CHAPTER 9: REPORTING
DEHCR – BUREAU OF COMMUNITY DEVELOPMENT

Required Reports

- Single Audit
- Semi-Annual Reports
- Reporting/Monitoring
- EQ/EO
- Section 3
- Fair Housing
REPORTING PROCESS

Construction (Your Project) → Construction Manager → UGLG → DEHCR → HUD → Congress

Grant Agreement Timetable

**UGLG:** CITY OF LAWRENCE

**PROJECT:** WATER SYSTEM AND STORM SEWER IMPROVEMENTS

**AWARD:** $500,000

**MATCH:** $500,000

**PERFORMANCE PERIOD:** JULY 31, 2018 – DEC. 31, 2020
### April 15, 2019
- Submit Semi-Annual Section 3 Report, unless notified by DEHCR CDBG Project Representative of another submission date. Include accomplishments and activities for the period of April 1, 2018 through March 31, 2019 (grant award date) through March 31, 2019.

### July 1, 2018
- Begin Construction Document and report progress and/or delays to DOA.

### September 25, 2018
- Submit Semi-Annual Labor Standards Report and 402 Report for the period of April 1, 2018 through June 30, 2018 unless notified by DEHCR CDBG Project Representative of another submission date.

### September 30, 2018
- Submit Single Audit Report and Management Letter for CY2017, if the Grantee was required to complete a Single Audit for CY2017.
- Complete Fair Housing Actions described in Attachment F of the Grant Agreement.

### October 15, 2018
- Report Fair Housing Actions completed (on the Fair Housing section of the Semi-Annual Summaries Narrative) and supporting documentation to DEHCR.
- Submit Annual Section 3 Report for the period of October 1, 2017 through September 30, 2018 unless notified by DEHCR CDBG Project Representative of another submission date.

### January 15, 2019
- Submit Single Audit Statement for CY2018, if applicable.

### March 25, 2019
- Submit Semi-Annual Labor Standards Report and 402/51 Report for the period of October 1, 2018 through March 31, 2019 unless notified by DEHCR CDBG Project Representative of another submission date.

### March 31, 2019
- Conduct second Public Hearing to report project progress to, and receive input from, local community regarding the CDBG project.

- Report status of second Public Hearing completion (in the 2nd Citizen Participation Public Hearing section of the Semi-Annual Summary Narrative) and submit second Public Hearing meeting notice, attendance list, and minutes to DEHCR CDBG Project Representative.
- Submit Semi-Annual Section 3 Report, unless notified by DEHCR CDBG Project Representative of another submission date. Include accomplishments and activities for the period of October 1, 2018 through March 31, 2019.

- Submit Single Audit Report and Management Letter for CY2018, if the Grantee was required to complete a Single Audit for CY2018.

### December 31, 2019
- Submit Final Payment Request and supporting documents.
- Submit Project Completion Report and supporting documents.

### January 15, 2020

### September 30, 2020
- Submit Single Audit Report and Management Letter for CY2019, if the Grantee was required to complete a Single Audit for CY2019.

---

### GRANT AGREEMENT LANGUAGE

**KEY Points:**

**SIGNATURE PAGE (Page 1)**

- Performance Period reporting requirements will be automatically extended if report submissions are incomplete

**ARTICLE 3 – LEGAL RELATIONS AND INDEMNIFICATION**

- The UGLG is responsible for complying with and observing all applicable federal and state laws, ordinances, and regulations which are in effect during the Performance Period of the Grant Agreement.
KEY Points:

**ARTICLE 11 – FAILURE TO PERFORM**
- Payment ("Draw") Requests **will not be processed** until all report submissions are up-to-date
  - Payment ("Draw") Requests **will not be processed** until all report submissions are up-to-date for this Public Facilities (or Planning) project
  - Payment ("Draw") Requests **will not be processed** until all report submissions are up-to-date for any other concurrent (or previous & not-yet-completed) Energy, Housing and Community Resources Grant project(s)
- Unresolved Single Audit Exceptions (i.e. “findings”) and Monitoring Findings **may impact DOA determinations**, and could result in a payment being withheld or termination of the Grant Agreement

**ARTICLE 30 – RECORDS AND REPORTS**
- Reporting Due Dates are listed in the **TIMETABLE** (Grant Agreement – Attachments A, E and F)
- Financial Reports must be **submitted with each request** for CDBG funds
- **Copies** of the Financial Reports will be retained in the UGLG’s Grant File(s)
GRANT AGREEMENT LANGUAGE

KEY Points:

ATTACHMENT A – SCOPE OF WORK
- The Timetable lists the reporting due dates in relation to all other project activities and deadlines
- States specific time frames for reports

