

# ***Grant Administrator Update***

Thursday,  
October 16, 2025  
10a-12p



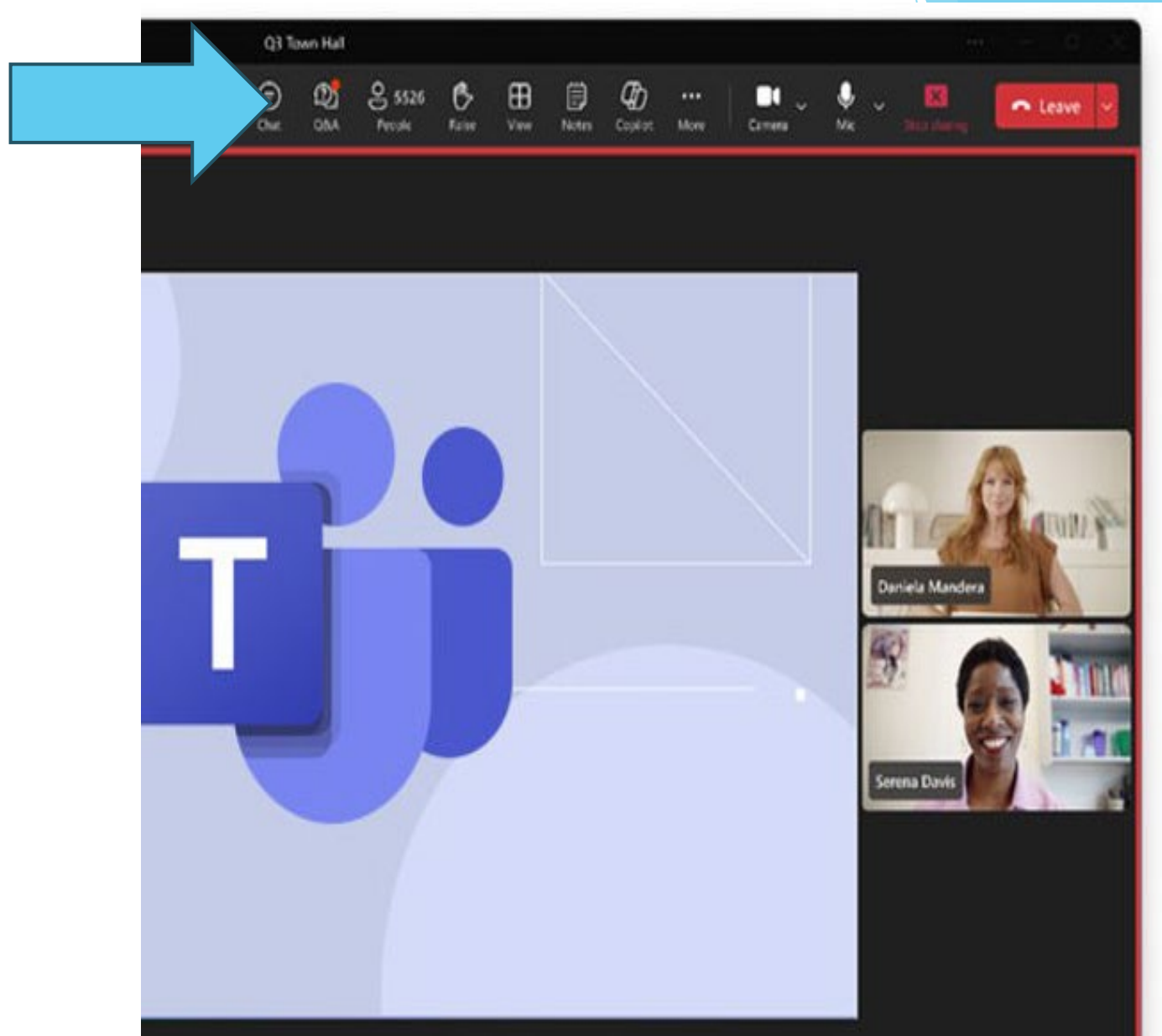
*Agency under the Office of Lieutenant Governor Micah Beckwith*

# Housekeeping

- ▶ This GA update is using 'Teams Town Hall' While using this platform, you will not be able to use your audio or video.
- ▶ If you are having any issues connecting, reach out to [CDBG@ocra.in.gov](mailto:CDBG@ocra.in.gov) for assistance.

## Q&A Function

If you have any questions during the presentation, please use the Q&A function located at the top of your screen. A panelist will respond to your inquiry as soon as possible



# 2nd Grant Administrator Update

## Continuing Education Unit (CEU)

- ▶ Your attendance for this live event was automatically recorded upon joining.
- ▶ As instructed, you were required to sign in using your personal computer, enter your official email address, and provide your full name when logging into the session.
- ▶ If you followed these steps correctly, your attendance has been successfully documented, and no further action is needed to receive credit toward your certification requirement.

**~ 1 CEU ~**



- ▶ The webinar materials, including the PowerPoint presentation and recording, will be available on OCRA's Grant Administration Continuing Education webpage, after this event concludes.



## Feedback on 2025 Round 2 CDBG Instructions



## Survey

This survey will be available  
until November 17, 2025.

Thank you!

