



HUD Office of Housing Counseling

Grant Award Package Training for FY 2023
Comprehensive Housing Counseling NOFO
Awardees

May 23, 2024





Webinar Logistics

- Webinar is being recorded.
- The recording, transcript, and slides will be available in 7-10 days on the HUD Exchange:
<https://www.hudexchange.info/programs/housing-counseling/webinars/>.
- Click the “Get Credit” button on the training page to add the course to your transcript. You must have a HUD Exchange account.
- Presentation materials were sent prior to the webinar.



How do I ask questions?

Please submit your questions and comments in the chat box.
We will answer questions in the chat throughout the presentation.

If time allows, we will answer some questions live at the end of the presentation.

You can also send questions to housing.counseling@hud.gov



Introduction

Rebecca Mullaley





Today's Presenters

- Introduction: Rebecca Mullaley
- Grant Execution Process: Joel Schumacher
- Grant Agreement:
 - Articles III, IV, and V: Elizabeth Dunn
 - Article VIII: Kate Carrigan
 - Articles X, XI, and XIII: Gabriela Roman
 - Article XXII: Shelena Hawkins

Award Overview

- \$39.9 million awarded on May 16, 2024, to 165 FY 2023 grantees
 - This includes \$3 million awarded to 14 grantees participating in the Minority Serving Institutions (MSI) initiative
- Period of Performance: October 1, 2023 – September 30, 2024 with an automatic extension until March 31, 2025
- Grant execution documents due on June 10, 2024



Grant Execution Process

Joel Schumacher

Grant Package Checklist

- Along with your grant agreement, you received this checklist.
- Your agency will not have access to grant funds until all required grant execution documents are returned and approved.
- Ask your HUD Point of Contact (POC) for an extension if needed

Office of Housing Counseling FY 2023 Housing Counseling Grant Award Package Checklist

- ✓ This is a checklist of required documents grantees must submit to execute the FY 2023 grant awards. See enclosed grant agreement for detailed requirements of each item.
- ✓ All documents must be returned to the assigned Point of Contact (POC) within 15 business days of the date of the enclosed award letter. An incomplete package will delay the ability to access grant funding.

Form HUD-1044 and Grant Agreement Signature Page

- ☐ HUD-1044 signed and dated (box 19)
- ☐ Grant Agreement signature page signed and dated

Indirect Cost Rate Documentation

- ☐ Copy of Grantee's Negotiated Indirect Cost Rate Agreement (NICRA), **OR**
- ☐ Statement that Grantee elects to charge a de minimis rate of 10% of modified total direct costs in accordance with 2 C.F.R. Part 200.414, **OR**
- ☐ Statement that Grantee will not seek reimbursement for indirect costs

Financial Management Systems

Form HUD-1044 and Grant Agreement Signature

- The HUD-1044 is the official government form that shows the agency's grant amount, grant number, and point of contact at HUD
- Sign, date, scan, and return to HUD:
 - The final page of the grant agreement. (Please don't send back the entire grant agreement)
 - 1 copy of the HUD-1044 with block 19 completed
- Keep your hard copies of the executed grant package for your records.

Indirect Cost Rate Documentation

- There are three options for indirect cost rate documentation:
 - Copy of your Negotiated Indirect Cost Rate Agreement (NICRA)
 - Statement that you elect to charge a “de minis” rate of 10% of the modified total indirect costs in accordance with 2 CFR 200.414
 - Statement that you will not seek reimbursement for indirect costs

Financial Management Systems (FMS)

- Provide documentation (a certification from the executive director or other qualified professional) demonstrating that the organization's FMS satisfy the requirements in regulations at 2 CFR 200.302
- FMS must identify:
 - All federal awards received and expended
 - Source and application of funds, including comparison of expenditures with budget amounts for each award
 - Accurate and complete disclosure of financial results of each award
 - Effective control and accountability over funds, property, and other assets

Audit

- Agencies that expend more than \$750,000 in Federal funds must:
 - Provide the agency's single or program-specific audit
- Agencies not required to complete a single or program-specific audit (under 2 CFR 200.501) must:
 - Provide the most recent independent financial audit; AND
 - Provide a written statement affirming that the grantee does not expend \$750,000 or more in Federal funds
- Agencies who do not have an audit or who are not required to have an audit:
 - HUD will provide a financial review at HUD's expense; contact your HUD Point of Contact (POC) for information

Code of Conduct

- Submit a written code of conduct that meets the requirements outlined in the award letter, if:
 - Your agency is not listed on the HUD Code of Conduct (CoC) for HUD Grant Programs website (https://www.hud.gov/program_offices/spm/gmomgmt/grantsinfo/conductgrants); or
 - Your CoC has changed since the last time you submitted it to HUD
- If your agency is listed on the website above, and your CoC has not changed, you do not need to submit a CoC.

