COMMUNITY PLANNING & DEVELOPMENT

Disaster Recovery Grant Reporting (DRGR) System including the Quarterly Performance Report (QPR)

Welcome and Speakers

- Welcome to HUD's webinar series on CDBG-DR basics
  - Webinars will focus on key rules and requirements for managing DR grants
  - Webinars will also share tips & lessons learned
- Speakers:
  - Ryan Flanery, U.S. Department of Housing and Urban Development (HUD)
  - Tyler Bridges, U.S. Department of Housing and Urban Development (HUD)
  - Janine Cuneo, ICF International

CDBG-DR Webinar Series

- This is the fourth in a series of webinars about CDBG-DR for CDBG-NDR grantees and CDBG-DR grantees
  - Specific guidance on NDR will not be covered in these webinars
- Upcoming webinar schedule:

Topic	Date
2016 Disaster Recovery Grant Reporting System	March 31, 2016 at TBD
2016 Duplication of Benefits	April 7, 2016 at TBD
2016 Environmental Review	April 21, 2016 at TBD

Polling and Asking Questions

- Webinar will include some polls
  - If you are attending as a group, feel free to briefly discuss before answering
- How to ask questions – Chantel Key, ICF
  - Questions will be taken at the end of the webinar
  - Written questions: Type questions into “Questions” box located on your GoToWebinar panel

What you'll learn today!

- Overview of DRGR
  - Lay of the Land
  - Administrative options
- The Basics of…
  - Action Plan
  - QPR
  - Drawdowns
  - Report Functionality
- Questions and Resources

Quick Tips embedded throughout the presentation!

Poll #1a

- Do you consider yourself a staffer that works on the fiscal side or program side?
  - Fiscal
  - Program

Poll #1b

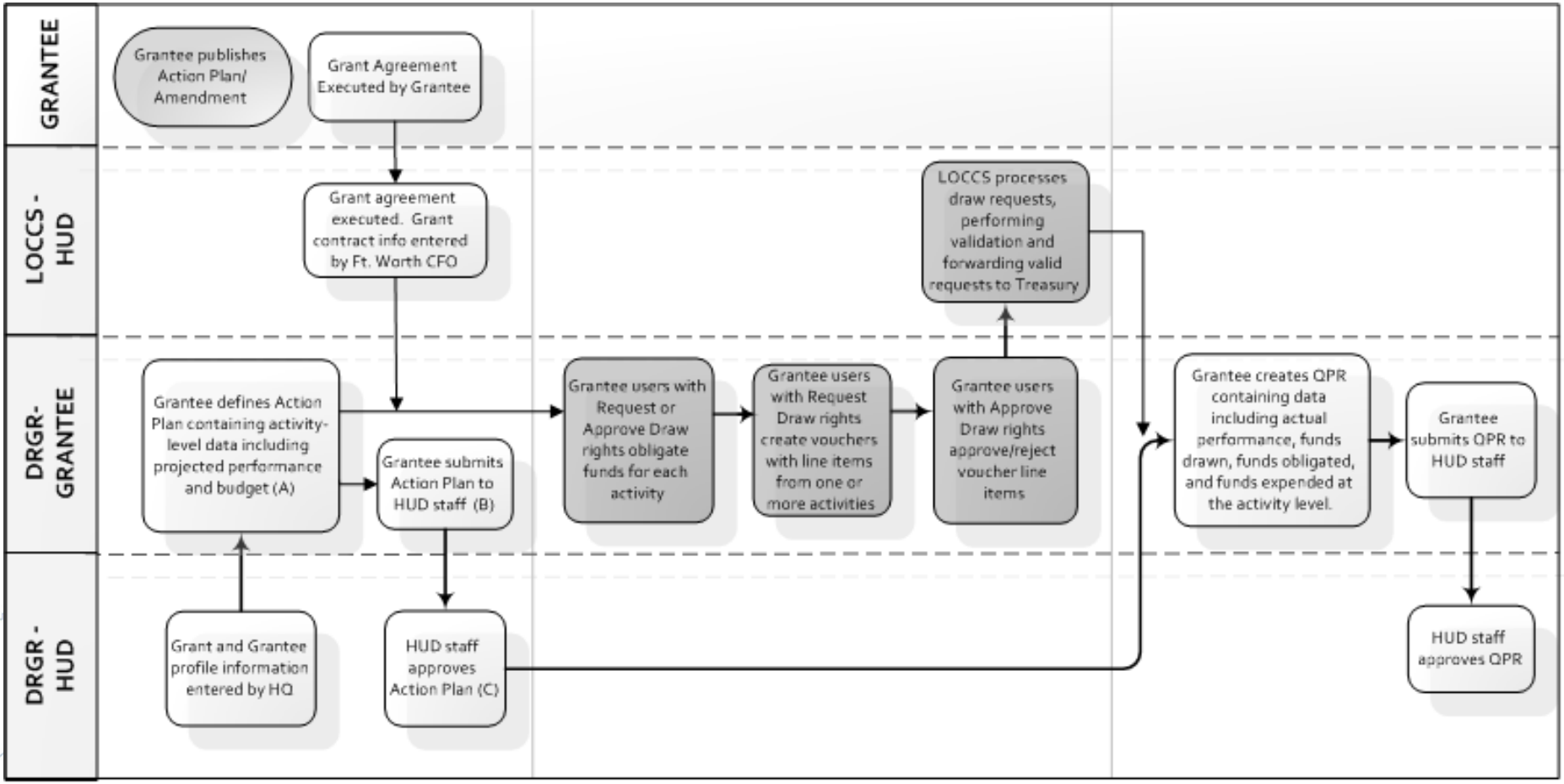
- Have you worked in DRGR before? If yes, how would you rate yourself?
  - Novice
  - Intermediate
  - Advanced

Overview

Overview

- What is DRGR?
  - Disaster Recovery Grant Reporting
- How does information flow?
  - Sequencing
  - 5 Modules
  - Math Rules

Sequencing

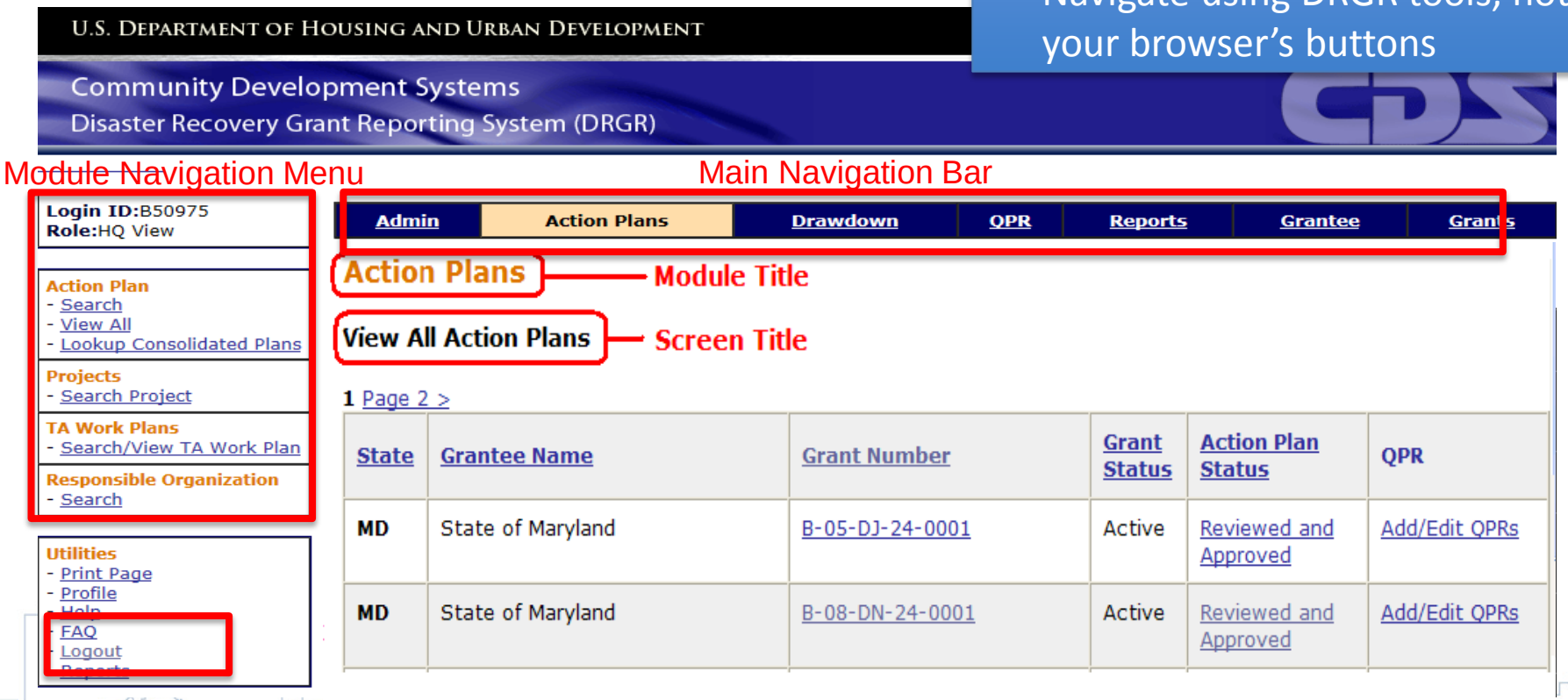

GRANTEE
LOCCS - HUD
DRGR- GRANTEE
DRGR - HUD
Grantee publishes Action Plan/ Amendment
Grant Agreement Executed by Grantee
Grant agreement executed. Grant contract info entered by Ft. Worth CFO
LOCCS processes draw requests, performing validation and forwarding valid requests to Treasury
Grantee defines Action Plan containing activity-level data including projected performance and budget (A)
Grantee submits Action Plan to HUD staff (B)
Grantee users with Request or Approve Draw rights obligate funds for each activity
Grantee users with Request Draw rights create vouchers with line items from one or more activities
Grantee users with Approve Draw rights approve/reject voucher line items
Grantee creates QPR containing data including actual performance, funds drawn, funds obligated, and funds expended at the activity level.
Grantee submits QPR to HUD staff
Grant and Grantee profile information entered by HQ
HUD staff approves Action Plan (C)
HUD staff approves QPR
GRANT & ACTIVITY SETUP / FUNDING
ACTIVITY OBLIGATION & DRAWDOWN
REPORTING

DRGR Modules

Basic Layout

QUICK TIP

- Logout Using Logout Link.
- Use Internet Explore: Compatibility View Mode
- Save Early! Save Often!
- Navigate using DRGR tools, not your browser's buttons



- Use **Main Navigation Bar** to Select Module.
  Use **Module Navigation Menu links** to select screens.
  Use **Logout Link.**

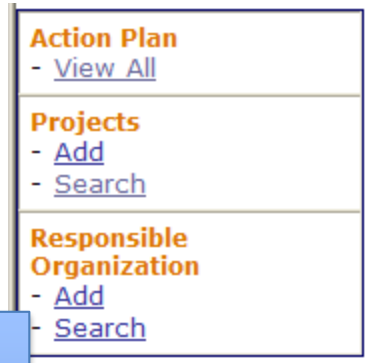
Module Navigation Menu

Admin

Link only shows for Grantee Admin Users

Monitoring and Audit links show for ALL users

Action Plans



Links show for ALL Grantee Users.

QUICK TIP

Searching in DRGR:

- Blank Search
- Partial Search – RECOMMENDED
- Exact Search

Module Navigation Menu Cont.

Grantee Basic & Additional Roles

- Basic Roles
  - Grantee Admin
  - Regular Grantee Issue
  - Grantee – View Only
- Additional Roles
  - Request (Create) Drawdown, OR
  - Approve Drawdown
  - Submit Action Plan
  - Submit QPR

QUICK TIP

No Basic Role allows a grantee user to Request or Approve a Drawdown!

Check out page 1-6 of the DRGR User Manual.

