



Chapter 18: Technical Assistance Work Plan – HUD Review | Manage My Grants Module

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Chapter 18: Technical Assistance Work Plan - HUD Review

This Chapter provides instruction to HUD users authorized to approve Technical Assistance Work Plans, in the **Manage My Grants** module. This Chapter describes the actions of HUD Users when approving Work Plans submitted by technical assistance provider organizations (TA Providers) and is divided into subsections. The following actions are covered in this Chapter:

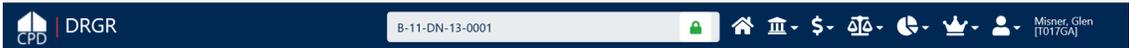
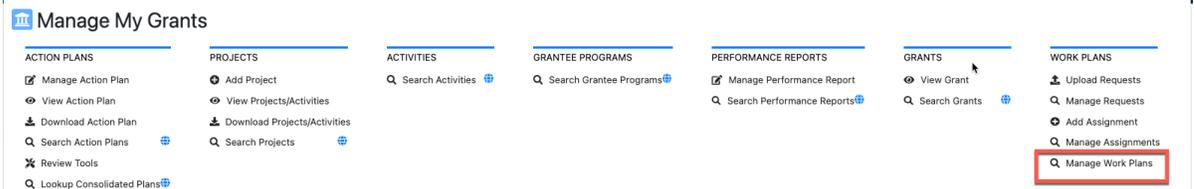
Grantee Users

| Menu Option | Subsection | Action |
|---------------------|------------|----------------------------------|
| 🔍 Manage Work Plans | B1 | Search for and Review Work Plans |

A. Manage My Grants Module Access

The **Manage My Grants** module contains the Work Plan functions.

A1. HUD | User Access

| | |
|---|---|
| User Role: HUD User | Menu Option: 🏠 Manage My Grants Module |
| Purpose: Allow Grantee Users to access Work Plan actions. | |
| <p>✔ Complete the following steps to access the Manage My Grants Module:</p> | |
| <p>1 In the DRGR System, select the Manage My Grants module, or 🏠 icon, located in the navigation menu.</p>  | |
| <p>2 This opens the dropdown menu items for the Manage My Grants module. The DRGR System displays the relevant menu items based on HUD User role.</p>  | |



B. HUD Approval/Rejection of a TA Work Plan

After a Work Plan is submitted in DRGR by a TA Provider User, an appropriate CPD Representative and other HUD staff included in the related grant user group can take review and approval/rejection actions on TA Work Plans with the status of “Submitted.” HUD will use the following steps to approve or reject a TA Work Plan in DRGR.

B1. HUD | Review Work Plan

| | |
|---|---------------------------------------|
| User Role: HUD User | Menu Option: Manage Work Plans |
| Purpose: Allow HUD to review a TA Work Plan in DRGR. | |
| Complete the following steps to review a DRGR Work Plan: | |
| <ol style="list-style-type: none"> Navigate to the Manage My Grants or icon and under the Action Plan menu as described above and select <Manage Work Plans>. The “Manage Work Plans” page will load. <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> </div> On the “Manage Work Plans” page, use the “Search Criteria” to find one or more TA Work Plans. Alternatively, users can select < Search> without entering any data into the search fields to see a list of all Work Plans. The search results are displayed on the same screen. <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> </div> | |



User Role: HUD User

Menu Option: Manage Work Plans

- The results display key features of the TA Work Plan: “Work Plan Number”, “Grant Number”, “TA Provider”, “Primary CPD Rep”, “Period of Performance”, “Work Plan Type”, “Status Last Updated Date”, “Status Last Updated By”, “Date Submitted”, “Status”, and allowable Actions based on the user role in the “Action” column.

From the “Actions” column, users can view and manage either of the results.

Select each column within the search results to sort the list in descending and ascending order.

Use the <Search> link to search for additional TA Work Plans.

Search Results 9

Copy Print CSV Excel

| Work Plan Number | Grant Number | TA Provider | Primary CPD Rep | Period of Performance | Work Plan Type | Status Last Updated Date | Status Last Updated By | Date Submitted | Status | Actions |
|------------------|--------------|--------------|---------------------------|----------------------------|----------------|--------------------------|---------------------------|----------------|----------|---------|
| | | | T047FOLast T047FOFirst | 09/13/2021 - 06/30/2024 | | 09/16/2021 | T012FOLast T012FOFirst | 09/15/2021 | Approved | |
| | | | T047FOLast T047FOFirst | 09/13/2021 - 06/30/2024 | | 09/16/2021 | T012FOLast T012FOFirst | 09/15/2021 | Approved | |
| | | | T047FOLast T047FOFirst | 09/15/2021 - 12/31/2021 | | 02/06/2022 | T047FOLast T047FOFirst | 02/03/2022 | Approved | |
| | | | T047FOLast T047FOFirst | 10/04/2021 - 09/30/2022 | | 10/14/2021 | T012FOLast T012FOFirst | 10/07/2021 | Approved | |
| | 0011 | Incorporated | T047FOLast T047FOFirst | 10/05/2021 - 09/30/2022 | Support | 10/14/2021 | T012FOLast T012FOFirst | 10/07/2021 | Approved | |

- To view the TA Work Plan, click on action.