Projected Budget (1 of 2)

- The budget must account for how every dollar being billed to the grant will be spent.
 - Projected budget for grantee and each subgrantee itemizing all proposed expenses under the grant and budget narrative, if necessary.
 - Budget may include, but is not limited to: salaries, fringe and other employment benefits, travel, training, marketing, outreach, cost of managing a network, HUD counselor certification exam fees, and indirect costs, as applicable.

Projected Budget (2 of 2)

- The initial budget must be approved by your HUD POC prior to any expenditures.
- Proposed amendment(s) to the projected budget are permitted at any time during the period of performance.
- See Article IV of the Grant Agreement for detailed requirements.
- Fixed-fee methodology: You must seek prior approval from the HUD POC

Projections for Housing Counseling Grant Activities (1 of 2)

- You must submit the HUD-9902 projections through the Housing Counseling System (HCS)
 - <https://www.hudexchange.info/programs/housing-counseling/9902/>
- Enter projections under the “HUD-9902” menu item and select projections for NOFA-2023-1.
- Click the “Submit to HUD” button, then notify your HUD POC for review and approval.
- For step-by-step instructions, refer to:
 - <https://www.hudexchange.info/trainings/courses/housing-counseling-webinar-hud-client-projections-in-hcs1/>
 - https://www.hud.gov/sites/documents/OHC_HCSUGAV1300071513.PDF

Projections for Housing Counseling Grant Activities (2 of 2)

- Where to Enter Projections in HCS:

<input type="button" value="Save As Draft"/> <input type="button" value="Submit To HUD"/> <input type="button" value="Return To Budget Allocation"/>		Fiscal Year 2024: 10/01/2023 - 09/30/2024	Total
* Comment required			
8. Households Receiving Education Services (Including Online Education), by Purpose			
a. Completed financial literacy workshop, including home affordability, budgeting and understanding use of credit	<input type="text" value="0"/>	0	
b. Completed predatory lending, loan scam or other fraud prevention workshop	<input type="text" value="0"/>	0	
c. Completed fair housing workshop	<input type="text" value="0"/>	0	
d. Completed homelessness prevention workshop	<input type="text" value="0"/>	0	
e. Completed rental workshop	<input type="text" value="0"/>	0	
f. Completed pre-purchase homebuyer education workshop	<input type="text" value="0"/>	0	
g. Completed non-delinquency post-purchase workshop, including home maintenance and/or financial management for homeowners	<input type="text" value="0"/>	0	
h. Completed resolving or preventing mortgage delinquency workshop	<input type="text" value="0"/>	0	
i. Completed disaster preparedness assistance workshop - FY 2022	<input type="text" value="0"/>	0	
j. Completed disaster recovery assistance workshop - FY 2022	<input type="text" value="0"/>	0	
Section 8 Total:	0	0	
9. Households Receiving One-on-One Counseling by Purpose			
a. Homeless Assistance	<input type="text" value="0"/>	0	
b. Rental Topics	<input type="text" value="0"/>	0	
c. Prepurchase/Homebuying	<input type="text" value="0"/>	0	
d. Non-Delinquency Post-Purchase - FY 2022	<input type="text" value="0"/>	0	
e. Reverse Mortgage	<input type="text" value="0"/>	0	
f. Resolving or Preventing Forward Mortgage Delinquency or Default - FY 2022	<input type="text" value="0"/>	0	
g. Resolving or Preventing Reverse Mortgage Delinquency or Default - FY 2022	<input type="text" value="0"/>	0	
h. Disaster Preparedness Assistance - FY 2022	<input type="text" value="0"/>	0	
i. Disaster Recovery Assistance - FY 2022	<input type="text" value="0"/>	0	
Section 9 Total:	0	0	
Sections 8 & 9 Total:	0	0	

