

# ***CED Performance Progress Report (PPR) Forms and Instructions***



# **CED**

This document provides instructions for completing the Community Economic Development (CED) Performance Progress Report (PPR). This document includes samples of each form within the PPR and instructions for entering qualitative and quantitative data.

THE PAPERWORK REDUCTION ACT OF 1995 (Pub. L. 104-13): Public reporting burden for this collection of information is estimated to average 1.5 hours per response, including the time for reviewing instructions, gathering, and maintaining the data needed, and reviewing the collection of information.

An agency may not conduct or sponsor, and a person is not required to respond to, a collection of information unless it displays a currently valid OMB control number.

OMB Clearance No.: 0970-0386



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## Instructions for Completing the CED Performance Progress Report

The Performance Progress Report (PPR) will be used by the Office of Community Services (OCS) to collect the comparative data required to account for the expenditure of Federal funds, assess the progress and impact of the Community Economic Development (CED) program, and provide feedback to assist grantees. The data collected also fulfill the requirements of the Office of Management and Budget (OMB) for assessing program performance.

The PPR consists of four forms:

- Cover Page – collects basic information about your grant including your organization name, address, grant number, and grant period. Much of this information is pre-populated.
- Form A – collects the quantitative data about your project regarding businesses, jobs, employees, and leveraged funds
- Form B – collects the qualitative data about your project and allows you to tell the story about your grant including accomplishments, challenges, and changes
- Form E – collects financial information about your CED project

The PPR forms are completed online in the On-Line Data Collection System (OLDC), which is accessed through GrantSolutions. This instruction document provides a blank sample form for each section of the PPR, along with instructions on completing the forms.



### Cover Page

The Cover Page collects the basic information about your grant. The cover page is also where, at the end of your grant period, you will indicate the PPR being submitted is your final report. Review the information on the Cover Page. Most of the fields are pre-populated, but be sure to confirm that the pre-population information is correct. Below the sample form for the cover page shows a blank version of the form.

### Sample Form: Cover Page

		Page	of Pages
1. Federal Agency and Organization Element to Which Report is Submitted	2. Federal Grant or Other Identifying Number Assigned by Federal Agency	3a. DUNS Number	
		3b. EIN	
4. Recipient Organization (Name and complete address including zip code)		5. Recipient Identifying Number or Account Number	
6. Project/Grant Period Start Date: <i>(Month, Day, Year)</i>   End Date: <i>(Month, Day, Year)</i>	7. Reporting Period End Date <i>(Month, Day, Year)</i>	8. Final Report? <input type="checkbox"/> Yes <input type="checkbox"/> No	
		9. Report Frequency <input type="checkbox"/> <i>annual</i> <input type="checkbox"/> <i>semi-annual</i> <input type="checkbox"/> <i>quarterly</i> <input type="checkbox"/> <i>other</i> (If other, describe: _____) _____	
<b>10. Certification: I certify to the best of my knowledge and belief that this report is correct and complete for performance of activities for the purposes set forth in the award documents.</b>			
10a. Typed or Printed Name and Title of Authorized Certifying Official		10c. Telephone <i>(area code, number and extension)</i>	
		10d. Email Address	
10b. Signature of Authorized Certifying Official		10e. Date Report Submitted <i>(Month, Day, Year)</i>	
		11. Agency use only	



## Instructions for Completing the Cover Page

The table below provides step-by-step instructions for completing/confirming the information on the cover page is correct.

Item	Data Elements	Instructions
1.	<b>Federal Agency and Organization Element to Which Report is Submitted</b>	This field is pre-populated. Confirm the name of the awarding Federal agency. For your CED grant, this field should read: Administration for Children and Families, Office of Community Services.
2.	<b>Federal Grant or Other Identifying Number Assigned by the awarding Federal agency</b>	This field is pre-populated. Confirm the correct grant number is listed.
3a.	<b>DUNS Number</b>	This field is pre-populated. Confirm the correct Data Universal Numbering System (DUNS) number or Central Contract Registry extended DUNS number is listed.
3b.	<b>EIN</b>	This field is pre-populated. Confirm the correct Employer Identification Number (EIN) provided by the Internal Revenue Service is listed.
4.	<b>Recipient Organization</b>	This field is pre-populated. Confirm the correct organization and address, including ZIP code, is listed.
5.	<b>Recipient Account Number or Account Number</b>	No information is required in this field. A Pop-up window will indicate: <i>This field is intentionally left blank. You will not have information for this field.</i>
6.	<b>Project/Grant Period</b>	This field is pre-populated. Confirm the correct project/grant period established in the award document during which Federal sponsorship begins and ends is listed.
7.	<b>Reporting Period End Date</b>	This field is pre-populated and varies by reporting period. For semi-annual reports, the following calendar quarter reporting period end dates shall be used: 3/31 and 9/30. For final PPRs, the reporting period end date shall be the end date of the project/grant period.
8.	<b>Final Report</b>	<b>This field is editable.</b> Mark appropriate box. Check “yes” only if this is the final report for the project/grant period specified in Box 6.
9.	<b>Report or Frequency</b>	This field is pre-populated. Reports are due semi-annually.
10a.	<b>Certification – Name and Title</b>	This field will auto-populate once report is certified.
10b.	<b>Certification - Signature</b>	<b>This field is not automatically populated.</b> The Authorized Certifying Official should electronically sign the cover page by certifying the report and using the “Click to Sign” electronic signature option in this field.
10c.	<b>Certification – Telephone</b>	This field will auto-populate once report is certified. Confirm this information is correct.
10d.	<b>Certification – Email</b>	This field will auto-populate once report is certified. Confirm this information is correct.
10e.	<b>Certification – Date</b>	This field will auto-populate once report is certified. Confirm this information is correct.



