



Final Transcript

HUD – US DEPT OF HOUSING & URBAN DEVELOPMENT: Housing Counseling Training Grant NOVFA

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SPEAKERS

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PRESENTATION

Moderator Ladies and gentlemen, thank you for standing by. Welcome to the Housing Counseling Training Grant NOVFA conference call. At this time, all participants are in a listen-only mode. (Operator instructions.) As a reminder, this conference is being recorded.

I'd now like to turn the conference over to your host, Virginia Holman. Please go ahead.

Ginger Good afternoon or good morning, depending on where you are, and thank you very much for joining us today for this very important webinar on the Housing Counseling Training Grant application. Before we get started

with the content, I do want to go over some logistics of the webinar. Next slide.

The audio is being recorded. We will be providing a playback number along with the PowerPoint and the transcript in a few days. They will be posted at HUD Exchange in our webinar section. We will also be sending out a [indiscernible] that will let you know when those archives have been posted. All your lines, as Amy said, are muted during this presentation.

This morning I did send out handouts to you. A copy of the PowerPoint and the charts, but you will also note on the control panel on the right-hand side, there is a block labeled Handouts and if you just click on that plus sign, it'll open it up and there are three handouts there that you can download. One is a copy of the charts, one is a copy of the handout on the NOVFA and one is a synopsis of the NOVFA. You can download them, look at them today and they will be available to you at any point. Thank you. Next slide.

We will not be having polling questions during this nor are we going to have a question-and-answer period at the end. Next slide.

But we do want you to ask questions. There are two ways that you can do that. One, on the control panel on the right-hand side of your screen, there's a box labeled Questions. You can type your question in there and we will be monitoring those questions. You can also send your questions and other comments to our mailbox housing.counseling@HUD.gov.

It is unlikely that we are going to answer questions that we receive today, but we will be preparing frequently asked questions based on what you've asked us and we will be posting those. Next slide.

Since we're not having discussions, we're not going to worry about muting your phones. Next slide.

There will be a brief survey at the end. Please take that, we are constantly improving our webinars and your input is very valuable. Next slide.

You will also be receiving an email from GoToWebinar. It usually comes within 48 hours of the end of the webinar. The email will say, "This is your certificate of training." There is no attachment; the email is, in fact, your certificate. Copy that, save it for your records. Next slide.

At this point, I would like to turn the webinar over to Jerry Mayer who is the director of the office of outreach and capacity building in the Office of Housing Counseling. Jerry?

Jerry

Thank you, Ginger. Good afternoon, everybody, and welcome to the Housing Counseling Training Notice of Funding Availability or NOVFA webinar. HUD relies on a network of participating housing counseling agencies to assist consumers with a wide range of housing issues and provide counseling for clients seeking help with issues like rental, fair housing, homeless, pre- and post-purchase, default and foreclosure and reverse mortgage issues.

We also rely on a network of training grantees to deliver educational services to our network of counselors who work at those HUD participating agencies. Those training grantees are partially funded with money from this training NOVFA.

Today, you will learn about HUD's training NOVFA application and the process. We hope that you'll enjoy today's presentation and will find the information useful in completing your application.

Now, without any further delay, I'll turn the mic over to Rhonda Rivera for today's presentation.

Rhonda

Alright. Thank you, Jerry. Hello, everybody. I hope you're all having a good day. Today's agenda, we'll be going over a general overview of the NOVFA application itself. The eligibility information, there are some new charts for this application as well. The presenters will be going over the rating factors as well as the application process itself on how to submit your proposal. Next slide is the list of our presenters today on the NOVFA application itself; Virginia, Judy, Kim, Joel Ibañez, and Tom Hardy. They'll be your main presenters today.

Just to give you a quick overview of what this grant is about, I just want to clarify that for those that are on the line or watching this webinar, please be aware that this training NOVFA is for nonprofit organizations and government entities. HUD does not award individual grant award for this grant. We will not award an actual individual; we award to nonprofit organizations and government entities to provide training with this grant funds.

This training grant will improve and standardize the quality of housing counseling and the training is accessible to all counselors nationwide that are employed by participating agencies in our housing counseling program.

NOVFA will support general housing counseling topics, as well as specialized training topics for the counselors. Again, the eligible applicants are nonprofit and government organizations with at least two years' experience providing training on a national basis. Next slide.

This is what the presenters will be talking about today, the summary of the changes from the prior NOVFA from 2014, the chart revisions, the funding methodology, the award information of the cooperative agreement. I just want to stress with the chart revisions, please do not use your prior charts that you used in the 2014 NOVFA of charts because the charts have changed.