Entering Budget and Sub-Allocation List MSOs, SHFAs, and Intermediaries (1 of 2)

- Complete in HCS under the budget allocation screen:
 - General Allocation Guide:
<https://files.hudexchange.info/resources/documents/Changes-to-Agency-User-Interface-for-HCS-V13-0-0-0.pdf>
 - Allocation across Fiscal Years (Slides 28-41):
<https://www.hudexchange.info/resources/documents/HCS-Improvement-Release-v-14-12-0-0-September-2017.pdf>
- Enter list of subgrantees and funded branches, and their corresponding award amount sub-allocations.

Entering Budget and Sub-Allocation List MSOs, SHFAs, and Intermediaries (2 of 2)

- Where to enter your agency's budget and sub-allocations in HCS:

BUDGET		FUNDS RETAINED BY GRANTEE		SUB-ALLOCATION COSTS	
Total Budget:	\$ 581,836.00	Cost of Managing Network:	\$ 0.00	To Be Sub-Allocated:	\$ 336,061.00
Award:	\$ 336,061.00	Indirect Costs:	\$ 0.00	Sub-Allocated:	\$ 0.00
Grant Ratio:	58 %	Total Funds Retained by Grantee:	\$ 0.00	FY 2021 Total Allocation:	\$ 0.00
				FY 2021 Balance:	\$ 336,061.00
				FY 2022 Allocation:	\$ 0.00
				Remaining Funds:	\$ 336,061.00

Status	Sub-Agency	Agency ID	Agency Type	# of Counselors	# of Projected Clients	Sub-Allocation	Agency Total Budget
Active			Branch Inter Agency	0	0	\$ 0.00	\$ 0.00
Active			Branch Inter Agency	0	0	\$ 0.00	\$ 0.00
Active			Branch Inter Agency	0	0	\$ 0.00	\$ 0.00
Active			Branch Inter Agency	0	0	\$ 0.00	\$ 0.00
Active			Branch Inter Agency	0	0	\$ 0.00	\$ 0.00
Active			Branch Inter Agency	0	0	\$ 0.00	\$ 0.00

Client Management System (CMS)

- You must certify that you utilize a CMS approved to interface with HUD systems. See list of approved CMS:
<https://files.hudexchange.info/resources/documents/HUD-Certified-CMS-Products-for-HUD-HCA-Use.pdf>
- Intermediaries, Multi-State Organizations (MSOs), and State Housing Finance Agencies (SHFA) must list their subgrantees and the CMS they use.

FY 2024 Expression of Interest Form

- Grantees must complete and sign the Expression of Interest in Fiscal Year 2024 Comprehensive Housing Counseling Grant Program Funds:

Expression of Interest

Please choose from one of the two options below:

☐ YES, my agency is interested in receiving FY 2024 funds as outlined in the FY 2023 NOFO.

☐ NO, my agency is not interested in receiving FY 2024 funds as outlined in the FY 2023 NOFO. I understand that by choosing "NO" I will likely render my agency ineligible for all FY 2024 Comprehensive Housing Counseling Grant Program funding.

Signature

Name, Title

Date



Grant Agreement – Articles III, IV, and V

Elizabeth Dunn

Article III: Period of Performance

- Begins: October 01, 2023
- Ends: September 30, 2024
- If an applicant indicated on their HUD-9906 form that program costs would be incurred prior to the award, reimbursement may be requested for costs incurred no earlier than April 01, 2023.
- Only HUD is authorized to grant an extension. All grantees received an automatic extension until March 31, 2025.
 - A grantee's extension(s) cannot exceed a total of 12 months from the original Period of Performance end date of September 30, 2024.

