



Healthy Homes Grant Program Round 1 Fiscal Guidance

PUBLIC HEALTH DIVISION



Healthy Homes Grant Program (HHGP)

GRANTEE FISCAL GUIDANCE

Version 1.1 – October 2024

This document is the HEALTHY HOMES GRANT PROGRAM EDITION and is intended to be used for Healthy Homes Grant Program (HHGP) funding only.

Please Note: As this document is intended to be a living document, the information it contains will be updated on an as-needed basis. Grantees will receive appropriate and timely notification on any updates before release. All updates will be documented in the “**Version Log**” below and made available on the HHGP RFGA Webpage at <https://bit.ly/HHGPRFGA>.

VERSION LOG

Version	Description of Update or Revision	Author	Last Revised
1.0	Healthy Homes Grant Program (HHGP) Fiscal Guidance, with launch of RFGA. (Adapted from OHA Public Health Equity CBO Fiscal Guidance document)	HHGP Staff	February 2024
1.1	Updates disbursement terms and key dates	HHGP Staff	October 2024

Healthy Homes Grant Program
GRANTEE FISCAL GUIDANCE

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Overview

The purpose of this document is to provide fiscal and expenditure guidance to organizations who are preparing grant applications to or implementing awards from the Healthy Homes Grant Program (HHGP). This document will provide guidance related to developing budgets and work plans, revising, or finalizing budgets and implementing them.

Additionally, this document includes updated information related to allowable and unallowable expenditures, timelines, and financial reporting requirements. Some of the information may apply to your organization depending on the scope of work, program activities, goals, and objectives in your proposed or approved HHGP work plan.

Except where specified otherwise, HHGP Round 1 funding will be awarded from October 1, 2024, to November 30, 2027.

****Please Note*:*** *If your organization has previously received funding from OHA's Public Health Division (PHD), this Healthy Homes Grant Program is a separate funding opportunity with its own set of rules and requirements.*

Executive Summary

The Healthy Homes Grant Program (HHGP) seeks to improve housing conditions and health outcomes for residents of low-income households; preserve affordability and availability of existing housing stock by addressing deferred property maintenance issues; and help low-income homeowners and renters avoid displacement through access to home repair funds.

OHA recognizes housing as a [driver of health](#) and works to “ensure that all people in Oregon live, work and play in a safe and healthy environment and have equitable access to stable, safe, affordable housing.”¹ This Round 1 Funding seeks to [support](#) home repair and rehabilitation activities currently underway by eligible entities throughout the State of Oregon which serve those impacted by environmental justice factors, including People of color, low-income, and American Indian and Alaska Native communities.

¹ <https://www.oregon.gov/oha/PH/ABOUT/Documents/ship/2020-2024/Healthier-Together-Oregon-full-plan.pdf>

Funding Information

ITEM	DESCRIPTION
Funding Opportunity Name	Healthy Homes Grant Program- Round 1. OregonBuys Number S-44300-00009255/OHA NUMBER 5795
Funding State Agency – Division	Oregon Health Authority (OHA) – Public Health Division (PHD)
Application Due Date	April 9, 2024
Work Plan & Budget Timeframe	Initial work plan and budget due upon application. Approved work plan and budget due prior to grant agreement execution.
Notice of Award Date	June 2024
Program or Project Start Date	July 1, 2024*
Grant Award Period	October 1, 2024 – November 30, 2027*

**Estimate*

For the HHGP's Round 1 RFGA (for the period of October 1, 2024 – November 30, 2027)

Organizations are being funded for work in the following areas:

- Maximizing the energy efficiency of residences.
- Extending the usable life of residences.
- Improving the health and safety of occupants of residences.

Work Plans

- All funded work should be based on the OHA approved work plans.
- Grantees must finalize work plans and budgets with OHA prior to finalizing a grant agreement.

