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DRGR Public Action Plan

Disaster Recovery and Grant Reporting (DRGR) System | Grantee Training

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Trainer, Training Format and Training Objectives

- Trainer
  - Jennifer Alpha, TDA Consulting, Inc.

- Training Format
  - Slide Presentation
  - Live Demonstration

- Training Objectives
  - Public Action Plan Overview
  - Describe Public Action Plan and DRGR Action Plan
  - How to develop a Public Action Plan in DRGR

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Public Action Plan Overview

Relationships | Workflows

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Public Action Plan Overview

- HUD now requires CDBG-DR grantees to use the DRGR system to develop a single Action Plan that will include
  - the Public Action Plan 🌟
  - the DRGR Action Plan
- The new Public Action Plan component will serve as an umbrella for the DRGR Action Plan (Projects and Activities).
- The new requirement of the Public Action Plan applies prospectively
  - No affect on previously executed CDBG-DR grant agreements

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Public Action Plan Overview

- Public Action Plan
  - Same as the Published Plan that has always been required. Now certain Disaster Recovery grantees will be required to build out that Published Plan in DRGR as the "Public Action Plan."
  - Just like the Published Plan, the Public Action Plan is a public facing document so there will be no loss of transparency.
  - Includes all amendments
    - Substantial
    - Non-Substantial

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Public Action Plan Overview

- DRGR Action Plan
  - Same as the Action Plan that existing grantees will be familiar with in DRGR.
  - Builds out details of activities within the overall structure of the Public Action Plan.

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DRGR Terms and Definitions

DRGR Manual Chapter	Term	DRGR Definition
Chapter 11	Public Action Plan	The grantee's action plan for disaster recovery that identifies the proposed use of all funds. **Note:** The Public Action Plan has a separate review status from the DRGR Action Plan.
Chapter 10	DRGR Action Plan (Projects and Activities)	A comprehensive description of projects and activities. **Note:** The DRGR Action Plan has a separate review status from the Public Action Plan.
Chapter 13	Grantee Program	A representation of complex programs. Grantee Programs offer a way to group and report cumulative data in illustrative dashboards.
Chapter 12	Project	The most common grouping of activities. Projects represent major programs or responsible organizations.
Chapter 14	Activity	Associated with one project and one Grantee Program in DRGR. Activities contain the most information used by HUD to monitor for compliance with programmatic requirements.

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DRGR Terms and Definitions

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DRGR Modules

- DRGR Modules required to meet reporting requirements
  - Manage My Grants
    - Grantees develop:
      - Public Action Plan
      - DRGR Action Plan (Projects and Activities)
  - Manage My Financials
  - Manage My Compliance

- DRGR Modules that support meeting reporting requirements
  - Administration
  - Home Page
  - Data Analytics
  - My Profile

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DRGR Module Relationships

- Manage My Grants: Action Plans
    - **Public Action Plans** includes the grantee's plan for disaster recovery that identifies the proposed use of funds. Developed and submitted for HUD review and approval via the DRGR system.
    - **DRGR Action Plans** are the core of DRGR reporting and allow HUD to monitor grantee projects/activities for compliance and spending at a granular detail.
- Manage My Grants: Performance Reports
    - Submit quarterly (QPR) to show accomplishments and share information.
    - If the Action Plan is not properly set-up, grantees will be unable to report on required metrics in the QPR.
- Manage My Financials
    - Grantees can access grant funds by obligating funds and creating vouchers at the Activity level.
    - Project and Activity Budgets set in the Action Plan limit the amount of funds a grantee can obligate and draw for that Activity.

- Home and My Profile
    - **Home:** Displays useful resources and tasks based on the user's role.
    - **My Profile:** Shows the user's information and roles.
- Administration
    - User Roles determine a user's ability to access and complete certain tasks in DRGR.
    - Grantees must have at least two DRGR users but at least four (as backups) are recommended.
- Manage My Compliance
    - **Flags** are automatically generated by DRGR to alert users of actions that need to be corrected to achieve compliance based on data entered by grantees.
    - **Monitoring/Audits/TA events** are connected to a Grant and DRGR activity.
- Data Analytics
    - Reports are incredibly useful to determine the status of users, activities, financial information and several other data points entered by grantees in DRGR.