ATTACHMENT E – REPORTING REQUIREMENTS
- Reiterates due dates and links back to Timetable
- Contains the full list of reports by title

ATTACHMENT F – PROGRAM RULES & SPECIAL CONDITIONS
- Fair Housing Actions
  - Specific due date is set for when completion is required
  - Document progress via Semi-Annual Narrative Reports
  - Submit supporting documentation with Semi-Annual Narrative Reports
- Record Keeping
**GRANT AGREEMENT LANGUAGE**

**KEY Points:**

**ATTACHMENT F – PROGRAM RULES & SPECIAL CONDITIONS**

- Amendment requests received by DEHCR less than 30-days prior to the Grant Agreement’s performance period end date will **not** be considered.
- Amendment requests **must**:
  - Be written on the UGLG’s letterhead
  - Include a detailed list of changes
  - Include a brief explanation of why the amendment is needed
  - Be supported by previous Semi-annual Narrative Reports (if applicable)
  - Be signed by the CEO

---

**IMPORTANT DOCUMENTS FOR REPORTING**

- Grant Agreement
  - Attachment A (Timetable)
  - Attachment E (Reporting Schedule)
  - Attachment F (Program Rules)
- Implementation Handbook
  - Templates (check DEHCR website)
- Payment Requests
  - Ledgers/Journals are Financial Reports
REPORTING PERIODS AND DUE DATES

- Initial reports must cover the time period from the award date to the end of the current required reporting period!
- For the period of **April 1st through September 30th** – the report is due **no later than October 15th**!
- For the period of **October 1st through March 31st** – the report is due **no later than April 15th**!

**IMPORTANT REMINDER!**
The semi-annual reporting requirement begins when the Grant Agreement is fully executed (i.e. signed by DOA), and it continues until the UGLG has submitted the Project Completion Report and all supporting documents for the project.

---

**GRANT AGREEMENT TIMETABLE**

- **Audit Reporting**
  - January 15\* and September 30
- **Labor Standards Report**
  - March 25 and September 25

*The January 15th due date applies to both the Annual Single Audit Statement and the Annual Section 3*
• Audit Reporting
  January 15 and September 30

• Labor Standards Report
  March 25 and September 25

• Semi-Annual Report Packet
  April 15 and October 15*

• Fair Housing Actions
  Within 15 months of Award Letter

• 2nd Citizen Participation
  Public Hearing

* The October 15 Semi-Annual Reports will include the Annual Section 3 Report

---

April 15, 2018
- Complete Fair Housing Action Public Hearing Reports for the period as the report is due.

July 1, 2018
- Submit Semi-Annual Economic Development Standards and Performance and Evaluation Report for the period of April 1, 2018 through September 30, 2018 unless notified by DEOCR CDBG Project Representative of another submission date.

September 30, 2018
- Submit Final Payment Request and supporting documents.

October 15, 2018
- Submit Semi-Annual Economic Development Standards Report and MBE/WBE Report for the period of April 1, 2018 through September 30, 2018 unless notified by DEOCR CDBG Project Representative of another submission date.

December 15, 2018
- Complete Final Payment Request and supporting documents.

February 15, 2019
- Submit Final Payment Request and supporting documents.

March 31, 2019
- Submit Semi-Annual Economic Development Standards Report and MBE/WBE Report for the period of October 1, 2018 through March 31, 2019 unless notified by DEOCR CDBG Project Representative of another submission date.

---

End of Construction period
Approximately 2 Years from Award Letter

Final payment and project completion report submission
Within 2 Months of the End of the Construction Period
REMINDER: FINAL CDBG PAYMENT REQUEST

- Final CDBG payment requests **received after the due date** listed in the *Grant Agreement* **will not be processed**.

COMMON REPORTING ISSUES

- Details
- Timeliness
- Unsigned Reports
- Unreported Issues
- Supporting Documents
- Required Content (Grant Agreement)
REQUIRED REPORTS/ACTIONS/LANGUAGE

- Semi-Annual Report Certification
- Summary Narrative Performance Report
- Labor Standards Enforcement Report
- MBE/WBE Report
- Section 3 Report
- Fair Housing Actions
- Equal Opportunity Language
- Employee Self-Certification Report