**Form A**

Form A collects the quantitative data about your project. Below the sample form for Form A shows a blank version of the form.

**Sample Form: Form A**

1. Federal Agency and Organization Element to Which Report is Submitted		2. Federal Grant or Other Identifying Number Assigned by Federal Agency		3a. DUNS		Page	of	Pages
				3b. EIN		4. Reporting Period End Date <i>(Month, Day, Year)</i>		
<b>A. Performance Measures</b>								
(1) Indicator Number	(2) Objective/Goal	(3) Indicator	(4) Baseline	(5) Project Target	(6) Actual To Date		(7) Explanation	
A-01-B	Create new businesses to employ low-income individuals	Total # of new businesses created. List name of businesses in Explanation Field (7).						
A-02-B		# of new businesses that were created AT LEAST 12 months ago						
A-03-B		# of new businesses created that have been or were operational in the community for AT LEAST 12 consecutive months						
A-04-B	Expand existing businesses to employ low-income individuals	Total # of businesses expanded. List name of businesses in Explanation Field (7).						
A-00-J	Create positions to employ all individuals (low-income and non-low-income)	Total # of full-time positions created for low-income and non-low-income individuals						



A-05-J	Create positions to employ low-income individuals	Total # of part-time positions created for low-income individuals					
A-06-J		Total # of full-time positions created for low-income individuals					
A-07-J		# of those full-time positions that were created for low-income individuals AT LEAST six months ago					
A-08-J		# of full-time positions created for low-income individuals that have been or were operational in the community for AT LEAST six consecutive months					
A-09-J	Create full-time positions with benefits for low-income individuals	Total # of full-time positions created for low-income individuals with health care benefits					
A-10-J		Total # of full-time positions created for low-income individuals with paid sick leave					



A-11-J		Total # of full-time positions created for low-income individuals with retirement benefits					
A-12-J		Total # of full-time positions created for low-income individuals with profit-sharing					
A-13-E	Prepare low-income individuals for employment	Total # of low-income individuals trained in skills for the jobs created					
A-14-E		# of those low-income individuals trained who were TANF recipients					
A-15-E		# of low-income individuals who received a certification for a full-time position created					
A-16-E	Employ low-income individuals in positions created	Total # of low-income individuals, including TANF recipients, employed in the full-time positions created					
A-17-E		# of those low-income individuals employed who were TANF recipients					





A-18-E	Create full-time positions for low-income individuals with opportunity for advancement	Average STARTING wage of all low-income individuals, including TANF recipients, placed in full-time positions created					
A-19-E		Average STARTING wage of TANF recipients placed in full-time positions created					
A-20-E		# of low-income individuals in full-time positions created who received job promotions					
A-21-E		# of low-income individuals in full-time positions created who received pay raises					
A-22-E	Help low-income individuals retain new jobs	Total # of low-income individuals who were hired into a CED-created full-time position AT LEAST six months ago					
A-23-E		Total # of low-income individuals who retained their full-time jobs for AT LEAST six consecutive months					



A-24-E		# of TANF recipients who were hired into a CED-created full-time position AT LEAST six months ago					
A-25-E		Total # of TANF recipients who retained their full-time jobs for AT LEAST six consecutive months					
A-26-F	Leverage additional funds to increase project success	How many total dollars has your project leveraged?					
A-27-F		How many dollars has your project leveraged from government funds?					
A-28-F		How many dollars has your project leveraged from the private sector?					
A-29-F		How many dollars has your project leveraged from loans?					
A-30-F		How many dollars has your project leveraged from other sources?					



## Instructions for Completing Form A

The Performance Measures Table is where you will enter the quantitative data into Form A. The heading items (1, 2, 3a, 3b, and 4) at the top of Form A are automatically populated with your grant information.

The heading columns 1 – 7 under Performance Measures are as follows:

- **Column 1** lists the indicator number. The A corresponds to the form; the number corresponds to the question or line of data, and the last letter (B, J, E, F) identifies the type of information requested.
  - B indicates that these fields describe progress on outcomes related to new business creation information.
  - J indicates that these fields describe progress on outcomes related to new job creation information.
  - E indicates that these fields describe progress on outcomes related to participant employment information.
  - F indicates that these fields describe progress on outcomes related to leveraging additional funds.
  
