Flexible Facilities Program
APPLICATION DOCUSIGN FORM INSTRUCTIONS

Flexible Facilities Program Website: Access **here**.

The Wisconsin Department of Administration [DOA] Division of Energy, Housing and Community Resources [DEHCR] is using DocuSign to collect applications for the Flexible Facilities Program [FFP or "the Program"].

What is DocuSign?
DocuSign is a web-hosted electronic document transmittal and secure signature service. Accessing DocuSign documents requires internet access and a web browser. The DocuSign website is mobile-device friendly. You do not need a DocuSign account to access or complete the Grant Application. Use of DocuSign significantly reduces the amount of time needed by the program to process and evaluate applications.

==**Please review the FFP Grant Announcement and these instructions prior to beginning the application process. Reviewing the FFP Application Training presentation slides and recording (for the webinar held on May 9, 2024) is also recommended (documents are linked on the FFP website).**==
[Text in the previous sentence regarding the FFP Application Training materials was updated 5/24/2024 and is the only revision to this document since its original release on 4/30/2024.]

APPLICATION CHECKLIST AND DOCUMENTS

The application form, attachment forms, Grant Announcement, Application Training information, and application scoring rubric are linked on the FFP website (under the "Application Materials" and "Application Training" sections).

Check to confirm attached to application:	Document	Note	Due Date
☐	Application Form	**Required.** Link on FFP website.	July 11, 2024, at 2:00 PM CDT
☐	Attachment A: Project Budget Form	**Required.** Link on FFP website. Refer to Section 5.	July 11, 2024, at 2:00 PM CDT
☐	Attachment B: Match Funding Documentation	**Required for projects utilizing Match.** *(obtained by applicant)* Refer to Section 6.	July 11, 2024, at 2:00 PM CDT
☐	Attachment C: Applicant SAM.gov UEI Record	**Required.** *(obtained by applicant on SAM.gov)* Refer to Section 8.	July 11, 2024, at 2:00 PM CDT
☐	Attachment C(2): Subrecipient SAM.gov UEI Record(s)	**Required if Applicant is applying on behalf of Subrecipient(s).** *(obtained by applicant on SAM.gov)*	July 11, 2024, at 2:00 PM CDT

		Refer to Section 8.	
☐	Attachment D: Designation of CPI (FFP Form DOA-3027)	**Optional.** Link on FFP website Refer to Section 9.	July 11, 2024, at 2:00 PM CDT
☐	Attachment E: Subrecipient Survey	**Required if 2 or more Subrecipient(s).** Link on FFP website Refer to Section 10.	July 11, 2024, at 2:00 PM CDT
☐	Attachment F: Applicant 2nd Authorized Representative Signature Form	**Required if applicant's local policy or governing body requires 2nd signatory.** Link on FFP website Refer to Section 11.	July 11, 2024, at 2:00 PM CDT

A completed Grant Application, Attachment A, Attachment B, and Attachment C are required for all applicants. Attachment C(2) is required if the applicant is applying on behalf of one or more Subrecipients. Attachment E is required if the applicant is applying on behalf of two or more Subrecipients. Attachment F is required if the applicant's local policies or governing body require that a second authorized representative sign and/or approve the submission of the FFP Application. Applications will be deemed incomplete without the submission of all required, fully completed documents that are applicable to the applicant.

Convenience Copy of Grant Application

A link to a convenience copy of the application is available on the FFP website. The convenience copy is provided to assist applicants with preparing the materials and information required to be entered on the official application form in DocuSign. The convenience copy is for applicant reference only and will not be accepted by the Program.

Instructions for submitting the official FFP application using the DocuSign form provided by DOA-DEHCR are in the pages that follow within this document.

DocuSign Application Completion and Submission Instructions:

Accessing the FFP Application Form:

Open the link for the FFP Application document on the FFP website.

The first page to which you will be directed is the "PowerForm Signer Information." The person entering the information on the application should be an authorized representative of the local or tribal government.

1. In the "Applicant" section, enter the first and last name and email address of the local or tribal government's chief elected official [CEO] or other authorized representative in the "Applicant Name" field. This will be the person signing and submitting the document.