Search Results 9

Copy Print CSV Excel

| Work Plan Number | Grant Number | TA Provider | Primary CPD Rep | Period of Performance | Work Plan Type | Status Last Updated Date | Status Last Updated By | Date Submitted | Status | Actions |
|------------------|--------------|--------------|---------------------------|----------------------------|----------------|--------------------------|---------------------------|----------------|----------|---------|
| | | | T047FOLast T047FOFirst | 09/13/2021 - 06/30/2024 | | 09/16/2021 | T012FOLast T012FOFirst | 09/15/2021 | Approved | |
| | | | T047FOLast T047FOFirst | 09/13/2021 - 06/30/2024 | | 09/16/2021 | T012FOLast T012FOFirst | 09/15/2021 | Approved | |
| | | | T047FOLast T047FOFirst | 09/15/2021 - 12/31/2021 | | 02/06/2022 | T047FOLast T047FOFirst | 02/03/2022 | Approved | |
| | | | T047FOLast T047FOFirst | 10/04/2021 - 09/30/2022 | | 10/14/2021 | T012FOLast T012FOFirst | 10/07/2021 | Approved | |
| | 0011 | Incorporated | T047FOLast T047FOFirst | 10/05/2021 - 09/30/2022 | Support | 10/14/2021 | T012FOLast T012FOFirst | 10/07/2021 | Approved | |

- “View Work Plan” page opens in a new browser tab.



User Role: HUD User

Menu Option: Manage Work Plans

View Work Plan

| | | | |
|---------------------|--------------------------------|--------------------------------|--------------------------------------|
| TA Provider Name: | ICF Incorporated | Work Plan Number: | ICF-C-18-003 - 003 BBC AM On-Call TA |
| Last Updated Date: | 06/17/2021 | Work Plan Title: | |
| Grant Number: | C-18-TA-VA-0011 | TA Type: | TA - Tech Asst |
| Appropriation Code: | 2018 Departmental | Work Plan Type: | TA - On Call Assistance |
| Project Number: | Better Buildings | Performance Period Start Date: | 08/01/2019 |
| Project Title: | Cross-Cutting | Performance Period End Date: | 12/31/2020 |
| Grantee Program: | | Approved Work Plan Budget: | \$563,500.70 |
| Work Plan Status: | Modified - Resubmit When Ready | Work Plan Budget: | \$563,600.70 |

Scope of Work

*Scope Description

Modification Justification: Modification does not require GTR or program office review. The modification includes changes to the budget totaling less than a 10 percent and minor edits to the text in Task 2.1.

Amendment Justification: Amendment #3 (7/8/2020): This request made on 7/8/2020 is for an amendment to work plan ICF-C-18-003. We are requesting to extend the period of performance for this work plan to 12/31/2020. We are also requesting to add a new key personnel to task two. We have modified the budget to reflect these changes.

Modification Justification: HUD has requested updates to this 2019/2020 BBC training workplan pertaining to monthly narratives, training webinars and workshops with Rebecca Schaff.

This work will provide support to organizations that own and/or manage multifamily (MF) housing properties and have joined the Better Buildings Challenge (BBC), and will include all communication and peer exchange case study solutions activities outlined in the BBC Strategic Plan.

BBC Multifamily (MF) partners have committed to making their multifamily building portfolios 20% more energy efficient within 10 years, showcasing energy efficiency projects and Implementation Models, and reporting on energy performance data. ICF will support MF partners by providing organizational and technical assistance in support of the commitment as laid out in their BBC partnership agreement and their individualized annual plans. The work will include a variety of activities that support MF partners in making their buildings more energy efficient and creating replicable models for other MF organizations to follow. These activities include basic account management, energy savings plan development assistance, utility benchmarking assistance, and coordination with third-party service providers (e.g. WegoWise) partners have opted to utilize. Activities also include supporting the development of solutions-Implementation Models--to help partners share their successes and innovations with BBC peers and the public. Also included are other communications activities related to products (e.g. newsletters, blogs, social media) for which ICF helps develop ideas.