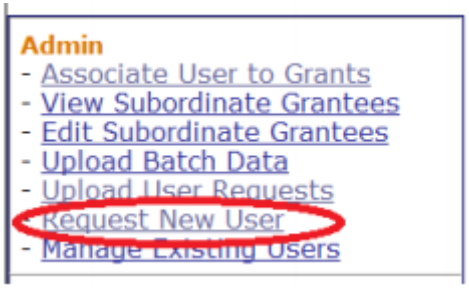
Poll #2

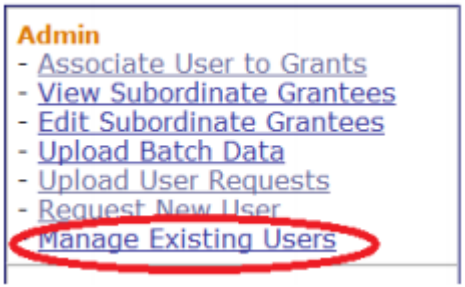
- One of these is not a DRGR Module. Which One?
  - Drawdown
  - Action Plan
  - Coordination
  - Admin

Admin

Account Registration/Mod

- New/Modified Account registration (R 7.10)
  - Submit requests via DRGR via your Grantee Admin user

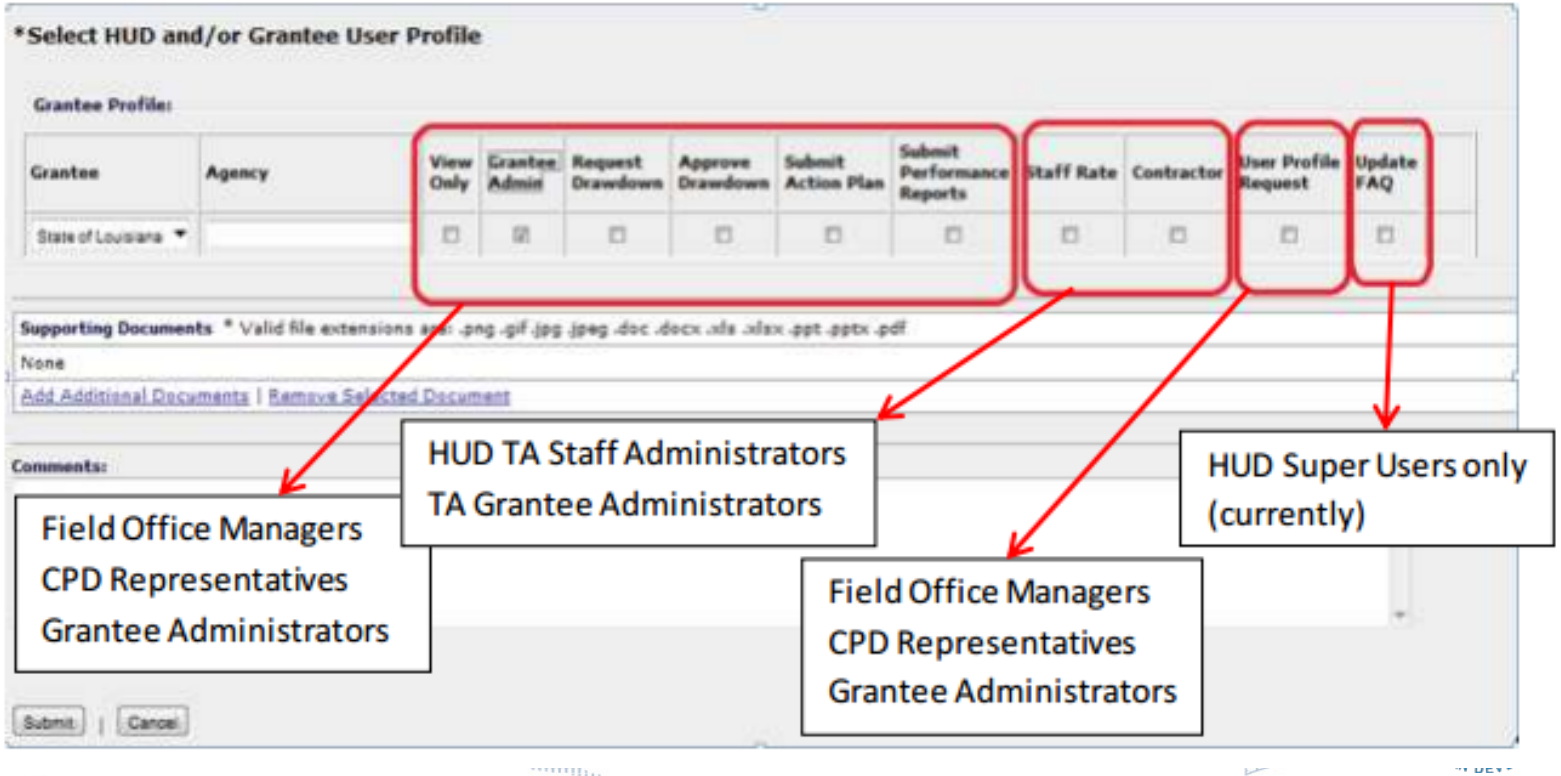




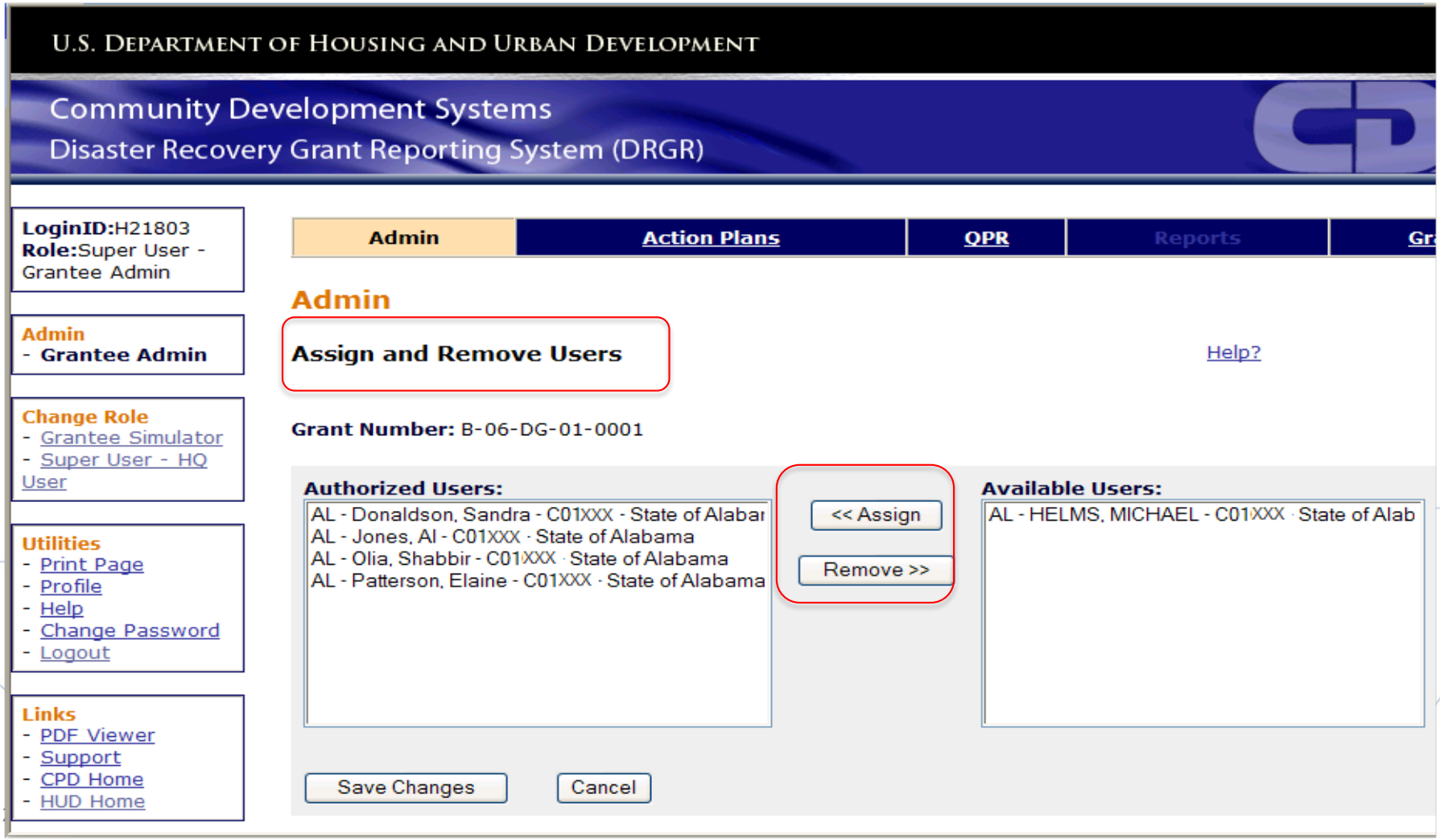
  - Search for user in IDIS or create new user request
- New User
  - Part 1: Contact information

Account Registration/Mod

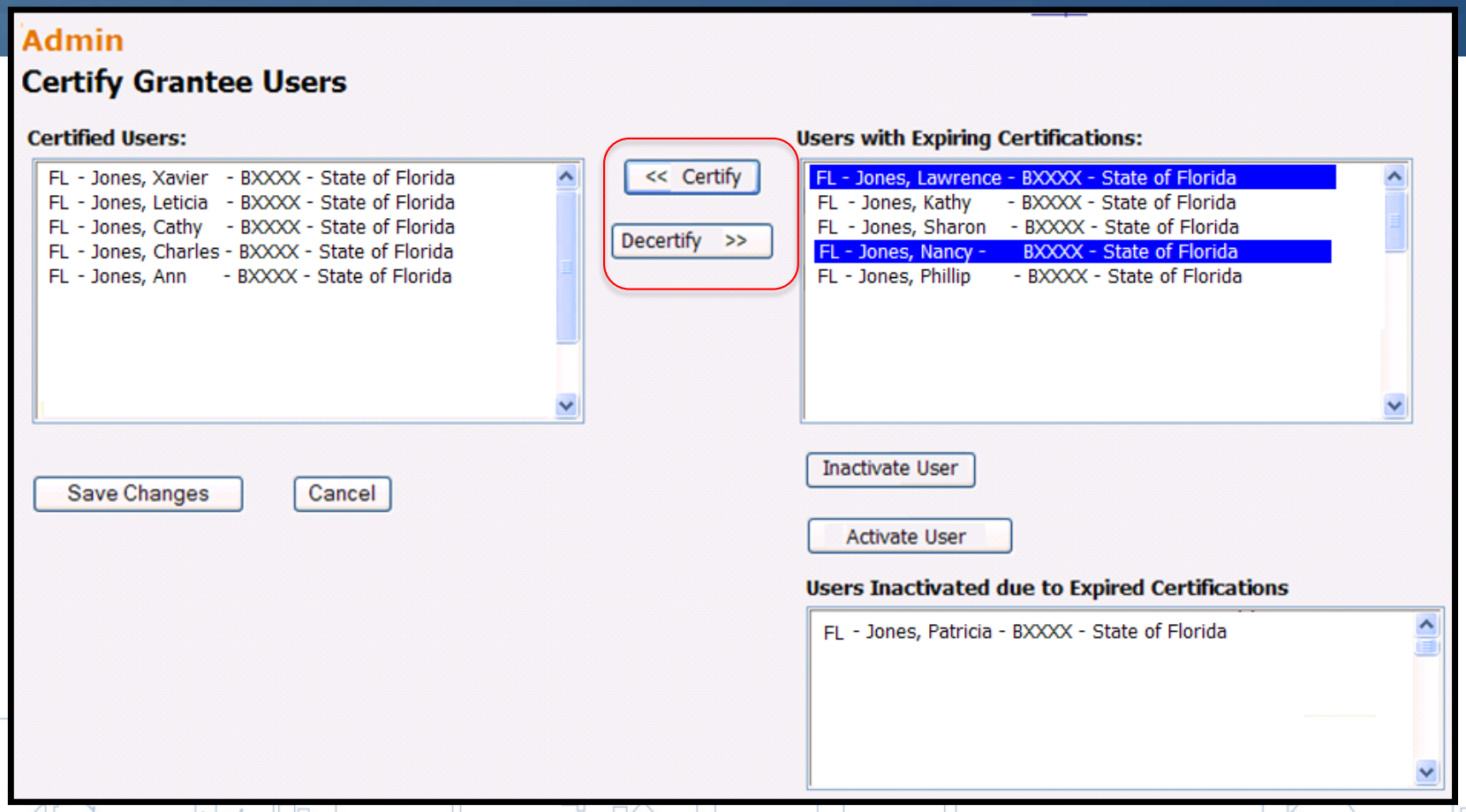
- New User
  - Part 2: Select User Roles



Assign/Remove Users (Admin)



(re)Certification of Users



- Recertification occurs every 6 months
- Grantee Admin Users certify regular grantee users
- HUD Reps certify Grant Admin

Monitor/Audit/TA Event

- Record monitoring, audit or technical assistance events you undertook: module is NOT a monitoring system.
  - Provides HUD with a summary of critical management and oversight actions that you have carried out to meet the appropriation requirements that requires grantees to identify how the are preventing fraud, waste and abuse.
- Required starting with Sandy DR grantees

QPR Table of Inputs for the quarter/cumulative

Monitoring, Audits, and Technical Assistance

	This Report Period	To Date
Monitoring Visits	4	12
Audit Visits	2	5
Technical Assistance Visits	3	9
Monitoring/Technical Assistance Visits	1	2
Report/Letter Issued	6	14

Monitor/Audit/TA Event

- Two Basic Levels of Information:
  - Events/Reports
    - Basic data of the event (start/end date, categories/topics of info being reviewed, etc.)
  - Findings/Concerns/TA Topics
    - Identify findings and/or concerns
    - Detail status and corrective actions

Action Plan

What is a DRGR Action Plan?

