OPB Quarterly Reporting Webinar

March 16, 2023

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- Recognize your obligation to comply with Mandatory Quarterly Reporting as a grantee

- Assist grantees in understanding the SurveyMonkey Apply platform, utilized for Quarterly Reporting

- Become familiar with information obtained during Quarterly Reporting

Grantees must complete the mandatory reporting survey for the following quarters in order to fulfill the reporting requirements placed upon the State of Georgia by the United States Department of the Treasury. Awardees should prepare for these reports after signing the Terms and Conditions agreement to ensure the information is available for timely reporting by the 15th of each month following each quarter.

This information is available on the OPB For Grantees website:

[For Grantees | Governor's Office of Planning and Budget (georgia.gov)](georgia.gov)

- **Quarter 1:** January-March (Due April15th)
- **Quarter 2**: April-June (Due July 15th)
- **Quarter 3:** July-September (Due October 15th)
- **Quarter 4:** October-December (Due January 15th)

Please note that due dates are subject to change based on review and submission needs.

It is the responsibility of the prime subrecipient to submit accurate and timely reports. Subrecipients who coordinate with contractor or subawards for reporting should establish a regular reporting framework to ensure the information is regularly available to the subrecipient for reporting purposes. It is crucial that your account contacts remain up to date to ensure that the reports are sent to the appropriate authorized representative. You may update an authorized user within the organizational profile in GeorgiaGrants or you may fill out [this form](#) to request that a member of the OPB staff updates the account for you.

Additionally, we encourage all subrecipients to work with your IT to whitelist OPB and Georgia Grant email addresses.

The **GeorgiaGrants** portal is the Grants Management system for OPB grants and is separate from the reporting platform. Home | Georgia Grants Portal

Survey Monkey Apply, referred to as "Apply" or "SMA" is the web platform used by OPB for quarterly reporting and grant applications. https://opb.smapply.io/

Because the two web-based platforms are completely separate, we request that grantees keep their portal accounts up to date with Primary Point of Contact information. Please note that once those updates are made in the portal, they are not automatically and instantly updated in the Apply platform. Those changes are made by OPB staff members, so if you have any updates to contacts and have not changed your reporting contact, you may email it to grants@opb.Georgia.gov

The following OPB grant programs and subrecipients are required to submit mandatory quarterly reporting in Survey Monkey Apply. Other programs may have reporting requirements outside of SMA:

- Broadband Infrastructure

- Capital Projects Fund

- Drinking Water Projects to Support Increased Population

- GA Investments in Housing

- Hospital Improvements for Disproportionately Impacted Communities

- Negative Economic Impact

- School Based Health Centers

- Victim Services

- Water Sewer Infrastructure

All of the previously mentioned programs, with the exception of Capital Funds Project, are funded under State Fiscal Recovery Funds (SFRF). As such, these SFRF grantees are subject to the reporting guidelines as laid out in the State Fiscal Recovery Fund Compliance & Reporting Guide, linked below.

SLFRF-Compliance-and-Reporting-Guidance.pdf (treasury.gov)

Grantees may use this document as a reporting guide for their respective program. There are basic metrics required throughout each program to include expense category, project status of completion, expenditures to date, etc. While programs such as infrastructure projects have specific metrics laid out in the guidance, OPB may request additional metrics to include number of individuals served, crime statistics, etc. as applicable to each program.

Reporting for Davis-Bacon prevailing wage requirements **DOES** apply to projects funded with State Fiscal Recovery Funds with <u>a total project cost (total cost of the project, not just the grant award from State Fiscal Recovery funds) of $10M or greater.</u>

Davis-Bacon specifies the prevailing wages, including fringe benefits, which are determined to be prevailing for the described classes of laborers and mechanics employed on construction projects of a similar character in the localities specified therein. Recipients will have two options with regards to complying with this requirement in their quarterly report:

1. Certify that the project with a total project cost of $10M or greater complies with Davis Bacon

2. If the project does not certify Davis Bacon, as an alternative, they must complete and upload a Project Employment and Local Impact Report to include:
   - The number of employees of contractors and subcontractors working on the project
   - The number of employees on the project hired directly and through a third party
   - The wages and benefits of workers on the project by classification
   - Whether those rates are less than prevailing