   Important Note: Only local and tribal governments are eligible to apply for FFP grant funds and they will be the "grantee" if awarded funds, so the authorized representative must be the CEO or another official or employee of the local or tribal government who has been given the authority to sign, as designated by local policy or the governing body. Subrecipients and other third-party entities are not eligible to sign the FFP application on the local or tribal government's behalf.

DocuSign Application Completion and Submission Instructions: (continued)

2. A message appears after the "Applicant" section and before the "Receives a Copy" section indicating information is to be provided for other "signers" of the document. Note that the individuals will not be "signers" of the document. They will only be designated recipients of a copy of the application. Only one signer may be designated for the application (as listed in the "Applicant" section).

3. In the "Receives a Copy (1)" section, re-enter the first and last name and email address of the Applicant CEO or other authorized representative listed as the "Applicant" in the previous section. Receiving a copy serves as confirmation of receipt by the Program.

4. In the "Receives a Copy (2)" section, enter the first and last name and email address of another person designated to receive a copy of the completed application confirmation.

5. The Flexible Facilities Program will automatically receive notification (to the FlexibleFacilitiesProgram@wisconsin.gov email address) and a link to the document upon the applicant submitting the completed application.

6. After entering all the information on the "PowerForm Signer Information" page, click "Begin Signing" to proceed to the application form.

An example of the "PowerForm Signer Information' page is shown on the next page.

DocuSign Application Completion and Submission Instructions: (continued)

Under Applicant, enter the first and last name and email address of the Applicant's chief elected official [CEO] or other authorized representative. This person will sign and submit the application. They will also receive an email link to the application any time the application form is saved (as a draft) for later completion.

Re-enter the first and last name and email address of the Applicant in the "Receives a completed copy (1)" section to ensure the applicant receives the notification and link to the final application after submission.

Click "Begin Signing" after you enter the information above it, to proceed to the application.

Add a second person's first and last name and email address in the "Receives a copy (2)" section if you want another person to receive the email notification of application submission and link to the document.

The next page will be "Please Review & Act on These Documents."

1. Click on the link to review the Electronic Record and Signature Disclosure statement.
2. Check the box to agree to use electronic records and signatures. This is required to complete and submit the FFP Application using DocuSign, as required.
3. Click the "Got It" button to acknowledge reading the information about using the "Finish Later" tool, which is addressed on the next page.

Submission Application Completion and Submission Instructions: (continued)

The screenshot below shows the "Please Review & Act on These Documents" page.

Read the terms and click to "agree" to use electronic records and signatures.

Read the message regarding "Finish Later" and click the "Got It" button to proceed.

After the "Got It" message disappears, click "Continue" to proceed to next page.

Document Link for Future Access – "Finish Later" Option (Strongly Recommended):

- Click "Finish Later" button. Clicking "Finish Later" creates a link to your application that can be accessed later and at any time prior to clicking "Finish" on the application document. An email with the link to your application will be sent to the email address of the applicant's authorized representative, which was provided in the previous step.
- Click "Review Documents" from that email link to continue the signing process.
- The program also strongly recommends clicking "Finish Later" any time you close the application to ensure any newly entered information is saved.

DocuSign Application Completion and Submission Instructions: (continued)

The screenshot below shows the "Finish Later" option. Select "Save & Close" to have your application saved and then check your email inbox for the email from DocuSign to re-enter the application.

