

Disaster Recovery Grant Reporting Training for NSP Users

BACKGROUND

You are the NSP Coordinator for Denver, CO. You have received an NSP-1 grant worth \$10,000,000 from HUD to help stem the tide of abandonment and foreclosure in areas of need. You're eager to get to work in the system in order to meet the 18th month obligation deadline. As a DRGR user, you have both the Request Drawdown and Grantee Admin capabilities.

Property Information

Multifamily complex 1: 100 Constitution Way, Denver, CO

Multifamily complex 2: 929 Connecticut Ave, Denver, CO

Multifamily complex 3: 525 California St, Denver, CO

Single Family Address 1: 1600 20th St, Denver, CO

Single Family Address 2: 1800 Wisconsin Ave, Denver, CO

Single Family Address 3: 2222 Nebraska Ave, Denver, CO

Single Family Address 4: 56 Ohio Drive, Denver, CO

Your CPD Representative: Lanette Cole, HUD Denver Field Office

CASE STUDY #1: Adding the Action Plan to the Grant

Time to get started in DRGR!

EXERCISE: First, you need to add an Action Plan template to your new grant. Add one sentence to the Disaster Damage (anything will do) and Recovery Needs narratives. Make sure to save your work!

CASE STUDY #2: Adding Projects

Your main projects will be running a large land bank, redeveloping the property at 525 California St, the acquisition and rehab of the remaining two multi-family complexes, and the acquisition and rehab of four single-family homes in Chevy Chase.

You have budgeted \$2,000,000 for properties in the land bank, \$1,000,000 for the redevelopment project, and \$7,000,000 for acquisition. You'll be splitting the project budget for acquisition and rehab so that the multi-family complexes each receive \$3 million, with the remaining amount (\$1 million) being split equally between the single-family properties.

While the city will be managing the land bank directly, a non-profit called Greater Denver Housing Help will be doing the day to day work on the multi family complexes. The single family addresses will be split between two different organizations – Denver Affordable Housing (1600 20th Ave and 1800 Wisconsin Ave) and Housing for the People (2222 Nebraska Ave and 56 Ohio Drive). Both of Denver Affordable Housing's properties are being sold to families that make 30% of AMI. In addition, 929 Connecticut Ave will house only families who make 50% or less of AMI.

EXERCISE: Your CPD Representative has asked you to set up the projects with titles that make it easy to discern their eligible use and to provide a two sentence project description for each.

Which pieces of this information are necessary at the project level? At the activity level?

How many projects will you have?

Write down Your Project #s here:

CASE STUDY #3: Editing Projects

Your supervisor informs you that she'd like you to enter more detail in your project description for the acquisition project, including how many properties you intend to assist and what responsible organizations you'll be working with.

EXERCISE: Please make and save these changes.

CASE STUDY #4: Adding Activities

EXERCISE: Now you're ready to proceed with splitting your activities.

Some things to keep in mind, in addition to the information you received earlier:

- You are acquiring the land bank.
- All activities will start today and end on October 1, 2011.
- Lanette has requested two sentences in each narrative section.

How many activities will you need?

Record your activity numbers and titles here:

CASE STUDY #5: Moving/Reassigning Activities

As it turns out, 100 Constitution Way has been found to be uninhabitable, and thus will be redeveloped rather than rehabbed.

EXERCISE: Update your Action Plan to reflect this change.

CASE STUDY #6: Obligating Funds

(To do this, you will need to log out of the system and log back in with your Request Drawdown Test ID.)

It's been a busy last week – your sub-awardees have gotten moving on many of their projects.

EXERCISE: You've recorded the following expenditures and checked with your CPD rep to make sure it is OK to obligate funds: you should do so according to the table below.

ORGANIZATION	ADDRESS	AMOUNT
Denver Affordable Housing	1600 20th St.	\$120,000
Denver, CO	(Land Bank)	\$500,000
Greater Denver Housing Help	100 Constitution Way	\$1.5 million

CASE STUDY #7: Create a Voucher

Time to make a draw!

