout.
22	The Completion Report Form has now been submitted. Thank you for completing your report.