Click "Save & Close" to save the application and receive an email with a link to access the application form any time during the process of completing it.
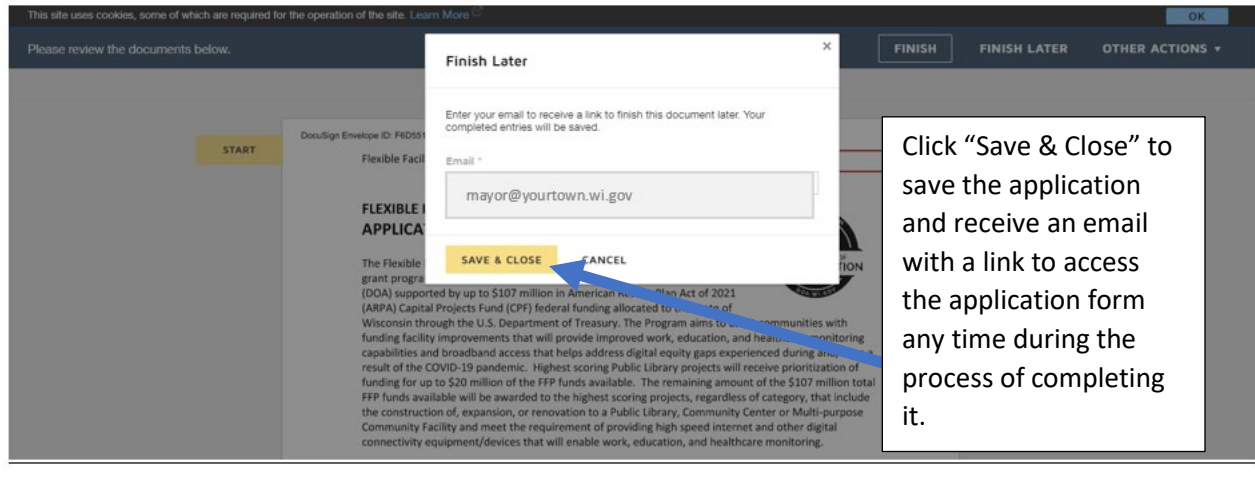
After receiving the email from the DocuSign system with a link to your application, click the "Review Document" button to go to your document in DocuSign. [Note: A message specifying the link to the document should not be shared with any other persons. However, you may share the link with others who are authorized to assist and collaborate with the Applicant during the process of completing the application form.]

A message specifying the link to the document should not be shared. The Applicant may opt to share it but is should only be with individuals authorized to assist and collaborate with them during the application form completion process.

Upon receiving the email from DocuSign with the link to your application form, click "Review Document" to go to the document you started and saved to continue editing it in DocuSign.
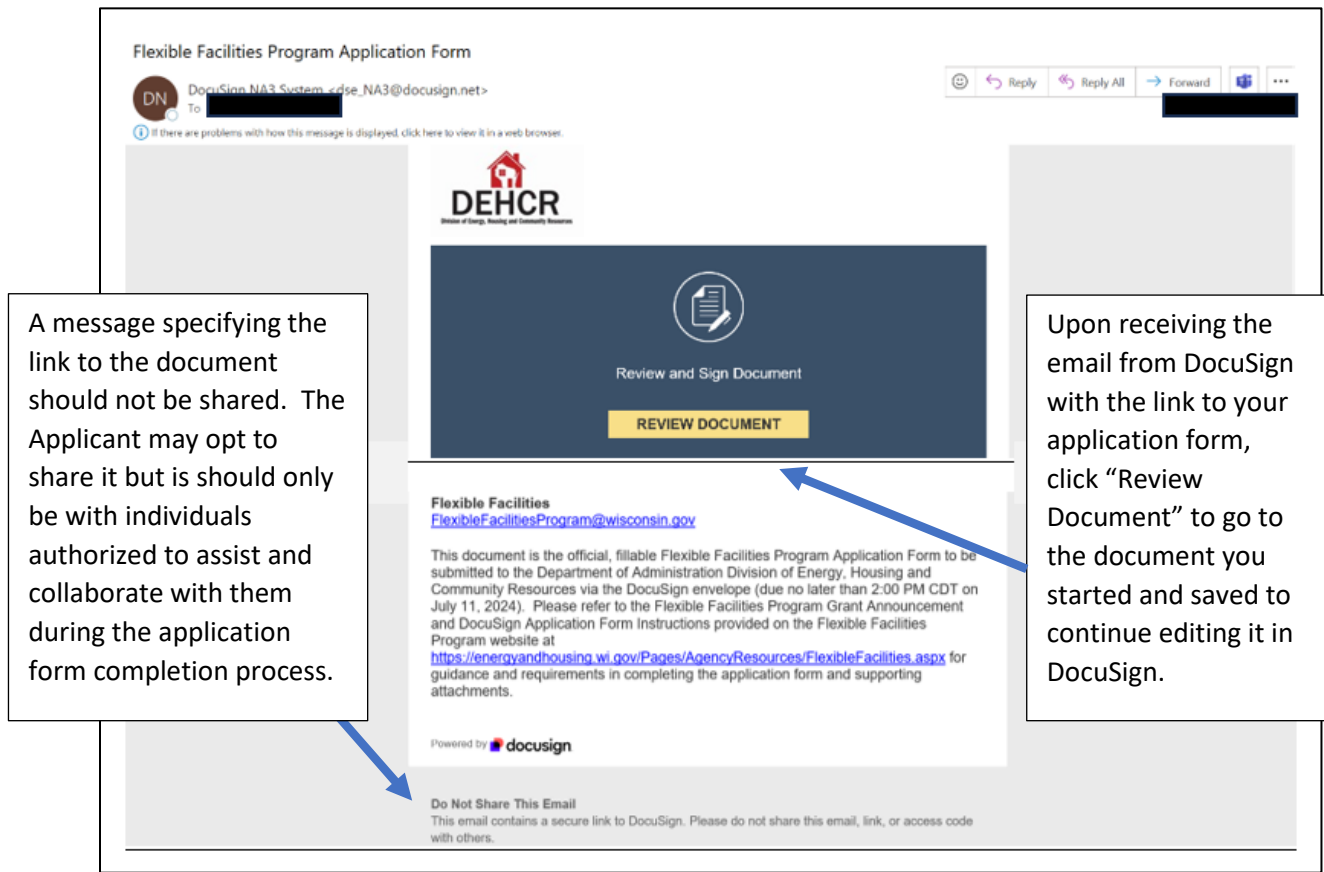
DocuSign Application Completion and Submission Instructions: (continued)