ATTACHMENT 9-F: REPORTING REQUIREMENTS CHECKLIST

<table>
<thead>
<tr>
<th>SEMI-ANNUAL REPORTS</th>
<th>PLEASE NOTE: These forms are:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form:</td>
<td>• Due semi-annually as indicated in your executed CDBG Grant Agreement.</td>
</tr>
<tr>
<td>9-A</td>
<td>• To be completed and submitted by the local Grant Administrator.</td>
</tr>
<tr>
<td>9-B</td>
<td>Semi-Annual Report Certification</td>
</tr>
<tr>
<td>9-C</td>
<td>Semi-Annual Summary Narrative</td>
</tr>
<tr>
<td>9-D</td>
<td>Semi-Annual Labor Standards Enforcement Report</td>
</tr>
<tr>
<td>9-E</td>
<td>Section 3 Report</td>
</tr>
<tr>
<td>9-H</td>
<td>CDBG Project Employee Self-Certification Report</td>
</tr>
</tbody>
</table>

**NOTE:** Several Reports will require the signature of the UGLG (either the Chief Elected Official or the Clerk).

<table>
<thead>
<tr>
<th>SINGLE AUDIT</th>
<th>Completed by:</th>
<th>Submit to:</th>
<th>Due:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11-B/11-C</td>
<td>Annual Audit Letter</td>
<td>Grant Administrator</td>
<td>DEHR Project Rep</td>
</tr>
<tr>
<td>Single Audit Report</td>
<td>External auditor</td>
<td>1) DOA Audit Bureau</td>
<td>2) DEHR Project Rep</td>
</tr>
</tbody>
</table>

All reports are due to the assigned DEHR Project Representative unless otherwise indicated. Electronic submission of reports is preferred. Any additional required documents listed in the 6520 CDBG implementation handbook (but which are not listed above) may be requested by the DEHR Project Representative at any time.
SEMI-ANNUAL REPORTS

- Semi-Annual Report Certification
- Summary Narrative Performance Report
- Labor Standards Enforcement Report*
- MBE / WBE Report*
- Section 3 Report**
- Employee Self-Certification Report

*These reports are always submitted March 25th & Sept. 25th (prior to the Semi-Annual Reports on April 15th & Oct. 15th)

** Both Semi-Annual and Annual reports apply
**Example: Village of Bishop’s Falls (1st reporting period)**

<table>
<thead>
<tr>
<th>Objective</th>
<th>Accomplishments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Establish a community center</td>
<td>- 1st reporting period: Completed. Community center now operational</td>
</tr>
<tr>
<td>2. Implement a comprehensive recycling program</td>
<td>- 1st reporting period: Complete. Recycling program now in place</td>
</tr>
<tr>
<td>3. Enhance public safety and security</td>
<td>- 1st reporting period: Complete. Additional security measures implemented</td>
</tr>
</tbody>
</table>

Detailed narrative for each accomplishment:

- 1st reporting period: Community center now fully operational with ongoing programming.
- 1st reporting period: Recycling program successfully launched, with participation rates meeting targets.
- 1st reporting period: New security measures improved public safety, with no incidents reported.
### Example: Village of Bishop’s Falls (1st reporting period)

<table>
<thead>
<tr>
<th>NEW Environmental Report Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW Fair Housing Actions</td>
</tr>
<tr>
<td>NEW 2nd Citizen Participation Public Hearing</td>
</tr>
</tbody>
</table>

### Fair Housing Actions

- **At least THREE (3) actions**
- **Refer to “Potential Fair Housing Actions” list in CDBG Application**
- **Publicly share (publish, post, etc.)**
- **Include details and documentation with Semi-Annual Report Summary Narrative**
# SEMI-ANNUAL JOBS REPORTING:

## Employee Self-Certification Report

### SEMI-ANNUAL JOBS REPORTING:

#### Employee Self-Certification Report (continued)

<table>
<thead>
<tr>
<th>Class</th>
<th>Total Created</th>
<th>Total Created</th>
</tr>
</thead>
<tbody>
<tr>
<td>Official Managers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Staff</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Professionals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Technical</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL CREATED</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please provide the family income breakdown of employees that corresponds with Question 1 of Employee Self-Certification Form.

<table>
<thead>
<tr>
<th>Income Level</th>
<th>B (Low)</th>
<th>C (Moderate)</th>
<th>D (High/LIM. LMTS)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**REPORT CERTIFICATION**

I certify that to the best of my knowledge and belief the contents in this report are true and correct. Completed Individual Employee Self-Certification forms are attached as supporting documentation.

Signature of Chief Executive Officer

Date: __________

**REQUIREMENT**: Submit supporting documentation (completed Employee Self-Certifications) with each Semi Annual Report submission. If submitting the 2018 BCDG Project Employee Self-Certification report, also include the payroll report from the business to confirm current employment status of each employee.