- **Column 2** describes the program goal. The goal also applies to the blank cells beneath it. For example, the goal “Create new businesses to employ low-income individuals” applies to the indicators A-01-B through A-03-B.
  
- **Column 3** describes the indicators of progress toward the goal in Column 2 to be used to report in the rest of the columns in the row. Indicators are measurable elements of the desired results of the program. For example, “Total # of new businesses created” and “# of new businesses created that have stayed in operation in the community for AT LEAST 12 months.”
  
- **Column 4** describes the baseline data, where the project started on this goal. The first time the grantee reports on their grant, the baseline column will be blank or zero. In subsequent reports, the number that populates in the baseline column will be the same number that was entered in the “actual to date” column in the previous report.
  
- **Column 5** describes the target for the project. So, if the project expects to create 25 jobs at the end of the project, this number would be 25. This number will not change from one reporting period to another. The project target data will only be pre-populated for four specific indicators, the rest of the cells in this column will be blank. This number will be automatically populated in the reporting system based on the information provided in your application.
  
- **Column 6** documents the grantees cumulative progress towards the project goal. Keep in mind, all data to be entered should be cumulative. For example, as of the last reporting period, a grantee may have created 10 full-time jobs for individuals with low income. In the subsequent reporting period, the grantee created an additional two full-time jobs for individuals with low



income. As a result, for the subsequent reporting period, in column 6, a grantee would indicate that they created 12 full-time jobs for individuals with low income.

- **Column 7** provides the grantee space to provide any additional information that the OCS Program Specialist might need to better understand the data. If the value entered in Column 6 is 0, the grantee must enter information in Column 7 to explain why no progress has been made toward the goal to date. When data has been entered in Column 6, the grantee should provide the names of the businesses created/expanded or positions created in Column 7. The grantee may also use this space to explain any variance between actual performance (Column 6) and the performance target (Column 5).



## Form A Objectives & Goals and Indicators

The objectives and goals section of this instruction document describes the information that OCS wants the grantee not only to collect, but to include in the grant and annual planning. Given the diversity of CED projects, not all of the objectives will apply to every grantee. The table below has five columns:

- Column 1, “Indicator number,” contains the corresponding question number on the PPR form A.
- Column 2, “Indicator,” contains the question, or data element, requested on the PPR form.
- Column 3, “Description of Indicator,” contains a description of the data requested. In some cases, the description in this column refers to just one indicator; in others, it pertains to multiple related indicators. This description elaborates on the questions in the PPR and provides clarification on the data requested. In cases where the description applies to multiple indicators, it clarifies relationships between the multiple indicators.
- Column 4, “Check your data,” defines relationships among related answers. These data validations are built into the OLDC system, so the system will produce an error message if there is an error. The inequalities listed in each cell specify which data elements are subsets of other data elements and should therefore contain numbers that are not greater than the answers for which they are a subset. You should use the information in this column to ensure you filled out the PPR form properly.
- Column 5, “Example,” provides sample scenarios and how the data would be recorded in the PPR.

