Bring It Home Rental Assistance
Monitoring Technical Assistance Session

February 10, 2026

MINNESOTA HOUSING

mnhousing.gov

Staff

Local Government Housing Programs

Bring It Home Rental Assistance Program

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Shannon Fortune – Grants Monitoring Specialist

Terese Fritchman – Financial Reimbursement Analyst

Dani Salus – Manager, Rental Assistance

Agenda

|	
1:00 – 1:10 p.m.	Welcome & Overview
1:10 – 1:20 p.m.	Guiding Documents & Definitions
1:20 – 1:30 p.m.	Data Reporting Vs. Progress Narrative
1:30 – 1:50 pm	Forms & Timelines
1:50 – 2:05 p.m.	Monitoring Lifecycle & Ongoing Requirements
2:05 – 2:25 p.m.	Questions & Discussion
2:25 – 2:30 p.m.	Closing

Our Vision & Mission

All Minnesotans live and thrive in a stable, safe and accessible home they can afford in a community of their choice.

Housing is foundational to a full life and a thriving state, so we equitably collaborate with individuals, communities and partners to create, preserve and finance housing that is affordable.

Guiding Documents

Monitoring work is guided by:

- Minnesota Department of Administration - Office of Grants Management Policy 08-10: Monitoring

- Minnesota Housing Grant Contract Agreement Bring It Home Rental Assistance Program - Section 2.5: Monitoring, Financial Reconciliation, and Final Reporting

- Bring It Home Rental Assistance Program Guide - Chapter 7.02: Monitoring
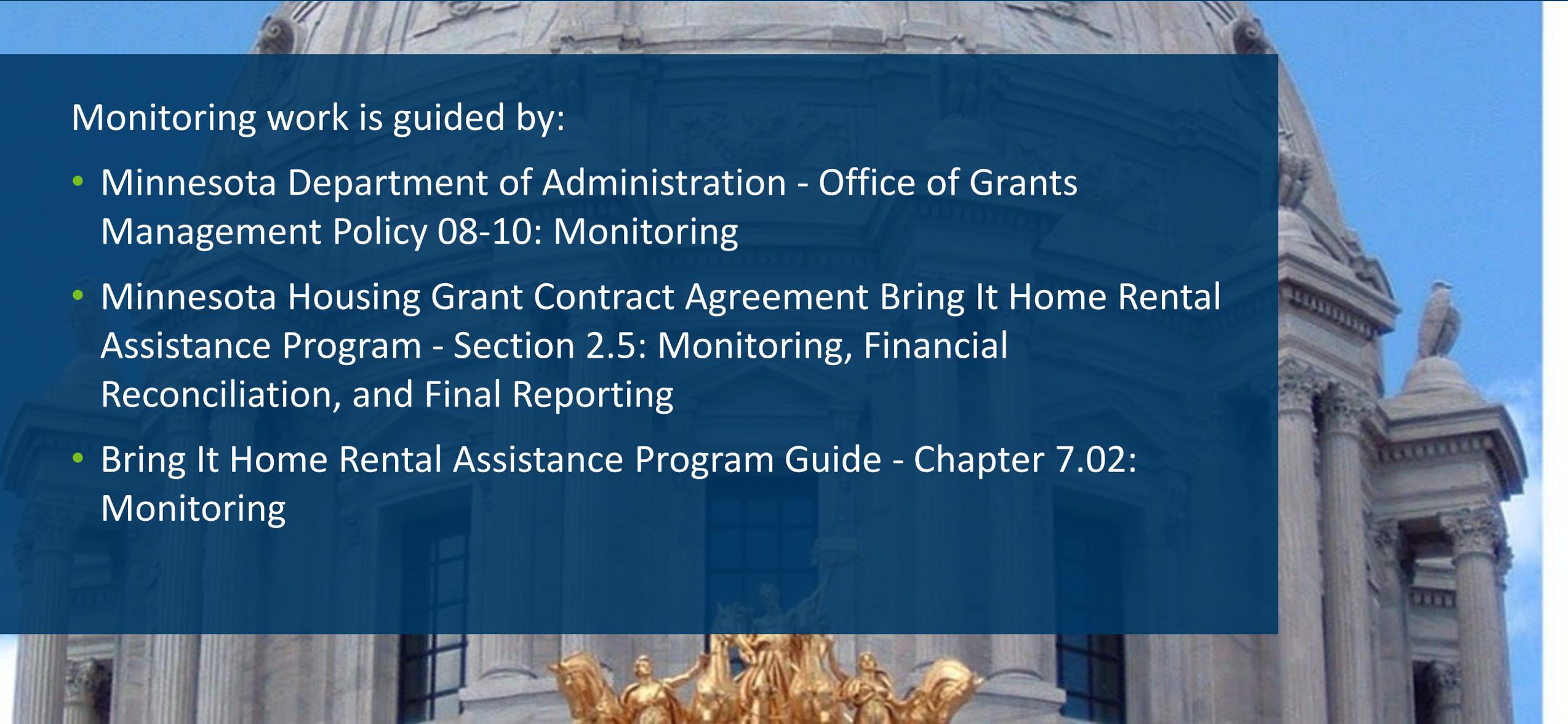
Definitions

