



**Fiscal Year 2023 Economic Development Initiative -
Community Project Funding Grants:
Grantee Overview Webinar**

March 8, 2023

TRANSCRIPT

Michelle:

Welcome and thank you for joining today's conference, HUD fiscal year 2023 Community Project Funding Grantee Overview. Before we begin, please ensure you have opened the WebEx chat panel by using the associated icon on the bottom right corner of your screen. Please note that all audio connections are muted to reduce background noise. You may submit written questions throughout the presentation and these will be addressed at a later time. To submit a written question, select all panelists from the dropdown menu in the chat panel, enter your question in the message box provided and send. If you require technical assistance, please send a chat to the event producer. And with that, I'll turn the conference over to Robin Keegan, Deputy Assistant Secretary for Economic Development. Please go ahead.

Robin Keegan:

... Michelle. Good afternoon and welcome. I'm Robin Keegan, the Deputy Assistant Secretary for Economic Development here at HUD and this program, the Congressionally Directed Grants Community Project Funding is managed within my office in the Congressional Grants Division. We are so excited to be here today and to be meeting with you to begin this journey together as your Partner in implementation of your projects which are so important for your community.

For a little context, this is a new program we started last March with 1000 grantees at 1.5 billion and this December we were directed by Congress to support another 1600 grantees with another \$3 billion. But we are building on a legacy of doing this work in the past in a previous iteration of congressionally directed grants. There's a lot to share with you here today and we know you have a lot of questions for us. We appreciate the questions and the data points that you gave us before so that we understand how to shape our technical assistance and our responses to you.

This is really, as I mentioned again, the beginning of the journey. We know that your main questions today are probably something like when can I start my project? Do I have to do an environmental review? How can I get my funding? And we're going to answer those questions today with you, but we also know that you have specific questions about your project. Many of you have sent those to us already and you'll continue to work with our team, including your grant officer and your environmental review officer as needed to help to facilitate, again, the implementation and getting answers to those questions.

In the middle of last week, we sent you a lot of materials. We sent you a letter that was pretty extensive. We also sent you a grant guide with a lot of good information and a grant agreement and we encourage you and know that you're spending time with those, reviewing those. There's a lot of good stuff in there, but we really do recognize that it's dense and we want to make sure that we can unpack it together with

you to make sure that it is clear and understandable as you prepare to sign your grant agreement, get us the required materials, start your environmental review as required and get on your way to implementation.

Again, we'll be having additional webinars and office hours as well as other resources to help you navigate this work and you, of course, have a grant officer assigned to you. We will also be adding members to that team to continue to assist you.

And now I'll ask to switch the slide and introduce you to our team and then give a few logistics for the time we have today. So you are going to be hearing today from a few members of our team. Holly Kelly is the Director of our Congressional Grants Division and brings her expertise in leading this program many years ago and then bringing it up to speed for our new electronic age and our new grantees and requirements.

Shantel James is our Deputy Director of the Congressional Grants Division. Vaughn Watson is one of our Congressional Grants Division CPD Specialists, aka Grant Officers and Omri Gross is our Program Environmental Clearance Officer in the Office of Environment Energy here at HUD and will be walking you through the environmental requirements for these grants.

Next slide. Just a couple of logistics. This webinar will be recorded and we will share it within a few days. There will be a transcript as well. We do not have closed captioning, but we will provide a transcript after the webinar. There's a checklist provided for you in your action items for funding provided to you after the webinar and live questions may not be able to be answered during this webinar, but please do post them in the chat and then you can also use the HUDExchange Ask-A-Question help desk and/or emails sent with your questions to the CPF grants@HUD.gov inbox.

So there's a lot of mechanisms to get your questions to us and we look forward to, again, answering preliminary questions today with our webinar from our team and then getting with you on your specific questions. So thank you again and we look forward to sharing the journey with you and right now I'll hand it off to Holly Kelly.

Holly Kelly:

Good afternoon. This is Holly Kelly. Can you hear me?

Michelle:

Yes, please go ahead.

Holly Kelly:

Thank you very much. Again, my name is Holly Kelly. I am the Director of the Congressional Grants Division under the Office of Economic Development under Deputy Assistant Secretary Robin Keegan. And as Robin said, welcome to this webinar. We are incredibly excited as a division and as an office to come to you and provide this information and an overview of the FY 2023 Economic Development Initiative Community Project Funding Grants. My team and I are incredibly excited to begin, as Robin has said, this journey with you. We're looking forward to working with you throughout the life of this grant and your project.

Please advance the slide. Just some very top line information to give you a sense of the magnitude of what we are working with together as HUD and as you the grantee. The grant appropriation for fiscal year 2023 was 2,982,000. 1616 grantees across the nation, 47 states and several of the US territories. And that gives you an idea of the breadth of the work that we are working on together as Partners.

Our grantees are a mix of state, local governments, nonprofit organizations, jurisdictions, housing authorities, tribal communities. You, as the grantees, are selected by members of Congress through a competitive process and HUD does not have a role in the selection of those grantees. We look forward to the statutory language and the joint explanatory statement that lets HUD know which organizations have been selected for a Particular fiscal year's round of funding, how much that funding is, and a basic overview of that project description.

After HUD receives that information, we begin to work with you as the grantee and our Partner in this effort to get additional information from you and begin to establish opportunity for you to draw down funds and help us understand what your project is more fully.

So the project activity must be implemented as written in the joint explanatory statement and we'll look a little bit further about the joint explanatory statement in the next couple of slides. These grants must adhere to what are called cross-cutting requirements and by cross-cutting requirements we mean requirements that are subject to all HUD grants or most HUD grants. For example, the environmental review requirements, section three requirements. Those are what are considered cross-cutting requirements and they are not specific to the ADI community project funding grant portfolio.

The start or effective date of the grant; and you will see this information in your grant agreement when you have received your grant agreement late last week. You'll see the information in the grant agreement that states the start or effective date of the grant is the date that HUD signs the grant agreement and we know that there are some specific considerations regarding when funds can be drawn down based on whether or not they are considered soft costs. Those are the administrative costs, planning costs. Or if they are considered hard costs, those are the project costs or the program cost.

The cost for soft costs incurred can be incurred on or after December 29th, 2022. So those are the soft costs. The hard cost, those program costs, those project costs; construction renovation, et cetera; can be incurred on or after the later of December 29th, 2022 and the completion of the required project-specific environmental review. And those hard costs must meet of course the allowability criteria per the Code of Federal Regulations to 200.403 and we have that provided to you in this slide.

So the effective date of the grant is when the fully executed grant agreement is signed by both you, the grantee, and by HUD, but the dates that cost can be incurred are driven by soft costs and that's the date of enactment, December 29th, 2022 or the date that we have the completed environmental review and that is driven by when that information is submitted to HUD.

The expiration period for the funds is August 31st, 2031. We recognize that the grant funds expire in September of 2031. However, the department is encouraging grantees to submit requests for payment by August 31st, 2031 so that the department, we have an opportunity to review those requests, mitigate any challenges, help you to understand if there's any additional information that we need and get those payments approved prior to the expiration date.

