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FY 2024-25 SUBRECIPIENT TRAINING

HOUSING STAFF

- Jesus Niño – Interim ED&H Director
- Dylan Mayeux – Interim Housing Manager
- Terry Malcolm-Smith – Housing Coordinator III
- Irin Gomez – Community Development Coordinator II
- Brenda Douglas – Accountant II
- Kara Grande – Housing Coordinator I
- Gabe Parra – Community Development Coordinator I
- Dania Perez – Community Development Coordinator I
- Jessica Chueka – Housing / Community Development Specialist



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THE BASICS

- Assist Extremely Low- to Moderate-Income persons (0% to 80% AMI)
- Submit one (1) draw request per month due by 10th of every month for Public Services.
- Submit Accomplishment Report by 10th of every month at the same time as draw request is submitted for Public Services.
- Submit Accomplishments Report by 10th of every month for Public Facilities
- Report any changes in key personnel to City as soon as possible



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NEIGHBORLY SOFTWARE: HOME PAGE

Good Afternoon, Dania

1. Follow the process to register in Neighborly.

<https://portal.neighborlysoftware.com/clearwaterfl/Participant> *Please register business emails only.*

2. Have your grant writer add you as a user, under the users tab.

3. Under “Grants” click on “view” to view the case.

Grants							
ID	Name	Program	Year	Approved	Disbursed	Remaining	Action



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NEIGHBORLY SOFTWARE

- Home
- ACCOUNT
- MONTHLY REPORTS
- ACCOMPLISHMENTS
- DRAW REQUESTS
- APPLICATION
- DOCUMENTS
- USERS

Case Id: [REDACTED]
Program: Public Services

Name: [REDACTED]
Status: Approved


Account



Amount Funded
\$15,983.00

● Disbursed
● Remaining

ID	CATEGORY	FUNDING	AMOUNT	DISBURSED	REMAINING
[REDACTED]	Salary Support	CDBG 2023/2024	[REDACTED]	[REDACTED]	[REDACTED]



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INCOME LIMITS: CDBG

Reports > Monthly Report


A. Goals
 B. Accomplishments
 C. Supporting Documents
 Submit

Please utilize the [HUD Income Limits](#) guide to track income.

Please utilize the following links to guidance on Race and Ethnicity [here](#) and [here](#).

Only click Complete and Submit on this step once Accomplishments have been provided.

CDBG Income Limits				
Effective May 1, 2024				
Household Size	0 to 30% AMI (Extremely Low)	30+ to 50% AMI (Low)	50+ to 80% AMI (Moderate)	Above 80% AMI (Non-Low/Moderate)
1 Person	\$ 20,100	\$ 33,450	\$ 53,500	N/A
2 Persons	\$ 22,950	\$ 38,200	\$ 61,150	N/A
3 Persons	\$ 25,800	\$ 43,000	\$ 68,800	N/A
4 Persons	\$ 28,650	\$ 47,750	\$ 76,400	N/A
5 Persons	\$ 30,950	\$ 51,600	\$ 82,550	N/A
6 Persons	\$ 33,250	\$ 55,400	\$ 88,650	N/A
7 Persons	\$ 35,550	\$ 59,250	\$ 94,750	N/A
8 Persons	\$ 37,850	\$ 63,050	\$ 100,850	N/A
Median Family Income (MFI) Rounded - \$92,000				



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INCOME LIMITS – HOME

Reports > Monthly Report

- A. Goals
- B. Accomplishments
- C. Supporting Documents
- Submit

Please utilize the [HUD Income Limits](#) guide to track income.

Please utilize the following links to guidance on Race and Ethnicity [here](#) and [here](#).

Only click Complete and Submit on this step once Accomplishments have been provided.

HOME Income Limits				
Effective June 1, 2024				
Household Size	0 to 30% AMI (Extremely Low)	30+ to 50% AMI (Very Low)	50+ to 60% AMI (Low-LIHTC)	60+ to 80% AMI (Low)
1 Person	\$ 20,100	\$ 33,450	\$ 40,140	\$ 53,500
2 Persons	\$ 22,950	\$ 38,200	\$ 45,840	\$ 61,150
3 Persons	\$ 25,800	\$ 43,000	\$ 51,600	\$ 68,800
4 Persons	\$ 28,650	\$ 47,750	\$ 57,300	\$ 76,400
5 Persons	\$ 30,950	\$ 51,600	\$ 61,920	\$ 82,550
6 Persons	\$ 33,250	\$ 55,400	\$ 66,480	\$ 88,650
7 Persons	\$ 35,550	\$ 59,250	\$ 71,100	\$ 94,750
8 Persons	\$ 37,850	\$ 63,050	\$ 75,660	\$ 100,850
Median Family Income (MFI) Rounded - \$92,000				



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INCOME LIMITS - SHIP

Reports > Monthly Report

- A. Goals
- B. Accomplishments
- C. Supporting Documents
- Submit

Please utilize the [HUD Income Limits](#) guide to track income.