Some of the general changes that are in this NOVFA, the language pertaining to the Dodd-Frank legislation components are removed out of this, the language out of this NOVFA. We encouraged the inclusion of the six core topics in the classes to the counselors. Those six core topics, again, are the financial management, property maintenance, homeownership and tenancy, fair housing and other civil right laws and requirements, housing affordability, avoidance, and the responses to rental or mortgage delinquency and avoidance of eviction and mortgage default. Those are the six core topics mentioned in this NOVFA.

We're encouraging, also, more rewarding of scholarships based on past performance rewards on the percentage of [ph] grants and on scholarships, then a number of scholarships that were supposed to be awarded with these grant funds. Points will also be based on the post-performance rewarding, a percentage of grants earmarked for scholarships, as well as scholarships for underserved areas and for newly approved agencies.

The scoring also will be based on emphasis on training partners, working together with collaborations with some training partners, rewarding formal partnerships both past and proposed proposals going forward, who are you training partners with these grant funds, as well as looking at place-based training and web-based training. Rewarding the number of training partners and the number of local place-based training with those partners, the number of web-based classes. We'll also be looking for your leverage

funds that will include funds from your training partners that will provide logistical support and training support for local place-based trainings.

We also encouraged those to—we have two new additional curriculums to be identified as [indiscernible] activities and that's Coping with Stress. That's of course on tools and techniques to help counselors deal with on-the-job related stress, and Culturally Sensitivity, teaching [indiscernible] counselors to become more culturally sensitive to the needs of the community that they are serving and helping them to design counseling, education and marketing materials that are culturally sensitive. Those are the two new curriculums.

Again, the presenters will go over the chart revisions; there are five charts that will be discussed. These are changes to chart A on past performance, of your prior grant if you were a grantee and you're applying again, we're going to look at your past performance as well as your proposed performance on chart B, the new chart. We deleted the previous chart B, that was a duplicate. Also, leverage funds are on chart D and chart E is to include funding commitments by your training partners. Chart C is your actual expenditures for fiscal year 2014.

The scoring is based on, there's a total possible 100 points on this application. To earn a score of 75 points or more, we have a three-tiered structure of calculating the award. First tier is 75 points or more, [indiscernible] we'll receive a base amount. Second tier will be based on the total number of scholarships awarded in FY 2014 during the grant period from June 2014 to May 31st of 2015. The third tier will be based on the total number of classes provided during FY 2014, during that same grant period of June 1st, 2014 to May 31st of 2015.

This NOVFA, again, we're reserving the right to carryover the awards for— 2016 would be the basis for possibly awarding 2017 NOVFA awards. In other words, if you were funded and awarded money and the application that you submitted with this grant proposal would be used for the basis of awarding under fiscal year 2017.

At HUD, we'll reserve the right to do that again if we choose to do so, and, of course, if we have the funds appropriated by Congress for it. Next slide.

There's \$2 million earmarked for this grant. We may award one grant or we may award multiple grant awards to more than one entity. This grant

is for a 12-month period and that 12-month period is from June 1st, 2016 through May 31st of 2017, that's the 12-month period going forward.

The applicants are not required to submit a specific award amount, or do not need to provide a proposed budget, but on your SF- 424 Grant Assistance Application form when you fill out line 18a just enter, for the requested amount, just enter \$1. That way the form will be accepted through the grants.gov process.

The agreement that we'll enter in with the grantee or grantees that are awarded the funds is a cooperative agreement. It's a cost reimbursement based on the requirements under the 2 CFR Part 200. HUD will have significant involvement including revealing an approval of marketing of proposed courses, including course materials, evaluation instruments and methodology, training locations, technology and logistics, provisions of content standards and course audits by HUD staff. We will be interacting with the grantees on the training courses.

That's a quick overview of the NOVFA itself. I'm going to turn it back to Virginia Holman and she'll go over the eligibility information. I hope everybody has a good day.

Ginger

Thank you very much, Rhonda. The next slide, please. Today we'll talk about the eligibility information for applicants, training partners, activities, training topics and threshold requirements.

As Rhonda said, the eligible applicant must be a public or private nonprofit, 501(c)(3) organization. Also, state housing finance agencies and other units of local, county or state government are eligible. They must have at least two years' experience in providing training nationwide; it's not providing it at a state or local level.

The applicant may use their in-house staff, have sub-grantees, training partners, consultants, as long as they have the experience and capacity to provide the required training. Next slide.

As Rhonda mentioned, this year we are focusing on a category we're calling Training Partners. We have always encouraged the grantees to partner with other agencies, we're just formalizing that relationship a little bit more. Training partners you find as an agency or organization, again, that has at least two years of experience providing housing counseling

training services to our housing counselors. This does not have to be nationwide; this can be more localized, usually at the state level.