As a note here, the FY 2022 appropriations was approximately half of what was appropriated in 2023 and so the funding amount for 2022 was 1.516 billion and there are 1014 grantees in that FY '22 cohort. Some of you are both 2022 grantees and 2023 grantees.

Next slide, please. This slide gives you an overview of where the funds are located. Of course they are nationwide. Some states were appropriated more grants than others and that of course is decision that is done at the congressional level. HUD has no role in the identification or selection of those grantees, but we can see here from this slide that the grants are awarded at different levels in different state and that might change based on fiscal year. So the number of grants awarded in one state in a Particular fiscal year might be more or less than the grants in another state in a different fiscal year. And so this slide helps to understand where these funds are located and we anticipate on our website in the coming

weeks and months additional graphics to help understand exactly where these dollars are landing and what types of activities these dollars are affecting at the local level. We hope this slide is helpful to you to understand where these funds are located.

Next slide, please. This slide helps you to understand what we see when we look at the joint explanatory statement and the statutory language. Of course, all statutory language is entered into the congressional record and we receive that information and helps us understand the level of funding, the dollar level of funding. And then there is reference to companion information and companion documents that help us understand who the grantees are and that is called a joint explanatory statement.

What you see here on the slide is what we see as the department. We know that funds are made available through the department of Housing and Urban Development under the Community Development Fund account. We know that we are told that the project description is very brief and that's why we coordinate with you, the grantee, to understand in a more expanded way what that project will be. And we are told who the recipient is, the state where the project is located, the dollar amount, and then we're given some information about who at the congressional level sponsored the Bill, be it Senate or the House, and where that member resides.

The link at the bottom of this slide is available to you so you can access this information for yourself. We encourage you to take a look at that so you can have an understanding of what we see, what we receive and how we coordinate our materials for you to help guide you in completing your application as submitting documentation to us. We have a very limited information that we start with and we work with you to help build out the portfolio or the profile of what this grant will do and result in at the local level. Next slide, please.

Of course, again, the joint explanatory statement shows the project, the recipient, the state, the amount, the requester or either house, requester either Senate and the origination of that member of Congress, either house or Senate. Just another point of reference for you here, Next slide, please.

The grants are managed by the US department of Housing and Urban Development and again, the portfolio is managed by HUD, the Office of Community Planning and Development, the Office of the Deputy Assistant Secretary for Economic Development, Office of Economic Development, Congressional Grants Division. The Congressional Grants Division is your first point of contact for technical assistance, advice and guidance and coordination with our office of Environment and Energy on environmental review matters or our field office on environmental review matters. But we wanted to show you here who manages the award and the protocols for coordination with you, the grantee, on the management administration of this grant. Next slide, please.

I would also offer that of course under the Congressional Grants Division; and Robin mentioned that at the top of this webinar; that you are assigned a grant officer by your state. That grant officer, again, is your first line point of contact. Please feel free to use the email address provided to you in the grant award letter to contact your grant officer and get the conversation started about what you need to submit to whom and when, et cetera. They are your first point of contact for technical assistance at all levels.

So we'll talk about some key contacts and resources that we have available to you and we are making available to you. We are very excited to be able to bring you some technical assistance that is outside the Congressional Grants Division that is provided through our Technical Assistance Division. There are various types of TA that we will be bringing to you, most certainly currently. And then we have some additional technical assistance resources that we are teeing up to make available to you to ensure that you are successful in getting your materials completed, submitted, reviewed, forwarded process, and then getting your accounts in the various systems, financial systems specifically, set up so that you can

begin to make requests for payments and submit your semi-annual reports and facilitate your closeout of the grant. So we have a few key contacts and resources that we'll share with you at this time. Next slide, please.

One of the first resources that we encourage everybody to engage with is our website. We have really done a lot of great work and Robin's front office, the Office of Economic Development, has done a great job in building out our website to provide information and links to forms and materials to help facilitate the administration of the award. So we encourage you to click on the link and become familiar with our website. It is a plethora of information that's provided there and we're continuing to look at it and see how we can improve it, adding frequently asked questions there, et cetera.

So our website is available. You'll see a very generic overview of the information that would be germane to both fiscal years '22 and '23, but when you look down at the bottom of the web page, there is specific information that's germane to the FY 2022 grantees and then to this FY 2023 cohort, specifically speaking to the date of enactment. So the 2022 grants were enacted March 15th, 2022 and have some specific nuances that are germane specifically to that fiscal year. And then for the 2023 grants, the enactment date of course again is December 29th, 2023. So let's advance the slide.

Thank you. When you click on the 2023 link, there's some information that is specific to your grant. There's an overview. There are main requirements that you'll need to be sensitive to and aware of. There is an overview of the process to secure the executed grant agreement to initiate the completed environmental review and most certainly points of contact in both the Congressional Grants Division and in the Office of Environment and Energy. There's also a link that helps you to understand forms that you may want to review. So you'll click on the "I want to review" link and then there's all sorts of resources to the federal regulations, the executive orders that would be germane to the fiscal year '23 cohort.

So these resources are made available to you. We encourage you to, again, become familiar with the website. We will be working very hard to keep it up to date with new information, news, frequently asked questions, any changes to grant officer assignment, et cetera. One of the first places that you'll be able to look is on our website. Next slide, please.

So under the "I want to review" just as a recap, funding and award information, environmental review information, process guidance, information about reimbursement eligibility, payment eligibility, various laws and regulations that would be associated with the award. So again, we are working to, and we've most certainly stepped up effort in making these resources available to you, trying to understand what we think you will need to know and making these resources available to you in this common location so that you don't have to go through HUD's website looking for the information that you will need. We wanted to have a one-stop-shop for resources for you and we're continuing to build that out. Next slide, please.

There are two HUD staff that we want to make sure that you are aware of that will be working with you throughout perhaps the life of the award and that's the Community Project Funding Grant Officer. That's the grant officer that is assigned to the Congressional Grants Division. That will be your main point of contact for the administration of your grant. They are, again, the primary point of contact for the duration of the award unless that grant officer is changed but we are training our grant officers to be fungible enough so that any grant officer can support you in the administration of this award.

The grant officer will work with you to review the project narrative and the budget for completion and verify that the narrative and budget that you're submitting aligns with the intent of Congress. The grant officer will initiate grant agreement and grant award process for you and work with you on that aspect and then work with you to coordinate the closeout of the grant award and any post closeout actions, real property disposition, et cetera. So again, your grant officer is that first line point of contact for the overarching administration of the award.

And of course, this work is done in Partnership with our Office of Environment and Energy and you are assigned a Regional Environmental Officer and that information is on our website and available in the slide deck. That Regional Environmental Officer provides technical assistance to grantees and a local government responsible entity in conducting environmental reviews under Part 50. And you're going to hear a lot more about environmental reviews Part 50, 58, a few slides into our presentation.

