



Commonwealth of Massachusetts EXECUTIVE OFFICE OF HOUSING & LIVABLE COMMUNITIES

Maura T. Healey, Governor ◆ Kimberley Driscoll, Lieutenant Governor ◆ Edward M. Augustus Jr., Secretary

FY23 INVOICE AND PROGRESS REPORT INFORMATION

Community Planning
Housing Choice
Rural and Small Town Grant Programs

Contract and Invoice Dates:

Your contract starts the date it is executed by EOHLC. Funds spent before the execution date cannot be reimbursed.

Please remember, the start and end dates of your contract are found on Page 1 of your contract.

The end date of the grant is **June 30, 2024**.

- You must submit an invoice for all work done prior to **June 30, 2023** (end of FY23) by **July 17, 2023**.
- You must complete all services by **June 30, 2024**.
- You must submit final invoices for payment by **July 15, 2024**.

Invoice Fiscal Year Requirements:

Because these grants span more than one Fiscal Year, **submit separate invoices for the services provided in each separate fiscal year**. Do not combine more than one fiscal year in one invoice:

- FY23 lasts from start date contract to 6/30/23.
- FY24 lasts from 7/1/23 to end date of contract.
- The end date of service must be **prior to** the invoice date.
 - Invoice submitted on 5/15 cannot contain the dates of service 5/1 to 6/1.
 - Invoice submitted on 5/15 may contain the dates of service 5/1 to 5/14.
- Submit no more than one invoice per month.
 - For services completed between 11/1-15 and 11/18-27, submit **one** invoice for the month of November covering service dates between 11/1-27.
 - Invoices may be for dates of service of two or more months at a time such as between 5/1 to 6/30, except for services that span two fiscal year periods.

Invoice Dates of Service and Submission Frequency:

Invoices should be submitted covering dates of service no longer than 3 months:

- An invoice covering 1 month of service.
- An invoice covering 2 months of service.
- An invoice covering 3* months of service.
 - ***Invoices that are submitted with dates of service greater than 3 months pose challenges for fiscal account management and may significantly delay invoice payment to grantees.**

Invoices should be submitted at most once per month:

- One invoice submitted per month.
- One invoice submitted every other month.
- One invoice submitted every 3** months.
 - ****Invoices may be submitted more than every 3 months; however, dates of service should adhere to the guidelines above.**

Invoice Submission:

The Community Planning/Housing Choice/Rural and Small Town grant programs require that a standardized invoice form be completed for payments. Each grantee will be emailed a custom invoice template for each grant they receive. Please see instructions below on how to properly complete your invoice:

- **Invoice form must be completed and submitted using your Municipality/Organization's letterhead.**
- Invoice date should be the date of invoice submission.
- The 'Invoice Number' field will be completed for you except for the number of the invoice. Please input this number. For example, an invoice number should read as: CP 23 Boston 1. The number '1' is the number that you would input.

All invoices must be typed. Complete all sections in your invoice:

- Select invoice date from dropdown.
- Type short name of grantee on invoice number field and select the invoice number.
 - Do not include legal name such as Town of/City Of.
- Type a brief project name.
- Select one start and one end date from the dates of service dropdowns.
 - Input the **beginning** and **end dates** of service, e.g.: 1/1/2023 to 1/30/2023.
- Type a brief description of service.
 - If two or more different services were provided, please list them separately.
- Type **ONLY** the total amount invoiced in the "Total Amount Due this Invoice" field.
- Wet sign the invoice.
- Email invoice to Brett Morton at Brett.Morton2@mass.gov and Filipe Zamborlini at Filipe.zamborlini@mass.gov.

Do not reference/attach another information/document to the invoice. **Invoice should be submitted as its own page.** Supporting documents may be submitted separately. **Supporting documents cannot be attached to the invoice.**

Quarterly Progress Reports:

The Community Planning/Housing Choice/Rural and Small Town grant programs **require that a quarterly progress report be submitted on or before the 15th day of the month following the last the quarter.** Due dates are as follows:

FY23		
Q3	Period: 1/1/2023 to 3/31/2023	Due: 4/17/2023*
Q4	Period: 4/1/2023 to 6/30/2023	Due: 7/17/2023*
FY24		
Q1	Period: 7/1/2023 to 9/30/2023	Due: 10/16/2023*
Q2	Period: 10/1/2023 to 12/31/2023	Due: 1/15/2024
Q3	Period: 1/1/2024 to 3/31/2024	Due: 4/15/2024
Q4	Period: 4/1/2024 to 6/30/2024	Due: 7/15/2024

***Deadlines that fall on a weekend or holiday will be extended to the following business day.**

Progress reports are a required, contractual obligation of these grants Reports are an important tool to keep program staff aware of any challenges or updates relevant to your project and evaluate requests made by grantees. Progress reports **must** be submitted to Filipe Zamborlini (program representative) at filipe.zamborlini@mass.gov.

Contacts and Questions:

If you have any questions about the invoicing process, please contact Brett Morton at brett.morton2@mass.gov or at (617) 922-7004. If you have questions about the project or progress reports, please contact Filipe Zamborlini at filipe.zamborlini@mass.gov or at (617) 573-1445.