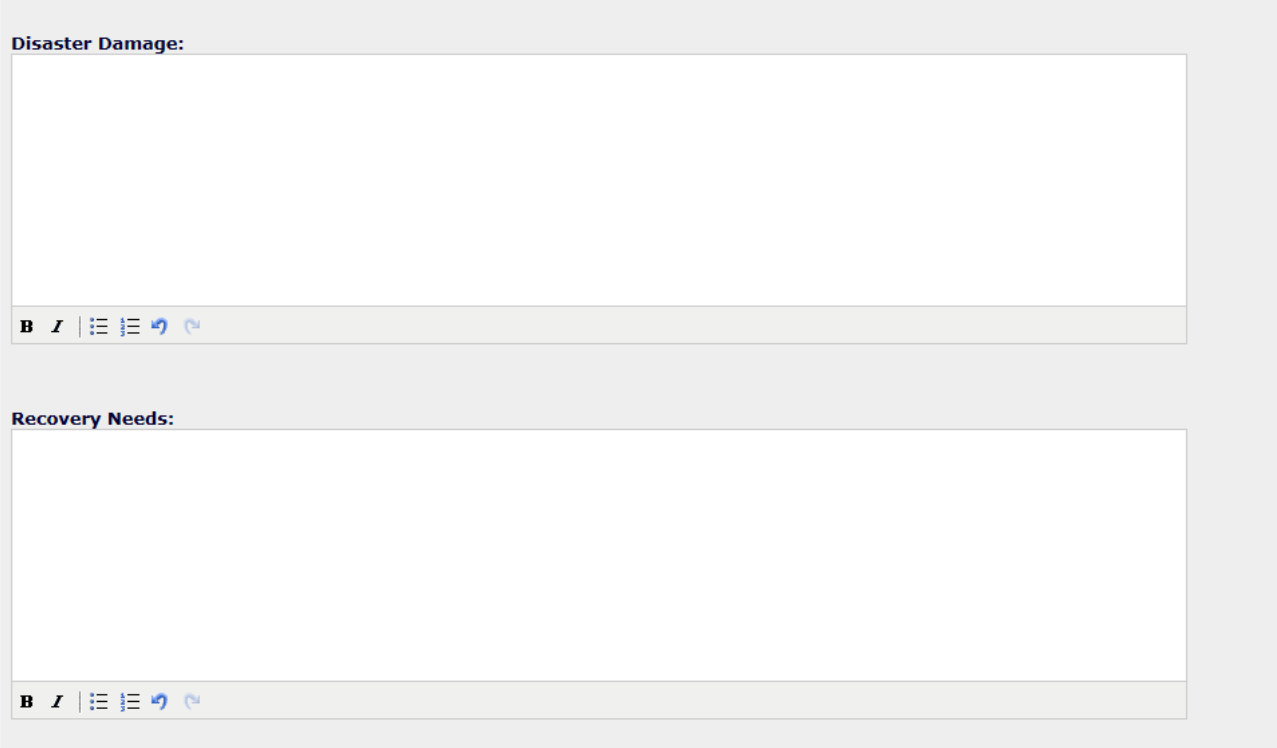
- Purpose: DRGR Action Plans are where grantees add projects and activities and provide a template for the QPR. Getting the Action Plan right helps grantees identify the date required to set up budgets and performance goals.
  - Base of operations
  - Two Tier Hierarchy
    - Projects vs. Activities
  - Changes will happen
  - Based on your published plan: More granular info.

4 Key Actions

1. Add/edit information regarding your grant overall (directly related to your “paper-based” Action Plan)
2. Add/edit information on projects v activities (e.g. narrative description, budgets, national objectives)
3. Add/edit information on Responsible Organizations
4. Add/edit the PROPOSED Performance Measures/Accomplishments

Add/Edit Action Plan

- "Add" Action Plan
  - Follow easy steps in manual to "activate" your grant
- Once "activated," edit overall grant-level information
  - Screens mimic your published plan



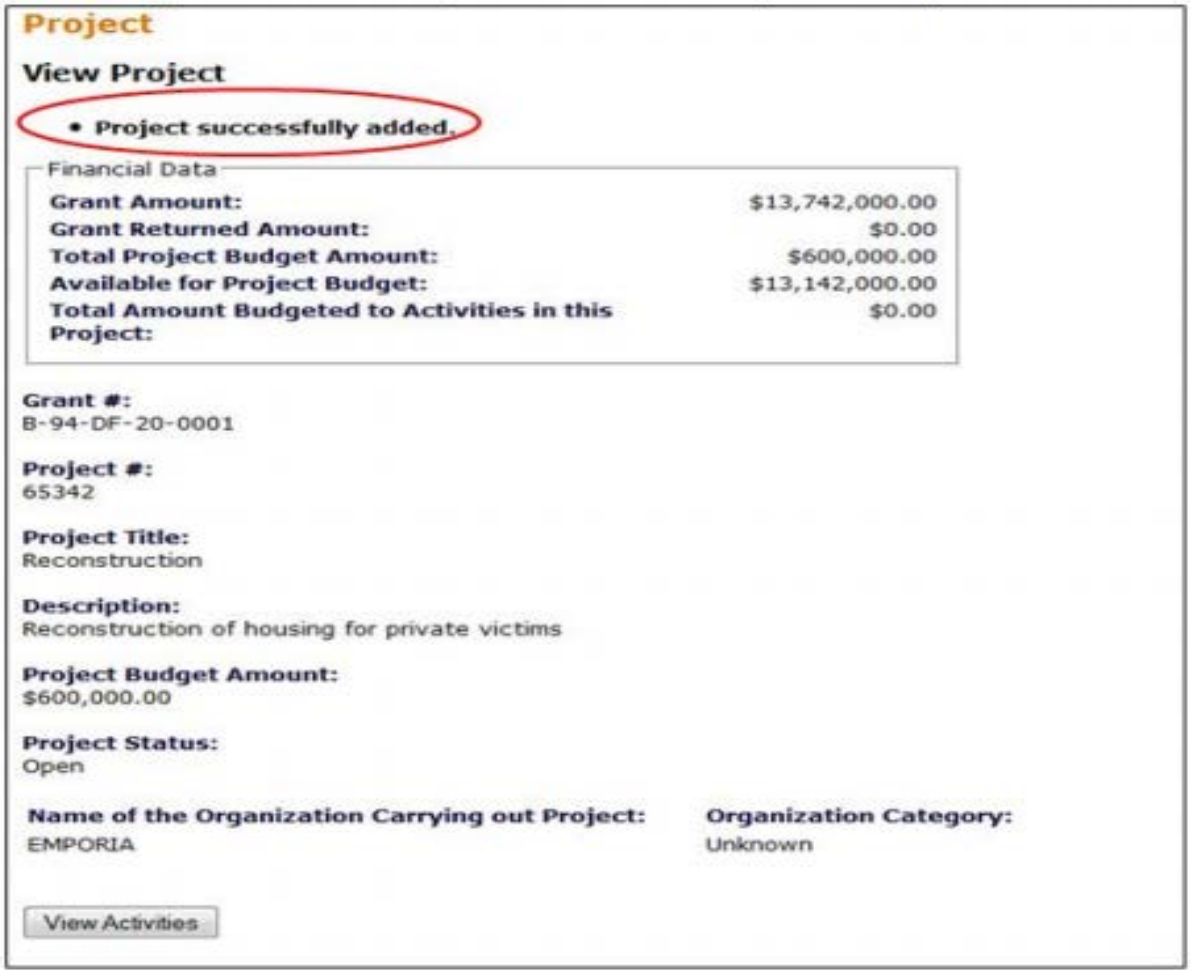
Add/Edit Projects & Activities

Setting Up Projects vs. Activities

- Enter Projects
  - Group activities by categories such as major programs outlined in your Disaster Recovery Published Plan (Housing, EconDev, etc.)
- Enter Activities second since they must be assigned to projects

Project 1
Activity 1.A
Activity 1.B
Project 2
Activity 2.A
Activity 2.B

Add/Edit Projects & Activities (cont)



Project

View Project

- Project successfully added.

Financial Data

Grant Amount:	$13,742,000.00
Grant Returned Amount:	$0.00
Total Project Budget Amount:	$600,000.00
Available for Project Budget:	$13,142,000.00
Total Amount Budgeted to Activities in this Project:	$0.00

Grant #:
B-94-DF-20-0001

Project #:
65342

Project Title:
Reconstruction

Description:
Reconstruction of housing for private victims

Project Budget Amount:
$600,000.00

Project Status:
Open

Name of the Organization Carrying out Project:
EMPORIA

Organization Category:
Unknown

View Activities

Add/Edit Activity

- Four elements to consider when breaking out an Activity
  - Activity Type (assign to the “end use” of the activity)
  - Responsible Organization
  - National Objective
  - Multifamily (as applicable)

Example: Project - Housing

- Two Activity Types
  - Rehab Program
  - Acquisition – buyout program
- Three Responsible Organizations
  - County A
  - County B
  - City D
- All Single-Family Properties, except one MF complex
- Two National Objectives
  - Urgent Need
  - Low/Mod
- Three Responsible Organizations
  - **County A (Rehab – L/M; SF & 1 MF complex)**
  - **County B (Rehab – L/M; Buyout Program – L/M)**
  - **City D (Rehab – L/M; Buyout Program – UN, L/M)**