EXERCISE: Please create a voucher based on the expenditures above.

Record your voucher number:

CASE STUDY #8: Approve a Voucher

To send the draw to LOCCS, your co-worker, Cara, will have to approve the voucher you've created.

EXERCISE: Sign in using your Approve Drawdown Test ID to test out how this process works.

CASE STUDY #9: Recording Program Income

Good news! During the quarter, the land bank managed to sell a vacant property to a for-profit developer and generated \$250,000 in revenue. You want to enter this right away so that you can draw on it.

EXERCISE: Please enter this Program Income into DRGR.

Where do you enter the Program Income?

Where do you draw on the Program Income?

CASE STUDY #10: Add/Edit/Save QPR

The quarter is quickly drawing to a close, and your supervisor asks you to create and submit this quarter's report. You go into a state of sheer panic until you realize that much of the information in the report will be pulled down from the system for you.

What data will you have to enter yourself?

EXERCISE: Please create, edit, and save this quarter's QPR based on the information you've entered in the previous case study exercises.

Remember, Lanette will ask you to have at least two sentences in each narrative section for activities drawn down on (and in the narrative for the overall QPR).

CASE STUDY #11: Modify a Report

Your boss wants you to become familiar with the Reports module.

EXERCISE: Follow your trainer's instructions to modify the Projected vs Cum Totals for Performance Measure Sorted by Activity Number report.

Day 2 – Field Office Staff Exercises

CASE STUDY #1: Checking the Status of Grantee User Accounts

It's your first day back at the office after a blissful two week vacation. Your boss, Daria Stalls, barges into your office to inform you that the State of South Dakota is now set up in DRGR. She wants you to check out who the users are and review the state's Action Plans, vouchers, and QPRs.

First, she wants you to make sure all is well with their user accounts. She wants to ensure all users are active, have assigned roles, and are able access the state's grant. She also wants you to make sure the state has all the roles it needs to have.

EXERCISE: You decide to pull a couple of reports to accomplish this.

Is everything okay in terms of user roles?

CASE STUDY #2: Take Action on the Action Plan

Your supervisor wants you to review the State of South Dakota's Action Plan and recommend either rejection or approval.

EXERCISE: Pull up the Action Plan and review it. Enter any issues you see into the Action Plan comments section. Assume you will send comments on to the grantee. When ready, approve or reject the Action Plan and save your changes. Do not send any e-mails to the grantee.

CASE STUDY #3: Check on Activity Budgets

EXERCISE: Make the following changes to the Grant Funds Budget and Cumulative Data – Activity Level by Resp Org, Act Type, and Nat Obj report for the State of South Dakota.

- 1) Move National Objective to columns
- 2) Filter by activity type.

What are some other ways you could modify this report to make it useful to you?

Which activities are most on target? Any activities 'in trouble'?

CASE STUDY #4: Pull Drawdown Voucher Line Item Status report

EXERCISE: Daria asks you to **pull the Drawdown Voucher Line Item Status – Grant Funds** report for the State of South Dakota.

Are there any large vouchers waiting for your approval? How do you know?

EXERCISE: Ms. Stalls wants you to set it up so you receive the Drawdown Voucher Line Item Status report every week. Set this up for her, please.

CASE STUDY #5: Review the QPR

Let's review the QPR for the State of South Dakota.

EXERCISE: What do you see that's good/bad about this QPR? Enter these comments in the comment section. Approve or reject the QPR.

CASE STUDY #6: Modify the 'Addresses by Activity' Report

Before you leave for the day, Daria wants you to **modify the Addresses by Activity and Responsible Organization** report.

EXERCISE: She wants the report modified in the following way:

Filter By: Location.City

First 3 Columns should be Address, State, Zip

Sort QPR Report Period Begin Date so the oldest dates appear first

After you have done this:

Move the Zip Code field to rows

Save the report.

How would this report be useful to you?