Once you are linked back to DocuSign, click "Continue" to proceed to fill out the application form.

Application Sections – General Guidance:

- Click the "Start" button to begin completing the application form.
- You may use the "Tab" key on your keyboard or your cursor to click through and move between entry fields.
- Please fill out all entry fields specified as required or that are fields confirmed to be applicable to the local or tribal government and your project. Refer to the "Application Form" section within this document (starting on page 9) and the Grant Announcement linked on the FFP website for additional guidance on completing the entry fields in the application form.

DocuSign Application Completion and Submission Instructions: (continued)

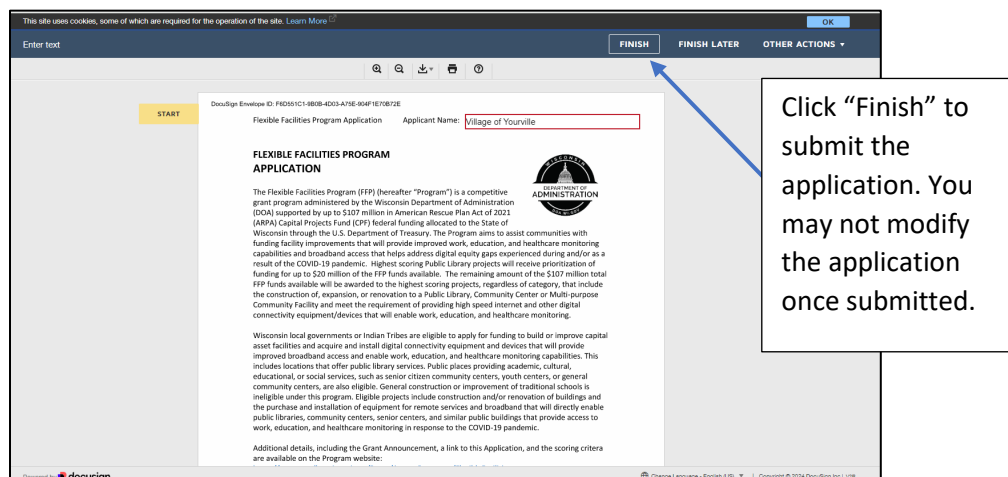**Submitting the Application:**

- Click "Finish" after you have reviewed and completed all required fields on, and uploaded all required attachments for, your application. This step will send the completed application to the FFP email address [FlexibleFacilitiesProgram@wisconsin.gov] and to any additional persons listed as "Receives a copy" when you initially started the application. Your application will not be submitted to the Program until you click "Finish".

- If there are responses missing in required fields or responses that do not meet the parameters set for the field format, error messages will appear for the item(s) requiring action. Go through the application form and identify the errors marked and address them. Continue to click the "Finish" button until all errors are resolved and cleared and the application is submitted.