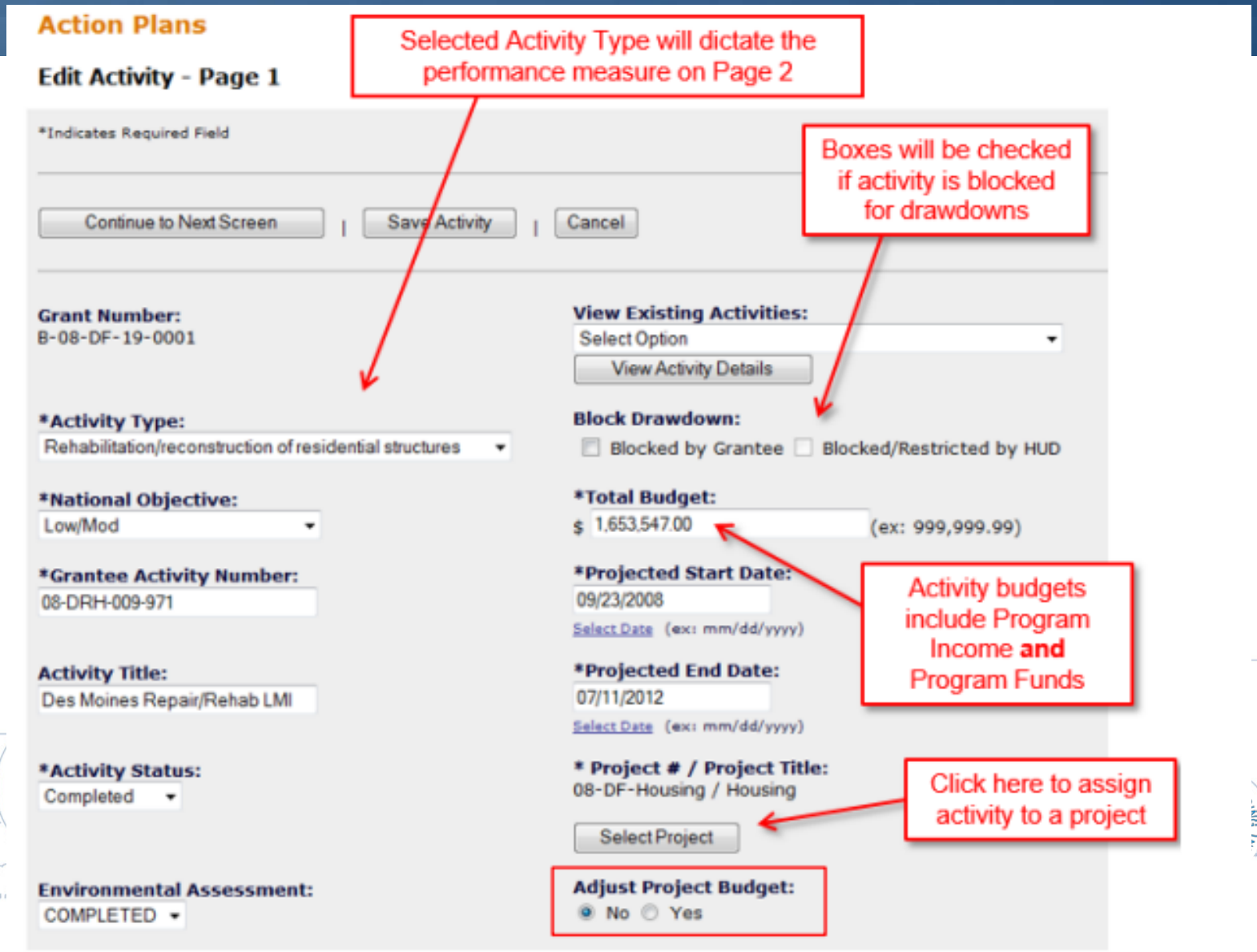
Example: Project - Housing

Breakdown

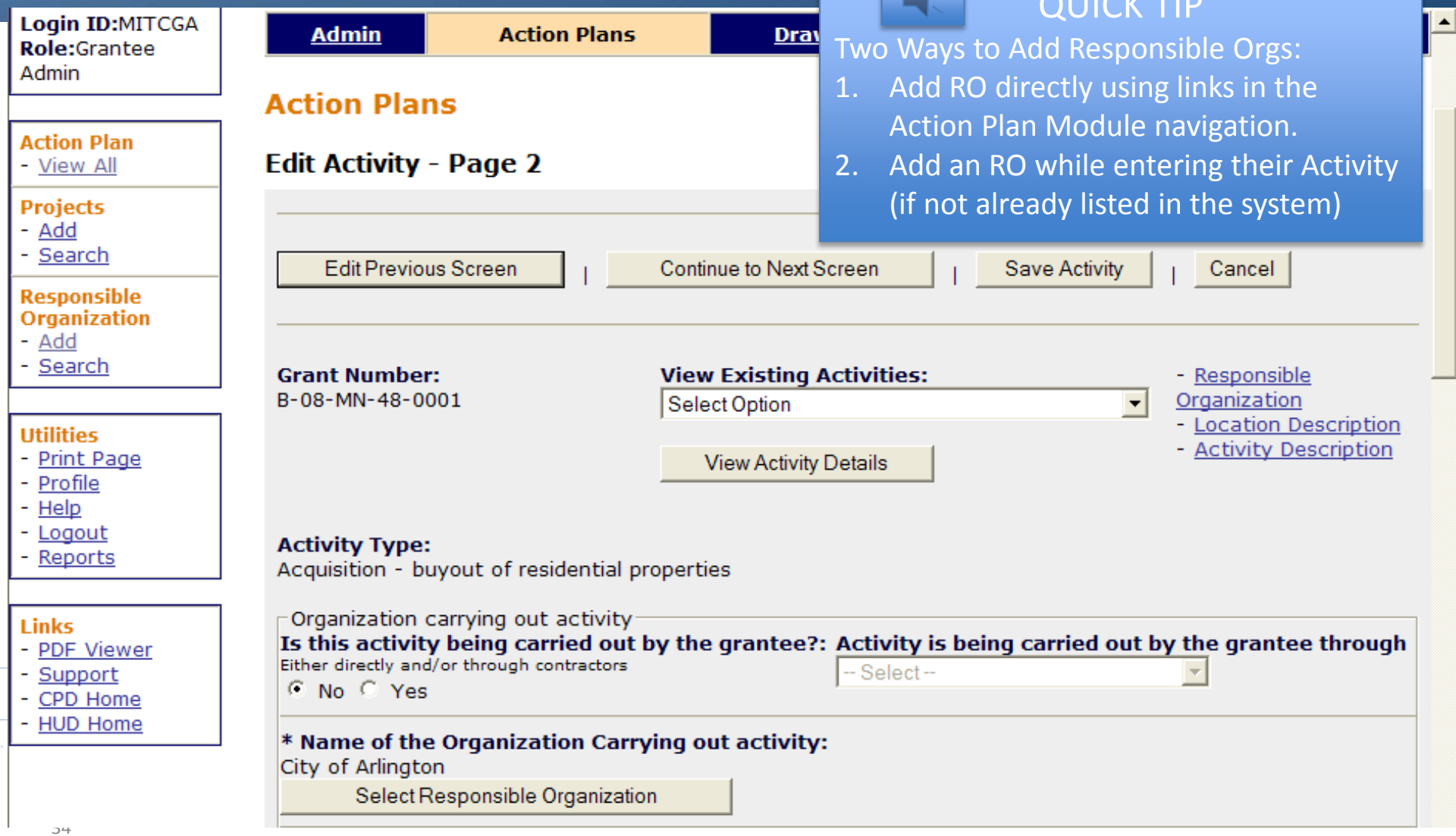
- **County A (Rehab – L/M; SF & 1 MF complex)**
- **County B (Rehab – L/M; Buyout Program – L/M)**
- **City D (Rehab – L/M; Buyout Program – UN, L/M)**

# of Activities	1	2	3	4	5	6	7
Activity Type	Rehab	Rehab	Rehab	Rehab	Buyout	Buyout	Buyout
Responsible Organization	County A	County A	County B	City D	County B	City D	City D
National Objective	L/M	L/M	L/M	L/M	L/M	L/M	UN
Housing Type	SF	1 MF	SF	SF	SF	SF	SF

Edit Activity Screen



Edit Activity Screen

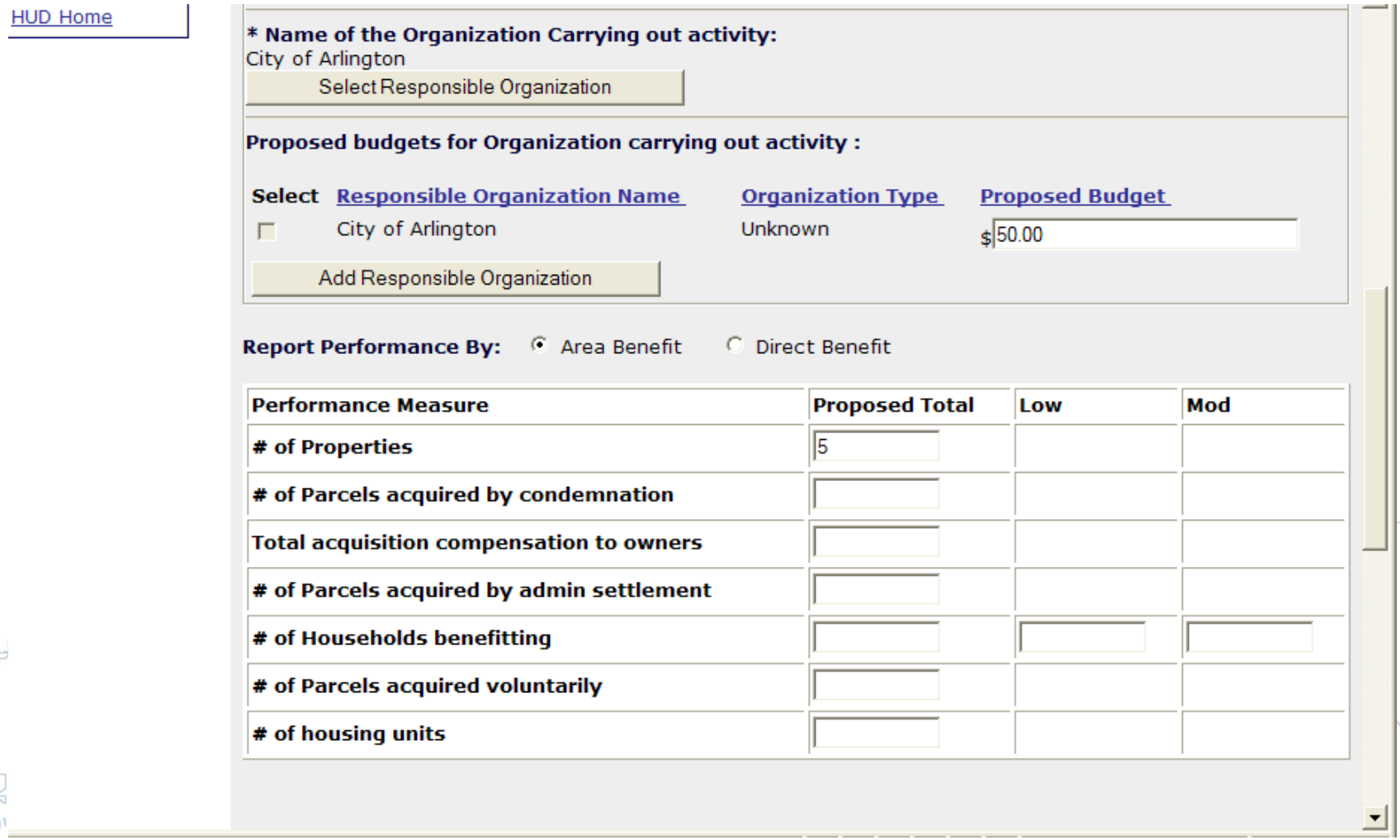


QUICK TIP

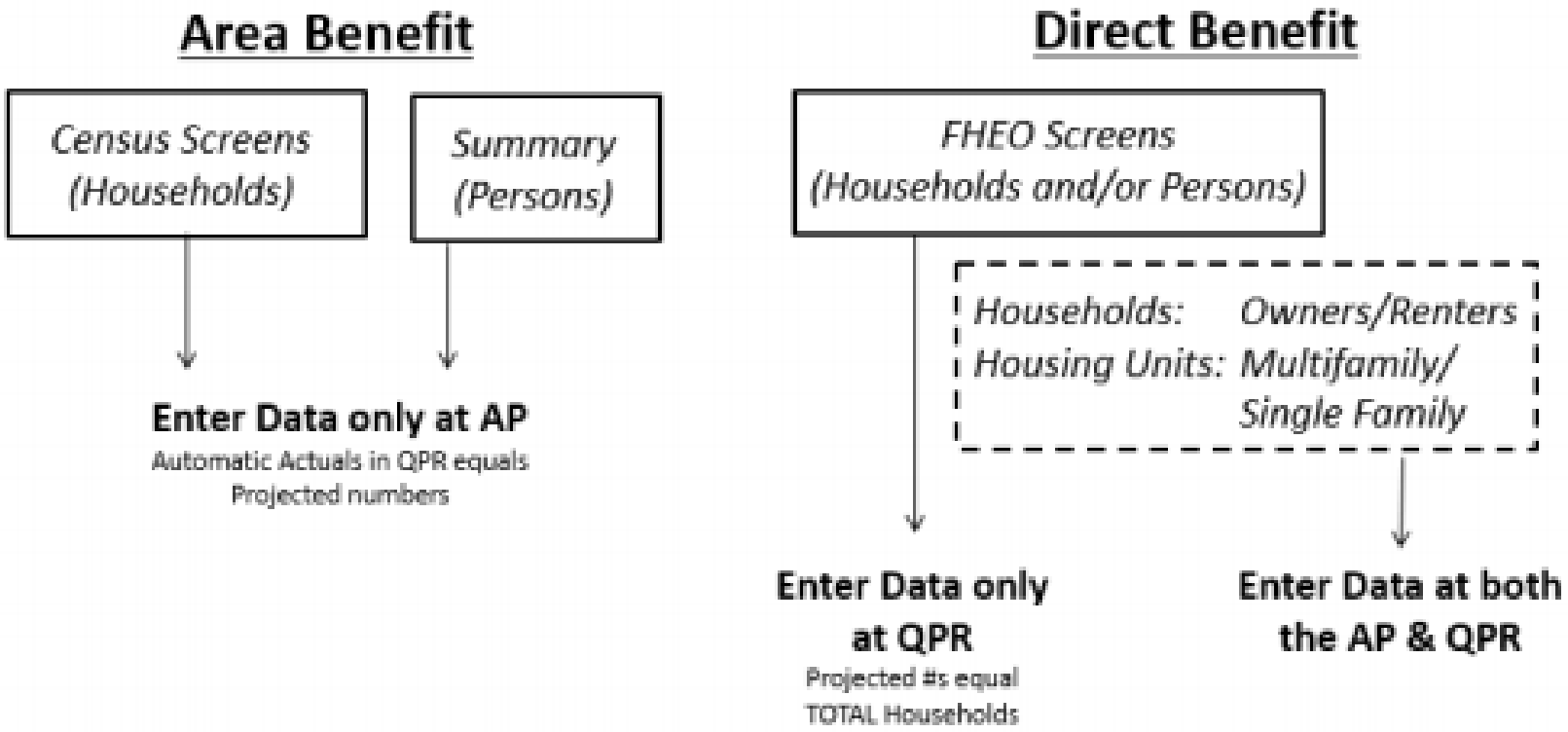
Two Ways to Add Responsible Orgs:

