



Baltimore Region State Revitalization Programs FY25 Award Management Orientation

Baltimore Regional Neighborhood Initiative

Community Legacy

SEED Community Development Anchor Institution Program

Strategic Demolition Fund - Project C.O.R.E.

Maryland Facade Improvement Program

Today's Agenda

Housekeeping:

- We will be recording this webinar and can share the presentation afterward
- During the presentation please add any questions directly to the chat and we will have two question & answer sessions (after Module 1 and 2)

MODULE 1: State Revitalization Programs Eligibility and Requirements

MODULE 2: Award Agreement

- Award agreement drafting and execution
- Demonstration: How to return your signed award agreement

MODULE 3: Award Management

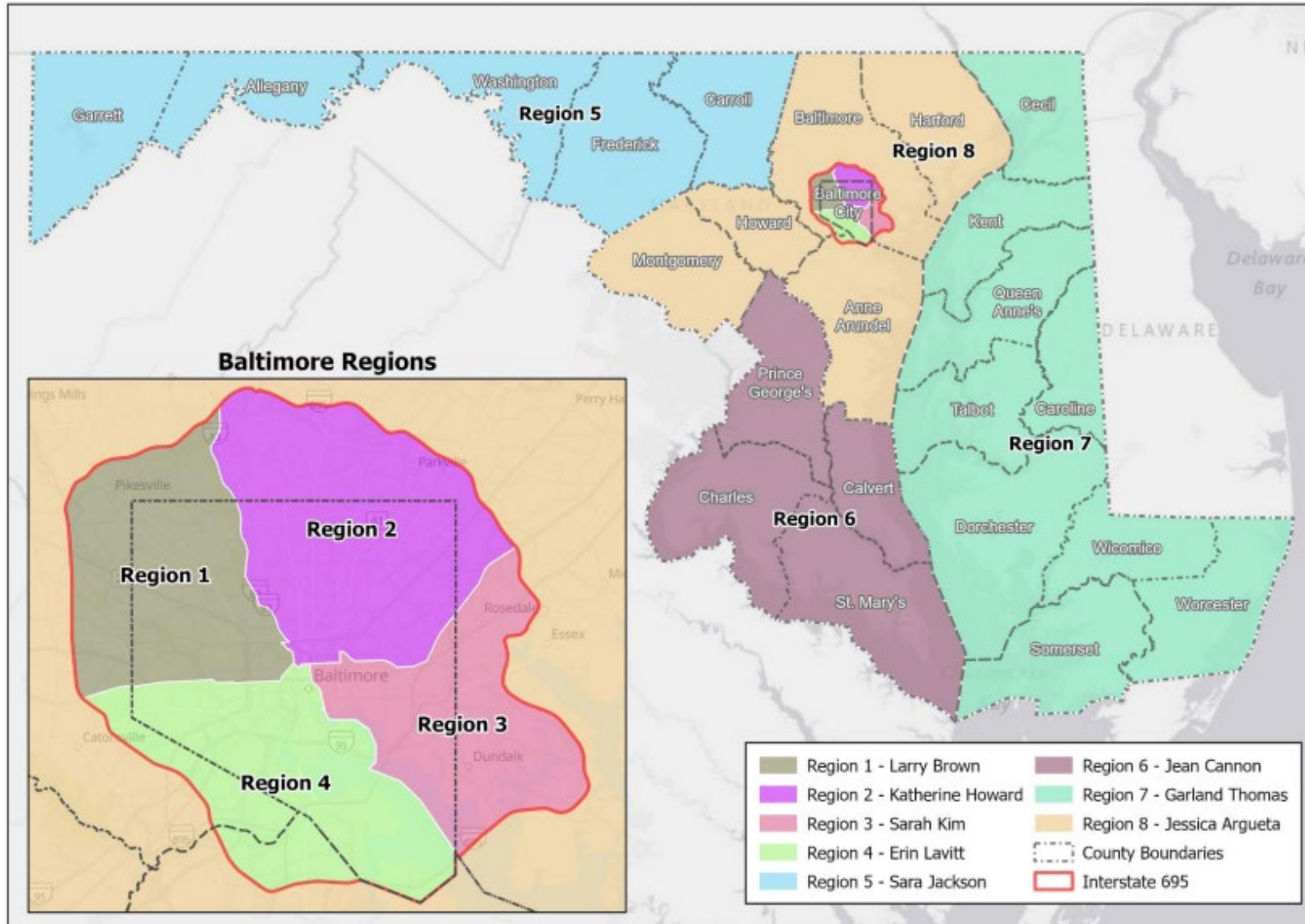
- Award life cycle
- Awardee and MDHCD expectations
- Award agreement policy topics
- Demonstration: How to use the Sustainable Community Mapper

Division of Neighborhood Revitalization

- Dedicated to working with local partners to bring new investment and vitality to Maryland's core communities.
- Offers a broad range of loan, grant and technical assistance programs to help local governments, nonprofit organizations and small businesses reinvest in their communities and make great places for Marylanders to live, work and prosper.