- **Once the application is submitted (by clicking the "Finish" button, and no errors are found), the applicant can no longer modify the document. You may only view and print it using the link that you will receive via email (and/or within your DocuSign account if you have a DocuSign account) upon submission; or that you received previously via email if you completed the "Save & Finish Later" steps earlier.**

Do not rely on the final automatic error check from the DocuSign system to verify a complete application. There are entry fields and attachments within the application form that are classified as "optional" but this is only for certain applicants and they are required for some applicants based on their project (as specified in this document, the application form, and the Grant Announcement). The applicant must manually check all entries and attachments to ensure they have a complete application.

Applications are due no later than **2:00 PM** on **July 11, 2024**. Late submissions will not be accepted or reviewed. The application ***must*** be submitted by the deadline and only through DocuSign. Applicants should plan ahead and ensure their technology is working and they understand the submission process before the deadline date.

Important Note: If an individual who is designated as a "Receives a Copy" person has a DocuSign account tied to their email address, they may not receive an email but rather will receive and have access to the completed application in their DocuSign account folder.

After you click "Finish" and the application is submitted, the page will automatically re-direct to the Division of Energy, Housing and Community Resources (DEHCR) website homepage.

DocuSign Application Individual Entry Fields and Attachments Instructions

Application Form (Required):

Applicant Name

- Enter the local or tribal government's name (e.g., Village of Yourville) in the upper right corner of the first page of the application.

Section 1: Applicant Information

Fill out all of the required fields (outlined in red in DocuSign) and any additional optional fields, as applicable. We have highlighted some required fields that may require additional attention here and in sections that follow:

- **SAM.gov UEI Number and Registration Record:** Refer to the Grant Announcement linked on the FFP website for guidance on obtaining this information and completing these fields. The applicant is required to have a UEI number at the time of application and will be required to have an active registration on SAM.gov upon award.

- **Wisconsin county(ies):** List each county in which the local or tribal government's boundaries reside. This field is required.

- **Application Contact information:** Enter the name and contact information of the appropriate contact person to whom questions about the application may be directed if necessary.

- **Subrecipient Information:** This section is required if the applicant is applying for the FFP grant on behalf of one or more subrecipients, which are government entities or qualifying non-profit organizations that will be implementing the scope of work for the proposed FFP project. If there are multiple subrecipients, list the primary subrecipient (the one for which most of the funding will be directed or the largest organization if the funds will be distributed equally, and then list all other subrecipients in the space provided in Section 1.3. Note that if there is one or more subrecipients for the project, Attachment C(2) in Section 8 and Section 10 (and Attachment E in Section 10 if there are multiple) are also required.

- **Project Site:** Enter the project site address information in the labeled text boxes provided. If there is more than one location for the project, enter the address information for the primary project site (where most of the funds will be expended or most of the project activities will be occurring) in the set of labeled text boxes provided in Section 1.4., and then list the additional project sites and addresses in the additional space provided.

  Important Note: Typically, multiple project sites, such as constructing multiple different new buildings, would be considered separate projects and an applicant is only eligible to submit one (1) application for new construction and one (1) application for expansion/renovation and improvement to an existing building. Renovation or expansion to one building and new construction of another building would be deemed two separate projects, for which two separate applications are required. However, exceptions for multiple project sites may be considered, such as when a library branch has multiple satellite locations for which they seek to make renovations and internet and other digital connectivity improvements to each site. Such exceptions must be reviewed by DEHCR on a case-by-case basis and the applicant should contact DEHCR prior to submitting the FFP application to determine whether the scope of work for their proposed project may be included in one FFP application or if they are considered separate projects.

DocuSign Application Individual Entry Fields and Attachments Instructions: (continued)

Section 2: Project Overview

- Select from the options provided. Fields are conditionally required based on the applicant's responses to the items presented.
- Refer to the Grant Announcement linked on the FFP website for guidance on the project requirements and specifications.
- Be sure to complete all required information for the Feature Types and Equipment Types that will be part of the scope for your proposed project. At least one option must be checked for the Feature Type(s) and at least one option must be checked for the Equipment Type(s), as both types of improvements and offerings are required to be in the FFP project scope of work for it to be an eligible project.
- Enter a number for the estimated number of beneficiaries in 2.4(a) and then explain how the number was derived/calculated in the text box provided.