Please utilize the following links to guidance on Race and Ethnicity [here](#) and [here](#).

Only click Complete and Submit on this step once Accomplishments have been provided.

SHIP Income Limits				
Effective April 1, 2024				
Household Size	0 to 30% AMI (Extremely Low)	30+ to 50% AMI (Very Low)	50+ to 80% AMI (Low)	80+ to 120% AMI (Moderate)
1 Person	\$ 20,100	\$ 33,450	\$ 53,500	\$ 80,280
2 Persons	\$ 22,950	\$ 38,200	\$ 61,150	\$ 91,680
3 Persons	\$ 25,820	\$ 43,000	\$ 68,800	\$ 103,200
4 Persons	\$ 31,200	\$ 47,750	\$ 76,400	\$ 114,600
5 Persons	\$ 36,580	\$ 51,600	\$ 82,550	\$ 123,840
6 Persons	\$ 41,960	\$ 55,400	\$ 88,650	\$ 132,960
7 Persons	\$ 47,340	\$ 59,250	\$ 94,750	\$ 142,200
8 Persons	\$ 52,720	\$ 63,050	\$ 100,850	\$ 151,320
Median Family Income (MFI) Rounded - \$92,000				



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DRAW REQUESTS

First

- i ACCOUNT
- M MONTHLY REPORTS
- A ACCOMPLISHMENTS
- D DRAW REQUESTS
- A APPLICATION
- D DOCUMENTS
- U USERS

Second


Draw Requests



Requested
\$15,983.00

ID	STATUS	WORKFLOW	DETAILS	REQUESTED DATE	REQUESTED AMOUNT	DISBURSED DATE	DISBURSED AMOUNT
4206	Submitted	0 of 6					
4152	Disbursed	6 of 6					
4087	Disbursed	6 of 6					
3047	Disbursed	6 of 6					
2993	Disbursed	6 of 6	April 2024				
2932	Disbursed	6 of 6	March 2024				
2899	Disbursed	6 of 6	February				

[Add a Draw](#)



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DRAW REQUESTS

SUMMARY


Oct 2021 Services

DOCUMENTATION

[Upload File](#)

DETAILS

CATEGORY	ORIGINAL AMOUNT	- OTHER DISBURSEMENTS	- AVAILABLE BALANCE	AMOUNT REQUESTED
Salary Support <small>CDBG 2021/2022</small>	\$ 10,000.00	\$ 0.00	\$ 10,000.00	\$ 0.00
Totals	\$ 10,000.00	\$ 0.00	\$ 10,000.00	\$ 0.00



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DRAW REQUESTS

Invoice or Cover Letter on Letterhead Requesting Reimbursement

- Month services provided
- Dollar amount
- Payee address for mailing payments
- Signature: handwritten or legal digital signature

Not a legal digital signature, *Dania Perez*



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SUPPORTING DOCUMENTATION: PUBLIC SERVICES

For Salary Support:

1. **Invoice** to: City of Clearwater from Subrecipient. Please include company logo, address, invoice number, date, and mailing address for check delivery and authorized personal signature.
2. **Timesheet Activity Report**
3. **Timesheets**
4. **Proof of payment:** direct deposit paycheck stubs, bank statements, or cancelled checks.