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Indicator #	Indicator	Description of Indicator	Check your data	Example (if relevant)																				
<b>Objective: Create new businesses to employ low-income individuals</b>																								
A-01-B	Total # of new businesses created. List name of businesses in Explanation Field (7).	This indicator measures how many total businesses were created with the CED grant	$A-01-B \geq A-02-B$ $A-01-B \leq A-00-J$	<table border="1"> <thead> <tr> <th colspan="2">Scenario</th> </tr> </thead> <tbody> <tr> <td>Total new businesses created</td> <td align="right">20</td> </tr> <tr> <td>Number of those that were created AT LEAST 12 months ago</td> <td align="right">15</td> </tr> <tr> <td>Number of those that are still in existence</td> <td align="right">10</td> </tr> <tr> <td>Number of those that are no longer in existence</td> <td align="right">5</td> </tr> <tr> <td>Number of businesses created less than 12 months ago</td> <td align="right">5</td> </tr> <tr> <th colspan="2">Answers</th> </tr> <tr> <td>A-01-B</td> <td align="right">20</td> </tr> <tr> <td>A-02-B</td> <td align="right">15</td> </tr> <tr> <td>A-03-B</td> <td align="right">10</td> </tr> </tbody> </table>	Scenario		Total new businesses created	20	Number of those that were created AT LEAST 12 months ago	15	Number of those that are still in existence	10	Number of those that are no longer in existence	5	Number of businesses created less than 12 months ago	5	Answers		A-01-B	20	A-02-B	15	A-03-B	10
Scenario																								
Total new businesses created	20																							
Number of those that were created AT LEAST 12 months ago	15																							
Number of those that are still in existence	10																							
Number of those that are no longer in existence	5																							
Number of businesses created less than 12 months ago	5																							
Answers																								
A-01-B	20																							
A-02-B	15																							
A-03-B	10																							
A-02-B	# of new businesses that were created AT LEAST 12 months ago	These two indicators measure how many of the businesses that were created with CED funds at least 12 months ago remained in existence after 12 months. The purpose of these indicators is to measure the longevity of the businesses that have been created, while correcting for businesses that were created less than 12 months ago. This allows OCS to accurately calculate the percentage of new businesses lasting at least 12 months without having businesses less than 12 months old skew the result. NOTE: Businesses created more than 12 months ago that lasted at least 12 months but have since folded should still be counted in A-03-B.	$A-02-B \leq A-01-B$ $A-02-B \geq A-03-B$																					
A-03-B	# new businesses created AT LEAST 12 months ago that have been or were operational in the community for AT LEAST 12 consecutive months		$A-03-B \leq A-02-B$																					
<b>Objective: Expand existing businesses to employ low-income individuals</b>																								
A-04-B	Total # of businesses expanded. List name of businesses in Explanation Field (7).	This indicator measures the number of already-existing businesses that were expanded using CED funds. It does not measure new businesses that were created with CED funds, but rather businesses that existed before the CED grant and that the CED grant helped expand.	$A-04-B \leq A-00-J$																					
<b>Objective: Create positions to employ all individuals (low-income and non-low-income)</b>																								
A-00-J	Total # of full-time positions created (low-income and non- low-income)	This indicator measures the total number of full-time positions that were created using CED funds, including positions created for low-income individuals and those created for non-low-income individuals.	$A-00-J \geq A-06-J$ $A-00-J \geq (A-01-B + A-04-B)$	<table border="1"> <thead> <tr> <th colspan="2">Scenario</th> </tr> </thead> <tbody> <tr> <td>Total full-time jobs created for low-income individuals</td> <td align="right">100</td> </tr> <tr> <td>Total full-time jobs created for non-low-income individuals</td> <td align="right">20</td> </tr> <tr> <th colspan="2">Answers</th> </tr> <tr> <td>A-00-J</td> <td align="right">120</td> </tr> <tr> <td>A-06-J</td> <td align="right">100</td> </tr> </tbody> </table>	Scenario		Total full-time jobs created for low-income individuals	100	Total full-time jobs created for non-low-income individuals	20	Answers		A-00-J	120	A-06-J	100								
Scenario																								
Total full-time jobs created for low-income individuals	100																							
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Answers																								
A-00-J	120																							
A-06-J	100																							
<b>Objective: Create positions to employ low-income individuals</b>																								
A-05-J	Total # of part-time positions created for low-income individuals	This indicator measures the total number of part-time positions that were created using CED funds.	NONE																					



Indicator #	Indicator	Description of Indicator	Check your data	Example (if relevant)																
A-06-J	Total # of full-time positions created for low-income individuals	This indicator measures the total number of positions created with CED funds, regardless of whether they were filled by TANF recipients.	A-06-J ≤ A-00-J A-06-J ≥ A-07-J A-06-J ≥ A-08-J A-06-J ≥ A-09-J A-06-J ≥ A-10-J A-06-J ≥ A-11-J A-06-J ≥ A-12-J A-06-J ≤ A-16-E	<table border="1"> <tr> <th colspan="2">Scenario</th> </tr> <tr> <td>Total full-time jobs created for low-income individuals</td> <td align="center">100</td> </tr> <tr> <td>FT jobs created for low-income individuals AT LEAST 6 months ago</td> <td align="center">60</td> </tr> <tr> <td>FT jobs for low-income individuals lasting AT LEAST 6 months</td> <td align="center">30</td> </tr> <tr> <th colspan="2">Answers</th> </tr> <tr> <td>A-06-J</td> <td align="center">100</td> </tr> <tr> <td>A-07-J</td> <td align="center">60</td> </tr> <tr> <td>A-08-J</td> <td align="center">30</td> </tr> </table>	Scenario		Total full-time jobs created for low-income individuals	100	FT jobs created for low-income individuals AT LEAST 6 months ago	60	FT jobs for low-income individuals lasting AT LEAST 6 months	30	Answers		A-06-J	100	A-07-J	60	A-08-J	30
Scenario																				
Total full-time jobs created for low-income individuals	100																			
FT jobs created for low-income individuals AT LEAST 6 months ago	60																			
FT jobs for low-income individuals lasting AT LEAST 6 months	30																			
Answers																				
A-06-J	100																			
A-07-J	60																			
A-08-J	30																			
A-07-J	# of those full-time positions that were created for low-income individuals AT LEAST six months ago	These two indicators measure how many of the positions that were created at least six months ago remained in existence six months after they were created. The purpose of this indicator is to measure the longevity of positions created, while correcting for positions that were created less than six months ago. This allows OCS to accurately calculate the percentage of new positions lasting at least six months without having jobs less than six months old skew the result. NOTE: Positions that were created more than six months ago and lasted at least six months but no longer exist should still be counted in A-08-J.	A-07-J ≤ A-06-J A-07-J ≥ A-08-J																	
A-08-J	# of full-time positions created for low-income individuals that have been or were operational in the community for AT LEAST six consecutive months		A-08-J ≤ A-06-J A-08-J ≤ A-07-J																	
<b>Objective: Create full-time positions with benefits for low-income individuals</b>																				
A-09-J	Total # of full-time positions created for low-income individuals with health care benefits	These four indicators document the quality of the positions created. Not all grantees can create positions with health care benefits or opportunity for advancement. However, those grantees that do will want to show the accomplishment of creating higher quality jobs.	A-09-J ≤ A-06-J																	
A-10-J	Total # of full-time positions created for low-income individuals with paid sick leave		A-10-J ≤ A-06-J																	
A-11-J	Total # of full-time positions created for low-income individuals with retirement benefits		A-11-J ≤ A-06-J																	
A-12-J	Total # of full-time positions created for low-income individuals with profit-sharing		A-12-J ≤ A-06-J																	
<b>Objective: Prepare low-income individuals for employment</b>																				
A-13-E	Total # of low-income individuals trained in skills for the jobs created	This indicator documents the number of low-income individuals who were trained. It includes TANF recipients.	A-13-E ≥ A-14-E A-13-E ≤ A-16-E	<table border="1"> <tr> <th colspan="2">Scenario</th> </tr> <tr> <td>Number of low-income individuals trained by CED</td> <td align="center">100</td> </tr> </table>	Scenario		Number of low-income individuals trained by CED	100												
Scenario																				
Number of low-income individuals trained by CED	100																			