During this meeting, you will receive updates from the following teams:



CDBG Team



Grant Services



# Office of Community and Rural Affairs

## Personnel Updates

# OCRA Staffing Updates

- ▶ Quinn Proudler
  - ▶ Community & Economic Development Program Manager
  - ▶ Phone: 317-460-6177
  - ▶ [qproudler@ocra.in.gov](mailto:qproudler@ocra.in.gov)



# OCRA Staffing Updates

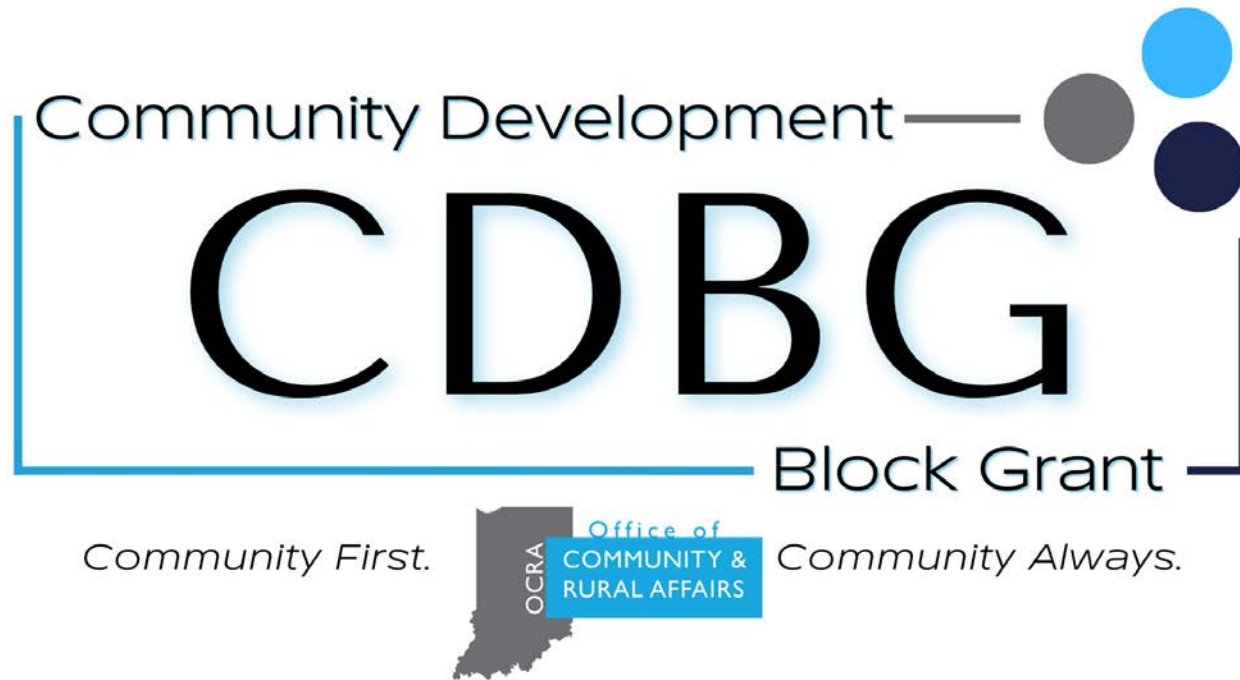
- ▶ Michaela Cathala
  - ▶ Executive Assistant
  - ▶ 317-232-8806
  - ▶ [mcathala@ocra.in.gov](mailto:mcathala@ocra.in.gov)



# OCRA Staffing Updates

- ▶ Armica- Bash Gaspar is no longer with OCRA.
  - ▶ For any pending task, [CDBG@ocra.in.gov](mailto:CDBG@ocra.in.gov)
  - ▶ CDBG Program Manager Position is Open for Applications





# Office of Community and Rural Affairs

## CDBG Team Updates

# Mission Statement

Indiana's state-administered Community Development Block Grant program fosters growth and resilience in rural cities and towns by investing in local initiatives that encourage communities to build, strengthen and thrive





# Welcome Grant Administrators!



Steve St. John



CDBG Program  
Director

# 2025 Round 2 is Open: Important Due Dates and Reminders



Proposals are due October 24th, 2025 . Submit via eGMS by 11:59pm ET



The GMS Program Page will reopen four days after the final site visit is completed.



Pre-approval items must be submitted to OCRA by December 5, 2025. Please email all requests to our CDBG shared inbox at [cdbg@ocra.in.gov](mailto:cdbg@ocra.in.gov).



Applications are due Friday, December 19, 2025. Applications must be submitted via eGMS by 11:59 p.m. ET.



Remember to double check all contact details for those assigned an application role in eGMS.

GMS Section	Project Design Factors	300 Total Points
Section 4	PROJECT DESCRIPTION	50 Points
4.1	Project Description	
4.1. a	Provide a detailed description of the program without the use of technical language. <ul style="list-style-type: none"> <li>Give an overview of the project in only two to three sentences.</li> </ul>	
4.1. b	Write at least three (3) clear, specific, and objectively measurable outcomes for the proposed program. <ul style="list-style-type: none"> <li>Include a baseline, a specific desired outcome, and how each of these are or will be measured.</li> <li>Note: the completion of the project itself is not considered an outcome.</li> </ul>	
4.2	Scope of Work	
4.2. a	Write a scope of work that is clear and logical for the type of project. <ul style="list-style-type: none"> <li>Identify any ineligible items.</li> </ul>	
4.2. b	Correlate the scope of work with the detailed budget. <ul style="list-style-type: none"> <li>Include per item costs in the detailed budget.</li> <li>Include specific information about soft costs in the detailed budget.</li> <li>Best Practice: Double check calculations before submitting detailed budget.</li> <li>Best Practice: Detailed budget should be uploaded as an excel document.</li> </ul>	
4.3	Project Development and Support	
	Provide description and documentation of the project development process spanning at least three (3) to six (6) months. Project development includes evidence of: <ul style="list-style-type: none"> <li>Research and identification of issues and solutions for this specific project.</li> <li>Evaluation of multiple alternatives.</li> <li>Multiple methods of public input.</li> <li>Provide timeline showing milestones of development process.</li> </ul>	
	Identify the project area on high-quality, colored, clearly labeled maps. <ul style="list-style-type: none"> <li>Maps show project area in relation to 1. Place, 2. County, and 3. State.</li> <li>Detailed project area maps include clear map markers, labels, legends, etc. for key locations and/or features.</li> <li>Any boundaries marked within the map are clearly defined and labeled.</li> </ul>	
Section 5	PROJECT NEED	125 points
5.1	Priority	
	Provide a summary of the history of issues across the past 3-5 years. Support with documentation (e.g. local data, residential anecdotes, maintenance logs, newspaper articles related to the issue, etc.) <ul style="list-style-type: none"> <li>A summary table presents a well-organized display of information.</li> <li>Highlight information within uploads that is specifically cited in the narrative.</li> </ul>	
5.1. a	Provide a compelling explanation of the frequency and prevalence of the issue(s) this program would address. Upload adequate documentation.	
5.2. b	Provide a clear and compelling explanation of the risk of the issue(s) having a significant impact on residents. Include adequate documentation showing a connection between the risk(s) and residents' daily lives. <ul style="list-style-type: none"> <li>Documentation is specific to the community.</li> </ul>	
5.3.c	Demonstrate in the narrative specifically how this project is a priority to both residents and local units of government. Include adequate documentation.	