They, again, may be governmental agencies, nonprofit organizations, or actually, in this case, nonprofit organizations as they are not actually grantees. Next slide.

The geographic coverage as, again, Rhonda and Jerry both mentioned the applicant has to propose to provide the training on a nationwide basis. So the training itself, the whole program, must be national in scope.

In addition, we're back to the training partners. The proposed program of training offered by the training partners will focus on state and local housing issues, which, in the past, we have found that there was a missing part of our training that did not recognize and focus on these needs. Next slide.

What needs to be in the proposal? One, the training recipients have got to housing counselors employed by housing counseling agencies who are participating in HUD's housing counseling program. There needs to be experienced trainers and trainers who are actually experienced in adult education as well as housing counseling. There needs to be open enrollment, which means that everyone must have equal access to the training and the training cannot be restricted to the members of an organization.

We want to see a variety of modes of training. Live, in person, large classes, web-based, online. We feel the more opportunities there are by these different modes, the more people we will educate. There need to be learning checks identified and this would include a final exam for each class.

As Rhonda said, we're now identifying those six core topics and they need to be incorporated into the curriculum. We're emphasizing scholarships and we're also talking about reaching underserved populations; the limited English proficiency, rural low income. Next slide.

The eligible activities, you're going to propose a comprehensive training program that is ongoing. Again, it needs to be national in scope unless it's being offered in conjunction with a training partner where there will be state and local emphasis. The proposal may contain both basic and

advanced classes. It may include evaluation efforts and assessments, and, again, must include those six core topics.

The training topics are listed in section 3C3 of the NOVFA. There's a long list of eligible topics from pre-purchase to [indiscernible] to emergency preparedness, cultural sensitivity, all of those. You do not have to, obviously, train all of the topics, but if you pick one, you need to use one or more of those topics. They can either be a general broad course or a more specialized course.

Then we have the threshold rule. They've got rules that can affect your eligibility to receive a grant in section 5D of the 2016 general section, as well as section 3C of the NOVFA that we're talking about, outline what those rules are. You need to read them and be familiar with them because you will be asked to address them in your application.

Then there will also be some rules that apply after you've gotten the award. Next slide.

The program added threshold requirements. Again, they're eligibility requirements; they have to be met in order for us to actually review and score the application. These requirements are not curable. You've got to ensure that your package addresses all of these threshold requirements. That's a part of your application to read over very carefully, because you don't want to be eliminated from review because you did not address one of the questions. Next slide.

Some of the items that are included in these threshold requirements, timely submission. That's pretty obvious, if you don't get it to us on time, we're not going to review it. If you're not a nonprofit or governmental agency. If, in looking at your application, it's clear you don't have the experience or capacity. If you have problems with your audit or financial review or performance reviews. If you have delinquent federal debt. And if your application is incomplete. If you have neglected to include one of the rating factors or one of the charts. These are the kinds of things that will eliminate your application from the review. Next slide.

At this point, I would like to turn it over to Joel Ibañez who's going give you more information and overview of our new charts. Joel.

Joel

Thank you, Ginger. If you could go ahead and turn to the next slide. We'll go ahead here and give everybody a little summary of the charts that

we have available with this particular competition. As Ginger pointed out earlier, we do have three handouts that are available. If you look at the toolbar to this invite, one of them is the charts package, which includes each of the five charts that will be required in order to be able to apply for this grant.

The charts, however, will be located in the Instructions section of the download directly at www.grants.gov. The five charts are in Excel format. One important thing about that that you're going to want to remember is to always make sure when you are completing these forms that you submit the charts in their original Excel format. Do not convert the charts to a PDF format when submitting your application or we will not be able to review and evaluate the application.

The five charts that will be available to you are regarding past performance, proposed performance, chart C, which is budgets, chart D on the leverage resources and in chart E on training partners. Next slide, please.

Now within the NOVFA, which is also included in the handouts here within this invite, there is a summary table on pages 23 and 24, which provides you the points for each rating factor, along with the charts and columns that need to be filled out with regard to those particular rating factors. This is a very important tool that will help you to understand with all the information that you're filling out on the chart, what exactly is it applicable to. Next slide.

Now this here is just a picture of the summary table that is located on page 23 and 24, and you'll be able to get a full picture of that. But as you can see, you have the left-hand column, which will indicate all of the rating factors and sub-factors that each question is pertaining to. The number of points in the next column that each factor or sub-factor is worth, which chart is applicable to those points and whether or not there is any narrative that is going to be required to be filled out on the chart as well. Next slide.