Healthy Homes Grant Program Terms and Acronyms

- a. **“Accessibility”** - means the design, construction, development, and maintenance of facilities, information and communication technology, programs, and services so that all people, including people with disabilities, can fully and independently use them.²
- b. **“Administrative Costs”** – are defined as expenses incurred by organizations for the general management, oversight, and coordination of the grant activities identified in the grant agreement, or otherwise necessary for the general operation of the organization and the conduct of activities it performs. Sometimes referred to as “overhead”, administrative costs can be direct or indirect, depending on whether the cost or expense can be directly attributed to and therefore charged to the program or project. *See table below for examples.*

Note: *Per Oregon Administrative Rule 333-090-0110³, Administrative Costs are capped at 20% of the Total Budget for Healthy Homes Grant Program awards. This means that total Administrative Costs cannot exceed 20% of the Total Budget.*

- c. **“OHA”** – means Oregon Health Authority.
- d. **“Capital Equipment”** – means a single piece of equipment with a purchase price of \$5,000 or more, with an expected use of more than one year.
- e. **“Grant Execution”** – means a grant agreement becomes “executed” when it is fully signed by both parties i.e., both the grantee and OHA. Once the grantee signs the grant agreement and returns it to OHA, it is routed through internal approval processes for final review and signature. Only once these processes are complete will the grant agreement be considered executed.
- f. **“Data”** – includes the information that may be accessed, exchanged, created, transmitted, or stored as a part of the grant agreement with OHA.

² https://www.hud.gov/program_offices/administration/admabout/diversity_inclusion/definitions

³ https://secure.sos.state.or.us/oard/displayDivisionRules.action;JSESSIONID_OARD=UrN6zOLjrTPZMc3zaxJJxcl9-3mmFps8YtYrSs0ha3Ewgl2UfBI!-918603911?selectedDivision=1292

- g. **"Direct Administrative Costs"** – include administrative and some overhead expenses for the general management, oversight, and coordination of activities of your Healthy Homes program or project, which can be attributed directly to it. This can include costs that support various work or programs across your organization where only a relevant portion is allocated to this Healthy Homes program or project. Examples include salaries for administrative staff (HR, facilities), accounting or IT services, rent for office or storage space specific to this project, or other general operating expenses.

NOTE: Direct Administrative costs are the direct portion of Administrative Costs and are therefore subject to the 20% cap on Total Administrative Costs.

- h. **"Direct Costs"** – are defined as direct expenses to implement the work plan of your Healthy Homes program or project. They are grouped in two categories in the budget: A. Healthy Homes Direct costs, which directly benefit households and B. Other Direct Costs – for Program Delivery, which are used for related Program Delivery.

Healthy Homes Direct Costs include personnel costs (salaries and fringe benefits), subcontracts, materials and supplies and equipment. These are budget categories 1-4 in the budget template which are included in the total for line item 6: Total Direct Costs.

Program Delivery Costs are other direct expenses of your program or project that support program delivery activities of the work plan but will not go into or directly benefit households. These support the HHGP's mission of improving housing conditions for low-income Oregonians. They include training and capacity building, travel, Direct Administrative costs, and other costs that fit this category and may be added to this section. In the budget template, they are grouped as "(B) Other Direct Costs - for Program Delivery", under budget category 5 and are included in the total for line item 6. Total Direct Costs.

A direct cost is an expense directly tied to accomplishing the home repair or rehabilitation activities, goals, or outcomes described in your Healthy Homes work plan. In contrast, indirect costs are overhead and administrative expenses that cannot be directly attributed to the program or project. See "indirect costs" below for more information.

- i. ***“Direct Client Services”*** – Direct client services, also known as “direct services,” are defined as the provision of services and payments toward direct care, housing, utilities, food (groceries), phone, internet, etc., on an individual person basis. Direct client services are mostly not allowed under an HHGP grant agreement.

Note: Relocation assistance *may* be an allowable cost under HHGP, at the discretion of the grantee organization.

- j. ***“Environmental Justice”*** – Environmental justice is the fair treatment and meaningful involvement of all people regardless of race, color, national origin, culture, education, or income with respect to the development, implementation and enforcement of environmental laws, regulations, and policies.
- k. ***“Environmental Justice Factor”*** – means a circumstance or condition that impacts a community’s ability to achieve a balance of health, economic or environmental benefits and burdens or that impacts a community’s ability to participate in public processes.
- l. ***“Equipment”*** – means equipment totaling less than \$5,000 per item. Any equipment totaling \$5,000 or more for an individual item is classified as capital equipment. See “Capital Equipment” for specific purchasing requirements. Examples for Healthy Homes projects include mechanical or technical devices used for testing and mitigation, specialized mechanical tools, medium to large equipment needed for home rehabilitation or repair work and items to be installed in homes (i.e., air conditioners, grab bars, pumps).
- m. ***“Indirect Costs”*** – are defined as overhead costs of the grantee which are necessary for the functioning of the organization, but which cannot be directly attributed to a household served or to the Healthy Homes program or project specifically. Examples include general operating expenses that cover the entire organization, including facilities, utilities and maintenance, insurance, IT network or software costs, legal or other business fees, administrative staff costs or other administrative costs that cannot be attributed directly to the program or project. Indirect costs are often calculated at the organization's fixed or negotiated rate.