Section 3: Project Narrative

- Respond to the questions presented in the sub-sections, 3.1 Project Description, 3.2 Project Need, 3.3 Project Reach, and 3.4 Sustainability Plan, in the spaces provided for each. Be sure to address each of the numbered items listed for each narrative. Not addressing all of the items for each narrative may deem your project to be ineligible, as the narratives are designed to have the applicant demonstrate that the project meets the required FFP criteria.
- The character and word limits listed in the application are approximate. Only use the spaces provided in the DocuSign form to respond to the narrative questions. The Program will not accept or review additional documents for responses to Section 3.
- Refer to the Grant Announcement and Scoring Rubric linked on the FFP website for guidance on the narrative responses and basis of scoring.

Section 4: Community Engagement

- Respond to this item in the text box provided. The character and word limits listed in the application are approximate. Only use the space provided in the DocuSign form to respond. The Program will not accept or review additional documents for a response to Section 4.

Section 5: Project Budget

- Section 5.1 Project Budget Form (Attachment A) – The FFP Project Budget Form may be downloaded from the FFP website. Complete it and save and name the file with the following file name:

  (Applicant Name)_Attachment_A_Budget

  Click the paperclip image that appears in Section 5.1 to select and upload the document.

DocuSign Application Individual Entry Fields and Attachments Instructions: (continued)

- Section 5.2 Budget Summary – Enter the budget amounts in the table provided. Check the box to indicate the project will have Match funding, if applicable (Match is only required if the total cost of the project will exceed the FFP grant amount being requested, and additional funds are needed to cover the additional costs and ensure the project can be completed). Enter the Match Funds amount in the box that will appear after you click the Match checkbox. The "Total Costs" value will automatically calculate and appear in the form after you have entered the value(s) for the Requested Grant Funds (and Match Funds, if applicable).

- Section 5.3 Professional Services Contract Costs – The entry fields in the table provided are only required for professional services for which the applicant intends to contract with or has contracted with a third-party. Enter the executed and/or potential professional services contracts and provide the information requested for each. The text boxes for responses will appear for each line on which you enter a contract in the first column of the table. Be sure to answer both questions in the table for each contract listed, indicating whether the contract has been executed and if approval of a non-competitive procurement process will be requested from DOA-DEHCR, if known at the time of application. Answer "TBD" for "to be determined" if the applicant is unsure whether they will be seeking approval for a non-competitive procurement process, for which approval from DOA-DEHCR is required. The applicant must follow its own local procurement policies, in addition to meeting state and federal procurement requirements.

- Refer to the [Grant Announcement](#) linked on the [FFP website](#) for guidance on the procurement requirements and eligible costs.

Section 6. Match Funding

- Match Funding Supporting Documentation (Attachment B) – This documentation is only required if Match is required for the project. If required, please compile all supporting documentation for Match into one file, and save the file with the following name:

  (Applicant Name)_Attachment_B_Match_Funds_Documentation

- Click the paperclip image that appears in Section 6 to select and upload the document.
- Refer to the [Grant Announcement](#) and [Scoring Rubric](#) linked on the [FFP website](#) for guidance on Match.

Section 7. Financial Audit Information

- Check the applicable option for the single audit or financial audit in this section
- If the CY2021 and/or CY2022 Single Audit Reports were submitted, the date of the submission to the Federal Audit Clearinghouse [FAC] must be entered. The entry box will appear after you check the "Yes" option and the applicable calendar year(s).
- If the financial audit item is applicable (if no Single Audit was conducted), the date of the financial audit must be entered. The entry box will appear after you check the "No" option.
- Refer to the [Grant Announcement](#) linked on the [FFP website](#) for guidance on financial management and audit requirements for the FFP project.

DocuSign Application Individual Entry Fields and Attachments Instructions: (continued)

Section 8: SAM.gov Unique Entity Identification (UEI) Number

- Refer to the Grant Announcement for guidance on the SAM.gov registration and UEI number requirements.
- Applicant SAM/UEI Record (Attachment C) - Obtain a copy of your SAM/UEI record that shows the applicant's name, address, UEI number, and SAM registration expiration date (if registered), from the SAM.gov website. Save it with a file name of:

  (Applicant Name)_Attachment_C_SAM_UEI_Record_Applicant

  Click the first paperclip image that appears in Section 8 to select and upload the applicant's SAM/UEI document.

