

### MI-HOPE Program Checklist for Subrecipients

The following is a checklist of steps that represents what MSHDA expects all subrecipients to complete. Documents must be maintained in local project files. The list of required documents is generally organized in a chronological order and broken into key phases of the life cycle of a specific project. *Note: There should be a separate file set up for each component and/or project.*

**Date Completed**

- \_\_\_\_\_ Partnership Profile Creation and Submission.
- \_\_\_\_\_ Staff Report Creation by MSHDA and approved by the Subrecipient.
- \_\_\_\_\_ Grant Documents signed and returned to MSHDA.
  1. Grant Agreement
  2. Certified Resolution (Non-Profits only)
  3. Grant Closing Statement (Non-Profits only)
  4. Authorized Signature Form (Local Units of Government only)
  5. Exhibit A (Eligibility Requirements)
  6. Exhibit B (Project Description)
  7. Exhibit C (Household Self Certification Template)
  8. Exhibit D (Program Administration Report Form)
  9. Exhibit E (Authorization to Release Form)
  10. Exhibit F (Quarterly Reporting Timeline)
  11. Media Kit
- \_\_\_\_\_ Program Guidelines Creation by the Subrecipient.
- \_\_\_\_\_ Program Guidelines reviewed and approved by MSHDA.
- \_\_\_\_\_ Overall Notice to Proceed Issued.
- \_\_\_\_\_ Application marketed to residents/intake process completed on MSHDA system.
- \_\_\_\_\_ Verification of Property Eligibility via MI-HOPE project checklist for subrecipients. Address specific information entered and uploaded into the MSHDA Grants System.
- \_\_\_\_\_ All applicable data has been collected, including the Household Income Self-Certification form, authorization to release information, landlord written participation and certification agreement, demographic information, and lead/asbestos form all required to be uploaded prior to execution of the property specific construction contract.



- \_\_\_\_\_ Issuance of Contract with an Effective Date, Scope of Work, Completion Date, and Dollar Amount.
- \_\_\_\_\_ Prior to the start of work, a determination of required inspection and/or confirmation that all other local requirements were met must be made by the subrecipient.
- \_\_\_\_\_ Notice to Proceed issued by the Subrecipient based on signed and dated formal approval by the homeowner, subrecipient, and contractor, based on an accepted bid/quote (per address).
- \_\_\_\_\_ If Change order to the Contract is required (submit a modified Pre-Approval form to Champion for approval). Required if there is a change in the scope of work or an increase in price beyond ten percent (10%) of the original estimate and contract amount.
- \_\_\_\_\_ Financial Status Report (FSR) entered in the system that includes:
  1. Program Administration Report filled out, signed, and uploaded if billing admin.
  2. Upload invoices for all work performed that identifies contractor name, description of the work performed, dates work was performed (start and end) uploaded.
- \_\_\_\_\_ Retain in file all checks issued and received for each invoice.
- \_\_\_\_\_ Approval and Request for Contractor Payment Form and Inspection Report must be uploaded to the system prior to FSR.
- \_\_\_\_\_ Final billing from contractor: Itemized summary listing all project costs.
- \_\_\_\_\_ Outcomes Report entered in the system that includes:
  1. Uploaded before and after pictures/video
  2. Uploaded MSHDA Homeowner Surveys
  3. Energy efficiency savings projections
  4. Yearly billing analysis
- \_\_\_\_\_ If the activity is roof, windows, and/or insulation *and* the home is pre-1978 construction then subrecipient must provide a pre-evaluation disclosure of Lead Based Paint Procedure to Property Owner. Property Owner must provide the informational lead brochure to occupant/tenant.
- \_\_\_\_\_ If the activity is insulation, modification for modernization/efficiency purposes or replacement of heating (furnaces or boilers)/cooling (full home only)/ventilation systems and water heater upgrades including on demand retrofitting, and/or electrical upgrades or replacement directly tied to plaster walls. If a subrecipient determines asbestos to be present, then mitigation measures are required to be completed.

