Pilot Recovery Housing Program Performance Reporting Webinar

Recovery Housing Webinar Series

Agenda

- Introduction and Learning Objectives

- RHP Reporting Requirements

    - RHP Action Plan Overview

    - RHP Reporting Requirements

- Disaster Recovery Grant Reporting (DRGR) system

    - Review and Verify Expenditures

    - Explaining Program Outcomes

    - DRGR Tips

- Questions and Answers

Introductions

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Session Learning Objectives

As a result of this webinar, participants will be able to:

1. Outline the scope and timing of RHP reporting requirements.
2. Develop internal reporting systems that provide all required data to submit complete annual RHP performance reports to HUD.
3. Access the DRGR Performance Reporting module.
4. Complete DRGR reports data entry and narratives.
5. Follow required procedures for 15-day public comment on the draft report before submission to HUD.

RHP Reporting Requirements: Scope and Timing

RHP Overview

RHP Action Plan

- The application for funds based on CDBG requirements, as modified by the statute and RHP Notices.

- Provides HUD and the public basic information on recovery housing needs and the process for deciding the use of RHP funds.

- Other elements of the Action Plan address administrative requirements including expected outcomes, performance measures, partner coordination, and management and oversight of funded entities.

- Grantees enter the Action Plan in HUD's Disaster Recovery Grant Reporting (DRGR) system for HUD review and approval of their grant award and use DRGR to draw funds and report program results.

RHP Reporting Requirements

Summary of RHP Notice provisions on reporting

- Each RHP grantee must submit an annual performance report (including financial reports) no later than 30 days following the end of each federal fiscal year,

    - Beginning 30 days after the close of the first federal fiscal year in which HUD and the grantee sign the RHP grant agreement and

    - Continuing until 30 days after the end of the last fiscal year in which the grant is open or the period of performance, whichever comes earlier.

- Reports must be submitted using HUD's DRGR system.

RHP Reporting Requirements

Summary of RHP Notice provisions on reporting

- HUD will use grantee reports to **oversee compliance** with RHP grant requirements and perform risk analysis that may inform HUD's monitoring plans.

- The grantee must enter information in DRGR about the uses of RHP funds in **sufficient detail** to permit HUD's review of grantee data and allow HUD to assess compliance and risk.

RHP Reporting Requirements

Summary of RHP Notice provisions on reporting

- Required information includes (but is not limited to):

project name	funds budgeted and expended	number of properties and housing units
activity	funding source	number of LMI persons or households benefiting from the activities
location	non-RHP funds expended	
national objective	start and end dates of activities	

RHP Reporting Requirements

Performance Measures and Progress

- To the extent feasible, HUD will configure DRGR performance measures to fit the purposes of the RHP program and the eligible activities

  - *Mandatory measures*: must provide data on persons served and persons moving to permanent housing

  - *Optional measures*: may provide data on income levels, health insurance coverage, relocation activity, etc.

- Program progress and status: describe the nature and scope of the activity when reporting, progress on performance measures, current project status, and explain the financials

RHP Reporting Requirements

Visualize the Reporting Process

Person with SUD → RHP Agency → UGLG → State MH/ SUD Agency → State HCD Agency → DRGR Report To HUD

NOTE – For DC and state direct action, there would not be "UGLG" in the information flow depicted above.