# Project Design Scoring Criteria

- ▶ The project design scoring criteria have been revised from question-based prompts to declarative statements.
- ▶ This change is intended to clarify the specific documents and information required for each section.
- ▶ Please note that the point values remain unchanged and are consistent with previous rounds.

# Q4 Planning and OOR Open: Important Due Dates and Reminders



Both Programs will open for applications on October 14, 2025.



Intent to Apply & Pre-approval items must be submitted to OCRA by October 31st, 2025. Please email all requests to our CDBG shared inbox at [cdbg@ocra.in.gov](mailto:cdbg@ocra.in.gov).



Applications must be submitted in eGMS by 11:59 p.m. ET. on November 14, 2025.



Remember to double check all contact details for anyone assigned an application role in eGMS.



Project Design Scoring Criteria (Part 4 in the Instructions) for Q4 Planning has changed, please ensure to review them while preparing applications for this quarter.

# Steve's Corner: Friendly Reminders

## Notice of Intent to Apply

- Required within 2 weeks after Planning or OOR application opens
- No Notice of Intent required for Construction

## Site Visits

- The purpose of the site visit :
  - **Strengthen the Application**
  - **Assess Project Readiness**
- Not making changes after a visit weaken your proposal
- CLs will no longer discuss scoring points with grant administrators at site visits
- Point details removed from site visit documents
- Focus should be on the quality of the submission
- Grant administrators should begin adjustments immediately after their site visit outside of the GMS
- GMS is re-opening 4 days after the last site visit is completed. There is no 30-day window of reopening from proposal deadline.

## Application Submissions

- Applications must be complete and meet all prerequisites
- Incomplete applications will not be scored

# Steve's Corner: Friendly Reminders

## Program-Specific Forms

- Must use correct forms for OOR, Planning, and Construction to earn points
- All required documents must be attached as one complete submission
- Failure to use the correct form results in **zero points** for that section
- [Form MSRP-001 CDBG Main Street Revitalization Program Specific Points-](#) MRSP
- [Form FP-001 CDBG Facilities Program Specific Points-](#) FP
- [Form FP-002 CDBG Facilities Program Specific Points](#) [Form-FP](#)
- [BCP-001 CDBG Blight Clearance Program-](#)BCP
- [Form PL-001 CDBG Planning Program Specific Points](#) [Specific Points-PL](#)
- [Form OOR-001 CDBG Owner Occupied Program Specific Points](#) -OOR

## Updated Resources

- [Form CDBG-001- Green Infrastructure Program Specific Form](#) – WDW & SIP
- [MSR 2025-004 CPD Green Building Retrofit Checklist-](#)OOR
- [MSR-002- Resilience Bonus Points Minimum Standards-](#) All Programs
- [MSR-003- Disaster Designation Bonus Points Step by Step Guide-](#) All Programs



# Steve's Corner: Fresh Updates

## CDBG Application Cycle Changes – Effective 2026

- **Construction programs** will continue to follow the current schedule of **2 cycles per year**.
- **Planning and Owner-Occupied Rehabilitation Programs.** The current 4-quarter schedule will be reduced to 3 application cycles per year to streamline the process.
- *Depending on available funding \**

## 2026 Deadline Adjustment

- Applications Deadlines for Proposals and Final Applications are now due **Sunday at midnight**
- Tech support ends **Friday at 3 PM**
- Bonus points must be submitted by the **application deadline** starting Q1 2026 and 2026 Round 2
- In-Kind Requests and Final income survey results are now due by **proposal deadline** starting Q1 and Round 2

# Grant Administrator Program

Reminders



# Grant Administrator Program Requirements

## Purpose

- **The Grant Administrator Certification Program was created to:**
- Help local governments access federal and state funding.
- Improve understanding of laws and policies to manage grants effectively.
- Reduce risks and ensure compliance by requiring proper training for grant administrators.
- Make sure community needs are met through proper use of Community Development Block Grants and other funds.

## Who This Applies To

- People who want to be certified to manage federal or state funds through the Office.
- Certified grant administrators who must follow continuing education rules and ethical standards to keep their certification active.

## Who Needs Certification and When It Applies

- **Who can apply for certification:**
- Anyone who wants to become certified can apply to the Grant Administrator Certification Program **unless** they were removed or disciplined by OCRA

# Qualifications for Certification and Other Requirements

## Qualifications for Certification

- **Meet Knowledge Standards:**  
Understand how to manage federal grants provided by the Office.
- **Complete Required Training:**
  - The Office provides training and exams at least once a year.
  - Training includes: Four course levels, course evaluations and exams
  - You must score at least **75%** on each evaluation and the exam.
  - If you fail an evaluation, you may retake it once.
  - If you fail the exam, you may retake it up to **two times** before restarting the program.

## Meet Other Requirements

- No history of unethical behavior or violations of rules.
- Agree to follow the Code of Ethics.

## Time Limit

- You have **one year** to complete all training and exams.