Now some general instructions for completing the charts. When you're filling these out, make sure that the applicant name is on each chart that is provided. You're going to have one single Excel workbook that will have five tabs. Each tab represents a separate chart, but you will need to be able to put the applicant name at the top of the page on each chart. When filling out the columns that are there, you're going to want to place an X for a yes in the correct column. For columns that are prompting any sort

of numerical responses, simply place the numerical digits into each block and then there will be a few columns that will be asking you for a brief narrative pertaining to the question that's being asked. If we go to the next slide, I can show you just a sample of this.

As you can see here, you'll be able to explain, say the course name, course A and then you'll be able to explain the delivery method, whether it's in person, online, or a group setting. For the questions that require a numerical response, you have, say the number of courses provided, you'd be able to indicate that. For all the yes/no questions, you'd simply be able to put an X.

Then, at the end, there may be something that you need to be able to provide in terms of a narrative on a description of the course, or what the results of the survey were. Next slide.

Now this here is just a picture of one of the charts on leveraging, this is chart D. As you can see at the top, once again, you're going to want to make sure that each chart has the applicant name at the top. Then, when filling these out, you'll see that toward the bottom of the toolbar, there are separate tabs for each chart, but they're all contained within this one Excel workbook. It's very important for you to keep the Excel workbook as a single workbook. What we have had in the past is some people will submit separate Excel sheets for each chart. We need everyone to be able to go ahead and make sure that the one Excel workbook is maintained just with the five tabs that are available. Next slide.

Now we're going to go ahead and move on to a general summary about the rating factors for this particular grant. First thing to point out to everyone is that there are no bonus points for this particular competition. There are 100 points available to everyone and no bonus points. We'll go ahead and pass onto the next slide.

I'll go ahead and pass it on to my colleague, Judy Ayers, who will be able to provide a summary of rating factor one. Judy.

Judy

Thanks, Joel. Hi, everybody. Thank you so much for joining us today for this presentation. We hope to be able to clarify some of the changes that have been made to the rating factors this year as well as give you a brief idea of how to submit an application if you haven't already submitted one. Let's move to the next slide.

I'm going to talk about rating factor one and rating factor two. In rating factor one, we talk about capacity, experience, past performance, goals and accomplishments, student satisfaction and scholarships. As has been said previously, scholarships are a little bit more of an emphasis this year. Next slide.

In rating factor one, we're looking at the capacity of the applicant. Rating factor one is worth 35 points this year. You'll notice throughout the rating factors that the points have changed. This factor is to elevate the readiness and ability of the applicant to immediately begin and successfully implement your proposed work plan. This work plan is going to be described in rating factor three, which Kim will be going over later. Next slide.

Rating factor one, sub-factor A talks about capacity and experience. It scores 14 points, and it's the extent to which you, the applicant, can clearly demonstrate your past housing counseling training and their testing experience necessary to successfully implement your proposed work plan. In this factor, this sub-factor, you're going to complete chart A. Chart A is specifically for past performance.

You're going to put an X for yes or the appropriate number that's asked for in the column. Next.

Here's just an idea, which you saw earlier of what chart A will look like. You'll note in big letters, we have past. You don't want to get confused with past and proposed. Make sure that you keep those separate when you're looking at these charts. Each chart also has instructions at the top and hopefully will clearly explain in detail what we want you to put in those sections. You'll see here, as Joel had stated earlier, a brief course description on the side there, just a couple of sentences as to what's included in that course. Next.

We're also looking at trainer experience, and none of this is new, this is the things that we've been asking throughout the years. We want you to provide a narrative that's clear and simple, that talks about the total years of training experience and the total number of how housing counselors who have participated in your specific training program since its inception. The total number of years providing online or other forms of remote training.

You see how we have a lot of difficulty and the expense to try to get counselors to some of the place-based training can be tough. So we're looking at remote training as being, maybe a little better form of training. Average years of the housing counseling trainer experience for your proposed trainers and relevant experience providing training for persons with disabilities or limited English proficiency. Next.

And actually, that last slide said proposed trainers, it's actually past trainers. This section specifically talks about past. Rating factor one, sub-factor B1 talks about goals and accomplishments. This section is worth 5 points. We're evaluating performance relative to goals and how well you satisfy the grant requirement. We're going to use our records to score this factor. There's no chart to complete. A narrative is required for applicants who didn't receive a grant in 2014. The narrative is optional for those who did receive a grant. Next.

Rating factor one, sub-factor B2 talks about oversight audits, financial, and administrative reviews. We've looked at this information in the past, we will be looking at some of the [indiscernible] reviews that you had, some of you who have received funding already. This section's going to be worth 5 points. We'll be evaluating the performance relative to HUD's oversight, the audits and financial reviews as well.