NOTE: *Indirect Costs are the indirect portion of Administrative Costs and are therefore subject to the 20% cap on Total Administrative Costs.*

- n. ***"Intersectionality"*** – Intersectionality refers to the interconnected nature of social categorizations such as race, class, gender, and other forms of identity as they apply to a given individual or group, regarded as creating overlapping and interdependent systems of discrimination or disadvantage.
- o. ***"Low-Income Household"*** – means a household having an income equal to or below 80 percent of the area median family income as defined by the US Department of Housing and Urban Development's (HUD) Income Limits Documentation System, calculated using the Oregon county of residence and number of residents for the household in question.
- p. ***"LPHA"*** – means Local Public Health Authority, also will be referred to as ***"Local Public Health"***
- q. ***"Residence"*** – A residence is a dwelling that is intended for occupation by a single family and is occupied by one or more individuals who are members of a low-income household as the individuals' principal residence, including a site-built home, manufactured home, residential trailer, mobile home, condominium unit or unit within multifamily housing.
- r. ***"RFGA"*** – means Request for Grant Application.
- s. ***"The Website" or "The HHGP Website"*** – The OHA- Healthy Homes Grant Program website referred to throughout this document can be found here: <https://www.oregon.gov/oha/ph/healthyenvironments/healthyneighborhoods/healthyhomesgrantprogram/pages/index.aspx>
- t. ***"Whole-Home Assessment"*** – A whole-home assessment is a home inspection approach that addresses a broad range of housing deficiencies and hazards that can affect residents' health and safety.

Budget Template and Work Plan

For the Round 1 Funding period starting in 2024, applicants are required to submit a Healthy Homes Grant Program (HHGP) application, work plan and proposed budget.

Project Budget and Work Plan Instructions

Organizations applying for HHGP funding will complete an online application following instructions and using the link from the HHGP website:

<https://www.oregon.gov/oha/PH/HEALTHYENVIRONMENTS/HEALTHYNEIGHBORHOODS/HEALTHYHOMESGRANTPROGRAM/Pages/Healthy-Homes-Grant-Program-RFGA.aspx>

The work plan is included as part of the online application. It should provide enough detail about the proposed project and key activities and costs should be reflected in the proposed budget. If HHGP awards funds for a lower amount than requested, work plans will need to be revised with a budget that reflects a smaller scope of work. Throughout the grant period, if there is a significant change to the work in the program or project or to the budget, the work plan should be updated accordingly.

In the proposed budget, applicants will list all costs to accomplish the proposed Healthy Homes program or project on the Budget & Narrative tab. Detailed instructions for completing the “Proposed Budget Template” are included in the “Instructions” tab of that document. The instructions include definitions for various line-item costs and examples. Narrative descriptions of costs are required for most budget line items. If necessary, applicants may attach a longer budget narrative as a separate PDF file named “Additional Budget Narrative”.

Important Budget Rules

- Per Healthy Homes Administrative Rules 333-090-0110, Administrative Costs are capped at 20% of the Total Budget for Healthy Homes Grant Program awards. This means that Total Administrative Costs cannot exceed 20% of the Total Budget. Total administrative costs are the sum of Direct Administrative Costs (5d.) and Total Indirect Costs (7.).

Line Item “5d. Direct Administrative Costs” is the ***direct*** portion of Administrative Costs, which is therefore subject to the 20% cap on Total Administrative Costs. Line item “7. Total Indirect Costs” is the indirect portion of Administrative Costs.

- **GUIDANCE:** Healthy Homes direct Costs (A) should comprise 80% of the Total Direct Costs and Other Direct Costs (B) should comprise 20% of Total Direct Costs.
- For a quick analysis in the proposed budget, please view the Budget Check section at the bottom of the Summary tab, which auto-calculates a comparison of costs entered on the Budget & Narrative tab with these rules and guidance.