1. Add RO directly using links in the Action Plan Module navigation.
2. Add an RO while entering their Activity (if not already listed in the system)

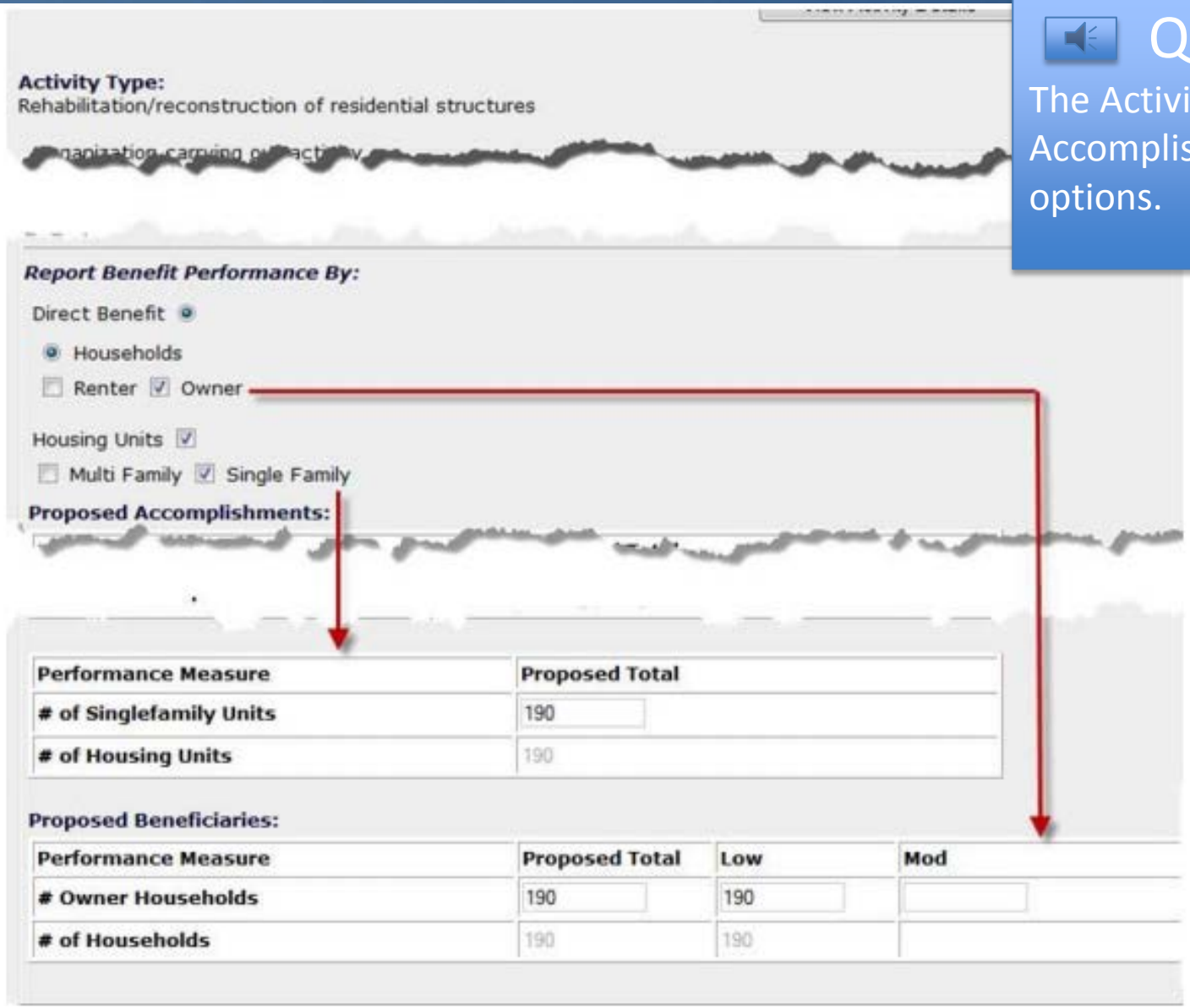
Edit Activity Screen



Activity: Propose Performance Measures



Example: Direct Benefit



QUICK TIPS

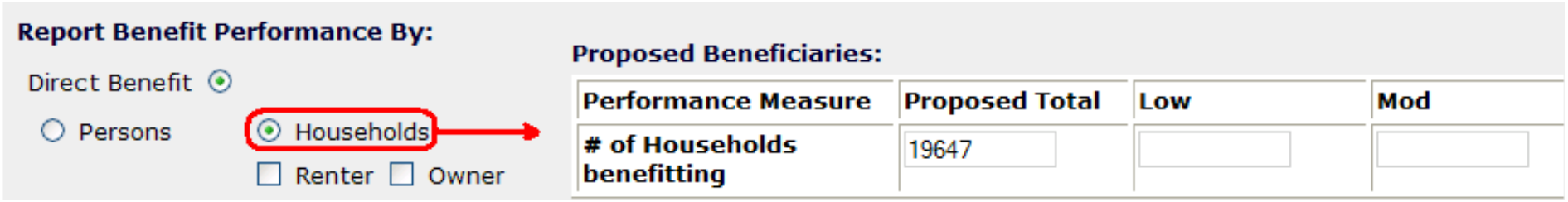
The Activity Type drives the Accomplishments and Measure options.

US DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

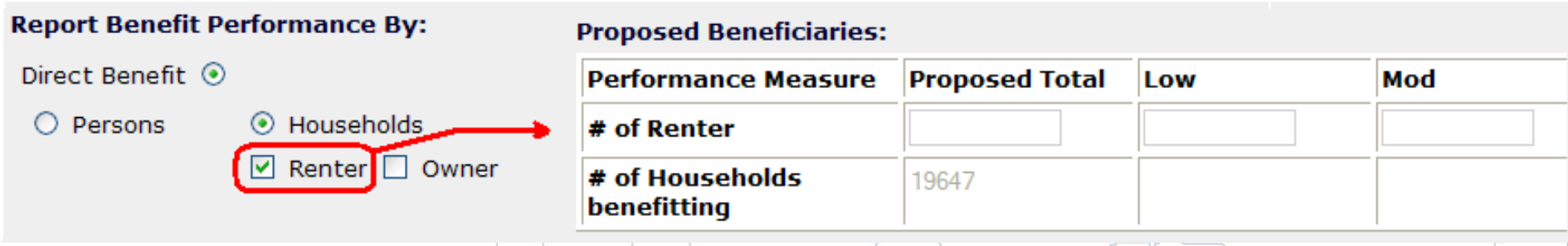
COMMUNITY PLANNING & DEVELOPMENT

Example: Direct Benefit

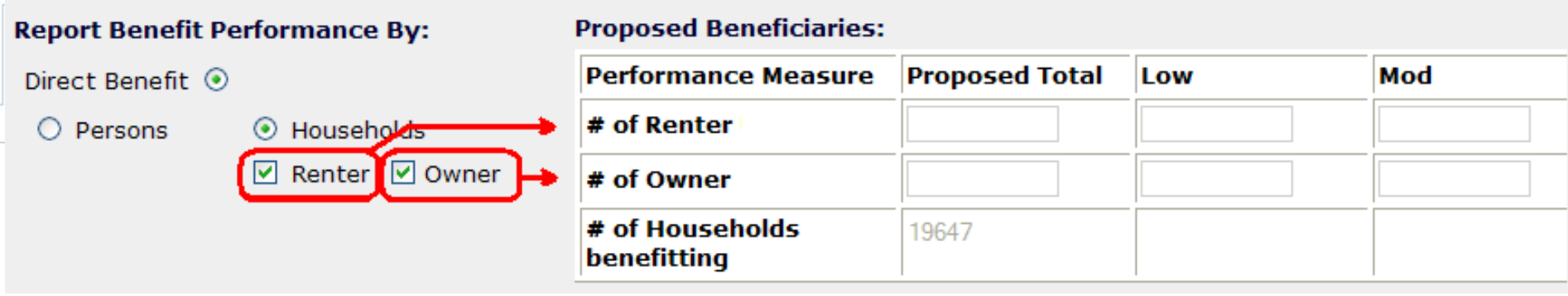
Example 1



Example 2



Example 3



Poll #3

True or False:

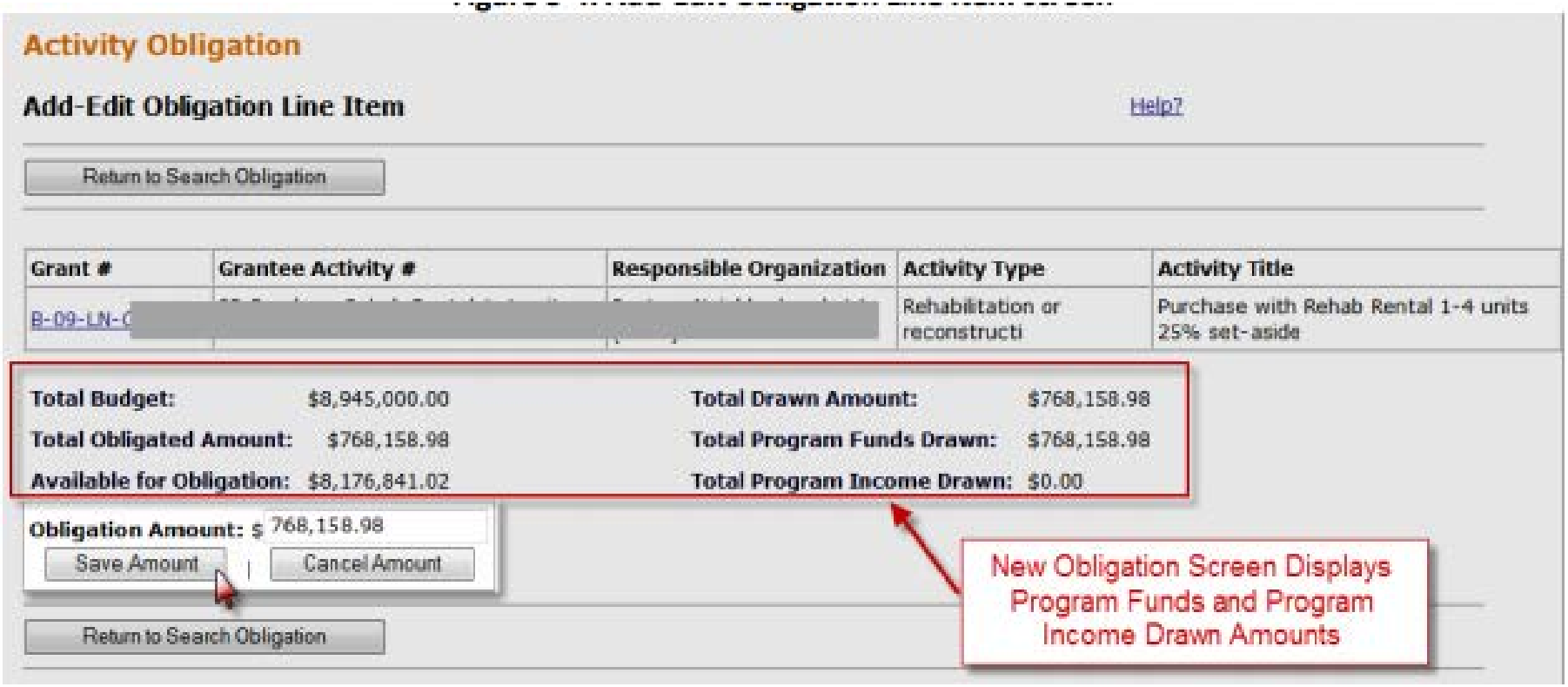
‘Activity Types’ have unique performance measures associated with them that are pre-populated by HUD.