# Active Certification

## Continuing Education & Reporting

- Your certificate expires every 2 years and must complete 6 **annual continuing education units (CEUs)** to keep it active.
- Report your education credits to the Office by **December 31** each year.

## Auditing

- The Office will audit your education records by **January 31** of the following year.
- If you don't meet the requirements, you'll have **90 days** to fix it before further action is taken.

# Roster & Contact Info



The Office will publish a yearly list of certified grant administrators, including:



You must keep your contact info up to date with the Office.



Any notice sent to your listed address counts as official.



Grant Administrators are responsible to provide their updated information every year during the yearly roster information update (December every year)



If update is needed during the year, Grant Administrators must fill out the Update Contact Form located on OCRA's Website \* *Coming soon*

# Code of Ethics

- ▶ Certified grant administrators must follow high standards of professionalism, honesty, and fairness when working with local governments, the Office, and the public.
  - ▶ **Professional Conduct**
  - ▶ **Public Interest**
  - ▶ **Legal Compliance**
  - ▶ **Integrity**
  - ▶ **Conflict of Interest**
  - ▶ **Obligations to Local Governments**
  - ▶ **Professional and Ethical Obligations**
  - ▶ **Professional Courtesy**
  - ▶ **Equal Opportunity**
  - ▶ **Continuing Education**



## Next Up Is...



Tanaha Peton



CDBG Program  
Manager



# Recovery Housing Program

2025 Program Re-Opening  
Information Session

# Agenda



Program Goals



Overdose and Recovery Residence Data



Program Overview



2025 Program Re-Opening: Grant Evaluation Updated



Timeline



Q&A

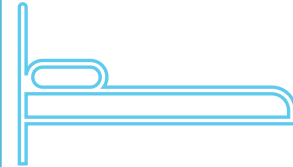


# Recovery Housing Program Goals



Goal 1-Fund one newly constructed transitional recovery residence

Goal 2-Increase the number of temporary housing beds available by 1% for a total of at least 1,589 available beds in Indiana designated residences.



Goal 3-All RHP funds will meet overall benefit to low to moderate income people by providing access to temporary transitional housing

# Snapshot of Indiana Overdose and Recovery Residence Data

In 2023, 2,130 Indiana residents died by drug overdose

Indiana has 32.5 (per 100,000) age adjusted fatal overdoses annually

Opioids, specifically fentanyl, most common drug involved in fatal overdoses

Overdoses higher among:

- Males
- Persons aged 35-4
- Black or African American persons

Counties with highest stable overdose death rate:

- Grant (68.2)
- Marion (59.2)
- Delaware (58.5)
- Wayne (54)
- Clark (52.3)

Indiana has 167 certified recovery residences with 1,574 beds available

Only 41 of 92 Indiana counties have recovery housing facilities

# OCRA Regions Total Residences

OCRA CL Region	Total Residences	% total facilities
Northwest	13	7.78%
Northeast	44	26.35%
Central	38	22.75%
Southwest	48	28.74%
Southeast	24	14.37%
Total	167	

# Recovery Housing Program Overview

▶ Legislative Authority: Authorized under Section 8071 of the SUPPORT Act

- ▶ Addresses the opioid epidemic through housing and recovery support

▶ Funding Classification: Treated as CDBG funds under Title I of the Housing and Community Development Act of 1974

▶ Regulatory Flexibility HUD waivers: modify standard CDBG program regulations

▶ Eligibility Scope: Available to both entitlement and non-entitlement communities

▶ National Objective: Meets the Limited Clientele criteria *Now includes:*

- ▶ Individuals insured by Medicaid
- ▶ Individuals who meet federal poverty guidelines



# Recovery Housing Program Overview

- ▶ **Program Activities:** Supports a range of eligible recovery and housing-related initiatives
- ▶ **Housing Support:** Provides funding for **stable, temporary housing** for individuals in recovery from substance use disorders. Covers up to **two years** or until **permanent housing** is secured—whichever comes first
- ▶ **RHP Program Flexibility**
  - ▶ No local match required
  - ▶ \$5,000 cap per beneficiary waived
  - ▶ OCRA encourages leveraging additional funding sources