Capital Projects Fund (CPF) has a distinct CFDA (Catalog of Federal Domestic Assistance), and therefore has its own reporting and compliance guide found here: Capital Projects Fund Reporting Guidance

One difference to note with regard to reporting for CPF is regarding the Davis Bacon requirement. The threshold for Davis Bacon in Capital Projects Fund differs from State Fiscal Recovery Funds Broadband Program. Davis-Bacon applies to projects funded with **$5M** or more of CPF funds.
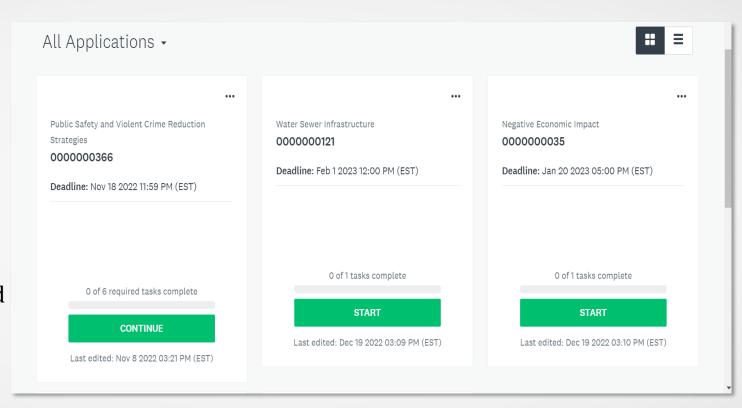
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1. Certify that the project with CPF funding of $5M or more complies with Davis Bacon

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    - The number of employees of contractors and subcontractors working on the project
    - The number of employees on the project hired directly and through a third party
    - The wages and benefits of workers on the project by classification
    - Whether those rates are less than prevailing

Survey Monkey Apply is the platform utilized for OPB's Quarterly Reporting. It is separate from the GeorgiaGrants online portal. Please note that changes made in the grant portal are not automatically changed or updated in SurveyMonkey Apply.
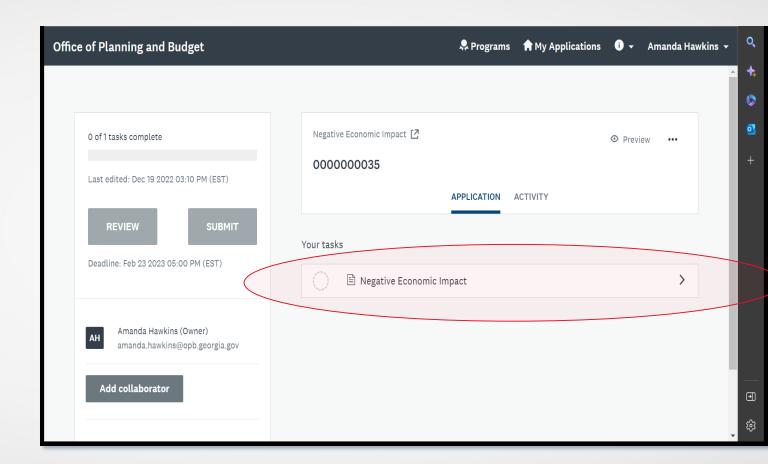
SurveyMonkey Apply Website

When a user logs into the SMA website, all applications are visible on the dashboard.

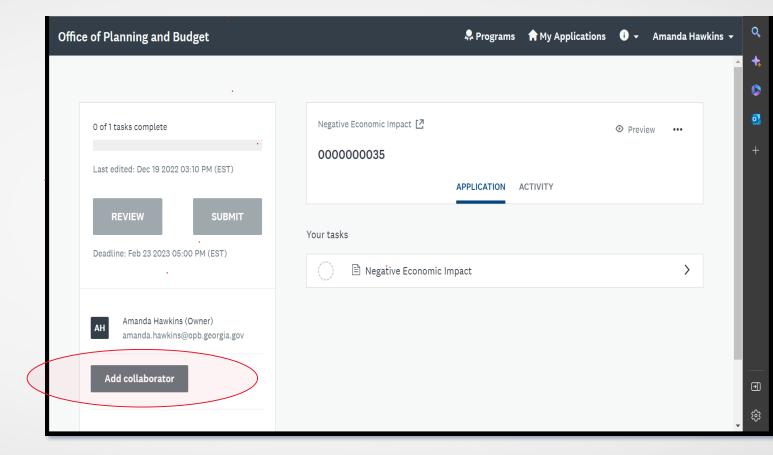Once logged in to SMA, a user will click START on the Reporting Application to open and edit the application.