Revised Budget and Work Plan Submission

- If requested, revised budgets and work plans are due prior to execution of the grant agreement.
- The Proposed Budget Template can be found on the HHGP RFGA webpage: <https://bit.ly/HHGPRFGA>
- Work plan revisions will need to be made in consultation with HHGP staff.
- Please submit revised budgets and work plans to: healthyhomes@odhsoha.oregon.gov

Allowable Expenses

Expenses must align with the activities, goals, and outcomes as described in the approved final work plan and budget in the Healthy Homes Grant Program (HHGP) grant agreement.

Personnel Costs

Personnel - Salary and Fringe

- Funds awarded may be used to cover personnel costs for staff working on the HHGP program or project, including salary and fringe benefits. Salaries and Fringe Benefits are listed as separate budget line items in the Proposed Budget. Costs should be calculated based on the amount of time (percentage % or full-time equivalent FTE) that staff will spend on the HHGP project. The calculations may factor a specific (shorter) timeframe for staff's work (i.e., 6 months or 1 year) as well as cost of living or other salary increases over the 3-year award period. Costs should clearly align between the activities noted in the work plan and the amounts listed in the approved budget.
- Expense reports will require Salary and Fringe Benefits costs to be reported separately.

Subcontracts

Contractors/ Consultants

- Grant funds may be used to hire consultants and contractors or to subcontract with other organizations, both nonprofit and for-profit that are reflected in the grantees' approved HHGP work plan.
- Known and anticipated subcontracts are required to be included in the applicant's proposed budget and in grantees' expenditure reports.
- Subcontracts are subject to all applicable subcontractor provisions outlined in the HHGP Grant Agreement and standards for repair and rehabilitation activities as described in Oregon Administrative Rule 333-090-0140⁴. Please review those terms before awarding any subcontracts and include the required OHA grant agreement terms in any subcontract agreements.

Materials and Supplies

Project Materials

- Costs for supplies or materials that your organization will purchase for individual homes or to implement the Healthy Homes activities in households are allowable.
- Project materials include materials and supplies necessary for conducting the work or service. This may include testing kits, assessment supplies, standard tools (including small power tools), storage bins/racks, home repair materials (lumber, paint, nails, brushes) or other items specific to the type of service delivery that are not medium to large equipment or specialized machines. (List those under equipment.)

Office Supplies

- Office supplies are allowable and include general office items for administering the project (paper, pens, binders, folders, clips) or small

⁴ <https://secure.sos.state.or.us/oard/displayDivisionRules.action?selectedDivision=1292>

tech items like a data storage device (jump drive, disk).

Equipment

Equipment (Non-Capital)

- Equipment totaling less than \$5,000 per item is allowed. This includes mechanical or technical devices used for testing and mitigation, specialized mechanical tools, medium to large equipment needed for rehab or repair work and items to be installed in homes (air conditioners, grab bars, pumps, etc.).
- Any equipment purchases, including IT and software purchases and upgrades and software licensing fees, must directly benefit the work plan associated with the Grant Agreement.

Capital Equipment – Definition & Requirements

- Capital Equipment means a single piece of equipment with a purchase price of \$5,000 or more and an expected use of more than one year.
- Any Capital Equipment purchases, including IT and software purchases and upgrades and software licensing fees, must directly benefit the work plan associated with the organization's grant agreement and must be approved by HHGP in advance of purchase.
- If purchasing office equipment totaling \$5,000 or more for an individual item, this is also classified as Capital Equipment.
- Awarded funds can be used for capital equipment as allowed by HHGP rules and may vary. Please reach out to HHGP if you have additional questions about expenses that fall into this category.

Other Direct Costs – for Program Delivery

Professional Development and Training

- Funds may be used to provide professional development and training opportunities as they relate to the organization's project. Training can be

for either organization staff or subcontractors.

- **Please Note:** The Healthy Homes Grant Program intends to provide work-plan related training, professional development, and capacity-building opportunities for all funded grantees. Any costs associated with HHGP training, such as staff time, travel, etc., can be covered with HHGP funding.