Project Manager Regions



Regional Project Managers

DIVISION OF NEIGHBORHOOD REVITALIZATION STATE REVITALIZATION PROGRAMS REGIONAL PROJECT MANAGERS As of January 2025			
Baltimore Regions (Inside I-695)			
REGION 1: <ul style="list-style-type: none"> Northwest Baltimore City and County <p>Larry Brown Assistant Director Phone: 410-209-5819 Email: larry.brownjr@maryland.gov</p>	REGION 2: <ul style="list-style-type: none"> Northeast Baltimore City and County <p>Kate Howard Project Manager Phone: 410-209-5824 Email: katherine.howard@maryland.gov</p>	REGION 3: <ul style="list-style-type: none"> Southeast Baltimore City and County <p>Sarah Kim Project Manager Phone: 410-209-5836 Email: sarah.kim1@maryland.gov</p>	REGION 4: <ul style="list-style-type: none"> Southwest Baltimore City and County Northern Anne Arundel <p>Erin Lavitt Project Manager Phone: 410-209-5828 Email: erin.lavitt@maryland.gov</p>
Statewide Regions			
REGION 5: Western Maryland <ul style="list-style-type: none"> Allegany Carroll Frederick Garrett Washington <p>Sara Jackson Project Manager Phone: 410-209-5812 Email: sara.jackson@maryland.gov</p>	REGION 6: Southern Maryland <ul style="list-style-type: none"> Calvert Charles Prince George's St. Mary's <p>Jean Cannon Program Officer Phone: 410-209-5806 Email: jean.cannon@maryland.gov</p>	REGION 7: Eastern Shore <ul style="list-style-type: none"> Cecil Caroline Dorchester Kent Queen Anne's Somerset Talbot Wicomico Worcester <p>Garland Thomas Assistant Director Phone: 410-209-5810 Email: garland.thomas1@maryland.gov</p>	REGION 8: Central Maryland <ul style="list-style-type: none"> Anne Arundel (outside I-695) Baltimore County (outside I-695) Harford Howard Montgomery <p>Jessica Argueta Project Manager Phone: 410-209-5848 Email: jessica.argueta@maryland.gov</p>

Other Contacts

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Olivia Ceccarelli-McGonigal, Sustainable Communities Program

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- 410-209-5826

Alexandra Laham, Project Manager

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- 410-209-5825

State Revitalization Programs: Eligibility and Requirements

Baltimore Regional Neighborhood Initiative

- **Purpose:** Demonstrate how strategic and innovative approaches can lead to healthy, sustainable communities. Accelerate achievement in target communities through strategic neighborhood plans.
- **Geographic Requirement:** Sustainable Communities in Baltimore City, or the inner-beltway communities of Baltimore County or Anne Arundel County
- **Eligible Applicants:** Nonprofit community development corporations (CDCs, Coalitions or Partnerships) that are implementing a clear revitalization strategy in a specific neighborhood or set of neighborhoods.
- **Eligible Use of Funds:** Capital projects that support community revitalization activities. Operating projects that support the management of capital BRNI projects and the implementation of the BRNI strategy
- **Budget Requirement:** Each organization may not apply for (or be awarded) more than 40 percent of the total financial assistance from the Baltimore Regional Neighborhood Initiative program to be used for operating expenditures.

Community Legacy

- **Purpose:** Preserve existing communities as places to live/conduct business and promote sustainable communities.
- **Geographic Requirement:** Sustainable Communities in Maryland. Opportunity Zones in Allegany, Garrett, Somerset, and Wicomico Counties
- **Eligible Applicants:** Local governments. Groups of local governments. Nonprofit Community Development Organizations.
- **Eligible Use of funds:** Capital projects that support community revitalization activities.



Maryland Facade Improvement Program

- **Purpose:** Assist qualified businesses located in Sustainable Communities with improving the outside appearance of the qualified businesses' buildings or facilities.
- **Program Requirement:** Awardees must develop and enforce their own local program guidelines. Local program guidelines must at least include criteria for: (1) rating qualified businesses that apply for grants and (2) awarding grants to qualified businesses.
- **Geographic Requirement:** Sustainable Communities in Maryland.
- **Eligible Applicants:** Local governments. Nonprofit Community Development Organizations (for example: community development corporations, main street organizations, downtown partnerships).
- **Eligible Use of Funds:** Capital costs related to the improvement of exterior facades for business buildings and facilities.
- DHCD provides model program guidelines that may be tailored for local use.