Data Reporting

- Ability to report outcomes to Legislature, Governor's Office and key stakeholders

- Focus on simple entry and export of required data elements

- Quarterly report submission

- Data export supported by most software providers

- Manual reporting template available if needed

Monitoring

- Verifies compliance and alignment with program guidelines

- Includes review of participant files to verify completeness and accuracy

- Initial visit within the first quarter after funds are disbursed

- Regular quarterly monitoring conducted by program staff

- Program Administrators submit quarterly narrative progress reports

Financial Reconciliation

- Compares payment requests for a given period with supporting documentation to ensure accuracy and proper use of funds

- After first HAP reimbursement is processed, may do an initial reconciliation

- Additional reconciliations conducted throughout the grant term, including prior to final payment

Data Reporting Versus Progress Narrative
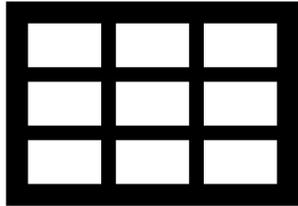
Data Reporting Template

- *Program usage and participant data elements*
- *Quarterly*
- *Excel template*
- *Uploaded to Box.com*
- *This is the "what"*
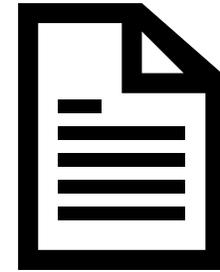
BIH Progress Narrative

- *Activities, usage & engagement*
- *Quarterly*
- *Word document*
- *Uploaded to Box.com*
- *This is the "how"*

Required Program Form: Program Progress Narrative

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Bring It Home Rental Assistance Program Progress Narrative

Instructions:

- Complete the Progress Narrative covering each quarter and submit according to the schedule below.
- When answering questions, refer to your approved budget, reimbursement requests, and expenditure reports, as well as your Grant Contract Agreement and Work Plan.
- When saving and naming this document, make sure to include your agency name and the reporting period. For example, "Quarterly Progress Narrative - Sample County HRA – Q1 2026".
- The completed narrative should be uploaded to the "Monitoring" subfolder in the Box.com folder set up for your agency for the Bring It Home program.
- Refer to the "Monitoring Process Instructions for Grantees" for additional information on file review and administrative compliance requirements that are included in ongoing monitoring.
- Once the Quarterly Program Progress Narrative is uploaded, email your assigned monitoring staff at: Shannon.Fortune@state.mn.org

Timeline:

- January 1 to March 31: due May 1
- April 1 to June 30: due August 1
- July 1 to September 30: due November 1
- October 1 to December 31: due February 1

The initial progress narrative may be submitted up to the last day in the month it was due. For example, an initial progress narrative for a grantee with a contract execution date in the fourth quarter would be due by February 28th.

All other progress narratives are due by 5:00PM on the date listed.

NOTE: Forms may be subject to change.