Empl. Name:		Pay Period Begin Date:													
Rate of Pay: \$		Pay Cycle: Hourly		Pay Period End Date:											
Pay Period Begin Date	Grand Total Hours	Regular Hours	Clearwater/CDBG Funded	Other Funding	Other Funding	Total Other	Vacation	Holiday	Sick Leave	Training	EOC	SEC	MFO	Other	
Sat 09/03/2009	0	0				0									
Sun 09/03/2009	0	0				0									
Mon 09/03/2009	0	0				0									
Tue 09/03/2009	0	0				0									
Wed 09/03/2009	0	0				0									
Thu 09/03/2009	0	0				0									
Fri 09/03/2009	0	0				0									
WEEK 3 TOTAL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Sat 09/04/2009	0	0				0									
Sun 09/04/2009	0	0				0									
Mon 09/04/2009	0	0				0									
Tue 09/04/2009	0	0				0									
Wed 09/04/2009	0	0				0									
Thu 09/04/2009	0	0				0									
Fri 09/04/2009	0	0				0									
WEEK 4 TOTAL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Sat 09/05/2009	0	0				0									
Sun 09/05/2009	0	0				0									
Mon 09/05/2009	0	0				0									
Tue 09/05/2009	0	0				0									
Wed 09/05/2009	0	0				0									
Thu 09/05/2009	0	0				0									
Fri 09/05/2009	0	0				0									
WEEK 5 TOTAL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
TOTALS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	

Your Payroll System/Hours/Activities/Status/ID, NWE, 2009

Pay period begin and end dates on this report must match your supporting documentation.

I certify that the information herein contained is true and complete to the best of my knowledge.

Signature: Employee _____ Date _____ Signature: Supervisor Approval _____ Date _____



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SUPPORTING DOCUMENTATION PUBLIC SERVICES

- Case Management / Salary Support for Public Services
 - Timesheet Activity Report
 - Individual timesheets
 - Proof of payment
 - ❖ Direct-Deposited paycheck stub or
 - ❖ Cancelled checks



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NEXT STEP: ACCOMPLISHMENTS PUBLIC FACILITIES AND PUBLIC SERVICES / ECONOMIC DEVELOPMENT



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MONTHLY REPORTS

Accomplishments - Public Services/Eco Dev and Facilities

	Home
	ACCOUNT
	MONTHLY REPORTS
	ACCOMPLISHMENTS
	DRAW REQUESTS
	APPLICATION
	DOCUMENTS
	USERS

A. Goals
 B. Accomplishments
 C. Supporting Documents
 Submit

Please follow all instructions [here](#) before completing. Please utilize the [HUD Income Limits](#) guide to track income.

Please utilize the following links to guidance on Race and Ethnicity [here](#) and [here](#).

Please utilize the following link for guidance on Assistance to Businesses [here](#).

Only click Complete and Submit on this step once Accomplishments have been provided.



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Total Number of Persons Assisted	0
Total Number of Unduplicated Beneficiaries Assisted this Month	0
Beneficiaries - Income	
Number of Extremely Low Income persons assisted (at or below 30% AMI)	0
Number of Low Income persons assisted (above 30% and at or below 50% AMI)	0
Number of Moderate Income persons assisted (above 50% and at or below 80% AMI)	0
Number of persons assisted who are NOT Low to Moderate Income (above 80% AMI)	0
Beneficiaries - Race/Ethnicity	
White - Hispanic	0
White - Non-Hispanic	0
Black/African American - Hispanic	0
Black/African American - Non-Hispanic	0
Asian - Hispanic	0
Asian - Non-Hispanic	0
American Indian/Alaskan Native - Hispanic	0
American Indian/Alaskan Native - Non-Hispanic	0
Native Hawaiian/Other Pacific Islander - Hispanic	0
Native Hawaiian/Other Pacific Islander - Non-Hispanic	0
American Indian/Alaskan Native & White - Hispanic	0
American Indian/Alaskan Native & White - Non-Hispanic	0
Asian & White - Hispanic	0
Asian & White - Non-Hispanic	0
Black/African American & White - Hispanic	0
Black/African American & White - Non-Hispanic	0
Am. Indian/Alaskan Native & Black/African American - Hispanic	0
Am. Indian/Alaskan Native & Black/African American - Non-Hispanic	0
Other Multi-Racial - Hispanic	0
Other Multi-Racial - Non-Hispanic	0
Client doesn't know his or her race - Hispanic	0
Client doesn't know his or her race - Non-Hispanic	0
Client refused to disclose his or her race - Hispanic	0
Client refused to disclose his or her race - Non-Hispanic	0

Printed By: Dania Perez on 9/11/2024 1 of 2

ETHNICITY

- Hispanic/Latino
- Non-Hispanic/Latino

ADDITIONAL INFORMATION

- What is the difference between race and ethnicity? Wouldn't Hispanic or Latino be someone's race?
- Asking about race and ethnicity confuses clients. Can I give a default answer?