Once the application is started, click on the task under Your tasks.
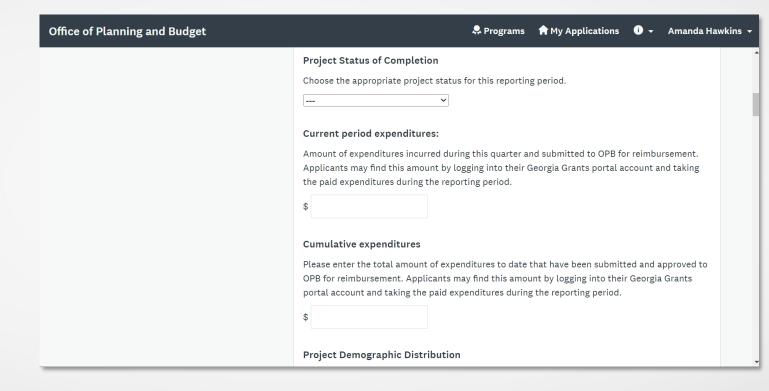
Survey Monkey Apply

On this page, if you are the application owner, you can also click to Add Collaborator.

Please note that Collaborators can edit and complete tasks, but cannot Submit the application.
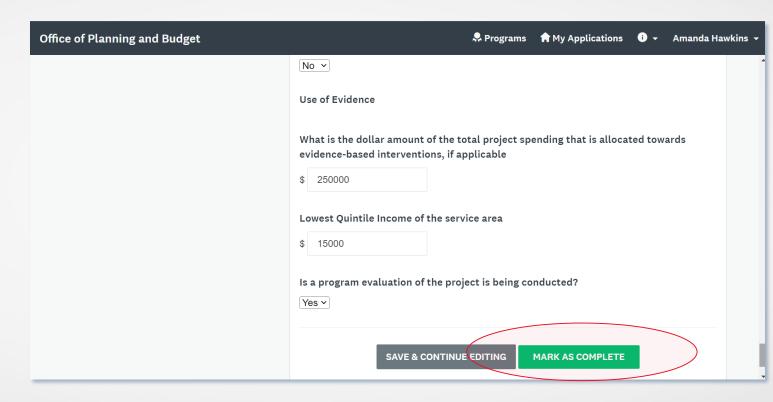
Once you click on the application task available, you are directed to the questions to be answered for reporting. Answer the questions completely and accurately, as this information is provided to Treasury.

After completing all of the questions on the application, click Mark As Complete.

You may also click Save & Continue Editing if you wish to complete later.

Office of Planning and Budget   Programs   My Applications   ⓘ ▾   Amanda Hawkins ▾

No ⌄

Use of Evidence

What is the dollar amount of the total project spending that is allocated towards evidence-based interventions, if applicable

$ 250000

Lowest Quintile Income of the service area

$ 15000

Is a program evaluation of the project is being conducted?