Quarterly Program Progress Narrative: *(Please limit response length to 250 words per question.)*

1. What is your agency name, your name, and your title?
   Click or tap here to enter text.

2. Indicate the timeframe this narrative covers.
   Choose an item.

3. What Start-Up Fund activities have been completed during this reporting period?
   Click or tap here to enter text.

4. Is your Start-Up Fund utilization higher, lower, or generally in line with expectations? Briefly describe the factors contributing to this and reference specific budget line items where applicable.
   Click or tap here to enter text.

5. Describe any outreach or property owner engagement activities completed during this reporting period.
   Click or tap here to enter text.

6. How many vouchers have been issued during this reporting period?
   Click or tap here to enter text.

7. What percentage of your total projected vouchers does this number represent?
   Click or tap here to enter text.

8. How many vouchers are placed as of the end of this reporting period?
   Click or tap here to enter text.

9. Briefly describe any factors that have contributed to voucher issuance or placement.
   Click or tap here to enter text.

10. Is your Housing Assistance Payment (HAP) utilization rate higher, lower, or generally in line with your expectations? Briefly describe the factors contributing to this (e.g. waitlist response rate, applicant eligibility, average shopping time, availability of units in your service area, etc.)
    Click or tap here to enter text.

Required Program Form: Program Progress Narrative

- Limit answers to not more than 250 words

- If there was no Start-Up Fund activity or property owner outreach and engagement activity in the quarter, write "N/A" or "none"

- There is no need for speculation on next quarter's activity

1. What is your agency name, your name, and your title?
   Click or tap here to enter text.

2. Indicate the timeframe this narrative covers.
   Choose an item.

3. What Start-Up Fund activities have been completed during this reporting period?
   Click or tap here to enter text.

4. Is your Start-Up Fund utilization higher, lower, or generally in line with expectations? Briefly describe the factors contributing to this and reference specific budget line items where applicable.
   Click or tap here to enter text.

5. Describe any outreach or property owner engagement activities completed during this reporting period.

Required Program Form: Program Progress Narrative

- Questions 6, 7, and 8 should be answered with numbers

- Limit answers to questions 9 and 10 to not more than 250 words

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Click or tap here to enter text.

7. What percentage of your total projected vouchers does this number represent?
Click or tap here to enter text.

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All other progress narratives are due by 5:00PM on the date listed.

- Initial due date for grantees with contracts signed in November and December 2025: 2/28/2026

- Initial due date for grantees with contracts signed in January, February, or March 2026: 5/31/2026

- Ongoing progress narratives due on the 1st

Ongoing Monitoring: Participant File Review

- The number of participant files monitored will be determined by program size and will include a sample of files from all grantee program staff involved and across all types of program activity.

- Program monitoring staff will communicate with grantees via email to identify which files to submit.

- Refer to the File Monitoring Checklist to ensure all required items are included for review

- Be careful to share only what documentation is necessary!

Participant File Review

- Complete 4-page list of file documentation requirements is available on the Bring It Home website

- Condensed checklist may be used as a cover sheet to ensure required items are included for review

- This document will be available in the Monitoring folder in Box.com

NOTE: Forms may be subject to change.

Eligibility & Initial Certification Documents

- Bring It Home Application
- Minnesota Government Data Practices Act Disclosure Statement and Acknowledgement
- Waitlist selection letter
- Verification of waiting list preference points
- Cost-burdened or unhoused status documentation
- Identify Verification
- Rent calculation form or 50058
- Income, asset, medical expense, and childcare expense verifications
- Rent reasonableness determination
- Unit inspection results
- Reasonable Accommodation documentation, if applicable

Voucher & Lease Documents

- Housing Assistance Payment (HAP) or Project Based Voucher (PBV) contract
- Request for Tenancy Approval form
- Lease and tenancy addendum
- Lead-based paint disclosure, if applicable
- Verification of unit ownership

Interim Recertification, If Any

- Interim request or other trigger of action
- Rent calculation form or 50058
- Income, asset, medical expense, and childcare expense verifications
- Reasonable Accommodation documentation, if applicable
- Rent change notification

Annual Recertification

- Bring It Home Application
- Minnesota Government Data Practices Act Disclosure Statement and Acknowledgement
- Rent calculation form or 50058
- Income, asset, medical expense, and childcare expense verifications
- Reasonable Accommodation documentation, if applicable
- Rent change notification
- Unit inspection status, based on inspection schedule

Program Exit

- Participant notice of program termination
- Property owner notice of rental assistance termination
- Repayment agreement, if applicable

- As part of the ongoing quarterly review process, grantees will be asked to provide evidence of compliance with various contract elements and other administrative or policy items.