Client refused to disclose his or her race - Non-Hispanic	0
Public Services (05)	
Total Number of Persons Assisted	0
Of the Total Persons Assisted, the Number with New or Continuing Access to a Service or Benefit	0
Of the Total Number of Persons Assisted, The Number of Persons With Improved Access to a Service or Benefit	0
Of the Total Number of Persons Assisted, The Number of Persons that Receive a Service or Benefit that is No Longer Substandard	0



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ACCOMPLISHMENTS: PUBLIC SERVICES/ECO DEV AND FACILITIES

RACE - UNDUPLICATED

- 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
- Am. Indian/Alaskan Native & Black/African American
- Other Multi-Racial
- Client doesn't know his or her race (I do not know my race)
- Client refused to disclose his or her race (I decline to disclose my race)



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ACCOMPLISHMENTS: PUBLIC SERVICES/ECO DEV AND FACILITIES

TOTAL NUMBER OF PERSONS ASSISTED

Total Number of Unduplicated Beneficiaries Assisted this Month

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ACCOMPLISHMENTS: PUBLIC SERVICES/ECO DEV AND FACILITIES

BENEFICIARIES - INCOME	
Number of Extremely Low Income persons assisted (at or below 30% AMI)	<input type="text"/>
Number of Low Income persons assisted (above 30% and at or below 50% AMI)	<input type="text"/>
Number of Moderate Income persons assisted (above 50% and at or below 80% AMI)	<input type="text"/>
Number of persons assisted who are NOT Low to Moderate Income (above 80% AMI)	<input type="text"/>
Totals	<input type="text" value="10"/>

Does **NOT** apply for CDBG or HOME funds.
Applies only for SHIP funds.



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ACCOMPLISHMENTS: PUBLIC SERVICES/ECO DEV AND FACILITIES

BENEFICIARIES - RACE/ETHNICITY	
White - Hispanic	<input type="text"/>
White - Non-Hispanic	<input type="text"/>
Black/African American - Hispanic	<input type="text"/>
Black/African American - Non-Hispanic	<input type="text"/>
Totals	<input type="text" value="10"/>



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ACCOMPLISHMENTS: PUBLIC SERVICES

PUBLIC SERVICES (05)	
Total Number of Persons Assisted	<input type="text" value="10"/>
Of the Total Persons Assisted, the Number with New or Continuing Access to a Service or Benefit	<input type="text" value="10"/>
Of the Total Number of Persons Assisted, The Number of Persons With Improved Access to a Service or Benefit	<input type="text"/>
Of the Total Number of Persons Assisted, The Number of Persons that Receive a Service or Benefit that is No Longer Substandard	<input type="text"/>
Female-Headed Households	<input type="text"/>



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ACCOMPLISHMENTS: PUBLIC SERVICES FOR ECONOMIC DEVELOPMENT

ASSISTANCE TO BUSINESSES (14E, 17, 18)	
Total New Businesses Assisted	<input type="text"/>
Total Existing Business Assisted	<input type="text"/>
Of the Total Existing Businesses Assisted, the Number that are Expanding:	<input type="text"/>
Of the Total Existing Businesses Assisted, the Number that are Relocating:	<input type="text"/>
Number of Businesses Assisted that Provide Goods or Services to Meet the Needs of a Service Area:	<input type="text"/>



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ACCOMPLISHMENTS: PUBLIC FACILITIES AND IMPROVEMENT

The screenshot shows a web application interface. On the left is a sidebar menu with the following items: Home, ACCOUNT, COMPLIANCE REPORTS (highlighted in yellow), ACCOMPLISHMENTS, DRAW REQUESTS, APPLICATION, DOCUMENTS, and USERS. The main content area displays a table titled 'PUBLIC FACILITIES & INFRASTRUCTURE' with the following data:

PUBLIC FACILITIES & INFRASTRUCTURE	
Total Persons Assisted	108
Of the Total Number of Persons Assisted, The Number of Persons With New Access to this Type of Public Facility or Infrastructure Improvement	
Of the Total Number of Persons Assisted, The Number of Persons With Improved Access to this Type of Public Facility or Infrastructure Improvement	
Of the Total Number of Persons Assisted, The Number of Persons With Access to this Type of Public Facility or Infrastructure that is No Longer Substandard	108

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ACCOMPLISHMENTS

Of the Total Persons Assisted, the Number with New or Continuing Access to a Service or Benefit

Of the Total Number of Persons Assisted, The Number of Persons with Improved Access to a Service or Benefit

Improved access to a service or benefit refers to a service or benefit that was previously offered, but has been expanded in terms of size, capacity, or location. (For example, perhaps a homeless drop-in center/soup kitchen previously offered clients one meal a day, but with use of CDBG funds, are able to expand services to include three meals a day.)