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Public Action Plan and DRGR Action Plans Process

	Step	Entity Responsible	Task	Public Action Plan or DRGR Action Plan
	1	HUD	HUD Headquarters (HQ) staff add Grant and Grantee Profiles to the DRGR System.	Both
	2	Grantee	Grantee submits request for user accounts with appropriate user roles to CPD field staff in DRGR via the Administration module.	Both
	3	Grantee	After DRGR user accounts have been created, DRGR Grantee Administrators authorize access to DRGR Grantee User accounts in DRGR via the Administration module.	Both
	4	Grantee	After DRGR user accounts have been created, grantee completes research, analysis and discussions in order to determine disaster recovery needs and how CDBG-DR allocation will address those identified needs.	Both

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Public Action Plan and DRGR Action Plans Process (continued)

	Step	Entity Responsible	Task	
NEW	5	Grantee	DRGR Grantee Users develop a **Public Action Plan** in DRGR via the Manage My Grants module by: • Creating Grantee Programs • Entering template narrative and data requirements. • Uploading projections of expenditures and performance outcomes • Uploading required forms (Standard Form 424) and certifications	Public Action Plan

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Public Action Plan and DRGR Action Plans Process (continued)

	Step	Entity Responsible	Task	
NEW	6	Grantee	Grantee submits Public Action Plan in the DRGR System once completed. Grantee will repeat step 5 (above) when new programs must be added, or changes need to be made to the existing action plan, includes substantial and non-substantial amendments.	Public Action Plan
NEW	7	HUD	HUD staff reviews the **Public Action Plan** in DRGR. If edits are needed, HUD staff can reject the **Public Action Plan**, returning the **Public Action Plan** to the Grantee to be revised and resubmitted. Otherwise, HUD staff approve the **Public Action Plan.**	Public Action Plan

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Public Action Plan and DRGR Action Plans Process (continued)

Step	Entity Responsible	Task	
8	Grantee	Following approval of the Public Action Plan, grantee users create a **DRGR Action Plan (Projects and Activities)** in DRGR via the Manage My Grants module by: • Entering projects to group activities. • Entering activities with budgets, performance measures and assigning said activities to the appropriate project.	DRGR Action Plan
9	Grantee	Grantee submits **DRGR Action Plan** in the DRGR System once completed. Grantee will repeat step 8 (above) resubmitting the DRGR Action Plan when new activities must be added or changes need to be made to existing activities.	Both

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Public Action Plan and DRGR Action Plans Process (continued)

Step	Entity Responsible	Task	
10	HUD	HUD staff reviews the **DRGR Action Plan**. If edits are needed, HUD staff can reject the Action Plan, returning the **DRGR Action Plan** the Grantee to be revised and resubmitted. Otherwise, HUD staff approve the **DRGR Action Plan**.	DRGR Action Plan
11	**Grantee**	Grantee submits Quarterly Performance Reports (QPR) through DRGR quarterly no later than 30 days following the end of each fiscal quarter. **Note:** DRGR Action Plan status must be "Reviewed and Approved" to submit QPR.	DRGR Action Plan

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Public Action Plan Sequence

FIRST - Grantee Program(s) must be developed prior to completing the Public Action Plan Template.

GRANTEE PROGRAM 1
- Narrative
- Budget
- Projections

GRANTEE PROGRAM 2
- Narrative
- Budget
- Projections

SECOND - Once at least one Program is created, grantees can complete the Public Action Plan template narratives.