- Program monitoring staff will communicate with grantees via email to identify which items must be submitted and acceptable verification methods.   (Up to 5 items sampled per quarter.)
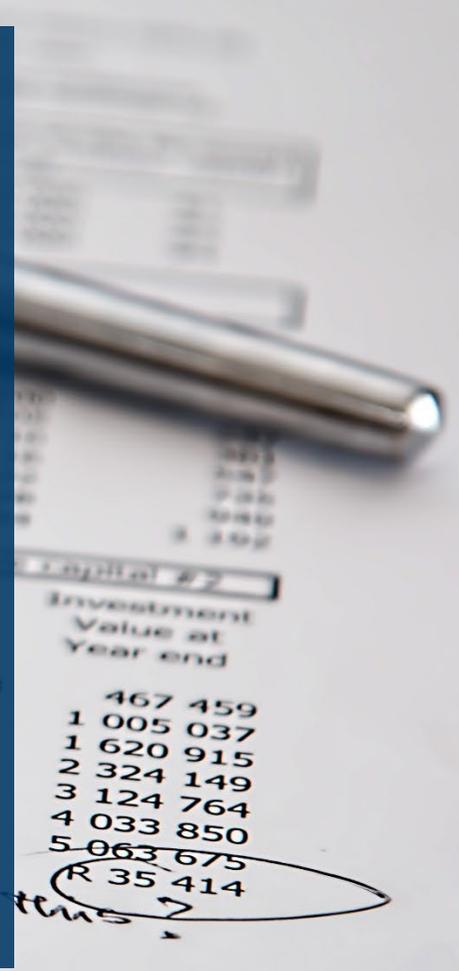
Administrative Compliance Checklist

- Up to 5 administrative compliance items will be sampled each quarter

- Some items require annual monitoring

- If areas of concern are identified, additional selections or supporting documentation may be necessary

- This document will be available in the Monitoring folder in Box.com

NOTE: Forms may be subject to change.

Table 1 Administrative Items To Be Sampled

Item To Be Sampled (As Applicable)	Frequency
Grantee's Administrative Plan, Tenant Selection Plan, or other program guidelines	Within first quarter; as needed if revised
Internal financial controls policy	Within first quarter; then annually
Tenant Income Guidelines	Annually
Payment Standards, Fair Market Rent limits, and Utility Allowances	Annually
Data practices policy and response to information requests, if any	Annually
Program marketing materials & website	Annually
Compliance with contracting/bidding policy	Annually
Worker's Compensation compliance	Annually
Use of disbarred vendors and targeted vendors lists	Annually
MOUs for shared service area	Annually
Rejected/denied applicant example	Annually
Terminated participant example	Annually
Record retention policy	Annually
Waiting list selection procedure, or relevant section of Admin Plan	As selected
Fraud & Misuse Policy, if not included in internal controls	As selected
Procurement policy	As selected
Written conflict interest policy for contracting	As selected
Fair Housing Policy or AFHMP	As selected
Reasonable Accommodation Request Policy	As selected
Grievance Policy	As selected
Other identified grantee policies and procedures related to agency or program operation	As selected

Ongoing Monitoring: Financial Reconciliation

- Financial reconciliation will ensure consistency and accuracy by verifying funds are being used as intended and in compliance with the grant contract agreement.

- Financial reconciliation will happen on an annual basis, most likely to occur in the third quarter of program activity after contract execution

- Financial program staff will provide grantee with a list of documentation needed and will make selections for further testing from items submitted.

Program Progress Narrative

Quarterly

Ongoing Administrative Compliance Review

Quarterly

Program Participant File Review

Quarterly

Financial Reconciliation

Annually

Close Out Monitoring

End Of Grant Cycle

Questions?

Thank You!

Additional questions:

BringItHome.MHFA@state.mn.us