Of the Total Number of Persons Assisted, The Number of Persons that Receive a Service or Benefit that is No Longer Substandard

Where the public service activity was used to meet a quality standard or measurably improved quality, report on the number of persons that no longer only have access to a substandard service. (An example of improving the quality of service is a transitional housing facility for persons with mental illness that is able to hire a licensed psychiatric social worker to work with clients, whereas existing case managers have no specific mental health training/qualifications.)

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SUPPORTING DOCUMENTS: PUBLIC SERVICES/ECO DEV AND FACILITIES

A. Goals B. Accomplishments C. Supporting Documents Submit

Documentation

- Documentation to support accomplishments being reported (i.e. intake forms completed by clients showing race, ethnicity, household size, and household income; also supporting documentation from the Property Appraiser website showing the current tax district of each property) ***Required**

Upload File 



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SUPPORTING DOCUMENTS

Under the supporting documents tab, upload documentation that is addressed on the Executed Agreement for monthly reports.

1. Client Application (Intake Forms): Should have clients name, address, total number of people in households, total household income based on gross, and signature; handwritten or legal digital.

NOTE: *Subrecipients working with a protected population will need to collect this information internally but will not be required to upload onto Neighborly. This information will be confirmed through an on-site monitoring visit.*

2. Copy of the Pinellas County Property Appraiser (pcpao.org) showing the tax district of CW, CWD, and CWDO.



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SOCIAL SECURITY NUMBERS

Intake Form

First Name: _____ Last Name: _____

Address: _____

SSN: [REDACTED]-1234 ← Redact first 5 digits
Display only last 4 digits



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PUBLIC FACILITIES PROCESSES



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ACCOMPLISHMENTS: PUBLIC FACILITIES

Goals

1. Project Status Update

Describe the progress of your project as compared against your project plan/schedule.

Expected Outcome: Maintain steady progress with project phases/tasks.

Progress	<input type="text" value="Enter goal progress here..."/>
Difficulties Encountered	<input type="text" value="Enter any difficulties encountered here..."/>
Planned Activity Next Period	<input type="text" value="Enter activity anticipated next reporting period here..."/>



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PUBLIC FACILITIES

PUBLIC FACILITY REHABILITATION CHECKLIST CITY OF CLEARWATER FY 2024-25

Subrecipient must notify NOVA and City **at least 24-48 hours before any onsite work is started.**
Contact the City and NOVA **before** going onsite.

No onsite work can commence until:

- 1) Subrecipient receives the Authorization to Proceed from the City's ED&H Dept Director **AND**
- 2) Building permits are obtained.

- _____ **Environmental Review – Date completed in HEROS and sent by City to Subrecipient**
- _____ **Subrecipient Agreement – Date fully executed by City and sent to Subrecipient**
- _____ **Coordinate with City's Inspection Servicer for Processes and Documentation Requirements**



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PUBLIC FACILITIES PHASES

- **PHASE 1** – Environmental Review and Subrecipient Agreement
- **PHASE 2** - Beginning of NOVA and City Administration’s Pre-Construction Work
- **PHASE 3** – Pre-Construction Work, Davis-Bacon Interviews, and Permitting Process
- **PHASE 4** - Construction in Progress
- **PHASE 5** - Project Completion



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PUBLIC FACILITIES

- Work with City on advertisements
- Send ad to City
- City will publish ads in Tampa Bay Times and on City website