Travel

- Travel expenses are allowed if they are within the Grantee's approved budget. All travel expenses should be reasonable as they relate to the needs of the approved work plan.
- Travel expenses shall be paid in accordance with the rates outlined in the Oregon Accounting Manual as of the date Grantee incurred the travel or other expenses.
- Includes local mileage as well as per diem, lodging, and transportation to conduct work included in the work plan.

Please Note: Chapter 40 of the Oregon Accounting Manual covers Travel. This manual is for reference purposes only and is not required for use by grantees. Link below:

<https://www.oregon.gov/das/Financial/Acctng/Pages/OAM.aspx>.

Other

Communications and Educational Outreach

- Awarded funds can be used to communicate to the public about this Healthy Homes program or project.

Translations and Interpretive Services

- Costs for material translation and interpretation services are allowed.

Postage, Printing and Miscellaneous

- Common costs that **ARE** allowable if they relate to this project:
 - Postage/Mailing
 - Educational/Resource Materials
 - Printing/Copying

- Accreditation and reaccreditation fees
- Common costs that **MAY** be allowable if they relate directly to this project **AND** are not included in your organization's indirect rate:
 - Phone/Internet
 - Facility/Rent (e.g., rental of program space)

Meals/Food/Refreshments for Events

- The purchase of meals/food/refreshments is allowable if it is directly related to key activities approved in the work plan for your Healthy Homes program or project. OHA recognizes that meals/food are an important culturally responsive way for communities to gather.

Unallowable Expenses

The types of expenditures listed and explained in this section are **not allowable**, or “unallowable”, and will not be covered through this grant unless an exception is approved by OHA in writing. Exceptions will be granted on a case-by-case basis.

Direct Client Services, or “Direct Services”

- Direct client services, also known as “direct services”, are individual payments toward direct care, housing, utilities, food, phone, internet, or similar; and are not allowable under HHGP.
- Gift cards may not be purchased using HHGP funding.
- Funds awarded **may not** be used for direct medical or behavioral health services, including but not limited to payment for durable medical equipment and supplies; vaccines and medications; staff, supplies, or equipment used to screen people at high risk or to confirm a diagnosis; or diagnosis, clinical education, or treatment provided by a licensed qualified health care professional that could otherwise be billed to Medicaid Oregon Health Plan (OHP) or other existing health insurance.

Motor Vehicles

- Funds awarded **may not** be used for the purchase of vehicles or Recreational Vehicles (RVs).

Real Estate

- Per Oregon Administrative Rule 333-090-0110:
 - (1) Grant program recipients may only use awarded funds to repair or rehabilitate existing residences.
 - (2) Grant program recipients may not use awarded funds to acquire real estate.

Politics and Research

- Funds awarded **may not** be used for research or political actions, including but not limited to lobbying.
- Other than for normal and recognized executive-legislative relationships, no funds may be used for:
 - Publicity or propaganda purposes, for the preparation, distribution, or use of any material designed to support or defeat the enactment of legislation before any legislative body.
 - The salary or expenses of any grant or contract grantee or agent acting for such grantee, related to any activity designed to influence the enactment of legislation, appropriations, regulation, administrative action, or Executive order proposed or pending before any legislative body.

Budget Amendments

- Grantees have flexibility to adjust costs between line items within an overall budget category (i.e., Personnel, Subcontracts, Materials and Supplies, Equipment, Other Direct Costs, Indirect Costs).
- Movement of costs between budget categories is allowable and this will be reflected on quarterly expenditure reports and reviewed by HHGP quarterly.
- If expenses exceed a budget category by 25% or there is a movement of costs between budget categories by 25% or more, grantees will need to obtain HHGP's written approval of the change and submit a revised budget. The submission and approval may be done via email.
- If expenditure or activity reporting shows a grantee may not be able to complete their work plan or spend most award funds by the end of the 3-year award period, HHGP will meet with the grantee to discuss this and possibly develop revisions to the work plan and budget.
- HHGP may request revised budgets or additional expenditure information on an as-needed basis.
- Any change to capital equipment purchases or the capital equipment budget must be pre-approved by HHGP in writing. Written approval can be obtained via email.

Expenditure Requirements

Unspent Funds

Grantees must spend all Healthy Homes Round 1 funding by September 30, 2027.