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Indicator #	Indicator	Description of Indicator	Check your data	Example (if relevant)														
A-14-E	# of those low-income individuals trained who were TANF recipients	This indicator documents the number of low-income individuals who were trained who were TANF recipients when they first took part in CED-funded training.	$A-14-E \leq A-13-E$															
A-15-E	# of low-income individuals who received a certification for a full-time position created	This indicator documents the number of low-income individuals who received a certification for a full-time position created with CED funds. It includes TANF recipients	$A-15-E \leq A-16-E$															
<b>Objective: Employ low-income individuals in the positions created</b>																		
A-16-E	Total # of low-income individuals, including TANF recipients, employed in the full-time positions created	This indicator measures the total number of low-income individuals placed in the full-time positions created with CED funds. This number accounts for turnover.	$A-16-E \geq A-06-J$ $A-16-E \geq A-13-E$ $A-16-E \geq A-15-E$ $A-16-E \geq A-21-E$ $A-16-E \geq A-22-E$	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2">Scenario</th> </tr> </thead> <tbody> <tr> <td>Total jobs created</td> <td style="text-align: center;">100</td> </tr> <tr> <td>Total number of low-income individuals employed in those jobs through the course of the grant period</td> <td style="text-align: center;">125</td> </tr> <tr> <td>Total number of those low-income individuals who were TANF recipients</td> <td style="text-align: center;">50</td> </tr> <tr> <th colspan="2">Answers</th> </tr> <tr> <td>A-16-E</td> <td style="text-align: center;">125</td> </tr> <tr> <td>A-17-E</td> <td style="text-align: center;">50</td> </tr> </tbody> </table>	Scenario		Total jobs created	100	Total number of low-income individuals employed in those jobs through the course of the grant period	125	Total number of those low-income individuals who were TANF recipients	50	Answers		A-16-E	125	A-17-E	50
				Scenario														
Total jobs created	100																	
Total number of low-income individuals employed in those jobs through the course of the grant period	125																	
Total number of those low-income individuals who were TANF recipients	50																	
Answers																		
A-16-E	125																	
A-17-E	50																	
A-17-E	# of those low-income individuals employed who were TANF recipients	This indicator measures the total number of low-income individuals who were TANF recipients at the time they were placed in the full-time positions created with CED funds. This number accounts for turnover.	$A-17-E \leq A-16-E$ $A-17-E \geq A-24-E$															
<b>Objective: Create full-time positions for low-income individuals with opportunity for advancement</b>																		
A-18-E	Average STARTING wage of all low-income individuals, including TANF recipients, placed in full-time positions created	These two indicators measure the average wage at which individuals in CED-funded positions are hired. These numbers only account for starting wage, and do not factor in the new wages of employees who have been awarded raises.	<b>A-18-E format = \$XX.XX</b> <b>A-19-E format = \$XX.XX</b>															
A-19-E	Average STARTING wage of TANF recipients placed in full-time positions created																	
A-20-E	# of low-income individuals in full-time positions created who received job promotions	These two indicators measure the upward mobility in the jobs created.	$A-20-E \leq A-16-E$															
A-21-E	# of low-income individuals in full-time positions created who received pay raises		$A-21-E \leq A-16-E$															
<b>Objective: Help low-income individuals retain new jobs</b>																		
A-22-E	Total # of low-income individuals who were hired into a CED-created full-time position AT LEAST six months ago	These two indicators measure the total number of low-income individuals who were employed in a job created with CED funds and remained in that job for at least six consecutive months. It includes	$A-22-E \geq A-06-J$ $A-22-E \leq A-16-E$ $A-22-E \geq A-23-E$ $A-22-E \geq A-24-E$	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2">Scenario</th> </tr> </thead> <tbody> <tr> <td>Total jobs created</td> <td style="text-align: center;">100</td> </tr> <tr> <td>Total low-income individuals employed in</td> <td style="text-align: center;">125</td> </tr> </tbody> </table>	Scenario		Total jobs created	100	Total low-income individuals employed in	125								
				Scenario														
Total jobs created	100																	
Total low-income individuals employed in	125																	