Drawdowns

Drawdowns Overview

- Purpose: All financial transactions take place
- Two Must Haves:
  - User Roles
    - Create Vouchers
    - Approve Vouchers
  - Enough Funding to Obligate and Draw
- Three Primary Functions:
  - Obligate Funds: Search for activity, Click Maintain, Enter amount, save amount.
  - Create Vouchers: Select activities and $$, Enter amount, confirm amount
  - Review and Act on Voucher

Obligate Funds



Submitting Voucher

- Five-Step Process
  1. Select the activities to include in the voucher and the fund type (program funds and/or program income);
  2. Enter the drawdown amounts for each activity and fund type;
  3. Confirm the drawdown amounts; and
  4. View/download PDF the finalized voucher.
  5. Review & Approve Voucher (automatically sent to Treasury).
- Pre-Defined Threshold Vouchers
  - Approved Pending HQ

Revising Voucher

- Conditions:
  - Within same grant;
  - New activity(ies) must have enough funds obligated;
  - New actvitiy(ies) must have status of “underway”; and
  - No activities associated with the revision can be blocked.

Admin | Action Plans | Drawdown | QPR | Reports | Grants

Drawdown

Maintain Voucher

Help?

Return to Search Voucher | Download PDF

Voucher #: 272833

Created By: T007GR - Rosalind Stevens

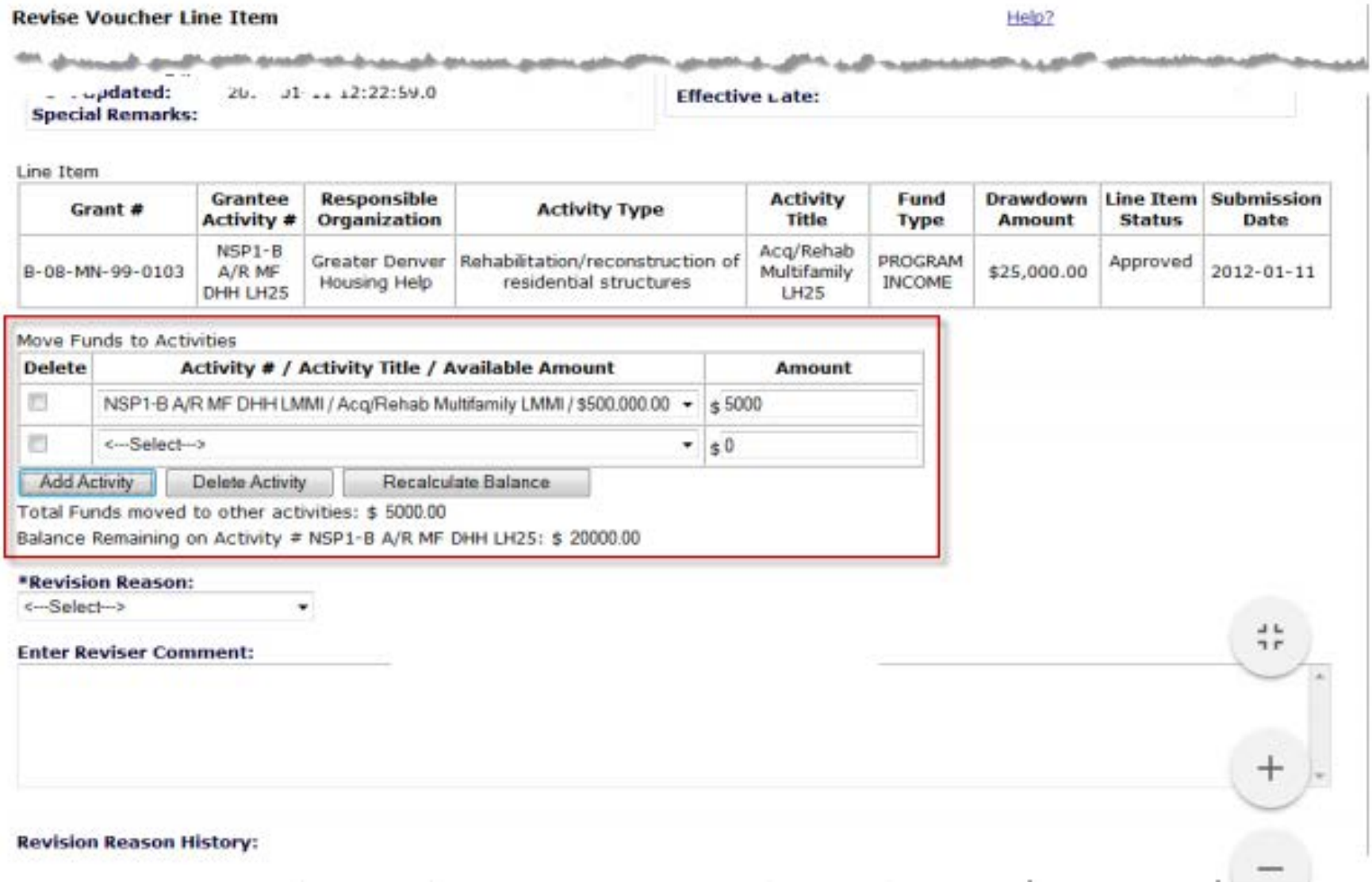
Voucher Created for: Chicago, IL

Creation Date: 03/07/2015

Line Item #	Grant#	Grantee Activity #	Responsible Organization	Activity Type	Activity Title	Fund Type	Drawdown Amount	Line Item Status	Revised From Line Item #	Submission Date	Action
1	B-13-MS-17-0001	Test2.1	City of Chicago	Affordable Rental Housing	Test2.1	PROGRAM FUND	$100,000.00	Approved		03/10/2015	Cancel | View
2	B-13-MS-17-0001	Test2.1	City of Chicago	Affordable Rental Housing	Test2.1	PROGRAM INCOME	$50,000.00	Approved		03/10/2015	Revise | Cancel | View
						Voucher Approved Total:	$150,000.00				

COMMUNITY PLANNING & DEVELOPMENT

Revising Voucher



Revise Voucher Line Item Help?

Updated: 20. 01 .. 12:22:59.0 **Effective Date:**

Special Remarks:

Line Item

Grant #	Grantee Activity #	Responsible Organization	Activity Type	Activity Title	Fund Type	Drawdown Amount	Line Item Status	Submission Date
B-08-MN-99-0103	NSP1-B A/R MF DHH LH25	Greater Denver Housing Help	Rehabilitation/reconstruction of residential structures	Acq/Rehab Multifamily LH25	PROGRAM INCOME	$25,000.00	Approved	2012-01-11

Move Funds to Activities

Delete	Activity # / Activity Title / Available Amount	Amount
☐	NSP1-B A/R MF DHH LMMI / Acq/Rehab Multifamily LMMI / $500,000.00	$ 5000
☐	<---Select--->	$ 0

Add Activity | Delete Activity | Recalculate Balance

Total Funds moved to other activities: $ 5000.00

Balance Remaining on Activity # NSP1-B A/R MF DHH LH25: $ 20000.00

***Revision Reason:**

<---Select--->

Enter Reviser Comment:

Revision Reason History:

Managing Program Income: Recipients, Vouchers, Accounts

- If you generate Program Income, you MUST track sources and uses in DRGR
- Managed in DRGR by:
  - DRGR users with Request Drawdown or Approve Drawdown roles (no monetary transaction though)
  - Budgeting Program Income at the Action Plan, Project, and Activity Level
  - Creating Program Income Receipts (typically against the activity that generated the PI)
  - Drawing Program Income on Vouchers (against the activity that expended the PI)
  - Optional: Creating Program Income Accounts and RLF Accounts (Optional)

QPR

QPR Overview

- Purpose: QPRs allow grantees to identify progress towards statutory requirements (expenditure milestones, achievement of national objectives) and tell their story on how investments are achieving results in their community.
- Report is based on your Action Plan set-up: cannot submit a QPR if changes to an Action Plan is pending with HUD.
- Report accomplishments for each quarter and on a cumulative basis at the grant and activity level by:
  - Identifying accomplishments once a national objective has been met
  - Pulling financial data as entered in the Drawdown Module
  - Providing narrative detail on progress of the grant as a whole and per Activity

QPR Requirements

- Report on 2 levels
  - Overall Progress of the Grant
  - Activity-by-Activity Progress
- Activities automatically populate in the QPR if:
  - Financial data entered that quarter, including obligations
  - Action Plan data changes (e.g. budgets, activity types, etc.).
- Grantee must include:
  - Activities where grantees need to identify accomplishments (once the National Objective has been met)
  - Activities where narrative detail will help to explain progress, even if the data isn't present.
  - Expenditures.

QPR Deadlines

- First QPR due: 30 days after the first full quarter after the initial grant agreement is signed.

Reporting Period End Date	Grantee QPR Submission Deadlines
31-March	30-April
30-June	30-July
30-September	30-October
31-December	30-January

QPR: Enter Data

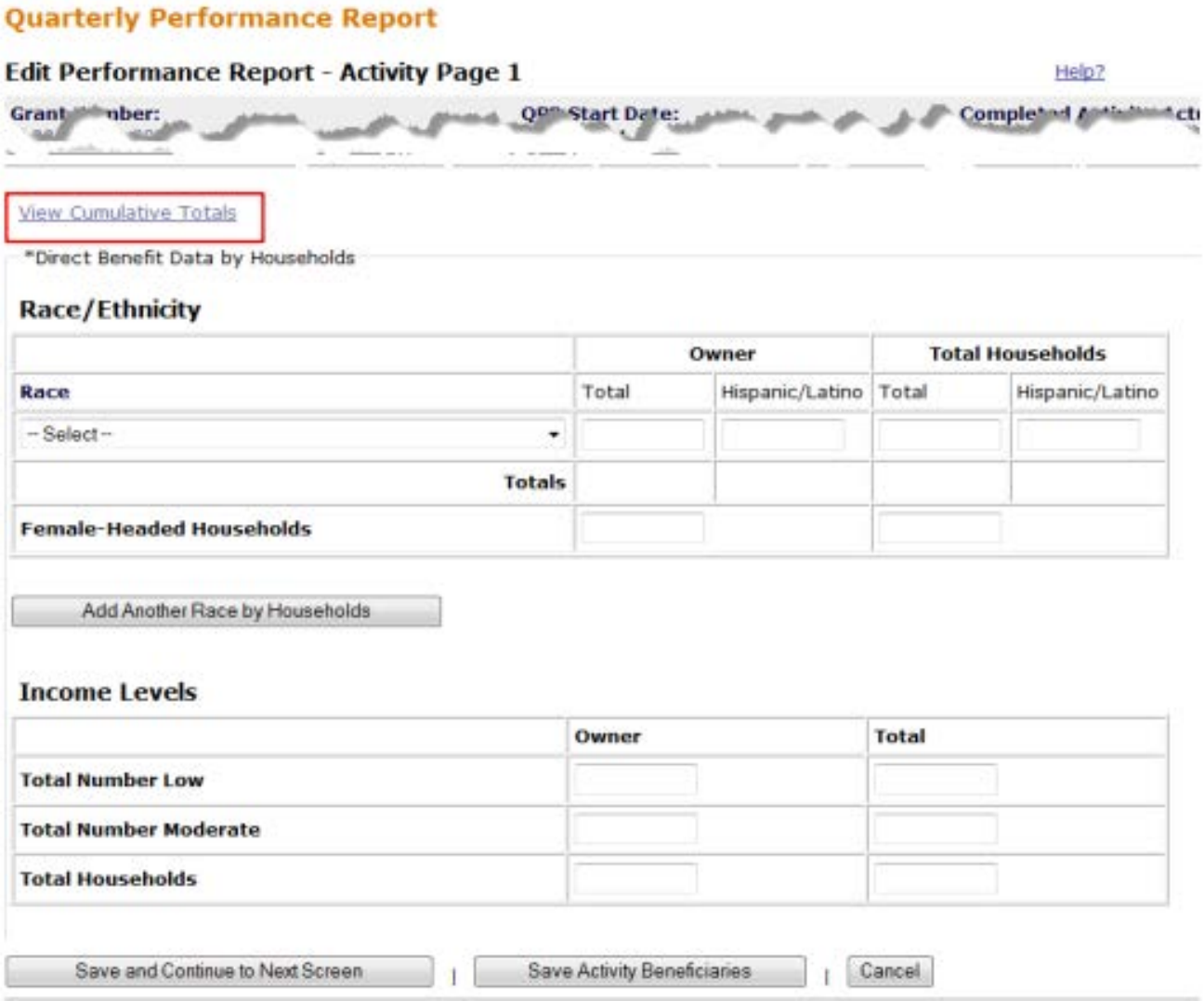
- Basic Steps to enter data in the QPR:
  - Enter overall progress narrative (grant level) and any additional matching funds
  - Add Activity Level information
    - Narrative: describe progress (or lack of)
    - Add Addresses
    - Funds Expended
    - Match Contribution
    - Direct Benefit
      - FHEO Information: Race, Ethnicity
      - Housing units (type/tenure)
    - Area Benefit: no data required (e.g. FHEO) at QPR
    - Additional accomplishments: availability of accomplishments in the QPR depended on those that you proposed in the Action Plan.