The environmental review officer will help you to coordinate Part 50 concept meetings to determine level of environmental review, consultation needs and timelines, reviews and analyzes Part 50 environmental review information and provides that to the grantee and is responsible ultimately for the Part 50 environmental review findings and determinations in cases where Part 58 is not possible. Next slide, please.

Here's a list of the grant officers based on state and environmental review staff based on state. Again, we will update our website when these staff make changes. You'll get notifications from us in an email and the website will be updated to reflect any changes in staffing. We want to make sure that you have the most recent point of contact for your grant officer. I will note here that FY 2022 and 2023 share the same grant officer. Grant officers are assigned by state, not by fiscal year. So if you are a grantee that has a 2022 grant and a 2023 grant in the state of California then Jerry Santana Carter is your grant officer for both of those fiscal years. Just want to make that point. Next slide, please.

Another resource that we have for you that we've been able to pull together very recently is an Ask a Question desk. We know that grantees share commonality in fiscal year and the way these grants are appropriated and so there are various aspects of the award that is common to all the grantees, but 1,616 different community development or economic development projects across the country and into various territories means that there could be all sorts of questions that would be specific to your project and we want to make sure that we have as many resources for you available to get those questions answered. And so we've coordinated with our technical assistance division to provide you with an Ask a Question desk that you can go into the HUD exchange and ask your question and get your question responded to. Of course, your grant officer is available to you and your environmental review staff are available to you. This is yet another resource that we know and truly believe will be beneficial to you.

So let's advance the slide and we'll look at a couple of slides from the HUD Exchange. If you do not have an account with the HUD Exchange, you will need to register for an account with the HUD Exchange. If you go into the HUD exchange up in the top right-hand quarter, it will ask you to either log in or establish an account. Very easy to do. Once you create the user account in the HUD exchange, you can then go into the Ask a Question desk and follow this model. Fill out the information, your name, first and last name, state, ask some very basic information, ask if you're a HUD grantee and then it's a dropdown box, which grantee are you? And you'll look at your program. Community project funding is the program that you would be under.

And then you would ask your question. If your organization is not listed, you can change to an I am a grantee or other and then please specify and provide the name of your organization. So we hope that the HUD exchange website for the Ask a Question is user-friendly. We would appreciate your feedback if you start to engage with the Ask a Question desk and you're not quite clear how to navigate it. Please reach out to us and let us know and we'll assist you through navigating the HUD exchange Ask a Question. Next slide, please.

Then you go in and ask a question. Once you've registered for an account and you've gone into the Ask a Question desk and satisfied some basic information, you go in and ask your question. There is technical assistance providers on the other side of that Ask a Question desk that are familiar with our program and can provide you with those responses or move those responses to another Part of HUD, either Congressional Grants Division, office of Environment and Energy, for a deeper dive into your question.

So we encourage you to use the Ask a Question desk. We think it will be beneficial. It's available to you and you'll let us know if there's anything about the Ask a Question desk that we need to tweak. We're very interested in hearing that feedback. Next slide, please.

Our communication is done through an email box that we've established in FY 2022 to engage grantees in submitting and distributing information. And so you'll see in the grant award letter that you received that we encourage you to submit your documentation, your project documentation, grant documentation to our Congressional Grants Division email at CPFgrants@hud.gov. We encourage you to CC your grant officer on those submissions. And then when your grant is underway and you have a fully executed grant agreement and you have a question that you want to talk to your grant officer about, you can most certainly use their email address to have that communication.

But when you're submitting your grant award materials, your grant agreement, your HUD 1044 forms, et cetera, we encourage you and you'll see that in our grant guide. We encourage you to use our CPFgrants@HUD.gov mailbox so that we can have as many resources in HUD capturing those emails, looking at what your questions are, looking at what your submissions are, and then processing those expeditiously. So the CPFgrants@hud.gov mail mailbox is our main mailbox. But again, when you start to engage with your grant officer, feel free to use their email address. Next slide, please.

So the key points of contacts from the grantee side, from your side are several fold. We have to know who the authorized representative for your grant is. So if there is grant point of contact, vis-a-vis authorized representative along with additional points of contact. And so we want as many points of contact as is practical for your organization. Because we are exchanging information in this email format and environment, we want to make sure that our communications get to you. And so this year we have been collecting additional points of contact for your grant.

The authorized representative is the person within your organization that is legally allowable to engage in to sign a grant agreement and to bind your organization through a contract, through a grant agreement. And so we have to know who the authorized representative is, but we also would like to know who are other points of contact that we can enter into our system and generate emails from.

We know that people are out of the office for a week or so. So if there's another person within your organization that you know want us to include in our system to receive that email, we'll most certainly take that information and put it into our system and ensure that the email is sent to that person as well. Again, the authorized representative is the person that can sign the grant agreement or any other documents so we have to know who that person is, but we can most certainly include another point of contact for your organization if that is the case and if you want us to. So make sure that we are aware of that and we'll update our systems accordingly. Next slide, please.

I'm going to quickly walk you through some key pieces of information, the HUD Fiscal Community Project Funding key documents. There are some key documents that were included with the email that we sent out to you on March 2nd. In the documents, there are various links to forms that you will need to access as complete and submit with the grant agreement that we forwarded to you. So if you'll advance the slide and we'll walk through some of those forms.

This is the email that you all received on March 2nd of this year that welcomed you to the program and provided an overview of what you would be seeing. We have the grant award letter. You received the Community Project funding, excuse me, grant guide, the grant agreement and the HUD 1044 form. We hope that the guidance in completing and submitting that information is clear to you. If it's not, please feel free to reach out to your grant officer and get any clarifications that are necessary.

We followed that email up very soon thereafter with another email that provided an important correction regarding your grant agreement. We had to correct the public law reference in that

document. So if you would please ensure that you are signing and dating the grant agreement that references public law 117-328. That would be very helpful. Grant officers will be keeping an eye out on four whether or not the incorrect grant agreement is submitted, and they will contact you and help redirect you to the correct grant agreement and get that signature and date from you and help you to submit that. So please be sensitive to ensuring that the grant agreement that references 217-328 is the grant agreement that you sign and date and send back to us and we would really appreciate that. Next slide, please.

The grant award letter provided the grantee, the project description, the grant amount, and your grant number. The grant number should be B-23-CP dash the state, abbreviation for your state, dash four digits. And so the first grant in our 1016 is 001 and the last grant is the last four digits is 1616. So become very familiar with your grant number. We will ask you to include that grant number with all of your communications. That way we know exactly which grant we should be interacting with and working with you on. The grant award letter provided a brief overview of the documents, the grant guide, the grant agreement, and the standard forms and requirements, and Particularly the form HUD 1044, which is a cover form that provides information for us as we engage with our chief financial officer's office to set up your account.

That HUD 1044 serves as a cover form for grantees who may have had an FY 2022 grant and may have signed some documentation. You may have recognized that we used to have grantees signed HUD 1044. We now use that as a cover page. And so the sections where there looks like there would be a signature are blacked out. Please don't try to sign the document. That's not necessary any longer. We are using that information strictly as we set up your account in our financial systems. And so we have the information there and you don't need to sign the form.