Article IV: Projected Services and Budget

- The housing counseling services listed in the grantee's HUD-approved housing counseling work plan represent the scope of services under this grant
- During grant execution, the submitted 9902 projections will be checked against the agency's work plan
- When there is a change in staff or management responsible for the grantee's housing counseling program, the grantee must notify its HUD POC in writing within 15 days of the change

Article IV: Projected Services and Budget

- Grantee must receive written approval from the HUD POC before implementing changes in projected services and budgets proposed in its application.
- The initial budget must be approved by the HUD POC prior to any expenditures. Budget must itemize all proposed expense categories:
 - Salaries, fringe, benefits
 - Travel and training
 - Marketing and outreach
 - Cost of managing network
 - Counselor certification exam fees
 - Indicate indirect cost rate

Article IV: Projected Services and Budget

- Fixed-fee methodology:
 - Must seek written approval from HUD POC
- Eligible Activities:
 - Housing counseling and group education
 - Oversight, compliance, and quality control
 - Supervision of housing counseling staff
 - Housing counselor training and certification
 - Marketing and outreach

Article V: Subcontract General Prohibition Against Subcontracting

- It is not permissible to contract out housing counseling services, except as specified in 24 CFR 214.103(i). If this exception to the general prohibition applies, grantee shall comply with 2 CFR 200 and all other requirements. Exceptions apply if subgrant:
 - Sub-grant, etc. was described in approved NOFO application and funded in grant or otherwise approved by HUD
 - Sub-grant, etc. is for web-based education.
 - Sub-grant, etc. is for the purchase of supplies, materials, etc.

Article V: Subcontracts and Requirements for Subgrants (1 of 3)

- Eligible subgrantees/branches: Grantees making subgrants must ensure that their subgrantee's quality of services meets or exceeds the standards for HUD approved Local Housing Counseling Agencies.
- Changes to network composition: Submit written request to HUD to amend subgrantee or branch list or corresponding subgrant amounts.

Article V: Subcontracts and Requirements for Subgrants (2 of 3)

- Funding agreements: Grantee shall execute a written subgrant agreement with each subgrantee before disbursing funds. Copies of all subgrant agreements must be maintained and made available to HUD upon request.
- Responsibility for grant administration: Grantee is responsible for managing the daily operations of its program and agrees to accept responsibility for its subgrantees' compliance with the applicable provisions of the grant agreement. Grantee must monitor the performance of its subgrantees and take appropriate action to resolve problems to ensure compliance.

Article V: Subcontracts and Requirements for Subgrants (3 of 3)

- Subgrants to affiliates and allocation of funds to branches:
 - Grantee must maintain copies of all subgrant agreements and a written record on how it distributed funds to its subgrantees. Grantees must list their subgrantee's and branches along with the corresponding sub-allocations in HCS.
- Documentation of funding decisions:
 - If a Grantee awards subgrants competitively, it must document its process and notify the public (if applicable).



Grant Agreement – Article VIII

Kate Carrigan

Article VIII: Cost (1 of 4)

- Prior approval for revisions to work plan and budget: HUD may require prior approval for deviations from the grantee's projected services and budget.
 - See 2 C.F.R. 200.308
- Allowable costs: Reimbursement is based on actual expenses and must be:
 - Allowable
 - Allocable
 - Reasonable
 - See eligible activities in Article IV of the grant agreement

Article VIII: Cost (2 of 4)

- Indirect cost rates:
 - 10% de minimis or;
 - Approved NICRA
- Direct grantees:
 - If grantee has a NICRA, must provide documentation from cognizant agency showing the approved rate
 - Those without a valid NICRA can elect 10% de minimis
- Subgrantees:
 - Can not use parent agency NICRA
 - 10% de minimis option, but Intermediary, Multi-State Organizations (MSO), or State Housing Finance Agencies (SHFA) direct grantee cannot require de minimis when a subgrantee has a NICRA

Article VIII: Cost (3 of 4)

- Period of Performance:
 - Costs must be incurred within the period of performance, unless an extension is granted
- Multiple sources of funding:
 - HUD will not cover the same portion of services or goods already covered by another funding source.
 - Grantees may bill HUD and another funding source for the same client if the cost of counseling exceeds the amount of reimbursement covered by HUD.
 - HUD may request documentation to verify HUD is not reimbursing grantees for activities already billed to another funding source.

Article VIII: Cost (4 of 4)

- Burden of proof:
 - The burden of proof for services rendered rests with the grantee
 - All grant expenditures and supporting records are subject to review
 - Improper payments may be disallowed and subject to repayment using non-federal funds or an offset to current or future grant awards.