QUICK TIPS

Direct Benefit Reporting: Enter ONLY For the quarter for which you are reporting.

DRGR will calculate the cumulative totals for you.

QPR: Direct Benefit



Quarterly Performance Report

Edit Performance Report - Activity Page 1 Help?

Grant Number: QPR Start Date: Completed Activity

View Cumulative Totals

*Direct Benefit Data by Households

Race/Ethnicity

	Owner		Total Households	
Race	Total	Hispanic/Latino	Total	Hispanic/Latino
-- Select --				
Totals				
Female-Headed Households				

Add Another Race by Households

Income Levels

	Owner	Total
Total Number Low		
Total Number Moderate		
Total Households		

Save and Continue to Next Screen | Save Activity Beneficiaries | Cancel

QUICK TIP

Errors can be fixed by conducting a Prior Period Correction!

US Department of Housing and Urban Development

Community Planning & Development

QPR: Add'l Accomplishments

Actual Accomplishments	Actual Total
# of Properties	
#Energy Star Replacement Windows	
#Additional Attic/Roof Insulation	
#Efficient AC added/replaced	
#Replaced thermostats	
#Replaced hot water heaters	
#Light Fixtures (indoors) replaced	
#Light fixtures (outdoors) replaced	
#Refrigerators replaced	
#Clothes washers replaced	
#Dishwashers replaced	
#Units with solar panels	
#Low flow toilets	
#Low flow showerheads	

	Actual Total
# of Singlefamily Units	
# of Housing Units	

Poll #4

True or False:

Once you've entered in data on a QPR, it can not be corrected in future QPRs.

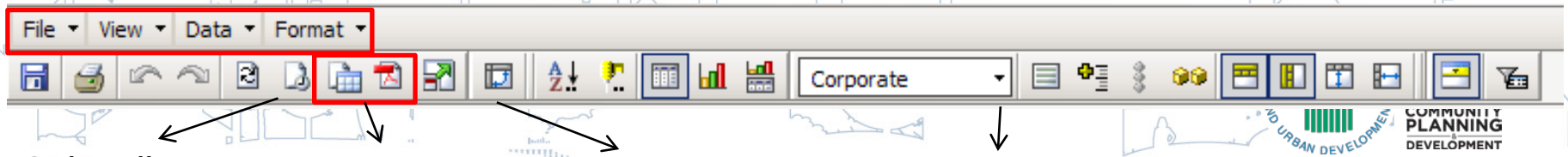
Reports

Reports Overview

- Purpose: Reports provide a relatively quick and easy way of accessing the most up-to-date info in DRGR
- Access: Which reports you can access will vary based on the type of account you have.
- OPTIONAL module, but HIGHLY useful

Basic Functionality

- Common modifications users perform:
  - Move and Sort Columns
  - Grouping Columns
  - Adding Filters
- Three ways to modify reports:
  - Use the ribbon (below)
  - Drag Objects
  - Right click over the object



Popular Reports

- Administration: User Info, AP/QPR Status
  - Admin04b
- Financial: Budgets, Disbursements, Cumulative $$ Data
  - Fin04b
  - Fin07b
- Performance: Beneficiary Measures
  - Perf01
  - Perf06

Accessing Reports

1.

Disaster Recovery Grant Reporting System (DrgrRep) - FY2008 - 001A
Project description unavailable

2.

Shared Reports
Run reports and share reports with others.

3.

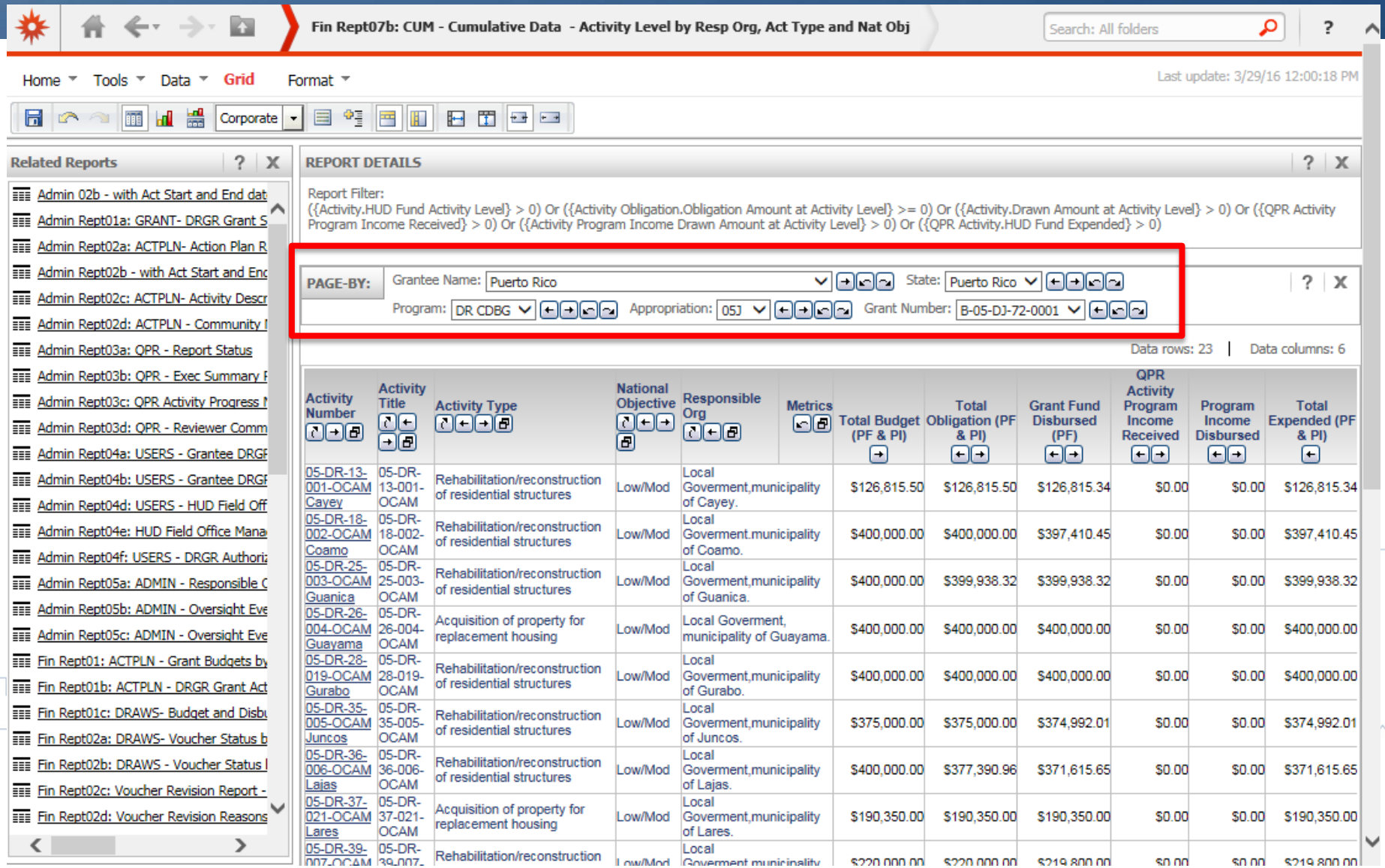
Public Reports
Owner: Administrator
Modified: 2/26/11 11:17:07 AM
Available reports: n/a

OR

Standard Reports
Owner: Administrator
Modified: 12/4/10 9:20:25 AM
Contains custom defined reports

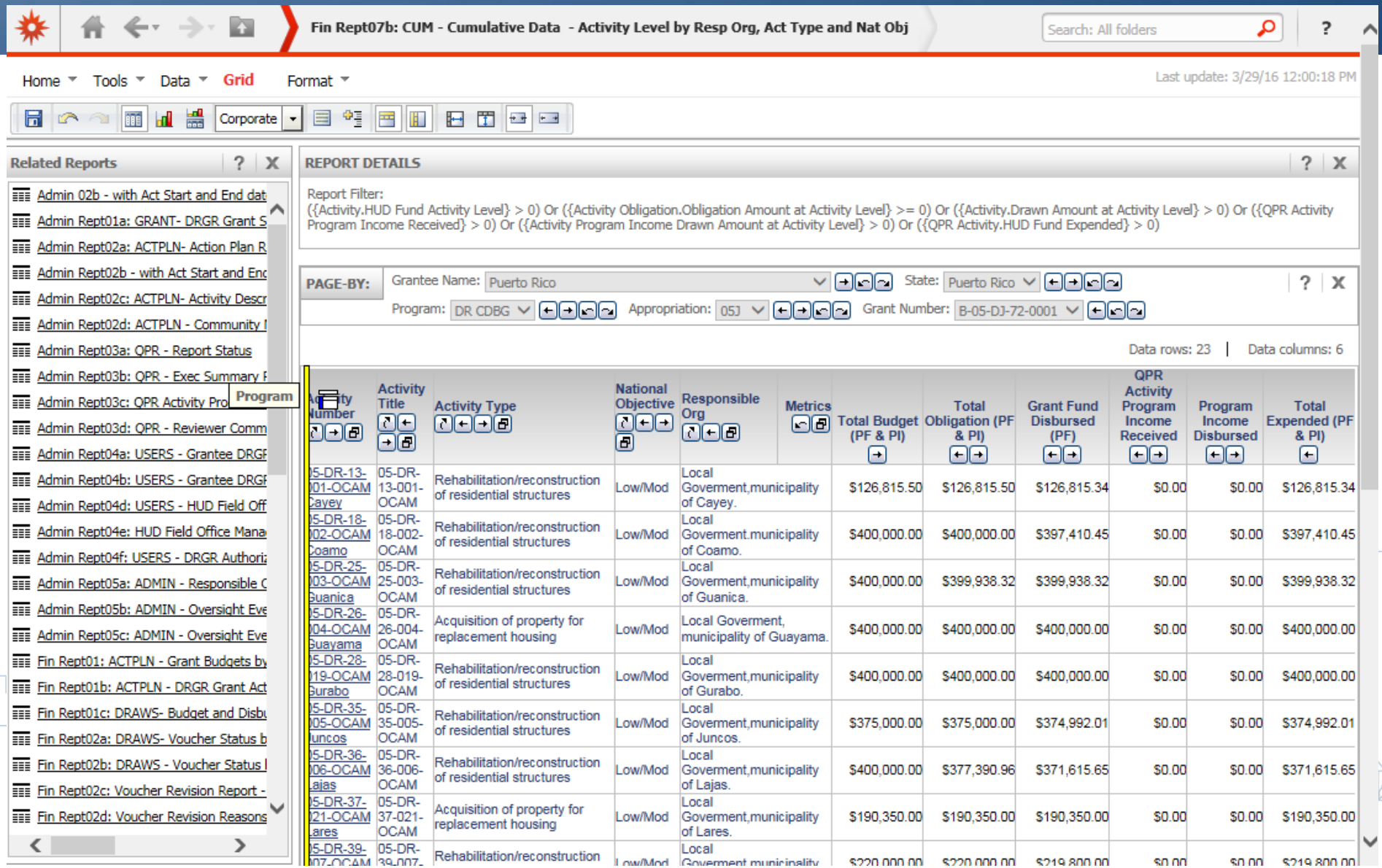
Live Demonstration

Page-by (aka Filtering)