We also provide the grant award process overview and overview of the 2023 Act, the administrative requirements, the environmental review requirements, and additional information and contact information for you in the grant award letter. Next slide, please.

Our grant agreement, we hope is clear to you. We know it's dense, and again, we can work with you to understand any provisions in the grant agreement that are not clear to you, but we ask you to take some time and sit with it and read it. And then if you do have questions, most certainly coordinate a phone call with your grant officer and we'll walk you through any Parts of the grant agreement that you're not clear about, as clear as you would like to be. It provides at the top of the grant agreement some very basic information about your organization. The name, the address, the unique identifier number in our grant guide provides guidance on how to register for a unique identifier number through the sam.gov system. The grantee's identification number, the IN, the grant number, which is the federal award identification number. That's the grant number, it starts with a B. And of course it lists the assistance listing number and the name. This is assistance listing number 14.251.

It also provides the period of performance from start date to end date and various articles throughout the grant agreement. And again, you'll see the list of articles here. In the interest of time, I would ask you to again, take some time with your team and sit with the grant agreement, sit with the grant guide, go through it. And of course if you step away from really taking a look at the grant guide and grant agreement with some questions that you just are not clear about, please feel free to reach out to your grant officer. Schedule an appointment. Either your grant officer and/or I can be available to be on a call with you to walk you through any Parts of the materials that you don't understand.

Specifically on the draw-down request requirements. A little bit later on in the presentation, you're going to hear about the process flow when funds can be drawn down, what type of funds can be drawn down at what time, and specifically addressing hard cost and soft cost. And we know that we have funds

that can be available at the date of enactment, which is again December 29th. And those are your soft costs.

We will need to have you under fully executed grant agreement. Even though you can incur cost as of December 29th, we will still need to have you under a fully executed grant agreement before we can begin to approve those payment requests. The environmental review in association with the hard cost, the project cost construction, rehab, renovation, et cetera acquisition will need to align both with the date of enactment after the date of enactment and the completion of the environmental review. So when we get into a few slides further in the presentation, Particularly under the environmental review presentation, you hear a more detailed overview of what type of costs can be incurred at what time and when the department can approve payments for those requests. Next slide, please.

This slide speaks to the HUD 1044 document that I referenced just a little while ago. You'll see that it provides some basic information about your organization and provides some description of specific provisions that we want you to be aware of. So we hope it's fairly self-explanatory. We'd like you to, again, take some time, sit with it, read it with your team, and if you step away with questions that you need clarification on, we'd be more than happy to schedule some time with you and answer your questions. Next slide, please.

The other document that was provided to you on March 2nd is our FY 2023 Economic Development Initiative Community Project Funding Grant Guide. It's dense. There's a lot of text here. We've added some graphics, we've added some flow charts to illustrate process as opposed to just writing it out in text, but it's still a lot there and we are here to walk you through it, to work with you to understand exactly what it's telling you. So we, again, ask you to go through it with your team, read it, and then feel free to reach out to your grant officer and/or I and ask for some help in understanding any specific Parts of it that just are not clear to you. We hope it's clear. We've done a lot of work on trying to clarify some areas that perhaps were not as clear for 2022, so we hope we were successful in that. Next slide, please.

An overview of the grant award process. So we know that Congress passes legislation awarding funding to the organization or the entity. The organizations are named in HUD's conference report or the congressional record. The named organizations receive grant award packages and grant guides from HUD. Those were sent to the FY 2023 cohort March 2nd, 2023. If anybody did not receive an email, someone in your organization did not receive an email from us dated March 2nd, 2023 please reach out to me. Please contact me via email and I'll be happy to work with your grant officer to find out why that is the case and get the materials to you.

The grant materials to submit the HUD include the project narrative, the project line item budget, and the associated federal forum. The note here about your project narrative and budget, you'll see in the grant guide that we ask for an overview of the entire project with a specific carve out for the CPF portion, community project portion of the narrative. We want to see the entire project so that if we have to do some environmental review considerations or other considerations, we have the full scope of that project, but then you will let us know specifically what the CPS portion of the project is.

Same thing with the project budget. We would like to see the entire project budget with a specific carve-out for the community project funding Part of the budget. HUD will receive the information, your grant officer will receive the information, review the projects, and verify that the project scope aligns with the purpose per the joint explanatory statement. HUD will then send a grant agreement and advises grantees on the remaining funding process. Next slide, please.

There's a little graphic here to help you understand the life cycle of the grant. So we know that we were in pre-grant agreements phase, received the grant materials on a rolling basis. March 2nd was probably the last time that all 1,616 of you in this cohort were at the same point. Once we sent those emails out, we get grant materials from grantees at various dates along this continuum. And so we are receiving this

information on a rolling basis and taking into consideration, we're receiving information from our FY '22 cohorts as well. Again, my team and I, we review and approve the grant materials, submit any congressional notifications so that your member of Congress is updated as often as we can about the status of the award. And we remind grantees throughout this process of the environmental review requirements, requirements on section three and other requirements. And again, those are the cross-cutting requirements we referenced a little bit earlier.

Once we have the grant under grant agreement, the grant start date ... Again, it's the date of the grant agreement when it's fully executed. We know that the grant is obligated as of the date of enactment, but the grant start date for approval of payments can be or is, I should say, the date of the fully executed grant agreement. There are periodic reporting requirements associated with this grant program, as with other grant programs and the grant guide help you to understand what those reporting requirements are semi-annually, twice per year. And you'll be submitting those reports through our DRGR Disaster Recovery Grant reporting system. And there's a whole document that we will get to you once the grant agreement has been submitted. There's a document that will provide a quick guide to our Disaster Recovery Grant reporting system.

Once the grant is in position to be closed out, there are three conditions under which the grant could be closed out. The grant officer will work with you on satisfying those requirements. The grant can be closed out under, again, one of three conditions. There's zero balance. You've drawn down all your funds and you've completed that CPF-related portion of your project. The grant funds expire. So September 30th, 2031, the grant funds will expire. However, we will be working with you well ahead of September to make any last payment requests because we don't want the funds to expire and be recaptured and returned department of Treasury before you have had an opportunity to access those funds.

Or in some cases, grantees write to us and let us know that conditions or circumstances in their community has changed and they no longer need the award. We would need that notification on your organization's letterhead and signed by the authorized representative. So one of those three conditions, the funds expired, there's a zero balance, or if you notify us that the organization no longer needs all or part of the funds, we'll initiate the closeout process with you. Next slide, please.

To recap, the start or effective date for the grants is the date that the grants are obligated. So we know that they're obligated as of December 29th, 2022. We can start repayment for those cost incurred as of the date of the fully executed grant agreement for the soft cost or the date that we have a completed environmental review documentation for the hard cost. The ending date for these grants is when the grant is closed out. We just chatted about that a few seconds ago. And grants will access funds using, again, our disaster recovery grant reporting system. Just wanted to put that slide in there for you as a reminder that you can go back to help you understand what dates should be what dates. And of course we will be available to clarify any of that for you as you get into the weeks and months and years that we will be working together on some of these projects. Next slide, please.