Grant Agreement – Article IX, X, and XIII

Gabriela Roman

Article IX: Reporting (1 of 8)

- Grantees must submit Grant Activity Reports (GAR) in conjunction with each drawdown request. The GAR is due according to the following schedule:

Performance Period	Grant Activity Report Due
10/1/2023 – 12/31/2023	Not later than February 15, 2024
1/1/2024– 3/31/2024	Not later than May 15, 2024
4/1/2024– 6/30/2024	Not later than August 15, 2024
7/1/2024– 9/30/2024	Not later than January 31, 2025

Article IX: Reporting (2 of 8)

- If the award package is distributed after the start of the Period of Performance, the first GAR reflecting activity for that quarter (and any previous quarters) will be due 45 days after the end of the quarter during which the grant award package was distributed.
 - The award package was distributed on May 16, 2024, so the first GAR report is due not later than August 15, 2024.
- If the Grantee will not seek reimbursement for costs during a specific quarter, the Grantee must notify their POC in writing.

Article IX: Reporting (3 of 8)

- GARs must include all information indicated in the grant agreement:
 - Grantee's name, address, and grant number
 - Start and end dates of the reporting period
 - Staff and hourly rate: Identify each counselor or other employee whose time or activity, or both, is billed to the grant, the individual's title, the individual's FHA Connection housing counselor ID number demonstrating certification (as applicable), and the hourly rate used to calculate reimbursement.
 - Staff hours
 - Fixed fee methodology (if applicable)
 - Itemized expenses
 - Required certification
 - Form HUD-9902
 - Reverse Mortgage (HECM) default counseling activities (if applicable)

Article IX: Reporting (4 of 8)

- In addition to the previous slide, Intermediaries, SHFAs, and MSOs must submit the following:
 - Oversight activity (if applicable)
 - Sub-allocations
 - Costs of managing a network
 - Federal financial report (SF-425)
 - Changes in composition or network size (subgrantees and funded branches)

Article IX: Reporting (5 of 8)

- Final Report:
 - A final report is due 120 days after the period of performance has ended.
 - If the grantee does not submit all reports in accordance with this section within one year of the period of performance end date, the Federal awarding agency must report the grantee's failure to comply with the terms and conditions of the award with the OMB-designated integrity and performance system (currently FAPIIS: <https://sam.gov/content/fapiis>)

Article IX: Reporting (6 of 8)

- Final Report:
 - Any problems, delays, or adverse conditions that impaired their ability to meet the objective of the federal award, and any favorable developments which enabled their ability to meet the objective of the federal award sooner or at less cost.
 - Grantees with expired grants and undisbursed balances at the end of the period of performance must provide a narrative description explaining the challenges leading to delays in grant closeout.

Article IX: Reporting (7 of 8)

- Submit a certification, signed by an authorized individual, which states that all applicable closeout activities required in 2 CFR 200.343 have been completed. This certification is in addition to the certification statement required in quarterly reports.
- Submit a NICRA containing final rates for any period for which the grantee received reimbursement of indirect costs.
 - This obligation exists even post-closeout.
 - Grant award may be adjusted to account for revisions to final indirect costs rates (See 2 CFR 200.435(a)).

Article IX: Reporting (8 of 8)

- Compliance with NOFO obligations: Should the grantee fail to meet the commitments made in the grant application, HUD may adjust the award amount and require repayment using non-federal funds or an offset to future grant awards. May include but are not limited to:
 - Network size
 - Oversight of funded network
 - Counselors

Article IX: Federal Sub-award Reporting (Only for Intermediaries, MSOs, and SHFAs)

- Report required for sub-awards of \$30,000 or more.
- Entities with gross incomes less than \$300,000 in the previous tax year are exempt from sub-award reporting requirements.
- Details found at: <http://www.fsrs.gov/>
- FSRS Report is due no later than 30 days after the month in which the sub-award is obligated.

Article X: Payment Requests

- Article X is where to find information on:
 - General payment procedures
 - Documentation of expenses

Article X: General Payment Procedures

- HUD will only process payment requests on receipt of an acceptable Grant Activity Report (GAR).
- After making the voucher request in eLOCCs, email a signed copy of the voucher form to your HUD POC. All sections of the HUD-50080 must be complete.
 - HUD-50080: <https://form-hud-50080-scmf.pdfFiller.com/>
 - Budget line Items 9500 and 9525
 - Program area CHC
- LOCCS user guides:
 - https://www.hud.gov/program_offices/cfo/locs_guidelines

Article X: Documentation of Expenses

- Maintain documentation of direct costs:
 - Invoices
 - Receipts
 - Cancelled checks
 - Documentation of personnel expenses

Submit to HUD POC upon request. Expense documentation is requested during a performance review.