Yes ⌄

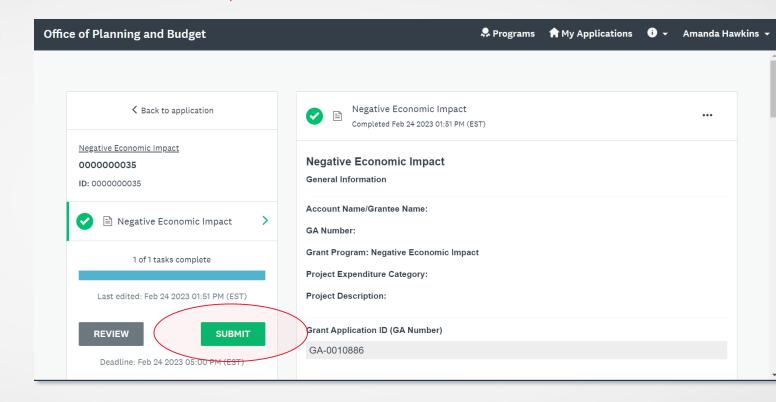SAVE & CONTINUE EDITING   MARK AS COMPLETE

Once you have marked the task as Complete, you will be taken to this screen and you MUST click SUBMIT in order for the application to be submitted.
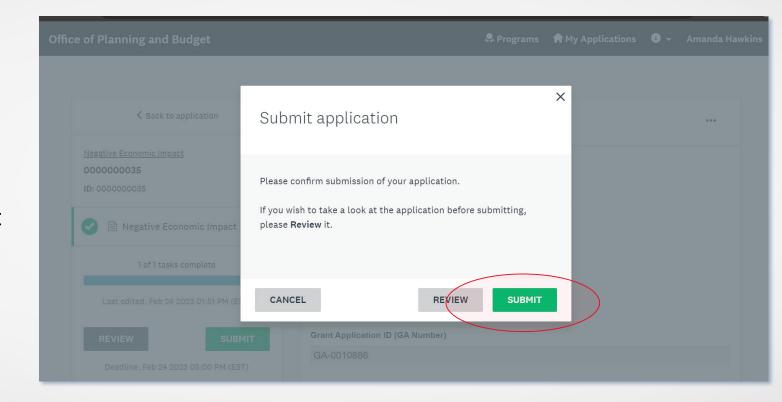
Only application owners can Submit.

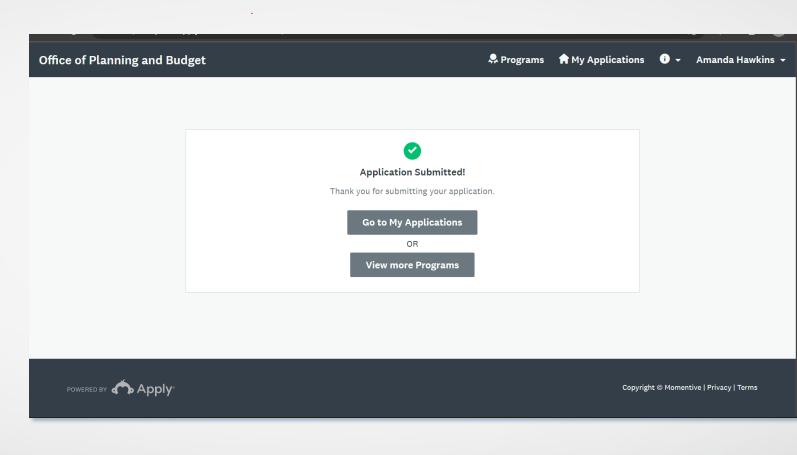Collaborators cannot Submit an application.

Users will then confirm the submission by clicking Submit again.

Users will receive this confirmation screen once the Quarterly Reporting application has been successfully submitted. If you do not see this screen, the submission was not successful.

One of the frequently asked questions among all grantees regarding reporting is regarding Lowest Quintile Income and Median Household Income, and how to find those for their area. We have put together a guide to assist grantees with this, which can be found [HERE](#).

Lowest Quintile Income: *Quintiles refer to the division of a statistical dataset into five equal segments. These divisions assist in representing large data into segments, which ensures these segments define certain characteristics. Occasionally, economists, policymakers, and politicians refer to the quintiles of a population when speaking about policy implementation or its outcomes. The first or lower quintile represents the lower on-fifth segment of a data, i.e., 0-20%, while the upper one defines the upper one-fifth of the data or population, i.e., 80-100%.*

Median Household Income*: The median income is the income level in the middle of a list of ranked incomes.*

Contact Us

Contact the Program Specialist listed in the grant portal for your program.

OR

General Grant Inquiries – grants@opb.Georgia.gov