PUBLIC ACTION PLAN TEMPLATE
- Narrative
- Data Tables
- Maps

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Public Action Plan Grantee Programs

- Grantee Programs offer a unique way to group and report cumulative data for the programs described in the Public Action Plan
- HUD must setup the Grantee Program structure for the grant or the appropriation
- Grantee Programs are only available to a limited number of Grantees based on program appropriation
- Once, activities are associated with a Grantee Program:
  - All activity related data will be aggregated and displayed at the Program level under the **Programs** tab of the **Manage Action Plan** screen
- For example, a "Housing" Grantee Program Type may be limited to housing Activity Types such as housing new construction or rehabilitation/reconstruction
  - Each activity's **Activity Type** will dictate the **Grantee Program** available to associate

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DRGR Action Plan Hierarchy

- Projects must be created first, then Activities.
- Once a Project is created, Activities can then be added to the Project.
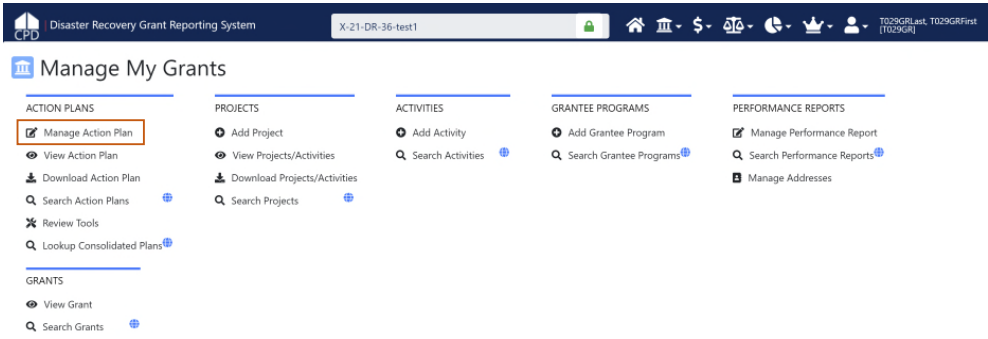
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Public Action Plan and DRGR Action Plan

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Public Action Plan and DRGR Action Plan

- Relationship
  - Public Action Plans have direct relationship with DRGR Action Plans.
  - If a program is not entered in the Public Action Plan, grantees will be unable to add projects and activities for the program in the DRGR Action Plan.
  - Public Action Plan can be downloaded from DRGR to allow for public review.
  - DRGR Action Plan must be submitted and approved in order to submit QPRs.

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Public Action Plan and DRGR Action Plan

- Access both the Public Action Plan and DRGR Action Plan through the Manage My Grants module <Manage Action Plan> menu option.

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Public Action Plan and DRGR Action Plan

The tabs for **Narrative**, **Programs**, **Documents, and Uploads** will be used to manage your **Public Action Plan**.

The tabs for **Projects, Activities, and Uploads** will be used to manage your DRGR Action Plan.

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Public Action Plan and DRGR Action Plan

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Public Action Plan Tips and Reminders

a. Download the Public Action Plan –
   a. As a best practice download a copy of the Public Action Plan to have as a back up outside of DRGR.
   b. Downloaded copies of the Public Action Plan are also helpful to complete public comment and Limited English Proficiency translation requirements per applicable Federal Register notice.

b. System Time Out -
   DRGR times out due to inactivity after 20 minutes.

c. MicroStrategy Reports –
   Reports are available for grantees and are helpful for both Public Action Plans and DRGR Action Plan (Projects and Activities) when managing your program, submitting amendments, troubleshooting issues, and aggregating and exporting data.

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Public Action Plan Tips and Troubleshooting

c. DRGR Action Plan is the same for all grantees –
   The HUD Resource Exchange has resources such as older trainings, fact sheets, and the DRGR User Manual for new grantees who need additional training and guidance regarding the DRGR Action Plan (Projects and Activities).

d. Policy and Programmatic Guidance –
   Federal Register notices can be found on HUD.gov and the HUD Exchange for information on CDBG-DR Programmatic and Policy topics related to the Public Action Plan and requirements.

e. Contact Your HUD Representative –
   When in doubt or in need of more specific assistance, contact your HUD Representative!

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Public Action Plan Tools and Resources

- DRGR User Manual – The complete DRGR User Manual is available on the HUD Exchange. The following chapters may be particularly useful in setting up your Public Action Plan
  - Chapter 11: Public Action Plan
  - Chapter 13: Grantee Programs
- DRGR Fact Sheets
  - https://www.hudexchange.info/programs/drgr/releases/
- Questions
  - Submit through Ask A Question (AAQ) on HUD Exchange

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Thank you for watching!

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