Again, we're going to use our own records to score this factor. There's no chart to complete. A narrative is required if you didn't receive funding in 2014 and it's optional for those who did receive funding. Next.

Rating factor one, sub-factor C talks about measuring student satisfaction. This sub-factor is worth 6 points. Applicants who measured student satisfaction and made adjustments to the training based on the information that they received will be rewarded.

We'll be looking at the period of June 1st, 2014 to May 31st, 2015. Here you're going to complete chart A, column G under Measured Student Satisfaction and you're going to provide a narrative that describes the process when the data was collected, summarize the data that was collected, attach a copy of what data collection instruments were used and describe the course and/or the test adjustments that you made based on the collected data that you received. Next.

Rating factor one, sub-factor D, Scholarships. This is new, and we're looking for rewarding applicants who give more scholarships. It's worth 5

points, you're going to look at chart A again, in columns L M N and O. You'll complete the information in those charts. Next.

Rating factor two talks about the need and extent of the problem, underserved communities, underrepresented communities, LEP, limited English proficiency, and departmental policies. Next.

For the need and the extent of the problem, this section is worth 10 points this year. We want you to address your assessment of the need for housing counseling training, and the degree to which the applicants' work plan substantially addresses HUDs NOVFA priorities. We also want you to provide a narrative for this sub-factor. Next.

Sub-factor A, under rating factor two, talks about the needs. This section is worth 8 points. It's a narrative that addresses the number of counselors that may require general training. You want to describe and document overall need and demand for place-based, online interactive, and online non-interactive training during the prior two fiscal years, address underserved and underrepresented populations, indicate if the applicant proposes to train counselors that served rural areas, describe the access to training for persons with disabilities, and for persons with limited English proficiencies, and incorporate needs into your training plan. Next.

Rating factor two, sub-factor B, talks about NOVFA priorities, and you can get a maximum of 2 points in this section. There's only one priority this year, and it's affirmatively furthering fair housing. You need to describe any activity that's in addition to the response that's in rating factor three, B1F. This is a narrative, and it's limited to 500 words, talking about staff, training and mobility counseling as well. Next slide.

With that, I'm going to turn it over to Kim Jakeway to talk about rating factor three.

Kim

Thank you, Judy. Good afternoon, everyone. As Judy mentioned, I'm Kim Jakeway, and I'll be walking you through rating factor three.

Rating factor three, soundness of approach, scope of housing counseling training services. This rating factor is worth 40 points, and addresses past performance, and the quality and effectiveness of the proposed work plan. In this factor, HUD will evaluate the extent to which the applicant presents a detailed and sound approach to providing the proposed services and

demonstrates the cost effectiveness of its activities and explains how the proposed activities will yield long-term results. Next slide.

Rating factor three, sub-factor A, past performance impact. This is worth 5 points. HUD will analyze the actual expenditures in cost per student during the fiscal year '14 grant period of June 1st, 2014 to May 31st, of 2015. HUD will evaluate the applicant's detailed comprehensive report of actual expenditures from all funding sources during fiscal year '14, listed in chart C. Applicants must determine the cost per student by dividing the total expenditures in chart C, by the total number of students shown in column E of chart A, and enter that number in column P of chart A for each course listed.

For scholarships, the applicant must describe in a narrative the number of scholarships and percentage of the training grant that was spent on travel, lodging and tuition, during the fiscal year '14 grant period. Be sure to indicate how the grantee made adjustments to accommodate more scholarships. Next slide.

Rating factor three, sub-factor B work plan. This sub-factor is worth 19 points. The applicant must submit a work plan that describes in detail, how they plan to develop and administer the proposed training services. The housing counseling training must not only describe each course it plans to offer, and indicate which of the housing counseling eligibility activities, listed in section 3C3, that the applicant proposes to address in each course, but also the proposed curriculum, administrative staff and trainers, delivery methods, marketing and enrollment, limited English proficiency, affirmatively furthering their housing, and Federal Electronic and Information Technology Accessibility and Compliance Act, section 508. Next slide.

Rating factor three, sub-factor C, scholarships and fees. This sub-factor is worth 10 points. Applicants must describe scholarships and fees for each proposed activity. For scholarships, the proposal must describe the type of scholarship that will be offered to students, including travel, lodging, and tuition, as well as leveraged non-federal resources, and the methodology applied for issuing scholarship awards. For the fees, if applicable, indicate the fee the applicant plans to charge for each proposed activity. Next slide.