LEGAL NOTICE

INVITATION TO BID

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PUBLIC FACILITIES

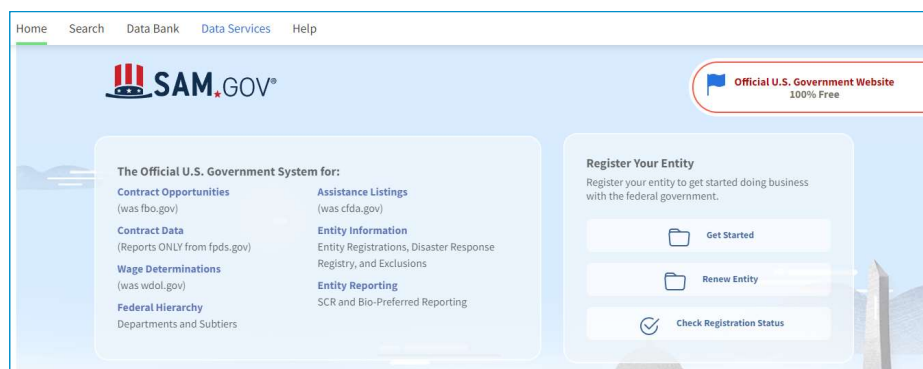
- Send all bids received, to the City
- Notify City of contractor selection
- Send to City:
 - Legal name of business
 - Doing Business As (DBA) name
 - Name of owner
 - Business address
 - Phone number and website address
 - Unique Entity Identifier Number (UEI) from SAM.GOV
 - License numbers



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PUBLIC FACILITIES

Ensure All Selected Contractors Are Registered in SAM.GOV



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PUBLIC FACILITIES

Ensure selected contractors are registered with the State of Florida.

[Licensing Portal - License Search \(myfloridalicense.com\)](https://myfloridalicense.com)

THE OFFICIAL SITE OF THE FLORIDA DEPARTMENT OF BUSINESS & PROFESSIONAL REGULATION

Florida dbpr Department of Business & Professional Regulation

HOME CONTACT US MY ACCOUNT

11:35:29 AM 9/13/2024

ONLINE SERVICES

- Apply for a License
- Verify a Licensee
- View Food & Lodging Inspections
- File a Complaint
- Continuing Education Course Search
- View Application Status
- Find Exam Information
- Unlicensed Activity Search
- AB&T Delinquent Invoice & Activity List Search

LICENSEE SEARCH OPTIONS

The DBPR Online Services website provides information about applicants and licensed individuals for those professions and businesses that are regulated by the Department of Business and Professional Regulation. If you would like to download general information (e.g. mailing addresses) about a particular group, please visit our free download site by clicking here.

Select Search Type

- Search by Name
- Search by License Number
- Search by City or County
- Search by License Type

Search Clear Back



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PUBLIC FACILITIES

- City Performs Due Diligence
- Do Not Enter Into Contract Until City Approves Contractor
- City Issues ATP **“Authorization to Proceed”** After:
 - City Receives Proof of Insurance for Contractor
 - City Receives Contract for Contractor



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PUBLIC FACILITIES

- Construction contracts must contain all required contract language
- Proposals/Bids are not contracts (not sufficient)
- Send copy of contract to City and NOVA



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PUBLIC FACILITIES

Notify NOVA and City **before** scheduling onsite work

- Send email notification
 - ❖ To: Mark Bottorff of NOVA (mbottorff@usanova.com)
 - ❖ To: Gabe Parra of City (gabe.parra@myclearwater.com)
 - ❖ To: Irin Gomez of City (irin.gomez@myclearwater.com)

(Davis-Bacon Requirements)



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PUBLIC FACILITIES

- Notify City of Pre-Bid Meeting Dates (in advance)
- Notify City of Bid Opening Dates (in advance)
- Notify City of Pre-Construction Meeting Dates (in advance)



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PUBLIC FACILITIES



Economic Development & Housing

CITY OF CLEARWATER

Post Office Box 4748, Clearwater, Florida 33758-4748
 509 S. East Ave., Suite 227, Clearwater, Florida 33756
 Telephone (727) 562-4030 Fax (727) 562-4037

AUTHORIZATION TO PROCEED

Date:
 Property Address:
 Case ID/Project:
 Owner:
 Contractor:



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PUBLIC FACILITIES: CONTRACTOR PAYMENT REQUEST

CONTRACTOR PAYMENT REQUEST

Property Owner: _____

Property Address: _____

Contractor: _____

Contractor Address: _____

Contract Amount: \$ _____

This Payment: \$ _____ Payment: Partial or Final

Contractor:

I hereby request an inspection to receive payment in the amount above. I certify that I have satisfactorily completed the necessary work to justify this request and all bills incurred for labor used and material furnished in making said repairs and improvements have been paid in full to this date. See attached cost breakdown.