So I will turn the presentation over to Omri Gross who is your Environmental Review Specialist for this presentation. And Omri, I'll yield and turn it to you. Thank you.

Omri Gross:

Thank you very much, Holly. Good morning everyone. My name is Omri Gross and I'm the Program Environmental Clearance Officer for HUD's CPD funding programs, which includes the CPF program, the Community Project Funding. We wanted to provide a brief high level overview of the environmental review process, regulations and compliance considerations for the CPF program. Since we only have a few minutes, we'll jump right into it. Next slide, please.

Okay. So as far as the agenda, first I'll provide a brief overview of the environmental review process. Then we'll discuss some environmental review considerations for the CPF program specifically. And then I'll share a couple key pieces of CPF environmental review guidance. And then finally, if there's time, which I suspect there won't be, we'll open it up for question to answer at the end. Next slide.

And we will be doing other environmental review webinars that go into more detail and we'll have more resources and that kind of thing. So this is more of the high level.

All right. So first off, what is an environmental review? An environmental review is an analysis of impacts that a project will have on its surrounding environment and how that environment will effect the project as well. The environmental review demonstrates that HUD-funded projects comply with all of the applicable environmental laws and authorities and ensures that those projects provide decent, safe, and sanitary housing. An environmental review is required for all HUD-assisted projects and is a public document used to encourage public Participation. So again, environmental review required for all HUD-assisted projects. Next slide, please.

It's important to understand HUD's legal framework for environmental compliance. There are a host of environmental laws and authorities that require HUD and other federally funded projects to analyze, avoid, minimize, or mitigate impacts to environmental and cultural resources. For instance, the National Environmental Policy Act, NEPA, requires all federal agencies to perform an environmental review prior to approving or funding any project. There are up to 17 different environmental laws and authorities that HUD projects must comply with. Next slide, please.

This slide lists the 17 environmental laws and authorities that HUD projects must comply with. Now, every project may not have to address each environmental law and authority, and the level of review for the project will depend on the nature and scope of the project activities. Next slide, please.

Okay, so this next slide lists the various Parts under 24 CFR covering environmental review requirements. So HUD regulations at 24 CFR Part 50 and Part 58 implement the National Environmental Policy Act, NEPA, for the agency. Part 50 is HUD's environmental review requirements where HUD is the entity conducting the environmental review. And Part 58 is the local government environmental review requirements where a unit of general local government assumes the authority and responsibility to conduct environmental review for a project instead of HUD.

Now, the community project funding program is a Part 58 program by default so the unit of general local government would be the responsible entity for conducting the review by default. Now, there's also Part 51, which outlines the standards and requirements associated with manmade hazards and Part 55, which covers floodplain management and wetlands protection. But we'll talk more about how Part 58 and Part 50 apply to the community project funding program in the comings slides. But first, let's discuss the levels of environmental review and timing. Next slide, please.

Okay, so this slide depicts various activities, their corresponding levels of review and estimated timing for completion for each level of review essentially. Now, projects require different levels of review based on the nature and scope of the project activities. So for instance, projects that involve groundbreaking and other hard cost activities such as new construction, acquisition and rehab require higher levels of review and take longer to complete. These higher level reviews and some of the reviews that require this process are the CEST and EA level reviews, which are categorically excluded subject to the laws and authorities and environmental assessment. And so these higher level CEST and EA level reviews require a public notice process, the submission of the request for release of funds and the receipt of an authorization to use grant funds approval from HUD before they are considered complete.

Whereas lower level environmental reviews for exempt and CENST projects, CENST standing for categorically excluded not subject to the laws; and authorities and the laws and authorities that they're

talking about there are the laws and authorities under 58.5, which we won't get into too much detail, but yeah. So exempt and CENST projects that are essentially categorically excluded from many of the laws, they do not require the public notice request for a lease of funds and authorization to use grant funds process and are considered approved when the responsible entity completes and signs the environmental review.

So you can see here on this chart, you have like CENST and exempt level activities and it gives you a few examples. These are your planning activities, admin, maintenance, services. And then you go up to the next one, which is CEST, categorically excluded subject to, the laws and authorities. That's more of like your refinance, your minor rehab, acquisition, maybe some smaller new construction. And then you get into the environmental assessment level. This is more of the new construction of larger developments or community centers, infrastructure projects, major rehabilitation and projects that involve change in land use activity. And then the final one is environmental impact statement. These are for very large scale projects such as large scale infrastructure, massive, massive developments. We probably won't be seeing too many of those with CPF, but it is possible that we do run into some of those.

But as you can see, all types of activities, even exempt activities, even projects that only include exempt activities require some level of environmental review. Next slide, please.

Okay. Now let's discuss how the environmental requirements apply to the fiscal year '23 CPF program. Next slide, please.

Okay, so this slide shows the fiscal year '23 CPF statutory language that was enacted in the Omnibus Appropriations Bill on December 29th, 2022. The highlighted section instructs that CPF grants shall be available for reimbursement of eligible expenses incurred on or after the date of enactment. Just a note here that HUD interprets eligible costs as costs of compliant activities including NEPA environmental compliance. So in order for costs to be eligible, the activities would still need to be covered by a satisfactory HUD environmental review, showing no unaltered environmental harm. Next slide, please.

Okay. Now, this graphic shows the process flow for fiscal year '23, which is now in effect. This is a very important, very useful graphic. Note that the Federal Nexus occurs at the date of enactment. The federal Nexus is when the project becomes federalized and that point is the date that the law was enacted for the program, which was December 29th, 2022, for the fiscal year '23 CPF program.

Now, under the fiscal year '23 process, grantees are allowed to incur eligible soft costs from the date of enactment, December 29th, 2022. And this is because HUD has already completed a nationwide Part 50 environmental review for CPF soft costs only. So HUD completed this Part 50 nationwide review that covers all soft costs for fiscal year '23 for all of the CPF projects. So all of your soft costs are essentially covered by HUD's Part 50 review, and there's actually a link to that Part 50 review so you can see exactly which types of activities are covered, which soft costs are covered, because there may be some that are not covered by it, so you'll want to check that to determine if your soft costs are covered. But most of them are covered by our Part 50 review.

So again, HUD completed this Part 50 nationwide programmatic review to cover all CPF soft costs for all CPF grantees. Now, grantees are also allowed to start incurring eligible hard costs at their own risk after the date of enactment, but only if the commitments for those hard costs were in place prior to the date of enactment, and if they ultimately are covered by an environmental review showing no unaltered harm. Now, we say at your own risk because if a grantee decides to continue work on hard cost activities for which commitments were entered into prior to enactments, but ends up not being able to complete a satisfactory environmental review for those activities, then the grantee may not be able to use HUD funds for the aggregated project and may have to reach out to their congressional grants officer to discuss repurposing those funds.