Rating factor three, sub-factor D, training partners. Applicants will list in chart E, the name of the identified sub-grantees and or training partners

that will enable the applicant to successfully implement the proposed work plan. In column H, provide the number of partnerships created during the period of June 1st, 2014 to May 31st, 2015. In column G, identify the proposed training partners proposed for fiscal year '16, and, just a heads up, applicants that have established training partners, will score higher for this sub-factor. For management activities, all applicants that pass through funding to sub-grantees and or training partners, must describe management activities that will be performed as part of the projected work plan, including monitoring and oversight.

With that, I'd like to turn it over to Tom Hardy.

Tom

Thank you, Kim. Good afternoon, my name is Tom Hardy. I'd like to share with you this afternoon new information, existing information as well as new information, on rating factor four, leveraging resources. Differing from previous years, chart E, a new chart, will capture training partner information.

Okay, let's get started. Leveraging resources, total rating factor points for this section would be 7 points. The following charts are utilized for leveraging resources for the leveraging resources rating factor. Chart D leveraging resources is weighted at 5 points. Chart E funds from training partners weighted at 2 points. Next slide, please.

Leveraging resources chart D, 5 points. Points will be awarded based on the amount of eligible leveraged funds. Additional non-federal funds, including grants, fees, in-kind contributions. Direct financial assistance grants, fees, that would be income generated from housing counseling training programs, such as charges were proposed, activities for students that did not receive a full partial scholarship for tuition. In-kind contributions, that being services, equipment, office space, and labor that supports the housing counseling training activities. Next slide, please.

Do not count funds from federal sources, such as, but not limited to, national foreclosure, litigation, counseling program, hardest hit [ph] funds, community development block grants, emergency homeowner loan program, per housing initiative program, home investment partnership program. Please remember attorney general settlement funds are not federal, and can be counted. Next slide, please.

Fee income can be counted. Only funds that will directly result in a provision of housing counseling training may be counted. Total funds

anticipated must be reflected in the SF424 application for federal assistance on line 18, under estimated funding, under section F program income. The available training grant period, is from June 1st, 2016 to May 30th, 2017. Next slide, please.

Evidence of funds must be maintained for HUD review, during the bi-annual performance review. Grantees are required to maintain evidence that leveraged funds sited in the training NOVFA application were actually provided to the agency. Funding files and/or leveraging files will be reviewed by HUD staff as a part of the performance review and onsite monitoring visits. Next slide, please. Thank you.

Provide an itemized list of all leveraged funds for the applicant and propose sub-grantees for FY 2016. The itemized list would include name of organization providing funds, type of contribution, time period funds are available, use of funds, as well as the amount of funds. Grantees must maintain evidence of leveraged funds for future review. Next slide, please.

Displayed on the screen presently is chart D. This gives you a visual representation of the chart. Within the chart, leverage resources would be included. Type of contribution, time period funds are available, as well as the other items going across commitment letter, and use of funds. Next slide.

Funds from training partners is weighted at 2 points. Within this section, please provide an itemized list of proposed, as well as past partners, with their proposed FY 2016 contributions and their FY 2015 actual contributions. This information would be captured in chart E. Sub-line items within the chart would include partner name, type of entity, name of contact at entity. May I have the next slide, please?

Contact phone number, proposed amount of training partner contribution, as well as past amount of training partner contribution. Again, grantees must maintain evidence of training partner contributions for future review. Next slide. Chart E, training partners information would be captured and listed in the file or on the chart that is presently on the screen. Next slide, please.

Joel, I'll hand it over to you.

Joel

Thank you, Tom. Please go ahead and move forward to the next slide. We'll go ahead and give you a brief summary of rating factor five, which is achieving results and program evaluation. This rating factor is worth a total of 8 points. It's meant to ensure that the applicants meet the commitments that are made in the application.

Each of the applicants must indicate how they evaluate their program success. Applicants that do demonstrate a wider variety of methods to evaluate their performance will receive higher scores in this section. Next slide.

For rating factor five, sub-factor A, we're looking specifically at that evaluation plan. This section is worth 6 points out of the 8. The plan must identify the information collection method that is used. Weight will be given to the applicant's ability to measure change in counselor's knowledge and skill. We want to be able to see how the counselors are progressing and how that is measured at each agency.

We also are looking at data analysis and the work plan adjustments. Each applicant should identify the steps that are taken to make needed adjustments, once the evaluation plan is analyzed. Next slide.

The second sub-factor here is sub-factor B, under grant expenditure history. This is worth 2 points out of the 8. HUD will be evaluating the applicant compliance with programmatic requirements, and expenditure results that came out during FY 2014. There is no narrative response needed from any direct grantees that received a training grant in FY 2014, because HUD will be using its own records to evaluate that. However, if we do have applicants that did not receive a HUD training grant in 2014, you simply want to provide information based on the compliance that you had with previous funding providers. Next slide.