## CED Performance Progress Report (PPR) Forms and Instructions

OMB Clearance No.: 0970-0386



Indicator #	Indicator	Description of Indicator	Check your data	Example (if relevant)
A-23-E	Total # of low-income individuals who retained their full-time jobs for AT LEAST six consecutive months	individuals who retained their jobs for at least six months and then left the jobs, as well as individuals who retained their jobs for longer than six months. Low-income individuals include TANF recipients.	$A-23-E \leq A-22-E$	<i>More specific examples concerning how to count individuals employed in jobs created can be found on Page 20.</i>
A-24-E	# of TANF recipients who were hired into a CED-created full-time position AT LEAST six months ago	These two indicators measure the total number of TANF recipients who were employed in a position created with CED funds and remained in that position for at least six consecutive months. It includes individuals who retained their jobs for at least six months and then left the jobs, as well as individuals who retained their jobs for longer than six months. TANF recipients are a subset of low-income individuals, so every TANF recipient should also be counted as a low-income individual.	$A-24-E \leq A-17-E$ $A-24-E \leq A-22-E$ $A-24-E \geq A-23-E$	
A-25-E	# of TANF recipients who retained their full-time jobs for AT LEAST six consecutive months		$A-25-E \leq A-22-E$ $A-25-E \leq A-23-E$ $A-25-E \leq A-24-E$	
<b>Objective: Leverage additional funds to increase project success</b>				
A-26-F	How many dollars total dollars has your project leveraged?	This indicator measures the amount of money leveraged through all non-CED sources. It is a sum of A-27-F, A-28-F, A-29-F, and A-30-F. This indicator will automatically be calculated based on what you enter in the other fields.	$A-26-F$ equals the sum of $A-27-F$ , $A-28-F$ , $A-29-F$ and $A-30-F$	
A-27-F	How many dollars has your project leveraged from government funds?	These four indicators measure the amount of money leveraged through any non-CED source.	$A-27-F$ $A-28-F$ $A-29-F$ $+ A-30-F$ $A-26-F$	
A-28-F	How many dollars has your project leveraged from the private sector?			
A-29-F	How many dollars has your project leveraged from loans?			
A-30-F	How many dollars has your project leveraged from other sources?			



## Examples for Counting Individuals Employed in CED-Created Jobs

For all three examples that follow, assume you created Business A with your CED funds and that it is September 2017.

Example 1: Business A was created in July 2016. In July 2016, Business A created 10 full-time jobs. 8 of these full-time jobs were created for individuals with low income. Of the 8 jobs created for individuals with low income:

- 6 of these 8 positions were created with health benefits
- 6 of these 8 positions were created with sick leave
- 2 of these 8 positions were created with retirement benefits
- 1 of these 8 positions were created with retirement profit-sharing

Given this, the job creation indicators would be filled out as follows. Note that indicators A-05-J through A-12-J deal with low-income positions only.

(1) Indicator Number	(2) Objective/Goal	(3) Indicator	(6) Actual to Date
A-00-J	Create positions to employ all individuals (low-income and non-low-income)	Total # of full-time positions created for low-income and non-low-income people	10
A-05-J	Create positions to employ low-income people	Total # of part-time positions created for low-income individuals	0
A-06-J		Total # of full-time positions created for low-income individuals	8
A-07-J		# of those full-time positions that were created for low-income individuals AT LEAST six months ago	8
A-08-J		# of full-time positions created for low-income individuals that have been or were operational in the community for AT LEAST six consecutive months	8
A-09-J	Create full-time positions with benefits for low-income individuals	Total # of full-time positions created for low-income individuals with health care benefits	6
A-10-J		Total # of full-time positions created for low-income individuals with paid sick leave	6
A-11-J		Total # of full-time positions created for low-income individuals with retirement benefits	2
A-12-J		Total # of full-time positions created for low-income individuals with profit-sharing	1



Example 2: John was hired at Business A in July 2016. When he was hired, he qualified as an individual with low income. He was also a TANF recipient. He still holds a job at Business A. John would be counted in each of the following categories:

- ✓ **A-16-E** - # of low-income individuals employed in jobs created
- ✓ **A-17-E** - # of low-income individuals employed who were TANF recipients
- ✓ **A-22-E** - Total # of low-income individuals who were hired into a CED-created job AT LEAST six months ago
- ✓ **A-23-E** - Total # of low-income individuals who retained their jobs for AT LEAST six consecutive months
- ✓ **A-24-E** - # of TANF recipients who were hired into a CED-created full-time position AT LEAST six months ago
- ✓ **A-25-E** - Total # of individuals who were TANF recipients who retained their jobs for AT LEAST six consecutive months