One example of this we are seeing in the field is that some environmental authorities, such as the State Historic Preservation Offices and the Fish and Wildlife Services, may be hesitant or outright refuse to consult on projects for which physical activities have already been conducted or completed, which creates a situation where the grantee is not able to complete a satisfactory environmental review for the project. So essentially what it boils down to here is that the best practice is to stop all hard cross work after the date of enactment until the environmental review is complete. But if you have questions or doubts about whether you can or should continue work that's already under contract after the date of enactment, please reach out to your regional environmental officer to discuss further and. Links to all of the contact information for regional environmental officers are all throughout this presentation and on the CPF landing page.

Okay. Now getting back to the process flow chart here. So we talked about what happens at enactment. Grantees are allowed to incur eligible soft costs from the date of enactment and allowed to incur ongoing eligible hard costs if they're covered by a satisfactory environmental review. And then after the grant agreement has been executed for a project, the grantee can start requesting payment for eligible soft costs. And then once the grant agreement and the environmental review has been completed, the grantee may undertake all project activities and request payment of all remaining eligible project funds. Next slide, please.

Okay. Now let's briefly touch on Part 58 versus Part 50, which refers to the regulations that govern the environmental review process. Under Part 58, the local government serves as the responsible entity and conducts the environmental review. This is the default approach and should be used whenever possible for community project funding. Now, under Part 50, HUD conducts the environmental review. This is not the preferred option and should be the last resort. We'll discuss more about Part 50 in the next slide. But first, to summarize the process under Part 58, the grantee will reach out and provide all necessary information to the local government responsible entity to complete the environmental review for the project. Then, the local government responsible entity conducts the environmental review and if the project rises to the categorically excluded subject two, CEST or environmental assessment EA level of review, the responsible entity will need to also publish the public notice, allow for the appropriate local comment period, then submit a request for release of funds to HUD.

HUD will then wait the 15-day objection period and if there are no objections, HUD will issue the authorization to use grant funds approval to the grantee. The grantee will provide a copy of the authorization to use grant funds approval to their congressional grants officer upon receipt to indicate that their environmental review process has been completed. And then the grantee can proceed with the project. Next slide, please.

Now, under Part 50, HUD is the entity responsible for conducting the environmental review for the project. Now, Part 50 typically applies when the program funding statute does not delegate environmental review authority to a unit of general local government, also known as the responsible entity. However, even when the funding program statute grants Part 58 assumption authority like it does with the community project funding program, there are instances when such a project may need to have their environmental review completed by HUD under Part 50. So for community project funding, this would be when a nonprofit grantee, for instance, is unable to find a local government responsible entity to conduct the environmental review for their project. So in such situations, that nonprofit grantee can reach out to their regional environmental officer to discuss paths forward essentially, and the possibility of bringing the project review under Part 50.

Now, HUD may also choose to complete a project review under Part 50 if it is determined that a local government does not have the capacity to act as a responsible entity. But again, it's important to reiterate here that HUD conducting the environmental review under Part 50 should be the last resort

and environmental reviews for community project funding should be conducted by a local government responsible entity under Part 58, whenever possible. Under the Part 50 process, grantees request that HUD conducts the review under Part 50 and provides all necessary and requested project info to the HUD environmental officer. The HUD environmental officer completes the review, conducts any necessary consultations, then certifies and approves the review. The HUD environmental officer will provide a copy of the environmental review record to the CGD grant officer who will provide a copy to the grantee. And then upon receipt of the authorization to use grant funds, the grant team may then proceed with the project, but must also implement and monitor any mitigation necessary that the environmental officer prescribes.

Note that there is no public notice request for release of funds or authorization to use grant funds process under Part 50. And while this may seem like it would take less time under Part 50, keep in mind that HUD has limited capacity to take on large numbers of additional Part 50 environmental reviews. And this can result in significant delays. So this is not something we want to heavily rely on, and everybody in the process should be doing everything we can to encourage that environmental reviews versus community project funding remain under Part 58 with a local government responsible entity can complete the review. Next slide, please.

Okay. This next slide includes information on choice-limiting actions and some environmental review timing considerations for the fiscal year '23 CPF program. The prohibition on choice-limiting actions states that following the Federal Nexus, neither the grantee nor Partners in the process may commit or spend HUD or non-HUD funds on physical or choice-limiting actions until the environmental review process is completed. Examples of choice-limiting actions are acquisition, entering into contracts, commitments or other agreements spending funds, or any actions that limit the choice of reasonable alternatives to a specific site or activity. For fiscal year '23, the Federal Nexus is the date of enactment, December 29th, 2022. And it's important to remember to communicate with stakeholders early in the process to reduce the time necessary to complete the environmental review and avoid taking choice limiting actions prior to the completion of the environmental review.

And then again, of course, one caveat here is that any work under existing contracts that were entered into prior to the Federal Nexus may actually proceed. But again, as we've discussed, proceeding with those activities that work, grantees would be doing so at their own risk. And again, that's because if the environmental review ends up identifying environmental harm resulting from that work performed, that even if they were under existing contracts and that environmental harm cannot be mitigated, the project may not be able to use HUD funds and will need to reach out to their congressional grants officer to discuss potential repurposing of funds. Next slide, please.

Okay, now in this last section we just want to share a couple new and updated CPF environmental review guidance materials, what they cover, where to find them, and for your reference and consideration. Next slide.

Okay. Very quickly, this first item is the community project funding environmental review guidance and scenarios document, which is available on the fiscal year '23 CPF landing page. This is the most inclusive CPF environmental review guidance document and serves as a one-stop shop resource for general CPF environmental review guidance. In addition to all of the items we've covered today, it also includes a common scenarios A and A style section, links to various other CPF environmental review resources and a guide on how to use HUD AAQs, which is the ask a question desk for CPF questions. Next slide.

Okay. Now let's very quickly talk about a couple more specific resources. This is the fiscal year '23 CPF cost eligibility chart, which can also be found on the fiscal year '23 CPF landing page. It is a logic tree chart we put together to assist in quickly and easily determining which project costs are eligible for payment. There are a few caveats on here that you'll be able to read. I won't go into too much detail on

them right now because we are very strapped for time. But the chart does also provide a link to HUD's nationwide Part 50 review for CPS soft costs, which lists all of the soft costs covered in its project description. And as you can see, there are two trees here, one for soft costs, one for hard costs. Essentially, you run your activities and costs through here to determine whether or not they're eligible. And this is structured so that it shows you which costs are eligible based on environmental review requirements. Okay, Next slide, please.

Okay. Now, this last guidance item we want to highlight is the FAQ style CPF guidance on documenting the environmental review record. This guidance, which can also be found on the CPF landing page, aims to clarify the coordination process between the grantee and the various HUD staff involved in the environmental review process. Essentially laying out procedures for coordination between all parties as it pertains to approval, completion, and documentation of the environmental review process. Next slide.

And then just last but not least, this slide includes links to the resources we discussed in this section, which again can also be found on the CPF landing page. Next slide.