Now we'll move on to a summary on finding and submitting the application, and Ginger Holman will be able to give that to you. Ginger.

Ginger

Okay, hello again, and thank you, Joel. Next slide, please.

You now know all about what you need to include in your application, but something that's equally critical to a successful grant is finding and submitting the application itself. Your source for all things related to finding and submitting your application is grants.gov. Next slide.

You find the application there, you submit it, you track it, you do all of that. What you need to know right now is the application is due April 4th, 2016 by 11:59:59 P.M. Eastern Standard Time. If it's later than that, we will not accept it. The recommendation is to submit the application at least two or three days in advance of that deadline to ensure that grants.gov has accepted it and validated it.

During the two or three days, you need to watch your emails all the time to make sure the application was either validated or rejected, and save all of those emails. A simple thing that is often overlooked is making sure that your email, that grants.gov, is valid and correct. Just from our experience with these webinars, people often do not type their email addresses in correctly, so you just need to make sure that you have done that because if you haven't, you're going to miss some important information. Next slide.

The first step you need to do is go to the registration section at grants.gov and make sure that the organization is registered. The basic item is, to have a [indiscernible] number. If you're new to the program, you need to make sure that you have registered with SAM, the Assistant Award Management System, at sam.gov.

If you've done that before, you also need to go into the system and make sure your registration is current, because it doesn't go on for indefinitely. You'll be given the opportunity to create a username and password. Then you will also get authorization for the various roles that the person in your agency can take. You'll also be able to track your role status. Next slide.

Now you want to actually begin to apply for and submit the application. You will be searching for funding opportunity FR6000N-30. You'll find you'll be able to search at grants.gov. As I've said in the control panel, there is a synopsis of the grant, which will give you a lot of this basic information. Next slide.

And that's just a view of the screen that you're looking for, the view grant opportunity. You will find that after you have searched for that particular grant. The item down at the lower right, select package, is where you're going to be going next. Next slide.

Step one, you download the application. From that screen that we just showed you, the view grant opportunity, select package, and then download the instructions. You'll be asked to open a zip file, which will

have the NOVFA, the general section and the chart. Then, you will download the package. So, there are two different things, the instructions and the package. You'll need to do both of them and save them to your desktop.

Step two will be to complete the application package. After you've downloaded the application, you'll complete it offline, saving it often. You don't have to see login to grants.gov to work on your application. Next slide.

Step three is submitting the package. You'll be prompted to save and submit the application package. Then you need to follow all the instructions on exactly how to do that. You will get a number from grants.gov, a tracking number, so keep that, because you'll need it for future activities.

Within the two days after you submitted it, you'll get two emails. One will be an email saying that the submission was received, and the second email will be the submission was validated or rejected. If it's rejected, you will have the opportunity to make corrections, so watch for that and follow those instructions very carefully. Next slide.

After that, you will have the ability to track and check the status of your application again, in the system at grants.gov. The important thing to realize is all this tracking system is going to do is tell you that, in this case, HUD has received your application.

It will not give you any further information about our review process or status of our review. We do not report that status back to grants.gov. Those statuses will be communicated as necessary. Again, why you needed to keep that tracking number when you've got your application back, is that's how you track. Next slide.

There's some formatting information that you need to be aware of that could affect, again, the acceptance of your application. In the general section, 4B, the content and form of application submission, you need to read that and make sure you understand it. Something that they have warned us about this year, is do not use Adobe Reader DC. Apparently the grants.gov system will not accept those documents.

You would use Adobe Reader 11.0.10, or you can use Adobe Acrobat standard or professional versions 9 through 11. Your narrative portion

that all of our reviewers have told you about, is limited to a total of 50 double-spaced, 12 point font, single-sided pages. A point for you to understand is your course descriptions, the detailed information that you're going to give us about your courses, do not count in those 50 pages. The pages must be numbered with a header on each page indicating the applicant name and the rating factor, the number and the title.

As Joel said, you need to put your name on each one of the charts as well. You need to create valid file names and they're restricting them to what they're calling the UTF8 characters, A through Z, cap and non-cap, 0 through 9, underscore, hyphen, space, and period. If you put other characters in, your files will be rejected. Next slide.

Just some tips to remind you, we've gone over them all, but we need to—repetition is very valuable. Read the general section and the NOVFA early, often, and very carefully. Use a highlighter, make sure you understand it. Follow all of the instructions in both of those documents, using again, the correct software and the correct file name.

Understand your charts, how to fill them out and how to submit them. As Joel and Rhonda have both said, do not convert those charts into a PDF format. Answer all of the questions, but don't give us information that we didn't ask for. Again, make sure the pages are numbered and named. We would hate to have you misplace a rating factor narrative because you didn't do that.