Any funds that are unspent by the grant award period end date will be forfeited. After reviewing grantees' final activity and expenditure reports and completing the final payment reconciliation in August 2027, HHGP will make final payments or communicate with grantees about any needed return of overpaid funds.

Reallocating Funds

HHGP grantees must use funding as outlined in their approved budget and work plans. Reallocation of funds of the approved budget will require written approval from HHGP. In such cases, grantees will need to submit a revised budget, which HHGP will review, approve, and file.

Supplanting Other Funds

Funds awarded may not be used to supplant other funds. Supplant means to deliberately reduce, displace, or replace other funding sources that may be currently in use to cover existing services such as other funds from state, local, other non-federal, or other federal funds.

Please contact HHGP if you need assistance.

Payments

- The first payment will be issued only after the grant

agreement is fully executed, meaning it has been signed by both HHGP and the Grantee.

- Once the agreement is signed, HHGP will make an initial payment to the Grantee. This payment will typically be one-third (1/3) of the Grantee's total grant award unless a different disbursement schedule is requested.
- In the subsequent years, HHGP will issue two annual payments, each equal to one-third of the total grant award.
 - Note: Subsequent payments are contingent on timely submission of complete and accurate financial and activity reports, as described in the grant agreement.
- Disbursements for this award will be made by Electronic Funds Transfer (EFT) once grantees are fully set up in the State system.
- Payments are made in advance of expenditure reporting. Grantees will report actual expenses on the quarterly expenditure reports. HHGP will reconcile payments made against actual expenses on an annual basis, after receiving the grantees' June 30th activity reports and all required expenditure reports.
 - OHA will monitor significant over- or under- spending and will meet with Tribe to discuss any identified concerns. This reconciliation process may result in a recovery of overpaid funds.
- Disbursements are also subject to the following:
 - Upon written request from Grantee to the OHA Agreement Administrator and subsequent OHA approval, OHA may adjust disbursements to meet Grantee program needs. If this results in a change of more than 10% to the disbursement amount, a change to the grant end date or to the disbursement schedule, an amendment will be required.
 - At its discretion, OHA may adjust disbursements to Grantee as a result of, and consistent with, Grantee's under expenditure or over expenditure of prior disbursements, or as a result of Grantee's revised budget

that was approved by OHA.

- OHA may withhold disbursements if any of Grantee's reports required to be submitted to OHA under this agreement are unapproved, are not submitted in a timely manner, or are incomplete or inaccurate. OHA may withhold disbursements under this Agreement until the reports have been submitted or corrected to OHA's satisfaction.

Expenditure Reporting

Grantees are required to submit expenditure reports to HHGP quarterly, following the schedule below. Expenditure reports will reflect the grantee's spending of HHGP grant funds, in alignment with the planned costs and activities from the approved budget and work plan. Expenses should be for allowable activities and will be listed in the same categories and line items as the budget. Detail will be required for payments to subcontractors and purchase of capital equipment. The purpose of these reports is to document grantees' use of funds. HHGP will review all reports and follow up with Grantees about any questions on the expenses reported. Reported financial data will be analyzed, summarized, and reported to OHA leadership and to Legislators.

Expenditure Reports will reflect both current quarter and cumulative expenses for the entire 3-year grant award period.

Grantee shall submit signed expenditure reports through the Healthy Homes Grant Program reporting dashboard or on an Expenditure Report Template that has been provided by HHGP. Detailed instructions will be shared with Grantees via email.

Grantees must submit completed expenditure reports following this quarterly reporting schedule:

Financial Reporting Schedule

Quarterly Expenditure Report Deadlines		
Period	Reporting Timeframe	Reporting Due by Date
Quarter 1	October 1, 2024 – December 31, 2024	Due by February 15, 2025
Quarter 2	January 1, 2025 – March 31, 2025	Due by May 15, 2025
Quarter 3	April 1, 2025 – June 30, 2025	Due by August 15, 2025
Quarter 4	July 1, 2025 – September 30, 2025	Due by November 15, 2025
Quarter 5	October 1, 2025 – December 31, 2025	Due by February 15, 2026
Quarter 6	January 1, 2026 – March 31, 2026	Due by May 15, 2026
Quarter 7	April 1, 2026 – June 30, 2026	Due by August 15, 2026
Quarter 8	July 1, 2026 – September 30, 2026	Due by November 15, 2026
Quarter 9	October 1, 2026 – December 31, 2026	Due by February 15, 2027
Quarter 10	January 1, 2027 – March 31, 2027	Due by May 15, 2027
Quarter 11	April 1, 2027 – June 30, 2027	Due by August 15, 2027
Quarter 12	July 1, 2027 – September 30, 2027	November 30, 2027

Expenditure report templates are subject to change. The most recent version should be used and will be posted on the HHGP webpage at <https://bit.ly/HHGPRFGA>.