That brings us to the end of the environmental section. I just want to thank everybody so much for your time and attention. We will have other more in-depth, detailed environmental review trainings and webinars specifically for CPF. I know that we had to go through a lot of this material quickly and also of course we're happy to address any CPF environmental review questions you may have, but I'll turn it back over to ... Who is the next presenter? Because I know that we're strapped for time.

Vaughn Watson:

[inaudible 01:06:25], it's Vaughn. Good afternoon everyone. My name is Vaughn Watson. I am a grant officer in the office of CPF Community Planning. And next slide, please. And I will be talking about the DRGR system. Just as a precursor, this will be a 30,000 high level overview of the DRGR system. We will be doing additional webinars on the DRGR system as well as in our documentation we provide you, we will give you specific step-by-step instruction through the DRGR system and processing as well as always, if you have any questions about any of the information presented today, feel free to reach us at the CPF mailbox and/or reach out to your grant officer. Next slide, please.

The DRGR system stands for Disaster Recovery and Reporting system. The DRGR system is a HUD platform that first, we utilized for the CDBG Disaster recovery grant but has then been extended out into other CPD programs such as the EDI Congressional Grants. Next slide, please.

A quick overview of the process. So DRGR is the system we will be utilizing to manage our EDI grants that you are awarded to. The first step in the process is once you have submitted all of your required documents, as my director Holly Kelly had stated early in the presentation, we have sent you your grant agreement, your SF 424 and other required documents. Once you have submitted those documents back to your grant officer, especially the SF 424, we take the information off the SF 424 and we then set up your grant in our DRGR system.

Here at HUD Congressional Grant Division, we will set up your first user. So once you send us that information back, our team will then set up your first user. We set that individual up as an administrator and we pull that information off of your SF 424, the section 8F, it says the point of contact listed on the grant, up for your grant off the SF 424 and we will set that person up as the administrator. Once that person is set up, they will be then the ones who will follow through the steps in setting up action plans and on getting you rolling into the system.

That individual will also be able to add additional users. One question we received is how many users can you put in the system? In DRGR, it's an organizational decision. At minimum, you will have to have two users; one who can request a voucher and do office set up and a second one who can approve it.

And so that's just a quick overview of the users. So once that individual is set up, they will receive an email from our department once they have been set up, letting them know they're able to go into the system. And then after they have access to the system, we provide specific instructions on how to do the next part. We'll be setting up your action plan and then from there we'll use the system also to process your draw requests, which are covered through creation of vouchers.

DRGR system is also utilized for the reporting aspect of the system, which is done twice a year. It will be done in January and July, is when the annual reporting is due in our department it will be providing written guidance for that process. Also, at some point, if we set you up a user in the system and things have changed, all you would do is contact your grant officer, letting them know and they will be able to then submit a new user's request. And DRGR again, is their system we're using to manage your grant in the system. Next slide, please.

So once you have access to it with the DRGR, once your users have access, they will go in, upload your approved narrative and budget in the system. Your grant officer will review that approved action plan as the DRGR labels it, and if it's ready we will approve it. If there's any issue, we will work with you then to make any modifications needed. Once that action plan, which is pretty much your budget and scope of work, has been uploaded in the DRGR system and accomplishments identified and approved, once it's approved, you then will have access to draw down. Again, this is a 30,000-foot high level overview of the process. We are providing on a monthly basis, DRGR office hours and training in order to walk you through this process as well as we are providing written instructions as well as your grant officer is able to work with you and additional staffing will be able to schedule meetings to walk you through this process.

So again, once the person has access, they submit your action plan, your brand officers will review it. If it's modification, they'll let you know, but once it's approved, you then will have access to then create vouchers, draw down. Reporting requirements is twice a year and our Department is providing written guidance and we'll be providing detailed training as well as office hours to assist you. And as always, first line of contact is your grant officers. They will be the ones who are able to answer your questions quickly. And again, this is just a 30,000 foot high-level overview of the DRGR system. Next slide, please.

At this time I'm turning over to our Deputy Director, Shantel James.

Shantel James:

Thanks Vaughn. Hi everyone. My name again is Shantel James. I'm the Deputy Director of the Congressional Grants Division and I will briefly walk you through Federal Awards Management. Next slide, please.

Now, what do we mean by federal awards management? The regs that govern this is 2 CFR Part 200, which is the Code of Federal Regulations that governs the uniform administrative requirements, calls, principles, and audit requirements for federal awards. All of your community project funding awards apply to 2 CFR Part 200. You guys all should have the grant guide. They're all listed in your grant guide. Please review those.

Because many of you are new to federal awards, I want to go over some terms with you so that when you're reading the grant guide things can be clear. The recipient is a non-federal entity who receives the award directly from a federal awarding agency such as HUD. Most of you all on this webinar will be recipients.

Sub-recipients or contractors are non-federal entities that receive a contract from or with the federal recipient to purchase property or carries out part or whole of a project or program using federal award funds. When you're reading the 2 CFR, the words must indicate a requirement where the term should

indicate best practices or recommended approaches, but it is not a requirement. For additional guidance on the administrative requirements, once you sign up for a HUD exchange log in, you can follow this link for a brief tutorial. Next slide, please.

Now, there are 15 Parts that are applicable especially to you in 2 CFR Part 200. Because we are pressed for time, I will not go through each of them individually, but I will point out a couple that are particularly important for you. One being financial management and internal controls. It really governs how you should expend an account for your award in alignment with state laws and procedures, financial systems that should be used as well as how you can safeguard and protect personally identifiable information.

Another one of note is federal payment requirements. It governs advanced payments, reimbursements of funds and proper payment systems also outlines the federal government's requirements to make timely payments to you. Another of note is the revision of budget and program plans. These are reporting and amendment requirement procedures if you would like to amend from your original scope of work or your objectives.

Procurement requirements. There is a preference for domestic procurement. As indicated in the materials you received on March the 2nd, you all are not subject to BABA, which is the Build America By America provision, but domestic preferences are recommended. Next slide, please.

Two other words of note is the record retention and access requirements. There is a three-year record retention policy that you should be aware of and in terms of reporting requirements, including status of property acquired and so forth, there is a reporting requirement of twice per year. Also of note, remedies for a non-compliance. With it could result in withholding of cash payment, suspended or terminated award and there is an opportunity to object, hearings and appeals that go along with that.

I hope this brief overview was helpful. Again, please refer to your grant guide for detailed information of the requirements. As always, please reach out to your grant officer. And the entire HUD Congressional Grants Division is available to assist you in your individual and specific needs.

With that, I will yield back to Vaughn Watson to discuss direct cost rate versus indirect cost rate.

Vaughn Watson:

Thank you, Shantel. Next slide. I will be talking about indirect and direct cost rate. Again, this is a 30,000 high up overview. We will be providing a more detailed webinar, but as always, if you have any questions, your first point of contact will be your grant officer. This is a high level overview of the difference between direct cost and indirect cost. The easiest way to remember direct cost is directly. Is this cost directly tied to the project? If this person, this material, this item was not a part of this project, will the building stand? For lack of a better term, if I take this brick away, if I take the mortar away, will it stand? Direct costs are directly required for this activity, this project, this building to move forward.