Article XIII: Non-Compliance and Remedies

- Delayed use of grant funds may result in default and recapture:
 - Failure to execute the grant within ninety (90) days of receipt of the grant award package.
 - Failure to submit a drawdown request for all remaining funds within 120 days following the end of the period of performance.



Grant Agreement – Article XXII

Shelena Hawkins

Article XXII: Historically Black College and University and Other Minority Serving Institutions Funding Initiative

- Article XXII is only applicable to grantees that received an award for the HBCU/MSI Funding Initiative. You can verify if you received this funding by referring to the FY 2023 HUD-1044.

16. Description

FY 2023 Grant Type: COMPREHENSIVE COUNSELING

HC1 funding to be spread under Housing Counseling Grant Voucher, LOCCS Budget Line Item 9500.

MSI funding to be spread under Housing Counseling Grant Voucher, LOCCS Budget Line Item 9525.

Total Award: \$2,139,145.00

HC1 / Counseling Services (9500): \$1,864,145.00

MSI / Minority Serving Institution Initiative (9525): \$275,000.00

LOCCS Draw Down Expiration Date: July 29, 2025

Period of Performance: October 1, 2023, to March 31, 2025 (extended)

Article XXII: Historically Black College and University and Other Minority Serving Institutions Funding Initiative

- The MSI Statement of Work (SOW) is included in all grantees' award packages and a fully executed SOW must be submitted.
- This SOW only applies to grantees receiving the Historically Black College and University and Other Minority Serving Institutions Funding Initiative ("MSI Initiative")
- Refer to Section I of the SOW for Grant Execution requirements, forms, and applicable deadlines
- The grantee must submit a separate budget itemizing all proposed expense categories for each MSI partnership, including any indirect cost rate for reimbursement
- Memoranda of Understanding (MOU) must be fully executed between all Participating Agencies and MSI and maintained on file for HUD's review.

HOUSING COUNSELING PROGRAM FISCAL YEAR 2023 MSI INITIATIVE STATEMENT OF WORK

This Statement of Work only applies to Grantees receiving the Historically Black College and University and Other Minority Serving Institutions Funding Initiative ("MSI Initiative"). Grantees are required to adhere to the following program requirements for funding under the MSI Initiative:

FY 2023 Minority-Serving Institution Initiative STATEMENT OF WORK		
Section I. Grant Execution		
Activity	Task	Submit by
CHC Grant Execution	Complete the tasks outlined in the FY23 Award Package Checklist, including: <ul style="list-style-type: none"> • Form HUD-1044 and Grant Agreement Signature Page • Indirect Cost Rate Documentation • Financial Management Systems • Audit • Code of Conduct • Name of CMS • Projections in HCS 	30 days after receipt of award package
Statement of Work	The Grantee must complete Section V. Program Requirements and sign the final Statement of Work	30 days after receipt of award package
MSI Budget	The Grantee must submit a separate budget itemizing all proposed expense categories for each Minority-Serving Institution (MSI) partnership which may include but is not limited to: salaries, fringe and other employment benefits, travel, training, marketing, outreach, and the cost of managing a network. Grantee must indicate any indirect cost rate for which they will seek reimbursement.	30 days after receipt of award package
Memoranda of Understanding or other Agreement	Execute and maintain agreements between all Participating Agencies and MSIs.	Maintain on file for HUD's review

Article XXII: Historically Black College and University and Other Minority Serving Institutions Funding Initiative

- Refer to Section II of the Statement of Work (SOW) for Grant Activity Report (GAR) requirements, forms, and applicable deadlines
- Grantees must submit quarterly Grant Activity Reports (GARs) as described in the SOW
- Grantees must submit sub-allocations, current balances, reimbursement amounts, and cumulative drawdowns and indicate the amount of funds expended, total clients served, and the relevant category of eligible activities carried out pursuant to this funding initiative
- Grantees must also include a brief narrative describing progress and challenges achieving performance goals and objectives described in the Statement of Work.
- Submission of the payment voucher to the HUD POC meeting Budget Line Item requirements