6 From the search results on the “Manage Work Plans” page, click on action next to the TA Work Plan that needs review. “Manage Work Plan” page will load with an option to review.

Manage Work Plans

Search Criteria Show More Criteria

| | | | |
|-----------------------------|---|--------------------------|--|
| Work Plan Number: | <input type="text" value="Enter Work Plan Number ..."/> | Assignment ID: | <input type="text" value="Enter Assignment id ..."/> |
| Work Plan Status: | <input type="text" value="Select Option"/> | Work Plan Type: | <input type="text" value="Select Option"/> |
| TA Provider: | <input type="text" value="Select Option"/> | Grant Number: | <input type="text" value="C-18-TA-VA-0011"/> |
| Primary CPD Representative: | <input type="text" value="Enter Name ..."/> | Program Office Reviewer: | <input type="text" value="Enter Name ..."/> |
| Lead POC: | <input type="text" value="Enter Lead POC ..."/> | Organization Assisted: | <input type="text" value="Enter Organization Assisted ..."/> |

Search Results 35

| Work Plan Number | Grant Number | TA Provider | Lead POC | Primary CPD Rep | Period of Performance | Work Plan Type | Status Last Updated Date | Status Last Updated By | Date Submitted | Status | Actions |
|---|-----------------|------------------|--|-------------------|-------------------------|--------------------------------------|--------------------------|------------------------|----------------|--------------------------------|---------|
| ICF-C-18-003 - 003 BBC AM On-Call TA | C-18-TA-VA-0011 | ICF Incorporated | Expert Consultant - 14649-09/10/2013 Charles Kreiman | Williams Pamela M | 08/01/2019 - 12/31/2020 | TA - On Call Assistance | 07/26/2020 | Madden Peter | 07/08/2020 | Modified - Resubmit When Ready | |
| ICF-C-18-006 - 006 CN Inform TA | C-18-TA-VA-0011 | ICF Incorporated | TBD | Williams Pamela M | 08/01/2019 - 03/31/2021 | TA -Direct TA (practitioner support) | 08/07/2020 | Williams Pamela M | 07/21/2020 | Approved | |
| ICF-C-18-007 - 007 CNI Tools & Products | C-18-TA-VA-0011 | ICF Incorporated | TBD | Williams Pamela M | 08/01/2019 - 12/31/2021 | TA Developing Web Products | 03/05/2021 | Williams Pamela M | 02/18/2021 | Approved | |
| ICF-C-18-004 - 004 CC18 HUD Exchange | C-18-TA-VA-0011 | ICF Incorporated | TBD | Williams Pamela M | 07/20/2019 - 06/30/2022 | TA Knowledge Mngmt | 06/01/2021 | Williams Pamela M | 05/28/2021 | Approved | |

7 On the “Manage Work Plan” page, select “Review Plan” to open “Review Work Plan” window.

TIP: If the <Review Plan> option is not available, then the HUD user does not have the appropriate permissions to approve or reject the TA Work Plan. Navigate to the Manage My Grants module, locate the Grants menu, and select <View Grant> to confirm TA Work Plan user group permission.



User Role: HUD User Menu Option: Manage Work Plans

Manage Work Plan ← Back Download Add Comments Validate Plan **Review Plan**

| | | | |
|---------------------|--------------------------------|--------------------------------|--------------------------------------|
| TA Provider Name: | ICF Incorporated | Work Plan Number: | ICF-C-18-003 - 003 BBC AM On-Call TA |
| Last Updated Date: | 06/17/2021 | Work Plan Title: | |
| Grant Number: | C-18-TA-VA-0011 | TA Type: | TA - Tech Asst |
| Appropriation Code: | 2018 Departmental | Work Plan Type: | TA - On Call Assistance |
| Project Number: | Better Buildings | Performance Period Start Date: | 08/01/2019 |
| Project Title: | Cross-Cutting | Performance Period End Date: | 12/31/2020 |
| Grantee Program: | | Approved Work Plan Budget: | \$563,500.70 |
| Work Plan Status: | Modified - Resubmit When Ready | Proposed Work Plan Budget: | \$563,600.70 |

Assignments Scope People/OBLs Tasks Organizations Financials Documents Measures Outcomes Surveys History

Review Work Plan

Review Decision

* Status:

Status Adjustment Comments:

Select a status from drop down and select **<Save>** to submit the action and comments in DRGR. The System automatically sends an email with the HUD action taken to the TA Provider User who created the Work Plan.

Select **<Cancel>** to return to the previous screen without saving the comments or approval action.

The remainder of this page is intentionally left blank