Indirect costs are those things that are indirectly affected. For example, let's take a shelter. If it's utilizing a portion of the building but not the entire building, then the cost of the building itself would be indirect because the facility itself is not utilizing entirely for that activity. So indirect are those indirect costs, high level items and direct costs are those things that are directly needed for that activity to be undertaking. As you can see here in 2 CFR 200.413 gives the full definition of direct cost and 2 CFR 200.414 also then gives more specific details on what is classified as indirect cost rates. Next slide.

Some examples of indirect cost rates would be rent, utilities, insurance. Those things that are for the total organization or for the total activity, not just specifically for that one activity, if that activity or item action being taken is not isolated in and of itself, that it is one item itself. So for example, again using office space, if it's using a office and a building, it would be indirect because it's a portion of it. Administrative team, your executive team, your director who may help with the program, but they

themselves are not, for example, working case management. And again, transportation and other costs that are indirect cost rates or things that are not using that 100% for that program. Just a couple examples. Next slide.

There are three methods in which indirect cost rates are utilized. There are first the 10%, De Minimis rate, the second method is the federally negotiated indirect cost rate agreement, and the third is the cost allocation plan. Note that if you are a non-federal entity that receives 35 million or more in federal funding per year, you are not eligible to take the 10% De Minimis rate. You are required to have a federally negotiated indirect cost rate. Again, and for additional information as it relates to that, you can see appendix seven in 2 CFR Part 200.

So again, if you receive 35 million or more in federal funding, you are not allowed based upon the federal rules to utilize the 10 De Minimis rate. You are required to have a federally-negotiated indirect cost rate. Even though it does not apply, the indirect cost rate would be a Part of your administrative cost if we had an administrative cap. And we know with the 23 appropriation that administrative cap does not apply and it listed on this 2022. So if there was an administrative cap, indirect cost rate would be part of that administrative cap. Next slide.

Again, I'm not going to go through every one of these. We're going to provide you a copy of the presentation. And here is specific 2 CFR, the regulation that gives you specific instructions on what's allowable and what is not allowable. Again, I'm not going to go through all of this, but as you can see a high level overview and you'll be able to do some additional research to see what is allowable and what's not allowable for indirect cost. Next slide.

How do you go about if you're interested in obtaining a federally indirect cost rate? Just again, high level overview for HUD, HHS Health and Human Services is the organization we have a collaborative agreement with to undertake that negotiation for us. If you can go to the next slide. And they are the ones who then will review it on behalf of HUD.

And these are the items that would have to be included in that proposal if you would like to have a federally-negotiated indirect cost rate. I'm not going to walk through all of these, but this is a high level overview to show you what would have to be included in your proposal for indirect cost rate. And as always, if you're thinking about it or would like to undertake having a federally negotiated indirect cost rate, reach out to your grant officer. They will be able to schedule a meeting with you, provide you with all the resources, all the contacts, meet with you and work with you and walk you through this process. Next slide.

So again, thank you for your time. At this time, I'm going to turn it over to the next presenter.

Holly Kelly:

Hi, this is Holly Kelly. Next slide, please.

So we want to talk to you very briefly about, in the interest of time, just make it very quick. We know that things change. Over time, the scope of your project may change. It may require a project amendment. That is understandable, that's fine and it is quite common. In order to initiate an amendment to your project to a previously approved either line item budget or a narrative for your project, you would coordinate that through your grant officer. We need the information provided on your organization's letterhead signed by your authorized representative, and again, you would submit that to your grant officer requesting the revisions either to the narrative or to the budget. We know that these grants have a fairly long life cycle and, again, things can change in your community and we can work with you on those changes.

We would ask you to include the justification for those proposed changes in your communication to us. We will review those revised changes vis-a-vis, the statutory language and update you accordingly. Again, the grant must complete the same process that it went through for the original narrative and budget to be approved and any changes must align again with the statutory language. HUD does not have the authority to approve changes that are significantly different from the congressionally intended information and there are processes that we can work with you on to change either the name of the organization or significantly change the project description. That is a technical correction and we can provide information and guidance on that as well. But if you want to change the narrative or budget that we approved several months or several years ago, we can most certainly work with you on that and that is coordinated firstly through your grant officers. Next slide, please.

The next slide talks about closeout. Next slide, please. Thank you. And we've already talked about that. One of three conditions will guide how we coordinate with you on grant closeout. Funds are expired, the grantee declines any or all portions of the grant or if all the funds have been expended. And there is a process that we will coordinate with you on grant closeout. Next slide, please.

I'm going to turn the presentation over to our Deputy Assistant Secretary, Robin Keegan. Thank you.

Michelle:

Robin, please go ahead. You're unmuted.

Robin Keegan:

Hi, can you hear me?

Michelle:

Yes, please go ahead.

Robin Keegan:

Thank you everyone. We just wanted to, again, thank you for your time today for spending the time with us. As we mentioned, we have a series of resources that we will be sending you. We have a number of ways that you can get in touch with us to be able to provide answers to your specific questions. We know that this was a lot of information and we'll be posting this recording on the website, so stay tuned for that. And then we also have provided to you an action items checklist for you so that you really can remember what the steps are because there are a lot of steps. We're here to guide you along the way and we really look forward to working with you on each of these steps.

So I think I'll just highlight that there's a lot of reading to do. We've run through very quickly, at a very high level, some of the requirements. We have the related contact points on our website. Things that you can do right now in addition to reading and working through your grant guide and your grant agreement are to prepare your documents, your project narrative, and your project line item budget. We know that you submitted these already to Congress. Please take a look at them and if there are any updates that need to be made before you submit to HUDs, feel free to do that. We'll ask for you to submit that with your signed grant agreement.

And then there are a number of forms that we've walked through today and there's guidance in the grant guide to help you walk through those forms. And then reaching out to the HUD Regional Environmental Review Officer to go through what our colleague, Omri, had walked through in terms of navigating and determining your level of environmental review.

We look forward to receiving this information. We look forward to receiving your questions. You can also complete your sam.gov registration, which is required. And then we will continue to update our webinars and office hours to dive deeper into each of these topics to give you more information as you navigate and walk through the project.

So with that, I'm just going to thank you again, unless I've forgotten something, which somebody from the team will let me know. I just really want to thank you again.

You'll look through these. These are just some more step-by-step for the required materials checklist to help you, to make sure that you've submitted everything in a timely manner and, well, thank you.

Sorry, there's more slides coming, so I'm not doing a good job. There are more webinars and office hours there in the deck and then there are a lot of additional resources as we've mentioned, as well as links provided in this presentation that we will send to you and post on the website. So thank you again, we really appreciate it and we look forward to working with you.

Thank you, Michelle.

Michelle:

Thank you everyone for joining today's webinar and thank you for using event services. Your webinar has ended and you may disconnect.