Activity Number	Activity Title	Activity Type	National Objective	Responsible Org	Metrics	Total Budget (PF & PI)	Total Obligation (PF & PI)	Grant Fund Disbursed (PF)	QPR Activity Program Income Received	Program Income Disbursed	Total Expended (PF & PI)
05-DR-13-001-OCAM Cayey	05-DR-13-001-OCAM	Rehabilitation/reconstruction of residential structures	Low/Mod	Local Goverment,municipality of Cayey.		$126,815.50	$126,815.50	$126,815.34	$0.00	$0.00	$126,815.34
05-DR-18-002-OCAM Coamo	05-DR-18-002-OCAM	Rehabilitation/reconstruction of residential structures	Low/Mod	Local Goverment,municipality of Coamo.		$400,000.00	$400,000.00	$397,410.45	$0.00	$0.00	$397,410.45
05-DR-25-003-OCAM Guanica	05-DR-25-003-OCAM	Rehabilitation/reconstruction of residential structures	Low/Mod	Local Goverment,municipality of Guanica.		$400,000.00	$399,938.32	$399,938.32	$0.00	$0.00	$399,938.32
05-DR-26-004-OCAM Guayama	05-DR-26-004-OCAM	Acquisition of property for replacement housing	Low/Mod	Local Goverment, municipality of Guayama.		$400,000.00	$400,000.00	$400,000.00	$0.00	$0.00	$400,000.00
05-DR-28-019-OCAM Gurabo	05-DR-28-019-OCAM	Rehabilitation/reconstruction of residential structures	Low/Mod	Local Goverment,municipality of Gurabo.		$400,000.00	$400,000.00	$400,000.00	$0.00	$0.00	$400,000.00
05-DR-35-005-OCAM Juncos	05-DR-35-005-OCAM	Rehabilitation/reconstruction of residential structures	Low/Mod	Local Goverment,municipality of Juncos.		$375,000.00	$375,000.00	$374,992.01	$0.00	$0.00	$374,992.01
05-DR-36-006-OCAM Lajas	05-DR-36-006-OCAM	Rehabilitation/reconstruction of residential structures	Low/Mod	Local Goverment,municipality of Lajas.		$400,000.00	$377,390.96	$371,615.65	$0.00	$0.00	$371,615.65
05-DR-37-021-OCAM Lares	05-DR-37-021-OCAM	Acquisition of property for replacement housing	Low/Mod	Local Goverment,municipality of Lares.		$190,350.00	$190,350.00	$190,350.00	$0.00	$0.00	$190,350.00
05-DR-39-007-OCAM	05-DR-39-007-	Rehabilitation/reconstruction	Low/Mod	Local Goverment,municipality		$220,000.00	$220,000.00	$219,800.00	$0.00	$0.00	$219,800.00

Page-by (aka Filtering)



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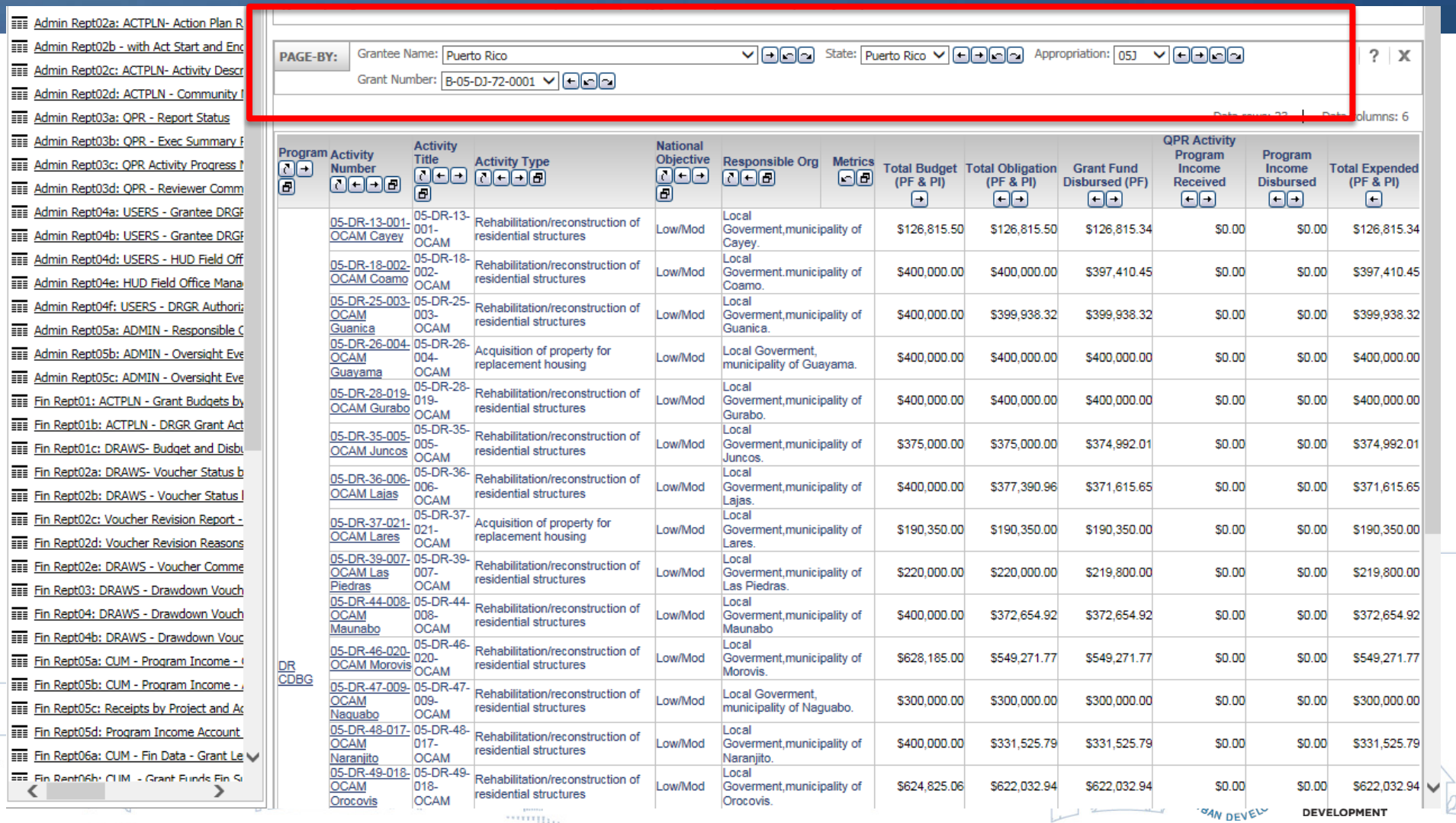

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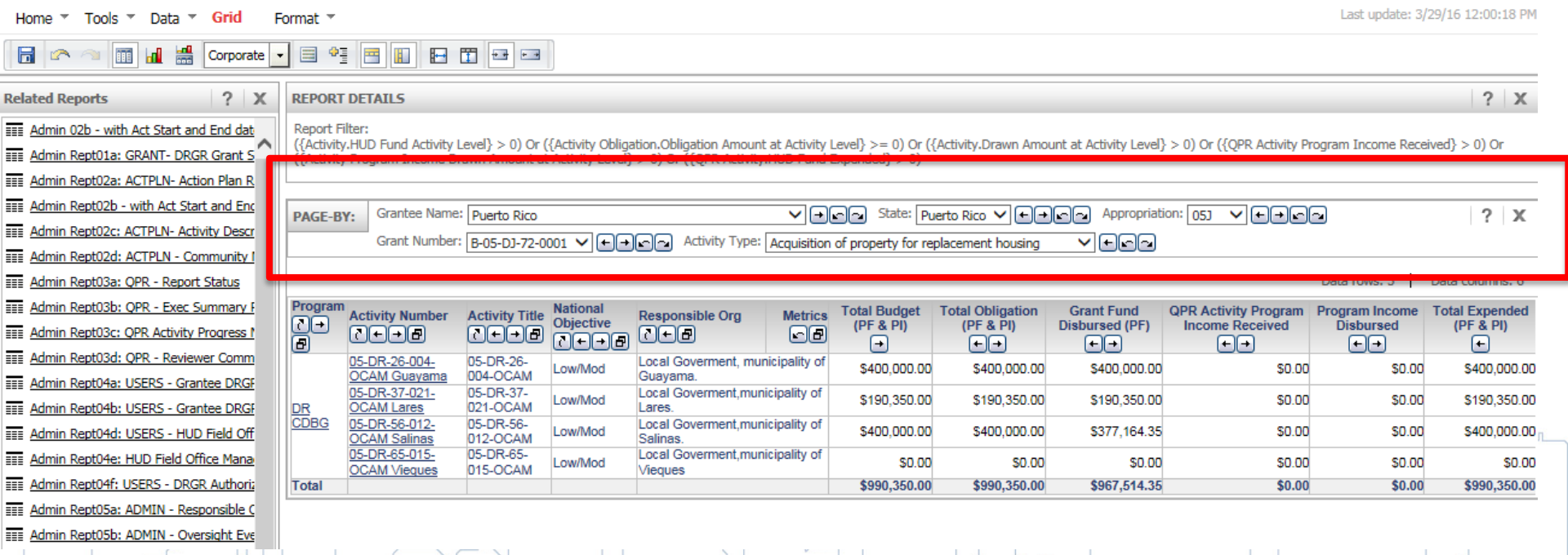

Data Uploads

HUD Exchange

Hi, Janir

Home | Manage a Program | News | Training & Events | Get Assistance | About Grantees | My HUD Exchange

Home > Manage A Program > Disaster Recovery Grant Reporting System

Disaster Recovery Grant Reporting System

The Disaster Recovery Grant Reporting (DRGR) system was developed by HUD's Office of Community Planning and Development for the CDBG Disaster Recovery (CDBG-DR) program and other special appropriations such as the Neighborhood Stabilization Program (NSP). Grantees use the system to drawdown funds and report program income. In addition, each grantee is required to submit an Action Plan in DRGR describing the process that will be used to determine the areas of greatest need; the distribution and eligible uses of funds; a program budget; and the expected outcomes and benefits to low-, moderate-, and middle- income families. Once an Action Plan is approved and the program launched, grantees begin submitting Quarterly Performance Reports (QPRs), which contain information about the uses of funds, activity types, demographics of households benefitted, budgets and locations of activities. QPRs are submitted via DRGR, and the data can then be used by HUD staff to review funded activities, prepare reports to Congress and other interested parties, and monitor program compliance.

DRGR Guides, Tools, and Webinars

Guides, tools, webinars, and other resources are provided to assist grantees and program partners in designing and implementing their programs.

View DRGR Guides, Tools, and Webinars

View DRGR Data Upload Templates

DRGR Release 7.11.1

DRGR Release 7.11.1 was deployed on October 10, 2015. Multiple defects were corrected. Key changes include:

HUD Exchange

Home | Manage a Program | News | Training & Events | Get Assistance | About Grantees | My HUD Ex

Tools and Templates

DRGR Data Upload Templates

Date Published: August 2014

Description

These templates are intended for grantees to use to upload data in the Disaster Recovery Grant Reporting System (DRGR).

Action Plan Module: Action Plan

Estimated Program Income Revolving Loan (PIRL) Amount
Funding Sources
Narratives

Action Plan Module: Activity

Activity Service Area
Activity Service Area Remove
Accomplishments
Add Activities
Address
Beneficiary
Edit Activities
Funding Sources
Responsible Organization Budgets

Action Plan Module: Project

Add Project
Edit Project

QUICK TIP

Work as a team: program and fiscal staff!

COMMUNITY PLANNING & DEVELOPMENT

Questions and Resources

Other Resources

- Upcoming webinars in this series: https://www.hudexchange.info/news/2016-cdbg-dr-webinar-series/
- DRGR Website at HUD Exchange: https://www.hudexchange.info/programs/drgr
  - DRGR Release (summary, fact sheets)
  - DRGR FAQ
  - DRGR Guides, Tools, and Webinars (subpage) https://www.hudexchange.info/programs/drgr/guides/
    - 2016 DRGR Manual (entire document or per chapter)

Thank you!