By [Signature]

Date: __________
Semi-Annual Labor Standards Enforcement Report (LSER)

<table>
<thead>
<tr>
<th>Prime Contractor(s)</th>
<th># of Prime Contracts Awarded During This Period</th>
<th># of Prime Contracts Awarded During This Period</th>
<th># of subcontractors</th>
<th>Contract Amount Awarded</th>
<th>Total Prime Contracts Awarded</th>
<th>Total Project-Built</th>
<th>Total Project-Created</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- **A** Prime Contractor(s)
- **B** No. of Prime Contracts Awarded During This Period
- **C** Project-Built Contract Amount
- **D** Contract Amount Awarded
- **E** Wage Decision Number & Publication Date
- **F** Wage Decision Locations

**Note:** This report is due to the Division or on or before [date].
Semi-Annual Labor Standards Enforcement Report (LSER)

7) Enter the employers (contractors, subcontractors, lower-tier subcontractors) against whom complaints, investigations or §5.11 hearings were received during the reporting period.

<table>
<thead>
<tr>
<th>Employer</th>
<th>Project</th>
<th>HUD or DOL</th>
<th>Investigations or Hearings</th>
</tr>
</thead>
</table>

8) Enter the information relative to wages institution that was collected and/or disbursed during this six (6) month period. This includes: institution disbursed by the grantee, institution reported on certified payroll correction report, and amounts collected but not disbursed because workers could not be found.

- a) Enter the total number of workers for whom wage institution was collected and/or disbursed during the six (6) month period:
- b) Enter the total amount of wage institution collected and/or disbursed during the six (6) month period:
- c) Enter the total amount of liquidated damages collected during the six (6) month period for Contract Work Hours and Safety Standards Act overtime violations:

* Use additional pages if necessary.

MBE/WBE

- Minority Business Enterprise (MBE)/Woman Business Enterprise (WBE)
- Placing qualified small and minority businesses and women's business enterprises on solicitation lists (see Chapter 7, Attachment 7-R)
- Assuring that small and minority businesses, and women's business enterprises are solicited whenever they are potential sources
- Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses, and women's business enterprises
MBE/WBE

- Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses, and women's business enterprises;
- Using the services and assistance of the Small Business Administration, and the Minority Business Development Agency of the Department of Administration; and
- Requiring the prime contractor, if subcontractors are to be let, to take the affirmative steps listed above.
## Contractor/Sub-Contractor Name & Address

<table>
<thead>
<tr>
<th>Name</th>
<th>Street Address</th>
<th>City</th>
<th>State/ZIP</th>
</tr>
</thead>
</table>

**PLEASE NOTE:** If you need to list more than 6 (six) contractors or sub-contractors on the space provided in this report, copy and attach additional pages to your MBE/WBE Report submission.

### Type of Trade Codes:

1. **N**eural Construction
2. **S**ubstantial Refurb
3. **R**epair
4. **E**dification / Training
5. **S**ervice
6. **P**rofessional

### Race / Ethnic Codes:

1. **W**hite American
2. **B**lack American
3. **N**ative American
4. **H**ispanic American
5. Asian / Pacific American
6. **H**ispanic Jew

---

**Division of Energy, Housing and Community Resources**

**MBE/WBE Report**

- **FEDERAL GRANT #:** B ----- DC ----- 55 ----- 0001
- **STATE GRANT #:** R ----- 55 ----- 0001
- **CITY GRANT #:** M ----- So ----- 55 ----- 0001

**GRANTEE/AGENCY NAME:** City of Lafayette

**DIHOR GRANT AGREEMENT #:** 17-99

**PREPARE CERTIFICATION:**

- **Preparer:** April Kelly
- **Preparer’s Signature:** April Kelly
- **Preparer’s Job Title & Company/Agency:** Sr. Engineer/Grant Administrator
- **Preparer’s Telephone Number:** (784) 837 --- 3273 ext 7
- **Preparer’s Email Address:** AKelly@KellyEngineering.com

**MAYOR:** Buddy Boyce
**MAYOR’S OFFICE:**

**Date Signed:** 10/09/2018

**Date Signed:** 01/01/2018  

---

**2018 BCD CDBG Training Slides**

**9/18 - 9/19/2018 (Eau Claire)**

**9/26 - 9/27/2018 (Madison)**
SEMI-ANNUAL REPORTS

- Semi-Annual Report Certification
- Summary Narrative Performance Report
- Labor Standards Enforcement Report*
- MBE / WBE Report*
- Section 3 Report**
- Employee Self-Certification Report

*These reports are always submitted March 25th & Sept. 25th (prior to the Semi-Annual Reports on April 15th & Oct. 15th)
** Both Semi-Annual and Annual reports apply
SECTION 3