- Subrecipient SAM/UEI Record(s) (Attachment C(2)) - Required only if there is one or more subrecipient for the project. The applicant must obtain the SAM/UEI record for each subrecipient entity that shows the subrecipient name, address, UEI number, and SAM registration expiration date (if registered), from the SAM.gov website. Compile all subrecipient SAM/UEI records into one file and save it as:

  (Applicant Name)_Attachment_C(2)_SAM_UEI_Record_Subrecipient

  Click the second paperclip image that appears in Section 8 to select and upload the Subrecipient SAM/UEI document.

Section 9: Designation of Confidential and Propriety Information

- Designation of Confidential and Proprietary Information (FFP Form DOA 3027) (Attachment D) – This is an optional form that the applicant may complete and submit if the applicant's application materials contain proprietary and confidential information which qualifies as a trade secret, as provided in s. 19.36(5) Wis. Stats., or is otherwise material that can be kept confidential under the Wisconsin Open Records Law.

  Other information cannot be kept confidential unless is a trade secret. Trade Secret is defined in s. 134.90(1)(c), Wis. Stats. as follows: "Trade secret" means information, including a formula, pattern, compilation, program, device, method, technique or process to which all of the following apply:
  1. The information derives independent economic value, actual or potential, from not being generally known to, and not being readily ascertainable by proper means by, other persons who can obtain economic value from its disclosure or use.

  2. The information is the subject of efforts to maintain its secrecy that are reasonable under the circumstances.

  This Designation of Confidential and Proprietary Information form may be accessed on the FFP website. Complete the form and save it with the file name:

  (Applicant Name)_Attachment_D_Designation_of_CPI

  Click the paperclip image that appears in Section 9 to select and upload the applicant's Designation of CPI document.

DocuSign Application Individual Entry Fields and Attachments Instructions (continued)

Section 10: Subrecipient Survey

- This Subrecipient Survey form is required for applicants that have one or more subrecipients for their project.
- Check the box provided in Section 10 if there is one or more subrecipients for the project.
- The table within Section 10 will populate with response options. Additional response options will appear based on how questions are answered for #1, #2, and #10. Be sure to respond to all items in the survey.
- If there are multiple subrecipients for the project, enter the information in the survey form within Section 10 of the application for the primary subrecipient (for which most of the funding will be expended or the largest organization if funds will be evenly distributed), and then complete separate Subrecipient Surveys for all other subrecipients. A survey must be fully completed for each subrecipient. The Subrecipient Survey form for the additional subrecipients may be accessed on the FFP website. Compile all surveys into one file and save it as:

  (Applicant Name)_Attachment_E_Additional_Subrecipient _Survey

  Click the second paperclip image that appears in Section 10 to select and upload the additional Subrecipient Survey document.

Section 11: Attestations and Required Signature

- Applicants must certify compliance with all of the statements in the Attestations section, including agreeing to the terms provided at the end of the application. Please consult the local or tribal government's legal counsel if you have any questions regarding your responses to the attestation statements.
- When making the first entry in the Attestations section and when adding a signature below the Attestations section, you will be prompted to select a signature and signed initials format from the options within the DocuSign system or you may upload your own signature and signed initials images. Either choice is acceptable.
- If the applicant's local policy or governing body requires that the applicant have a second authorized representative sign and approve the submission of the FFP application, the applicant must use the Applicant 2nd Authorized Representative Signature Form, which may be accessed on the FFP website, to add and submit the second authorized representative's signature. Have the second authorized representative complete and sign the form, and save the file as:

  (Applicant Name)_Attachment_F_Additional_Authorized_Signature

  Click the paperclip image that appears in Section 11 to select and upload the additional signature document.

Additional Helpful Links for DocuSign Troubleshooting:

Please be sure that your internet browser is up to date if you have any technical issues. DocuSign supports the most commonly used internet browsers: https://support.docusign.com/guides/signer-guide-signing-system-requirements

Additional DocuSign Help links are listed below:

Common Signing Issues: https://docusigncommunity.force.com/en/articles/Common-signing-issues

Adopting a signature: https://support.docusign.com/en/guides/signer-guide-signing-adopt-new

DocuSign Support Center: https://docusigncommunity.force.com/en/home

General DocuSign Walkthrough: https://support.docusign.com/en/videos/New-Signing-Experience