Example 3: Mary was hired at Business A in June 2016. When she was hired, she qualified as an individual with low income. Mary stayed with Business A until July 2017 and then left. Mary would be counted in each of the following categories:

- ✓ **A-16-E** - Total # of low-income individuals employed in jobs created
- ✓ **A-22-E** - Total # of low-income individuals who were hired into a CED-created job AT LEAST six months ago
- ✓ **A-23-E** - Total # of low-income individuals who retained their jobs for AT LEAST six consecutive months

Example 4: Charlie was hired at Business A in February 2017. At the time he was hired, he qualified as an individual with low income. He was also a TANF recipient. He left the job at Business A in April 2017. Charlie would be counted in each of the following categories:

- ✓ **A-16-E** - Total # of low-income individuals employed in jobs created
- ✓ **A-17-E** - # of low-income individuals employed who were TANF recipients
- ✓ **A-22-E** - Total # of low-income individuals who were hired into a CED-created job AT LEAST six months ago
- ✓ **A-24-E** - # of TANF recipients who were hired into a CED-created job AT LEAST six months ago

Example 5: Jennifer was hired at Business A in July 2017. When she was hired, she qualified as an individual with low income. Jennifer still holds a job at Business A. Jennifer would be counted in each of the following categories:

- ✓ **A-16-E** - Total # of low-income individuals employed in jobs created



**Form B**

Form B is designed to provide a structured format to discuss your CED-funded project and address or explain any issues raised in Form A. It will primarily collect the qualitative data that OCS Program Specialists need to monitor the program. Below the sample form for Form B shows a blank version of the form.

**Sample Form: Form B**

		Page	of Pages
1. Federal Agency and Organization Element to Which Report is Submitted	2. Federal Grant or Other Identifying Number Assigned by Federal Agency	3a. DUNS	4. Reporting Period End Date (Month, Day, Year)
		3b. EIN	
<b>B. Program Indicators</b>			
<b>(1) Activity Number or Label</b>	<b>(2) Activity Description</b>	<b>(3)</b>	<b>(4) Explanation</b>
<b>Project Description</b> If this is the first PPR for your grant, complete an Explanation (4) for each indicator.  For the following reports, provide information on any changes to the basic description of the project for each indicator. Leave Column 4 blank for any topics that are not relevant to your project during this reporting period.			
A-01	Changes in Project Strategy		
A-02	Type(s) of New Business Created		
A-03	Distinctive Characteristics of Participants		
A-04	Distinctive Characteristics of Community		
A-05	Geographic location		
A-06	Composition of Grant Recipient's Board of Directors/Board Leadership		
A-07	Public and Private Partnerships		
A-08	Will or did your organization purchase equity in a business with CED grant funds?		
A-09	Will or did your organization create a loan or revolving loan fund with CED funds?		
<b>Highlights &amp; Major Accomplishments</b> Provide key successes of the project related to each indicator in this reporting period. Leave Column 4 blank for any topics that are not relevant to your project during this reporting period.			
B-01	New Business Creation		
B-02	Business Expansion		
B-03	New Job Creation		
B-04	Population Served		
B-05	Participant Recruitment		
B-06	Participant Training		
B-07	Participant Placement in Jobs		
B-08	Participant Retention		
B-09	Leveraged Funding		
B-10	Partnerships		
B-11	Filing of Notice of Federal		



	Interest (for projects involving real property only)		
B-12	Job Creation Involving Flexible Work Policies		
B-13	Other Accomplishments		
<b>Challenges &amp; Resolutions</b>			
Provide information on challenges that arose or were addressed related to each indicator in this reporting period. Leave Column 4 blank for any topics that are not relevant to your project during this reporting period.			
C-01	New Business Creation		
C-02	Business Expansion		
C-03	New Job Creation		
C-04	Population Served		
C-05	Participant Recruitment		
C-06	Participant Training		
C-07	Participant Placement in Jobs		
C-08	Participant Retention		
C-09	Leveraged Funding		
C-10	Partnerships		
C-11	Filing of Notice of Federal Interest (for projects involving real property only)		
C-12	Job Creation Involving Flexible Work Policies		
C-13	Other Challenges		
<b>Changes</b>			
Provide information on any significant changes in the project that may impact future success and/or need to be documented. Leave Column 4 blank for any topics that are not relevant to your project during this reporting period.			
D-01	Planned Services		
D-02	Planned Timeline		
D-03	Planned Outcomes		
D-04	Budget		
D-05	Leveraged Funding		
D-06	Partnerships		
D-07	Staffing		
D-08	Composition of Grant Recipient's Board of Directors/Board Leadership		
D-09	In the Community		
D-10	In the Field		
D-11	Other Changes		



## Instructions for Completing Form B

There are four sections to Form B. The heading items (1, 2, 3a, 3b, and 4) at the top of Form B are automatically populated with your grant information.