## Eligible Activities

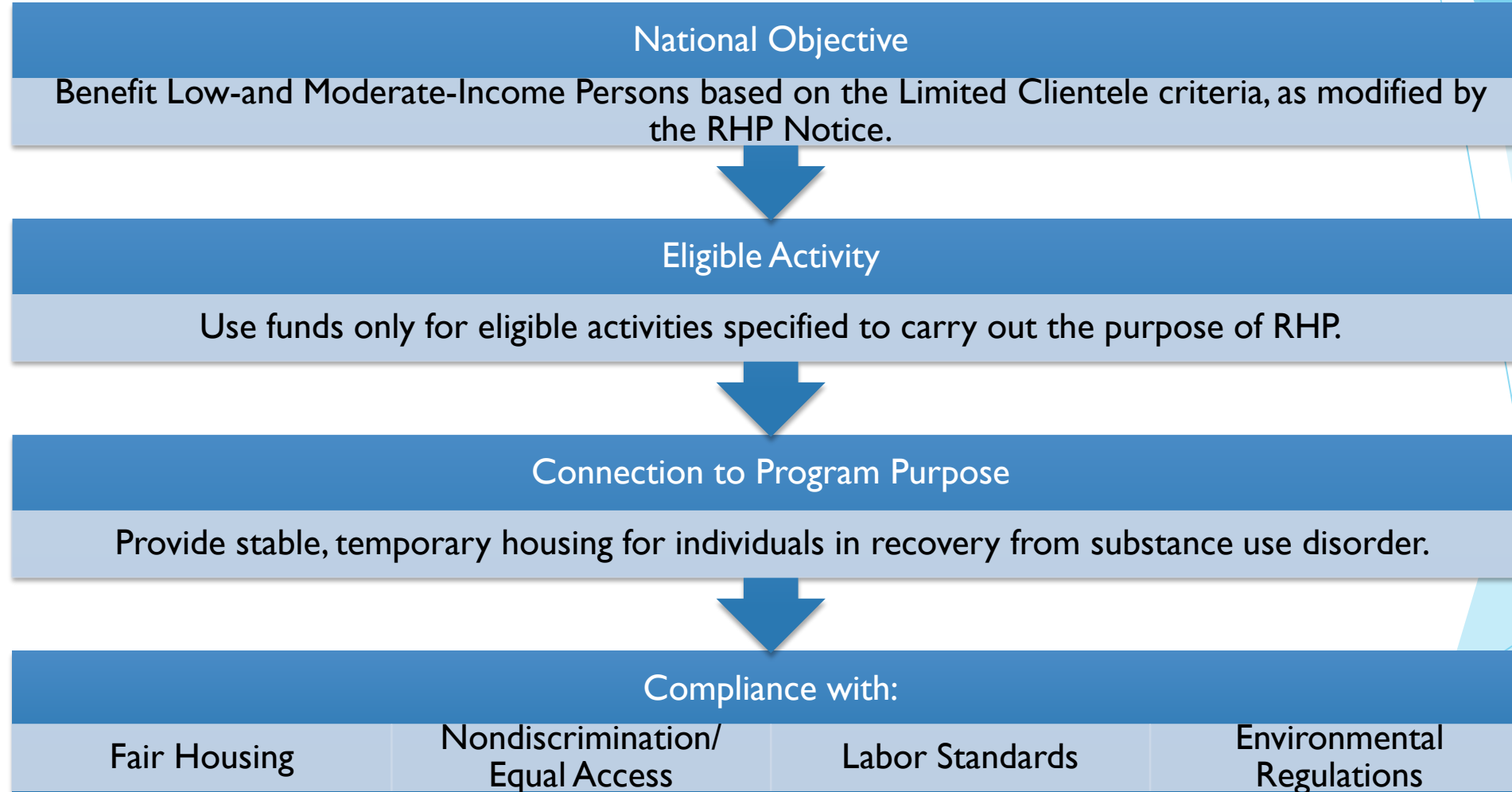
- Property Acquisition
- Rehabilitation and reconstruction
  - Single unit residences
  - Multi-unit residences ( up to 4 units)
- Operation Support:
  - Lease/rent/utilities- For expanded services or new services
- Disposition of real property
- Clearance and demolition
- Local Grant Administration
- Environmental Review

\*list is not comprehensive and does not include or exclude a project type

# Program Details

Eligible Applicants	Maximum Award	Match Requirement	Application Process
<ul style="list-style-type: none"><li>• Entitlement or Non-entitlement units of general local government<ul style="list-style-type: none"><li>• Partnership with eligible subrecipients</li></ul></li><li>• Indian tribes in the State of Indiana</li></ul>	<ul style="list-style-type: none"><li>• \$750,000</li><li>• \$5,000 cost per beneficiary for this program has been waived.</li></ul>	<ul style="list-style-type: none"><li>• Local match funds are not required but strongly recommended to leverage other available funds</li></ul>	<ul style="list-style-type: none"><li>• Project Development</li><li>• Submit Proposal</li><li>• Site Visit</li><li>• Submit Application</li></ul>

# Program Compliance Updated



\*Wraparound recovery services are strongly encouraged



# Grant Evaluation Criteria: Updated

Total Possible Points: 700

Minimum Score Needed: 450

## NATIONAL OBJECTIVE SCORE (100 POINTS)

- The National Objective for RHP grants is Benefit to low-and moderate-income-limited clientele. To show that a project will benefit individuals who are generally presumed to be principally low- to moderate-income, awardees will submit transitional recovery housing program admission documentation.

## COMMUNITY DISTRESS FACTORS (150 POINTS)

- As provided by Stats Indiana

## LOCAL MATCH CONTRIBUTION (25 Points)

- A maximum of 25 points may be awarded based on the percentage of local funds devoted to the project. This category is capped at 25 points or 25% match, i.e., a project with 25% match or greater will receive 25 points. Below 25% match, the following formula will apply.

# Grant Evaluation Criteria Continues

## INDIANA RECOVERY RESIDENCE DESIGNATION (30 POINTS)

- A maximum of 30 points based on the level of recovery residence that the facility will seek from FSSA DMHA or has already been designated by FSSA. Certificate of designation or required documentation must be submitted with application. Total points are determined as follows: Level II (10 points), Level III (20 points), Level IV (30 points)

## FEASIBILITY STUDY (30 POINTS)

- A maximum of 30 points will be awarded to applicants who have completed an assessment of the practicality and viability of the proposed project. The study must have been completed within the last 12 months from the program opening.

## PROJECT DESIGN FACTORS (300 POINTS)

- Project Description
- Project Need
- Financial Impact
- SUPPORT Act Goal

# Program Specific Points

Total Available Points: 65



**Non-Entitlement Communities** (10 points) – A maximum of 10 points will be awarded to applicants that are a non-entitlement.



**Beds Available to Pregnant Women or Women with Dependent Children** (15 points)–A maximum of 1 point per new bed that is provided by the facility and made available to pregnant women or women with dependents will be awarded up to 10 points.



**Individuals with Justice Involvement** (10 points) - A maximum of 1 point will be awarded per new bed that is provided by the facility and made available to people involved in court ordered rehabilitation up to 10 points.



**Beds Available to Veterans** (15 points)-A maximum of 1 point will be awarded per new bed that is provided by the facility and made available to veterans up to 10 points.



**Project Sustainability** (15 points) - A maximum of 10 points will be awarded for documentation of National Opioid Settlement Funds being used as project match.