RHP Reporting Requirements

Timing

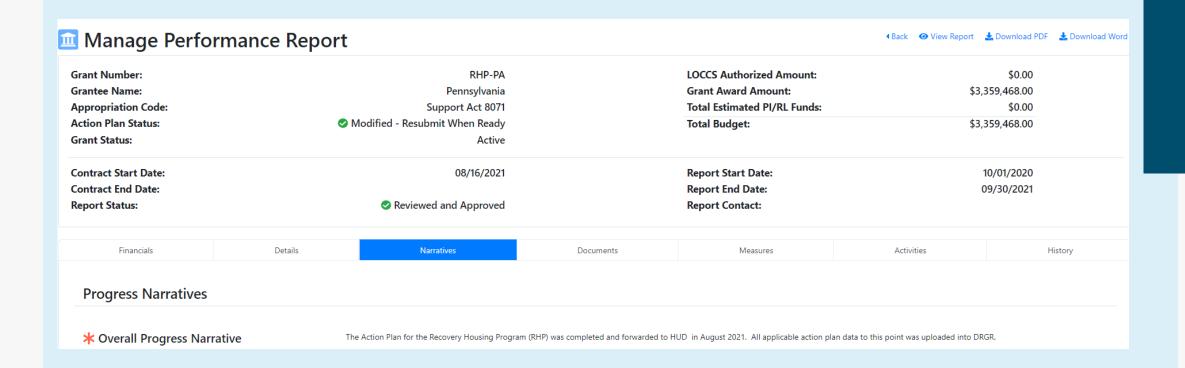| Date	Action
October 1-13	Assemble required reporting data and draft narratives
October 14-29	Post draft Annual Report for public comment – **15 days**
October 29	Public comment period ends. Summarize comments and revise as needed
October 30	Submit Annual Report to HUD via DRGR

RHP Reporting Requirements

Questions

Questions on reporting process, scope, and timing?

DRGR Demonstration: RHP Annual Report

RHP Expenditures and Outcomes

- Performance Reports measure compliance with statutory and regulatory requirements related to their Grant, such as:
    - Meeting Purpose of the SUPPORT Act
    - Meeting National Objectives
    - Meeting **expenditure milestones**
- Performance Reports provide a vehicle for grantees to tell their story of how investments are achieving results in their communities
    - Entering narratives
    - Meeting **outcomes and accomplishments**
- The contents of the Performance Report are taken directly from the DRGR Action Plan.

RHP Expenditures and Outcomes

Entering Narratives

RHP Expenditures and Outcomes
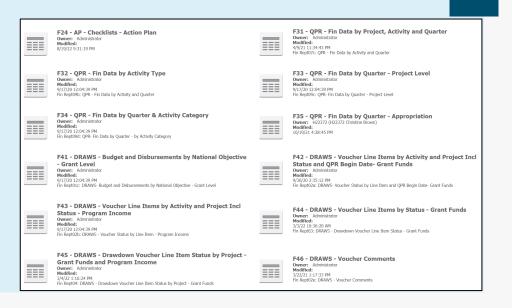
Reviewing and Verifying Grant Expenditures

- Action Plan must include a concise summary of:
  - How the grantee intends to expend at least **30 percent** of its RHP funds within one year from the date the funds are available to the grantee
  - How the grantee intends to expend **100 percent** of the RHP funds before the end of the period of performance.
  - How the grantee will expend no more than **5 percent** of the RHP grant for its administrative costs.

RHP Expenditures and Outcomes

Reviewing and Verifying Grant Expenditures

- Grantees will enter information into DRGR on their obligations and expenditures, available cash, program income, and other financial information for the use of RHP funds as required by HUD.
- Connection between internal financial systems and DRGR
  - Rely on data in existing accounting systems
  - Use this opportunity to reconcile data. DRGR should always match the grantee's records. Activity expenditures should be equal to the amount of funds the grantee expended.
- Grantees must use the DRGR system to generate and submit a form SF–425 federal financial report.

RHP Expenditures and Outcomes

Reviewing and Verifying Grant Expenditures

Financials

Overall Progress Metrics

Overall	This Report Period	To Date
Total Projected Budget From All Sources	$0.00	$1,171,647.68
Total Budget	$0.00	$1,000,000.00
Total Obligated	$71,514.28	$895,420.68
Total Funds Drawn	$71,514.28	$895,420.68
Program Funds Drawn	$71,514.28	$895,420.68
Program Income Drawn	$0.00	$0.00
Program Income Received	$0.00	$0.00
Total Funds Expended	$0.00	$852,725.47
Most Impacted and Distressed Expended	$0.00	$0.00
Other Funds	$0.00	$171,647.68
Match Funds	$0.00	$16,591.28
Non-Match Funds	$0.00	$155,056.40

Funds Expended

Overall	This Report Period	To Date
Rural Community Assistance Corporation (RCAC)	$0.00	$852,725.47

RHP Expenditures and Outcomes

Reviewing and Verifying Grant Expenditures

- Each grant is subject to its RHP expenditure deadline in accordance with the applicable executed grant agreement.