Don't exceed the page limits, we're not going to look at any extra pages. As Rhonda said, do not ask for specific grant amount or provide a budget. In SF424 on line 18A, you'll enter a dollar. Another tip that's often overlooked, is make sure that more than one person in your agency knows your username and password, because we've had, I don't know how many appeals, because the one person that knew all that stuff got sick or something. So, it needs to be shared with one or two people, so that kind of catastrophe doesn't happen. Next slide.

Get technical assistance from grants.gov; they're very, very helpful. You can contact them regarding issues and problems with the technology. They have an 800 number, they have an email address, and they are available 24/7. They also have an online user guide, which may be another thing to get to early on. As I've mentioned before, keep copies of any emails you sent to grants.gov and ones that you received from them regarding submission problems. If you need to appeal a late submission,

those communications are going to be critical to the support of your appeal. Next slide.

Questions regarding specific program requirements, you'll send to housing.counseling at hud.gov, putting TNOFVA in the subject line. Realize that LAC staff is going to be able to answer some general questions about the NOVFA, but we will not be able to answer any specific questions that could have an impact on or competitive advantage to you.

At this point, I'm going to turn it over to Lorraine Griscavage-Frisbee, who is the deputy director of the Office of Outreach and Capacity Building, to look and see if there's some general questions that we've received that we can answer. Lorraine.

- Lorraine Alright, well thank you very much, Virginia. And thank you, everyone, for providing this information and for our attendees hanging in there so we can look at a couple of questions. There seems to be a little bit of confusion over who was eligible to apply, and what the experience requirements are. Can you repeat, again, what the training experience requirement is in order to be eligible for this NOVFA? I think, Rhonda, did you cover that in your section?
- Ginger Rhonda did, and I did as well.
- Lorraine Ginger, would you like to answer that, then?
- Ginger Sure. You need to be a 501(c)3 agency or a state housing finance agency, or other governmental agency, with at least two years' experience of providing training on a nationwide basis. That means, unfortunately, that experience training at a state level doesn't meet that criteria.
- Lorraine Okay, we have a specific question that came in. It says, just to make sure, a state housing finance agency can apply and act as an intermediary for housing counselors, but we have to offer this training nationally, or can the sub grantees offer national training?
- Ginger The state housing finance agency would be the grantee and they would have to meet the criteria of providing the training on a national basis.
- Lorraine We have another question, similar on that line that says, can local housing counseling agencies, LHCA's apply for this training?

- Ginger No, but you might be able to be a training partner depending on the experience that you've had providing training.
- Lorraine Okay. I'm seeing quite a bit of similar questions that again are asking about that two year experience, so it's the applicant that needs to have that two year experience. Right?
- Ginger Correct.
- Lorraine Okay. That seems to be the majority of the questions, and Daniel Fenton [ph] we saw your question as well, and we will get back to you after the broadcast on that, if you're still on the call. Another question is, if we want to start providing nationwide training, can we apply for this NOVFA?
- Ginger Unfortunately not, because you've got to have had the experience. But it might be an opportunity to work with one of the agencies that's going to become a grantee to be a training partner, where you could then begin to gather some of that experience.
- Lorraine I have a new question. It says, can an intermediary partner with a for-profit that has more than two years' experience doing national training?
- Ginger No. The grantee itself has to be the qualified applicant.
- Lorraine Okay. That about finishes all the questions we have in the queue.
- Ginger Okay. As I had mentioned early on, we will look at these questions and the other questions that you submit to housing.counseling@hud.gov and put together a series of frequently asked questions.
- Also as a reminder, this webinar, the audio replay number, the PowerPoint and a transcription will be available at the HUD exchange in their archives section. You'll have the opportunity to review all of this information again.
- Does anyone else, before we close, have any more questions or comments? I mean, our staff.
- Rhonda I just want to remind everybody again, the applications, this is Rhonda, the application due date is April 4th at 11:59:59 P.M. Eastern Standard Time.

- Ginger Thank you, that's an excellent reminder. Jerry or Lorraine, do you have anything else?
- Jerry No, I'm done. Thank you for a great presentation today. I know it was very informative for our potential applicants, and thank you, everyone, for attending today.
- W Don't forget to do the survey. Thank you.
- Ginger I think we have one more slide. Again, as everyone said, thank you for attending. It'll be an exciting adventure for you all, and we look forward to working with the successful applicants. Again, thank you for attending.
- W Thank you.
- Moderator Ladies and gentlemen, that does conclude your conference for today. Thank you for your participation and for using AT&T Executive TeleConference. You may now disconnect.