Section II. Grant Activity Report (GAR)		
Sub-Allocations	Submit the Subgrantees and/or Branches' initial sub-allocations, current balances, quarterly reimbursement amounts, and cumulative drawdowns.	No more than quarterly
Grant Reporting Requirements	Grantees must indicate the amount of funds expended for each reporting quarter and the relevant category of eligible activities carried out in accordance with the Statement of Work. If the Grantee will not seek reimbursement for costs during a specific quarter, the Grantee must notify their POC in writing.	No more than quarterly
Grant Reporting Narrative	Grantees must include a brief narrative describing progress and challenges achieving objectives described in the	No more than quarterly
	Statement of Work for each of category of eligible activities.	
GAR Certification	Submit the GAR Certification - see language in the Grant Agreement (Article IX.A.7).	No more than quarterly
Form SF-425	Complete and submit Form SF-425 summarizing financial data for each quarter.	No more than quarterly
Form HUD-9902	Submit HUD-9902 data quarterly and update the data to reflect counseling activity funded through this Agreement (in the HUD Housing Counseling Grantees Only column).	Quarterly
Payment Voucher	Submit the payment voucher (form HUD-50090-CHC-a) to ELOCCS and e-mail voucher to HUD POC. Budget Line Item requirements will be provided to the Grantee in their award package.	No more than quarterly

Article XXII: Historically Black College and University and Other Minority Serving Institutions Funding Initiative

- Refer to Section III of the Statement of Work (SOW) for Final Report requirements and applicable deadlines
- The grantee must submit all required documentation listed in the Grant Activity Report (GAR) section of the SOW
- The grantee's Final Narrative must address questions **1 through 7** including demographic data (ethnicity, race, income level and LEP)

Section III. Final Report		
GAR	Submit all required documentation listed in the Grant Activity Report section of this Statement of Work.	No more than 120 days after the end of the Period of Performance
Final Narrative	<p>Grantees must describe the extent to which they (or their MSI partner(s)) were able to fulfill the program objectives described in their grant application, including the Statement of Work.</p> <p>The narrative must address the following questions and should include the following demographic data (ethnicity, race, income level and LEP) for numbers reported in questions 1 through 7.</p> <ol style="list-style-type: none">1. Number of student internships completed, if applicable.<ul style="list-style-type: none">• Number of stipends provided to student interns• Number of students that gained permanent employment2. Number of students, faculty, staff, or interns that passed the Housing Counseling Certification Exam3. Number of one-on-one counseling sessions<ul style="list-style-type: none">• Number of students, faculty, staff, counseled• Number of community residents counseled• Number of student interns counseled4. Number of group education/workshops completed<ul style="list-style-type: none">• Number of students, faculty, staff educated• Number of community residents educated• Number of student Interns educated5. Number of students, faculty, staff or interns educated or counseled on Fair Housing Rights.	No more than 120 days after the end of the Period of Performance

Article XXII: Historically Black College and University and Other Minority Serving Institutions Funding Initiative

- Grantees must describe the extent to which they (or their HBCU and/or other MSI partner(s)) were able to fulfill the program objectives described in the seven outcome categories below as found within their Statement of Work:
 - Student Internships, if applicable.
 - Housing Counseling Certification Exam Data
 - One-on-One Counseling Sessions
 - Group Education/Workshops
 - Fair Housing
 - Other Outcomes
 - Method of Marketing Initiatives

Article XXII: Historically Black College and University and Other Minority Serving Institutions Funding Initiative

- The grantee's Final Narrative must describe the extent the MSI partnership expanded its impact within the target community
- The grantee's narrative must advise HUD of any program refinement discoveries and program recommendations
- NICRA submission for any indirect costs
- Submission of a fully executed Closeout Certification confirming completion of closeout activities pursuant to 2 C.F.R. 200.344 and 2 C.F.R. 200.345