Administrative Requirements – Insurance

Workers' Compensation

Workers' Compensation is required by the state of Oregon and cannot be waived, except in special cases.

- All employers, including Grantee, that employ subject workers, as defined in [Oregon Revised Statute \(ORS\) 656.027](#), shall comply with [ORS 656.017](#) and provide workers' compensation insurance coverage for those workers, unless they meet the requirement for an exemption under [ORS 656.126\(2\)](#).

Commercial General Liability

Commercial General Liability is required by the state of Oregon and cannot be waived.

- Commercial General Liability Insurance covers bodily injury and property damage in a form and with coverage that is satisfactory to the State. This insurance shall include personal and advertising injury liability, products and completed operations, contractual liability coverage for the indemnity provided under this Agreement, and have no limitation of coverage to designated premises, projects, or operations. Coverage shall be written on an occurrence basis on an amount of not less than \$1,000,000.00 per occurrence. The annual aggregate limit shall not be less than \$2,000,000.

Automobile Liability Insurance

If the recipient conducts travel that involves a vehicle to perform allowable program activities the Grantee must have obtained Automobile Liability Insurance meeting the following requirements which Grantee shall have maintained in full force and at its own expense:

- Automobile Liability Insurance from an insurance company or entities that are authorized to transact the business of insurance and issue coverage in the State of Oregon and that are acceptable to OHA.
- Automobile Liability Insurance coverage that is primary and non-contributory with any other insurance and self-insurance.
- The grantee must pay for all deductibles, self-insured retention, and self-insurance if any for the Automobile Liability Insurance.
- The Automobile Liability Insurance must cover Grantee's business use including coverage for all owned, non-owned, or hired vehicles with a combined single limit of not less than \$1,000,000 for bodily injury and property damage. This coverage may be written in combination with the Grantee's Commercial General Liability Insurance (with separate limits for Commercial General Liability and Automobile Liability). **Use of personal automobile liability insurance coverage may be acceptable if there is evidence that the policy includes a business use endorsement is provided.**

The auto insurance policy **can** be waived *if*:

- No one from the organization will be driving a vehicle as part of the work associated with this grant (the budget should reflect this); or
- Individuals from the organization will be driving personal vehicles that are covered by personal use auto insurance with a business use endorsement (copy needs to be provided).

Insurance Certificates will be kept on file at OHA by the HHGP team.

Additional Insurance Requirements

Depending on the nature of work planned and described in the application, additional types or amounts of insurance coverage may be required. HHGP will conduct individualized risk assessments with each HHGP grantee. Final insurance requirements will appear in the final grant agreements.

Additional insurance costs necessary by the grantee to meet the minimum insurance requirements determined by the HHGP Risk Assessment are an eligible use of HHGP funds.

Project Administrative Technical Assistance and Support

Post-award, HHGP grantees may request direct technical assistance support on an as-needed basis and should reach out to HHGP staff with any questions using the email: healthyhomes@odhsoha.oregon.gov.

Templates of Fiscal and HR policies and procedures will be available to grantees to assist them with meeting compliance requirements and best practices.

For More Information

Post award, grantees may contact the program by email at healthyhomes@odhsoha.oregon.gov with program and/or budget-related questions.

Document Accessibility

For individuals with disabilities or individuals who speak a language other than English, HHGP can provide information in alternate formats such as translations, large print, or braille.

Everyone has a right to know about and use OHA (Oregon Health Authority) or HHGP (Healthy Homes Grant Program) programs and services. OHA provides free help. Some examples of the free help OHA can provide are:

- Sign language and spoken language interpreters
- Written materials in other languages
- Braille
- Large print
- Audio and other formats

If you need assistance, please contact the Healthy Homes Grant Program at healthyhomes@odhsoha.oregon.gov

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