# Bonus Points


Total Available Points: 25



It is the Division of Mental Health and Addiction's policy to encourage Medication Assisted Treatment (MAT) amongst providers. As such, a grant application should include how the provider will support residents in their recovery through the acceptance of individuals on medication for the treatment of their substance use disorder. Applications that include policies written in a manner to encourage and support use of medications including, but not limited to, nicotine replacement, long acting injectables and daily medication for substance use disorder, and trauma informed care approach into practices and policies will receive 25 bonus points.

# NARR Recovery Residence Levels

- ▶ Recovery Residence is an umbrella term.
- ▶ The National Alliance for Recovery Residences creates national quality standards for recovery houses.
- ▶ DMHA is basing most of the certification requirements and on-site inspection requirements on the most current NARR quality standards.



## Types of Recovery Residence Support

Current NARR Levels	New ASAM/NARR Types	Defining Characteristics
Level 1	Type P	<i>Peer-run</i> , decisions made solely by residents.
Level 2	Type M	<i>Managed</i> environment; house rules, appointed resident leader.
Level 3	Type S	<i>Supervised</i> activities, staffing, life skills programming.
Level 4	Type C	<i>Clinical</i> services included.

Note: No changes in NARR level definitions were made in creating this new naming convention.

# A Note on Indiana Recovery Residence Designation

- ▶ OCRA is using the **Indiana Recovery Residence designation** as a way to evaluate and incentivize the **quality and structure of recovery housing** proposed in grant applications. By awarding up to **30 points** based on the level of designation (Level II, III, or IV) from the **Indiana Family and Social Services Administration's Division of Mental Health and Addiction (FSSA DMHA)**, the program encourages applicants to align their facilities with recognized standards of care and accountability.
- ▶ This designation reflects the **level of support and services** provided at the recovery residence:
- ▶ **Level II** (10 points): Managed environment, house rules, appointed resident leader
- ▶ **Level III** (20 points): Supervised residences with structured programming
- ▶ **Level IV** (30 points): Clinically managed facilities with professional staff and comprehensive services
- ▶ Requiring a certificate or documentation ensures that applicants are either actively pursuing or have already achieved a recognized level of care, which helps the state prioritize funding for **safe, effective, and sustainable recovery environments**. It's a way to promote best practices and ensure that funded projects meet high standards for supporting individuals in recovery.

# Sample Project: “Safe Haven Recovery Home”

- ▶ The Town of Emerald, a non-entitlement community, in partnership with Safe Haven Wellness Foundation, a nonprofit, proposes the acquisition and rehabilitation of a vacant 4-bedroom residential property built in 1952 to establish “Safe Haven Recovery Home,” a transitional housing facility for individuals recovering from substance use disorder.
- ▶ The project will provide stable, temporary housing for up to two years or until permanent housing is secured, directly supporting the purpose of the Recovery Housing Program (RHP).
- ▶ The project meets the Limited Clientele National Objective by serving individuals insured by Medicaid and those meeting federal poverty guidelines, with admission documentation included to verify eligibility.
- ▶ A feasibility study was completed within the past 12 months, and the facility will seek Level IV designation from FSSA DMHA.
- ▶ The project includes 10 beds reserved for pregnant women or women with dependent children, 10 for justice-involved individuals, and 10 for veterans.
- ▶ A 25% local match is committed through opioid response funds and private donations, and National Opioid Settlement Funds will be used to support sustainability.
- ▶ Safe Haven Wellness Foundation has adopted policies that support Medication Assisted Treatment (MAT) and trauma-informed care, qualifying the project for bonus points under the grant evaluation criteria.

# Sample Project: "Jane Doe Recovery House Expansion"

- ▶ Jane Doe Recovery House, the largest provider of recovery housing for women in Marion County, is expanding its services to Southeast Indiana County with strong support from the local government and community.
- ▶ Certified as a Level IV Recovery Residence through the Indiana Alliance for Recovery Residences, the organization serves over 100 women annually, focusing on those who have experienced substance use disorder, homelessness, and physical, emotional, or sexual abuse.
- ▶ With a newly purchased site, the project is constructing a transitional housing facility offering stable, temporary housing for up to two years or until permanent housing is secured.
- ▶ The program meets the Limited Clientele National Objective by serving Medicaid-insured and low-income individuals, with admission documentation verifying eligibility.
- ▶ The project requires for CDBG funds to support operation expenses including utilities for up to 2 years
- ▶ No local match is available for this project. The facility supports Medication Assisted Treatment (MAT) and trauma-informed care, with written policies that encourage the use of approved medications for substance use disorder.





# Round Timeline

8/05/20XX



## Next Up Is...



Pamela Guerrero



Senior CDBG  
Program & Policy  
Analyst

# Resiliency Score Bonus Point



The Bonus Points policy was revised moving us from Regional bonus points to the new Community Resilience Index for all CDBG programs.



The Community Resilience Index (CRI) is a composite score that measures a community's ability to withstand, adapt to and recover from economic, social and natural challenges



The CRI is designed to help communities understand their strengths and vulnerabilities across 7 dimensions of resilience including: Industry variety, Education and workforce participation, Broadband access, social capital, homeownership, wealth equity, and local economic attainment



The CRI provides a single numeric score, typically ranging from 0 to 180



A lower CRI Score (-87) indicates stronger resilience, meaning the community is better equipped



A higher CRI Score (87 +) suggest more room for improvement across one or metrics

# CRVP Submission Timeline: Step- by-Step for Grant Administrators

## Schedule Meeting with Community Liaison (CL)

- Must occur before the pre-approval deadline listed in the program instructions
- Meeting formats: phone, Teams, in-person.