	<p>6. Describe how Grantee measured outcomes on the target population. Note improvements in any of the following areas (if applicable to program objectives):</p> <ul style="list-style-type: none"> • Number of students, faculty, staff, or Interns who Secured Rental Housing • Number of students, faculty, staff, or Interns who Purchased a Home • Number of students, faculty, staff, or Interns with Decreased Debt or increased savings • Number of students, faculty, staff, or Interns with Improved Credit Scores • Number of students, faculty, staff, or Interns that avoided foreclosure • Number of students, faculty, staff, or Interns who Started/Expanded Businesses <p>7. Describe the method of marketing initiatives and the number of disseminated/individuals reached:</p> <ul style="list-style-type: none"> • Flyers/Brochures • PSAs/Radio Advertisement • Surveys <p>Grantees must also describe the extent to which they (or their MSI partner(s)) were able to expand their impact within the target community. The Grantee must also advise HUD of any program refinement discoveries or recommendations:</p> <p>1. Describe how the institution's students and faculty were included in the proposed activities, and how the institution expanded its role in the target community.</p> <p>2. Describe how you would refine your program if you were to receive grant funds for a second year. Describe how HUD should refine this funding initiative.</p>	
NICRA	Submit the NICRA containing final rates for any period for which the Grantee received reimbursement of indirect costs.	No more than 120 days after the end of the Period of Performance
Closeout Certification	Submit a certification, signed by an authorized individual, which states that all closeout activities, per 2 C.F.R. 200.344 and .345, have been completed.	No more than 120 days after the end of the Period of Performance

Article XXII: Historically Black College and University and Other Minority Serving Institutions Funding Initiative

- After approval of the Final GAR and Narrative, the HUD POC will send the grantee the Closeout Agreement for execution.
- The Closeout Agreement must be returned to HUD no more than 60 days after receipt of the Closeout Agreement.

Section IV. Grant Closeout		
Closeout Agreement	HUD will send a Closeout Agreement to the Grantee after the Final Report has been approved. The Grantee should return the signed agreement to the HUD POC.	No more than 60 days after receipt of Closeout Agreement

Article XXII: Historically Black College and University and Other Minority Serving Institutions Funding Initiative

- At grant execution, grantees must submit a fully executed Minority Serving Institution (MSI) Statement of Work (SOW) for **each** Participating Agency that has entered into a formal partnership with an MSI.
- Grantees must include the type of counseling, service provided, each organization's role and responsibility, target audience, the proposed number to be served, the proposed methodology, and any collaborations or partnerships

Section V. Program Requirements	
At Grant Execution, Grantees must complete the Chart below for each Participating Agency that has entered into a formal partnership with the Minority-Serving Institution. Grantees must maintain evidence of these partnerships for review upon HUD's request.	
Period of Performance: October 1, 2023 - September 30, 2024	
Since grant award packages were sent to Grantees after the Period of Performance start date, Grantees will receive an automatic extension of two quarters (March 31, 2025).	

Clients.	How many housing counseling clients does the Applicant and/or its network plan to serve with this funding during the period of performance?	
Total Award.	Provide the total award amount supported to fulfill the program objectives described in this Statement and Work	

Name and HCS ID of Applicant/Subgrantee/Branch that Applicant is Funding with this NOFO	Name of Partner HBCU or other MSI; City, State; Contact Name, Email Address (state "N/A" if subgrantee or branch is an HBCU or other MSI)	Allocation Amount
Describe the activity undertaken for each of the relevant categories below. (limit 1,000 characters for each) The Applicant may provide a separate attachment if more space is needed.		
One-on-One Counseling		
Group Education and Workshops		
Housing Counseling Training and Certification		
Marketing and Outreach		
Oversight, Compliance and Quality Control		
Supervision of Housing Counseling Staff		



Conclusion Information

Rebecca Mullaley



Training Archives

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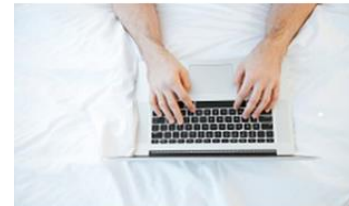
The Housing Counseling Training Digest is updated weekly to reflect trainings hosted by:

- HUD Office of Housing Counseling (OHC)
- OHC funded training partners
- Other partners that host trainings of interest to housing counselors

Please email housing.counseling@hud.gov to notify HUD about upcoming training and events for housing counselors.

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Access self-paced online training modules, such as Introduction to Housing Counseling.

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- Grant and award information:
hudexchange.info/programs/housing-counseling/nofa/
- [Counselor Training and Testing website](#)
- Email us at: housing.counseling@hud.gov
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