- Economic Opportunities For Low-Income People (24 CFR 135) – “Understanding Section 3”

- HUD Requirements for Local Government and Non-profit Subrecipients


SECTION 3 OBJECTIVES

To ensure that economic opportunities resulting from HUD financial assistance are directed to low- and moderate-income (LMI) persons

“Opportunity” involves reasonable access and fair notification.
SECTION 3 DEFINITIONS
(CHAPTER 6)

Section 3 Residents:
- Low-income individuals (in 80% or lower category of HUD Income Limits)

Section 3 Business:
- 51% owned by LMI, or
- 30% of employees are Section 3 (or within 3 years of the date of first employment were Section 3 residents), or
- 25% of contract dollar value goes to subcontracting with the Section 3 eligible businesses

SECTION 3 COMPLIANCE

UGLG/GRANTEE
- ALL

Contractors/Subcontractors
- DEHCR requires ALL that are working on components of the CDBG project must report

- Public Construction
- Housing Construction
- Housing Rehabilitation
- Reconstruction/Demolition
- Operations
- Infrastructure Development Projects
**SECTION 3 GOALS**

### Activities

- **Job Training**
  - 30% of building trades, and 3% of all other non-construction contracts

- **Earnings**
  - 30% NEW HIRES Section 3 residents

- **Contracting**
  - 10% of building trades, and 3% of all other non-construction contracts

**SECTION 3 RESPONSIBILITIES**

- Include “Section 3 Clause” in all covered solicitations and contracts (24 CFR 135.38)
- Notify contractors of Section 3 responsibilities
- UGLGs and their contractors must provide economic opportunities to low-income persons and qualified Section 3 businesses – to the greatest extent feasible (§135.30)
- Preference to qualified Section 3 Business Concerns without regard to affiliation or membership in any collective bargaining union
Section 3 non-compliance may result in debarment, suspension, or denial of participation.

Refer to the Bureau of Community Development website for the most recently updated version of the report form and instructions each reporting period.
### Part I: Employment and Training

<table>
<thead>
<tr>
<th>Job Category</th>
<th>Number of New Hires</th>
<th>Number of New Hires that are Section 3 Residents</th>
<th>Number of Section 3 Trainees</th>
</tr>
</thead>
<tbody>
<tr>
<td>Professionals</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Clerical</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Case Management</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Facilities / Maintenance</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Technical (Bookkeeping, IT, etc.)</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Carpentry</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Masonry</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Plumbing</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Electrical</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Administration</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Define Other: Laborer</td>
<td>1</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Define Other:</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Define Other:</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

### Part II: Contracts Awarded

#### Construction Contracts
1. Total dollar amount of all contracts awarded on the project: $201,395.00
2. Total dollar amount of contracts awarded to Section 3 businesses: $0.00
3. Percentage of the total dollar amount that was awarded to Section 3 businesses: 0 %
4. Total number of Section 3 businesses receiving contracts: 0

#### Non-Construction Contracts
1. Total dollar amount of non-construction contracts awarded on the project: $11,000.00
2. Total dollar amount of non-construction contracts awarded to Section 3 businesses: $0.00
3. Percentage of the total dollar amount that was awarded to Section 3 businesses: 0 %
4. Total number of Section 3 businesses receiving non-construction contracts: 0
Included Section 3 language in bid documents and contracts. Contractors conducted outreach to DBE businesses to promote Section 3 contracting.

SECTION 3 COMPLIANCE: BEST EFFORTS

- Jobs must be advertised through local/county job center
- Jobs must be advertised in local Public Housing locations (Housing Authority)
- Any efforts to outreach to LMI residents are important

Failure to meet Section 3 goals requires explanation from the UGLG.
SECTION 3 BEST PRACTICES

Contracting
• Include Section 3 goals and requirements in all contracts/subcontracts
• Require prime contractors to identify a plan for outreach efforts to MBE/WBE/DBE

Contractor Communications and Outreach
• Cover Section 3 in Pre-Construction Meeting
• Send reminders to contractors regarding LMI hiring requirements
• Provide guidance to contractors for posting positions

Data Collection and Reporting
• Provide contractors Employee Self-Certification Forms
• Collect New Hire and contracting Section 3 data (and Self-Certification Forms) with weekly payrolls
• Collect Section 3 Reports while contractor is still on the job

QUESTIONS?

Email: DOACDBG@Wisconsin.gov
END OF DAY 1

- General Housekeeping Items & Reminders:
  - Daily Sign-In Sheet
  - Training Materials/Handouts & Personal Belongings

- Preparation for Day 2:
  - Daily Sign-In Sheet
  - Agenda
  - Evaluations
  - Consultant Update