## Prepare CRVP Letter

- Max 3 pages
- Must follow the 9-section format (see next slide)

## Submit CRVP

- Email to [cdbg@ocra.in.gov](mailto:cdbg@ocra.in.gov)
- Must be received by the pre-approval deadline

## Maximum Bonus Points Available:

- Up to **25 points** total
  - **CRVP** : 5 points
  - **Resilience Score Calculation**: up to 20 points

# Best Practices for Drafting a CRVP That Meets All Requirements

## Follow the Outline for CEO Letter

- Use the outlined defined in **MSR-002: Resilience Bonus Points Minimum Standards (Pages 3–7)** when preparing your Community Resilience Vision Plan (CRVP).

## Use Strategic Framing:

- Frame the CRVP as a forward-looking, five-year strategic roadmap designed to strengthen a community's resilience .
- It should outline how the community intends to address each CRI dimension through a combination of projects, partnerships, and local initiatives, ensuring a comprehensive and measurable approach to long-term resilience.

# CRI Metrics

- ▶ **Address All CRI Metrics:**
  - ▶ **The CRI Metrics come from the Stats Indiana. These are the measures used for the Community Resilience Index**
  - ▶ **Tip:** Use current CRI scores from Stats Indiana to identify gaps and set measurable improvement goals.
  - ▶ Example: “By 2030, we aim to increase homeownership by 15% through targeted housing programs and zoning reforms.”
- ▶ The CDBG project that you are applying for may only addresses one or two resilience metrics, it's important to recognize that a single application is unlikely to solve every community challenge (metric gap).
- ▶ Avoid drafting the Community Resilience Vision Plan (CRVP) as if this one CDBG project is the comprehensive solution to all gaps.

Metric	What to Include
<b>Local Economy Structure</b>	Diversification strategies, sector growth, industry retention
<b>Entrepreneurial Activity</b>	Support for startups, incubators, small business incentives
<b>Human Capital</b>	Education initiatives, workforce training, skill development
<b>Social Capital</b>	Civic engagement, volunteerism, partnerships with nonprofits
<b>Broadband Connectivity</b>	Infrastructure expansion, digital literacy, public Wi-Fi
<b>Wealth Equity</b>	Income accessibility, financial literacy, neighborhoods development
<b>Homeownership</b>	Affordable housing, zoning reforms, ownership incentives

# Best Practices for Strengthening the Funding Source Section

Break the funding section into clear subsections:

- **Confirmed Funding:** List grants, loans, or local funds already secured.
- **Pending Applications:** Mention funding sources currently being pursued.
- **Future Opportunities:** Identify potential programs the community plans to explore.
- **Example:** “We have secured \$250,000 from the Community Crossings Matching Grant for road improvements. We are currently applying for the BRIC Grant to support broadband expansion and plan to explore USDA REDLG for small business development.”

Map Funding to CRI Metrics

- Show how each funding source supports specific CRI metrics:
- Broadband → INDOT, BRIC
- Homeownership → IHCD, RIF
- Workforce → DWD, IDOE
- Social Capital → IAC, ICJI

# What to Avoid: Common Mistakes

- ✗ Submitting after the pre-approval deadline
- ✗ Reusing old CRVPs without updating dates, signatures, or project details
- ✗ Missing meeting with CL
- ✗ Submitting a CRVP that exceeds 3 pages
- ✗ Omitting required sections or submitting vague content
- ✗ Failing to tailor the CRVP to the current round or quarter
- ✗ Tailoring every metric to be addressed by the CDBG application submitted.
- ✗ Missing to address any of the metrics or funding sources section



# Disaster Designation Bonus Points

Help Indiana communities verify eligibility for 15 bonus points on CDBG grant applications.



## Acceptable Documents

- ▶ Formal letter from County EMA
- ▶ FEMA Award Letter / Declaration Notice
- ▶ Approved Request for Public Assistance (RPA)
- ▶ Project Worksheets (PWs) for PA A–G
- ▶ Screenshot from FEMA's Page, if applicable.

Available Resource: [MSR-003- Disaster Designation Bonus Points Step by Step Guide](#)

# Facilities Program Overview



## National Objective:

Prevent or eliminate slums or blight- Spot basis

Benefit low- to moderate-income (LMI) persons



## Facility Types (Based on End Use)

### Public Facilities

- Examples: Community Centers, Senior Centers, Libraries
- Must benefit an LMI area
- Rehabilitation of building to serve its purpose.

### Historical Facilities Preservation

- Examples: Museums, Theater, Opera house
- Outside a designated blighted area is rehabilitated to address health or safety concerns.
- Not serving an LMI area
- Rehabilitation must be limited to the extent necessary to eliminate specific conditions detrimental to public health and safety.



## Program-Specific Scoring Criteria

### Public Facilities

- Philanthropic Contributions – *Up to 20 points*
- Project Sustainability – *Up to 20 points*
- Green Infrastructure – *Up to 10 points*

### Historical Facilities Preservation

- Local Government Incentives – *Up to 25 points* e.g., property tax abatements or reductions for historic properties
- Local Grant Funding – *Up to 25 points* e.g., preservation grants for restoration projects

# Blight Clearance Program- Residential Buildings



## National Objective

Prevention or Elimination of Slums or Blight: (Spot Basis)

Targets residential buildings with significant health and safety concerns



## Eligible Residential Properties

Vacant single-family homes

Residential buildings with up to four units

Must be **condemned for at least 3 years** prior to application

Must be **owned by a local unit of government or eligible subrecipient**



## Eligible Activities

Acquisition

Clearance

Demolition

Remediation (e.g., environmental hazard removal)



## Application Requirements

Submit a **Site Evaluation Matrix:** Acquisition or Donation

Interior and Exterior Conditions, Documentation on condemnation or public safety notices

Complete **Environmental Review Section 106**

**Consultation** before application submission

# Owner-Occupied Rehabilitation (OOR) Program: Building Retrofit Checklist

## The Owner-Occupied Rehabilitation (OOR) program

- These green infrastructure incentives are part of the broader 2025 Action Plan to improve housing quality.

