Grantee Guidance on Beneficiary Reporting

This document provides updated guidance for grantees on how to report beneficiary data. City staff have consulted with HUD for additional guidance on demographics reporting, due to feedback received from grantees and in an effort to improve the beneficiary reporting process, as a requirement for contracting with the City of Bellingham, grantees must identify how many people benefit from the grant activity. The Unit of Measure for beneficiaries is either persons or households. Generally, housing programs will report on households, while non-housing programs will report on individual persons.

In order to complete the quarterly beneficiary reports which are required by the City, all grantees must attempt to gather demographic information from all clients served; specifically, income, race, and ethnicity. Program staff working on City funded activities are expected to ask participants to self-identify race and ethnicity and explain the importance of collecting the data. Staff should not make observations or assumptions to collect information on race, and should strive to document this data as completely and thoroughly as possible.

We understand that with efforts to increase awareness behind racial disparities within programs and services, grantees are collecting data to inform their DEI efforts. We would like to encourage grantees to continue these efforts and continue to explore initiatives that advance this work. **We are no longer expecting to fit every client into a category or guess demographic information. We allow self-identifying by clients, including choosing not to disclose. This document is intended to be a tool for the grantee to capture necessary information for their agency into acceptable data for reporting purposes.**

With this updated guidance, we encourage our grantees to review their intake forms, and revise as needed. We are happy to assist with this process, and ask that final intake forms are shared with the City contract liaison.

There are several ways that agencies can fulfill the reporting needs of their agency as well as reporting requirements.

Please see some examples:

Ethnicity Data Standard
Are you Hispanic, Latino/a, or Spanish origin (One or more categories may be selected)

a. ____ *No, not of Hispanic, Latino/a, or Spanish origin*
b. ____ *Yes, Mexican, Mexican American, Chicano/a*
c. ____ *Yes, Puerto Rican*
d. ____ *Yes, Cuban*
e. ____ *Yes, Another Hispanic, Latino/a or Spanish origin*

> These categories roll-up to the Hispanic or Latino category of the OMB standard

Are you Hispanic or Latino?
○ Yes
○ No

Race Data Standard
What is your race? (One or more categories may be selected)

a. ____ *White*
b. ____ *Black or African American*
c. ____ *American Indian or Alaska Native*

> These categories are part of the current OMB standard

Race (check all that apply):
○ American Indian or Alaskan Native
○ Asian
○ Black, African-American, or Afro-Latino
○ Native Hawaiian or other Pacific Islander
○ White or Causasian

d. ____ *Asian Indian*
e. ____ *Chinese*
f. ____ *Filipino*
g. ____ *Japanese*
h. ____ *Korean*
i. ____ *Vietnamese*
j. ____ *Other Asian*

> These categories roll-up to the Asian category of the OMB standard

k. ____ *Native Hawaiian*
l. ____ *Guamanian or Chamorro*
m. ____ *Samoan*
n. ____ *Other Pacific Islander*

> These categories roll-up to the Native Hawaiian or Other Pacific Islander category of the OMB standard

Note that the options and categories provided on your intake form do not have to be identical to the options on the City's report form. The options given in the two examples above can all be translated into the City's "Client Race and Ethnicity" options provided in the quarterly beneficiary report.

We encourage you to develop language for your own intake form based on what you feel is most appropriate to the population you serve. The only requirement is that you can translate these categories into the required quarterly reporting template. If you need guidance on this, please reach out to your contract manager.

Please see how we have adjusted our Quarterly Beneficiary Reporting form that we require grantees to complete.

Client Race and Ethnicity	JUL-SEP		OCT-DEC		JAN-MAR		APR-JUN		YTD	
	RACE	HISPANIC	RACE	HISPANIC	RACE	HISPANIC	RACE	HISPANIC	RACE	HISPANIC
White										
Black/African American										
Asian										
American Indian or Alaska Native										
Native Hawaiian or Other Pacific Islander										
American Indian or Alaska Native *and* White										
Asian *and* White										
Black/African American *and* White										
American Indian/Alaskan Native *and* Black/African American										
Other Multi-Racial										
Did not disclose race or ethnicity										
Hispanic (no race disclosed)										
TOTAL BY RACE/ETHNICITY										
	If "ERROR" message appears please correct your entries.									
Are totals by **income** and **race** equal?	yes		yes		yes		yes		yes	

> **New Definitions**
>
> "Did not disclose race or ethnicity"— Utilize this box when best efforts have been made to collect demographic data but participant chooses not to answer.
>
> "Hispanic (no race disclosed)"— Utilize this box when best efforts have been made to collect race data, but client identifies only as Hispanic or Latinx, even when also given the option to select a racial category.

The City periodically audits agencies to make sure you have the source documentation that demonstrates proper accounting for beneficiary client race and ethnicity. Failure to gather the required information or to maintain proper documentation may lead to delayed payment, cancellation of contracts, and/or impact future funding from the City.