- Useful MicroStrategy Reports
  - F32 – Financial Data by Activity Type
  - F43 – Voucher Line Items by Activity and Project
  - F45 – Drawdown Voucher Line Item Status by Project
  - F67 – Cumulative by Activity, Responsible Org, Activity Type and Nat Obj

RHP Expenditures and Outcomes

Updating and Explaining Program Outcomes

- All programs managed in DRGR require reporting of accomplishments.
  - If the field for a performance measure or outcome is missing, it is likely that projections were not entered for that performance measure or outcome in the DRGR Action Plan Activity.
- Connection between proposed projections and actual outcomes
  - Enter accomplishments for the period in the field provided.
  - Grantees may use negative numbers in the current Performance Report to reduce the cumulative total to match actual, correct records for accomplishments and expenditures.

RHP Expenditures and Outcomes

Updating and Explaining Program Outcomes

- Action Plan must include sufficient information on proposed outcomes so that the annual performance report can include a comparison of the proposed versus actual outcomes for each outcome measure.
- Grantees must report:
  - The number of individuals assisted in RHP activities
  - The number individuals able to transition to permanent housing through RHP-assisted temporary housing.
- The grantee must explain, if applicable, why progress was not made toward meeting goals and objectives.

RHP Expenditures and Outcomes

Updating and Explaining Program Outcomes

- Grantees should consider other outcome measures and are encouraged to engage with researchers to better understand other measurable impacts of RHP funding

- Examples include:

  - # of housing units/beds
  - # who exited to residential treatment setting
  - # who exited sober to permanent housing
  - # who exited to homelessness or shelter
  - # who exited to corrections setting (jail, prison)
  - # served who increased their income through employment
  - # served who increased their income through benefits and entitlements
  - # exited with increased income

RHP Expenditures and Outcomes

- Using DRGR's data upload templates

RHP Expenditures and Outcomes

DRGR Tips

- Refer to User Manual
    - Chapter 19: Performance Report Overview
    - Chapter 21: Performance Report Review Tools
    - Chapter 22: Performance Report – Submission and Approval

- Action Plan must be in "**Reviewed and Approved**" status

- DRGR works best using the Google Chrome browser

- Do not let the system sit idle for more than 20 minutes or it will lock you out

- When leaving your DRGR session, always Log Out (found under the User Profile tab) before closing your browser

Live Demonstration!

- Navigate to Performance Report
- Verify Financials
- Add Actual Accomplishments

Public Comment

Allow for a 15-day Comment Period

- Before submitting the performance reports to HUD, Grantees must provide reasonable notice to citizens.
- Grantees need to make the full annual performance report, the SF–425 federal financial report, and the Consolidated Annual Performance and Evaluation Report, **available for citizen comment** for a period not less than 15 days.
- Performance reports must be available in a form **accessible to persons with disabilities** upon request
- DRGR generates a version of the report that grantees can download, save, and post on the grantee's website or share electronically.

Submission to HUD

Allow for a 15-day Comment Period

- HUD will review the performance report and determine whether it is satisfactory.
- Satisfactory means compliance, accuracy, and completeness of information.
- If a satisfactory report is not submitted in a timely manner, HUD may:
  - Suspend access to RHP funds until a satisfactory report is submitted, or
  - May withdraw and reallocate funding if HUD determines, after notice and opportunity for a hearing, that the grantee will not submit a satisfactory report.

Q & A

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

Resources

- **SUPPORT** Act

- **HUD Exchange** Recovery Housing Program (RHP) Page

- HUD Exchange DRGR

Thank you for attending!

[Visit RHP Page on HUD Exchange](#)