## Green Building Retrofit Infrastructure Checklist:

- Adapted from HUD's CPD Green Building Retrofit Checklist
- Aligned with five eligible rehabilitation activities under the OOR program
- Referenced in MSR 2025-004 guidance

## Eligible Retrofit Measures:

- Depends on category

## Applicant Requirements:

- Submit a narrative explaining how your project will incorporate green retrofit measures
- Use the checklist to guide your scope of work and demonstrate alignment with local program policies

# Owner-Occupied Rehabilitation (OOR) Program: Building Retrofit Checklist

CATEGORY	ITEM LIST
<b>A. Roof Repair or Replacement</b>	<ul style="list-style-type: none"><li>- Radiant Barriers</li><li>- Cool Roofs</li><li>- Recycled Roofing Materials</li><li>- Gutters</li></ul>
<b>B. Heating and Cooling (HVAC)</b>	<ul style="list-style-type: none"><li>- ENERGY STAR Heating &amp; Cooling Equipment</li><li>- Safe Combustion Appliance Venting (HVAC)</li><li>- Duct Sealing</li><li>- Flooring or Crawl Space Insulation</li><li>- Ventilation Improvements</li><li>- Proper Sizing of HVAC Equipment</li><li>- Programmable or Smart Thermostats</li></ul>
<b>C. Water Heater Replacement</b>	<ul style="list-style-type: none"><li>- ENERGY STAR Certified Water Heaters</li><li>- Pipe Insulation</li><li>- Safe Combustion Appliance Venting (Water Heater)</li><li>- Mold Prevention</li></ul>
<b>D. Lighting and Electrical Upgrades</b>	<ul style="list-style-type: none"><li>- Energy Efficient Lighting Upgrades</li><li>- Low-VOC Materials in Electrical Work</li></ul>
<b>E. ADA Accessibility Upgrades</b>	<ul style="list-style-type: none"><li>- Accessible Green Features</li><li>- Low-VOC Materials in ADA Work</li></ul>
<b>F. Other Options</b>	<ul style="list-style-type: none"><li>- Locally Sourced Materials</li><li>- Educational Materials for Homeowners</li></ul>

# Policy Updates & Reminders

## Project Overdue Policy

- Overdue list now renamed to “CDBG Timeliness Report”
- Projects must meet administrative milestones and missed deadlines without proper time extensions may result in findings or paybacks.
- Monthly Reporting requirement if listed on the CDBG Timeliness Report
- Overdue status now shared with Chief Elected Official and the corresponding grant administrator.
- The **CDBG Timeliness Report** is publicly available on the website and is updated on the **1st of each month**.
  - [Policy Notice 2025-002 Project Overdue Policy](#)

## Housing Project Programmatic Policy

- **Overrun Fees**
  - Local governments may use non-federal local funds to cover overrun fees
  - Must publicly disclose intent to use local funds at a public hearing before application submission
- **Professional Service Contracts**
  - All contracts must be executed directly with the local government
  - Subcontracts for professional services are not permitted under OCRA policy
- **Environmental Review Costs**
  - Must be included before any rehab work begins
  - Radon and lead-related costs must fall within the \$25,000 project cap
  - Remaining funds may be used for rehabilitation activities
- **Conflict of Interest**
  - Elected officials and their immediate family members may not benefit from the program while in office
  - Ensures transparency and prevents real or perceived conflicts of interest
  - [Policy Notice 2025-003 Housing Project Programmatic Policy](#)

# New Upcoming Policies & Changes

## In-Kind Contribution Policy Update

- **Effective January 1, 2026**
- OCRA is increasing the allowable in-kind contribution toward the local match:
- New Cap: Up to 10% of total project cost or \$75,000.
- **Eligible Contributions Include:**
  - Volunteer Work: Valued at average private hourly rate (BSL)
  - In-Kind Donations: Valued at fair market rate
  - Force Account Work: Valued at regular pay rate per employee
- **What's Next:**
  - Additional guidance will be released via an official OCRA policy notice and press release

## Lien and Covenants Policy Update

### **Effective Starting: 2025 Round 2 Projects**

- OCRA will require Lien and Covenants for:
- All newly funded facilities projects
- All blight clearance projects
- Applies with or without subrecipients

### **Key Details:**

- Lien and Covenants will remain in effect for 5 years following grant closeout
- Designed to ensure long-term accountability and project sustainability

### **What's Next:**

- Formal guidance will be released via an official OCRA policy notice and press release



## Next Up Is...



Adam Moschell



Director of  
Grant Services





# INDIANA OFFICE OF THE LIEUTENANT GOVERNOR

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## DIVISION OF GRANT SERVICES

# Indiana Office of the Lieutenant Governor

Grant Services

# Grant Services Updates



Reminder: When submitting a Closeout Request, the timer starts for you monitoring to occur.



Owner Occupied Rehab construction contracts should not be signed before the house is individually approved for its Tier 2 ER release.



Please review your local match documentation and be sure it matches your Public Hearing documents. Any corrections need to be prior to application due date.



Reminder: Use the most recent Section 3 form. This version includes a section for the Reporting Period to ensure proper hours are being submitted.

# Grant Services Updates



Planning Grant suggested first draft dates should be taken into consideration. Plans should be sent to Grant Services and your Community Liaison.



An on-site monitoring can be completed more quickly if Grant Services is provided the employee list in advance.



As usual, please continue to draw down funds in a timely manner. Keep in mind that you can Request Closeout once your last claim is submitted. Funds are not de-obligated once this process is started.

# Stay connected!

Sign up for press releases and announcements at [bit.ly/OCRA-signup](https://bit.ly/OCRA-signup)

Find your regional Community Liaison's contact information:

<https://www.in.gov/ocra/about/community-liaisons/>





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Office of  
COMMUNITY &  
RURAL AFFAIRS

# Questions?

Contact: [cdbg@ocra.IN.gov](mailto:cdbg@ocra.IN.gov)

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