Signature of Contractor _____

Print or Type Name _____ Date _____



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PUBLIC FACILITIES: PARTIAL PAYMENT AFFIDAVIT

**PARTIAL PAYMENT AFFIDAVIT
FOR
PROJECT FUNDING THROUGH
CITY OF CLEARWATER
ECONOMIC DEVELOPMENT & HOUSING DEPT
Housing Division**

DATE: _____

OWNER:	_____	CASE ID:	_____
ADDRESS:	_____		
PHONE:	(____) ____-____ ext. ____		
CONTRACTOR:	_____		
ADDRESS:	_____		
PHONE:	(____) ____-____ ext. ____		
PROPERTY ADDRESS:	_____		
PROJECT NUMBER:	_____		
INVOICE NUMBER:	_____		

PARTIAL RELEASE OF LIEN

CONTRACT DATED: _____ CONTRACT AMOUNT: \$ _____

The undersigned Contractor certifies that the work covered by this payment has been completed in



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PUBLIC FACILITIES: FINAL PAYMENT AFFIDAVIT

FINAL PAYMENT AFFIDAVIT FOR PROJECT FUNDING THROUGH CITY OF CLEARWATER ECONOMIC DEVELOPMENT & HOUSING DEPT Housing Division	
DATE:	_____
OWNER:	_____
ADDRESS:	_____
PHONE:	() _____ ext. _____ CASE ID: _____
CONTRACTOR:	_____
ADDRESS:	_____
PHONE:	() _____ ext. _____
PROPERTY ADDRESS:	_____
PROJECT NUMBER:	_____
INVOICE NUMBER:	_____
FINAL RELEASE OF LIEN	
CONTRACT DATED:	_____ CONTRACT AMOUNT: \$ _____
The undersigned Contractor certifies that the work covered by this final payment has been completed in	



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PUBLIC FACILITIES: REMINDERS

- Follow the Checklist
- Must Notify City and NOVA Before Onsite Work is Scheduled
- Must Receive Official Authorization(s) to Proceed From City
- If County/City Funded...
 - Must provide clear distinction/separation of charges
 - Must provide all documentation to City
 - Must notify City and NOVA



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PUBLIC FACILITIES AND IMPROVEMENTS

DRAW REQUEST SUPPORTING DOCUMENTATION:

- Requisitions and Purchase Orders
- Invoices
- Proof of Payment
- G703 of the AIA form
 - ❖ Receipts (i.e. Lowes, Home Depot)
 - ❖ Credit Card Statements
 - ❖ Bank Statements

AIA® Document G702/G703
can be used as invoice,
but **not** proof of payment.



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PUBLIC FACILITIES DRAW REQUEST

DRAW REQUEST SUPPORTING DOCUMENTATION:

- Partial Payment Affidavits
- Contractor Payment Request Forms
- Final Payment Affidavit
- Proof of Payment; Canceled Checks



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PURCHASE ASSISTANCE PROGRAM



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PURCHASE ASSISTANCE PROGRAM

1. Read the Purchase Assistance Manual, it will help you become familiar with our requirements.
2. As soon as you receive client information from the first mortgage lender, send the City the Prior Assistance form.
3. After receiving Prior Assistance form back from City of Clearwater indicating client is qualified to proceed, order the inspection and complete the application in the Neighborly Purchase Assistance portal.
4. In the Documents section of Neighborly, upload documents as per the provided checklists. The names should begin with the corresponding checklist number.
5. All documents should be uploaded **10 business days** prior to closing.
6. After the documents are uploaded and the application is complete, send the DPA Approval form to the City for execution. We will return this after we have reviewed the **full file** and find it to be in order.
7. Request the final insurance, title commitment and Closing Disclosures as required.

Draw Requests are uploaded in the Budget section of Neighborly. You may upload reimbursement invoices directly after closing and we will get them paid as soon as possible. You can also upload the processing fee invoice (\$1650) at that time, but those are not paid until the original recorded Mortgage and ALTA title policy are received by the City. Stay on top of this because it isn't a big priority for title companies.



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CITY TEMPLATES/FORMS



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CITY TEMPLATES/FORMS:

- FY 2024/25 Timesheet Activity Report
- Contractor Payment Requests
- Partial and Final Payment Affidavits
- Other

Do not alter any
templates/forms.
Use as provided.



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Questions?



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