- **Project Description** – This section provides space for basic data describing the project. For your first PPR of the grant, provide an explanation of each indicator. For the remaining reports, the section will auto-populate. Only provide updates for changes to the explanations. Any change to your project description indicators must be discussed with your program specialist. Below are examples of information to include in this section for each indicator:
  - A-01 Changes in Project Strategy Description of your project strategy including if it is a business creation, business expansion, microenterprise, and self-employment
  - A-02 Type(s) of New Business Created - Microenterprise, grocery store, factory, etc.
  - A-03 Distinctive Characteristics of Participants - Demographics, need, etc.
  - A-04 Distinctive Characteristics of Community - Empowerment Zone, history, poverty level, crime rate, etc.
  - A-05 Geographic location - Urban OR Rural
  - A-06 Composition of Grant Recipient’s Board of Directors/Board Leadership - President, Chief Financial Officer
  - A-07 Public and Private Partnerships - State or local TANF agency, employment agency and/or child support enforcement office, etc.
  - A-08 Will or did your organization purchase equity in a business with CED grant funds? - For this indicator, enter Yes or No. If yes, please describe the investment and the investment amount.
  - A-09 Will or did your organization create a loan or revolving loan fund with CED funds? - For this indicator, enter Yes or No: If yes, please describe.
- **Highlights & Major Accomplishments** – This section provides a place to document key successes in the project. The 12 specified topics in Column 2 are suggested areas where you may have experienced success. An additional line is included for accomplishments that are not covered by the 12 distinct topics. Column 4 provides an opportunity to describe accomplishments for any of the topics deemed relevant. Leave Column 4 blank for any topics that are not relevant to your project during this reporting period.
- **Challenges (or problems) & Resolutions (or steps taken)** – This section mostly mirrors the highlights section but collects data on the challenges faced in the reporting period, and how those challenges were or will be addressed. The 12 specified topics in Column 2 are suggested areas where you may have experienced challenges. An additional line is included for challenges that are not covered by the specific topics. Column 4 provides an opportunity to describe challenges and resolutions for any of the topics deemed relevant. Leave Column 4 blank for any topics that are not relevant to your project during this reporting period.



- **Changes** – This section documents for the OCS Program Specialist any significant changes in the project that may impact future success and/or need to be documented. The 10 specified topics in Column 2 are suggested areas where you may have undergone changes. An additional line is included for changes that are not covered by the specific topics. Column 4 provides an opportunity to describe challenges and resolutions for any of the topics deemed relevant. Leave Column 4 blank for any topics that are not relevant to your project during this reporting period.

### Form E

Form E is designed to collect financial information about your CED project. It will address expenditure amounts for each activity type.

### Sample Form: Form E

		Page	of Pages
1. Federal Agency and Organization Element to Which Report is Submitted	2. Federal Grant or Other Identifying Number Assigned by Federal Agency	3a. DUNS	4. Reporting Period End Date <i>(Month, Day, Year)</i>
		3b. EIN	
<b>E. Activity Based Expenditures</b>			
<b>(1) Activity Number or Label</b>	<b>(2) Activity Description</b>	<b>(3) Total Estimated Expenditures</b>	<b>(4) Funding Expended</b>
E-01			
E-02			
E-03			
<b>TOTAL</b>			

### Instructions for Completing Form E

The heading columns for Form E are as follows:

- **Column 1** lists the item number. This number should always be preceded by an *E*.



- **Column 2** describes the issue or activity that grantee will address in Column 4. When completing the Activity Description (Column 2), should be a description of the activity for which funds were expended. Examples may include construction, purchasing of equipment, a loan, etc.
- **Column 3** is to be left blank.
- **Column 4** should contain the total amount expended during the performance period on the activity described in Column 2.

## Definitions

When completing the PPR, refer to the definitions below that describe the indicators you will report on.

- **Business creation** – New businesses that did not exist prior to the start of the project and were created as a result of the start of the project. This includes the creation of any new business, including microenterprise. It does not include the expansion of already existing businesses.
- **Community** – Any geographic area defined by specific boundaries.
- **Full-time jobs** – New full-time, permanent jobs that did not exist prior to the start of the project and came about as a result of the start of the project. Full-time means a minimum of 36 hours per week.
- **Job creation** – New permanent jobs that did not exist prior to the start of the project and came about as a result of the start of the project. These activities can include jobs created through the development of new business ventures, the expansion of existing businesses, or the development of new products and services. Please note that the training and placement of individuals in already existing jobs, even jobs guaranteed to individuals with low income through a formal agreement with an employer, is not considered job creation.
- **Leveraged funds** – All non-CED funding used for the CED project. These sources may include, but are not limited to other Federal, state, or local government funding, private loans and investments, and/or philanthropic contributions.
- **Individual with low income** – An individual whose income level does not exceed 125 percent of the official poverty line as found in the most recent revision of the Poverty Income Guidelines published by HHS. These guidelines may be found at <https://aspe.hhs.gov/poverty-guidelines>.
- **Part-time jobs** – New part-time, permanent jobs that did not exist prior to the start of the project and came about as a result of the start of the project. Part-time means less than 36 hours per week.
- **TANF recipient** – A TANF recipient receives assistance through ACF's Temporary Assistance for Needy Families (TANF) program. This is a subset of individuals with low income.