Seed Community Anchor Institution Fund

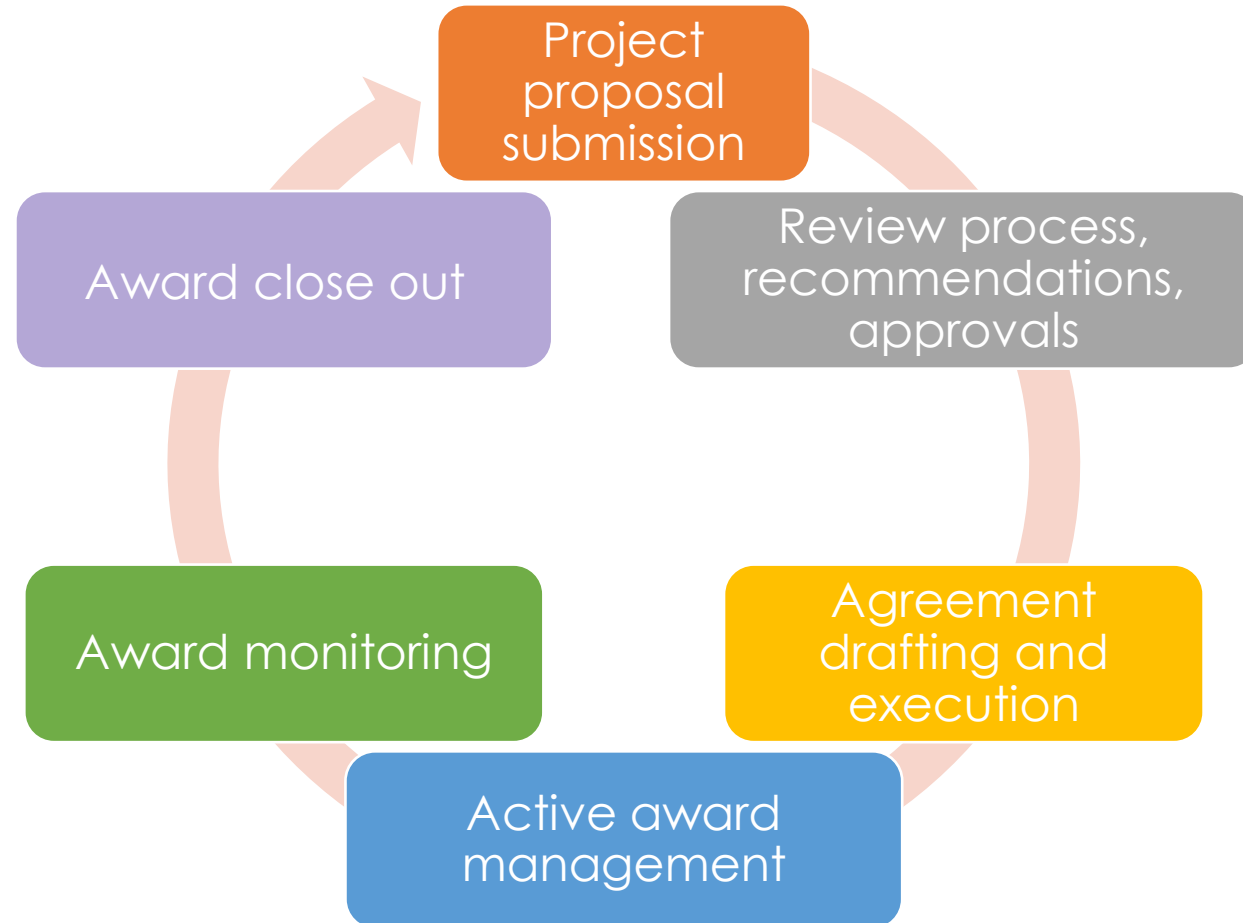
- **Purpose:** Provide matching financial assistance through grants and loans to anchor institutions to support local community development projects.
- **Geographic Requirement:** Projects must be in a Sustainable Community and/or an area of blight and support the improvement of a neighborhood that surrounds an anchor institution. Blighted areas are areas in which most buildings have declined in productivity by reason of obsolescence, depreciation, or other causes to an extent that they no longer justify fundamental repairs and adequate maintenance.
- **Eligible Applicants:** Institution of higher education in the State. Hospital institution in the State that: 1. Has a group of at least five physicians who are organized as a medical staff for the institution; 2. Maintains facilities to provide, under the supervision of the medical staff, diagnostic and treatment services for two or more unrelated individuals; and 3. Admits or retains the individuals for overnight care. Maryland Hospital and Maryland Higher Education Institution. Departments, Foundations, and Other Entities of the Institution.
- **Eligible Use of Funds:** Capital costs associated with neighborhood improvement projects.



Baltimore Vacants Reinvestment Initiative (Project CORE)

- Beginning FY2026, Project CORE will be renamed Baltimore Vacants Reinvestment Initiative.
- **Purpose:** Eliminate blight in Baltimore City. Support development of green space, new affordable/mixed-use housing and opportunities for businesses to innovate and grow.
- **Additional Data Request:** Prepare to provide additional, address-level information related to demolitions and stabilizations.
- **Geographic Requirement:** Sustainable Community Area in Baltimore City.
- **Eligible Applicants:** Baltimore City government. Nonprofit Community Development Organizations.
- **Eligible Use of Funds:** Capital projects that support certain predevelopment activities:
- 1) Demolition of derelict non-contributing structures. 2) Site acquisition and assembly to create redevelopment-sized parcels for solicitation or planned development. 3) Site development/infrastructure improvements. 4) Construction-level architectural and engineering designs. 5) Stabilization of buildings to complete structural and other critical repairs necessary to stay further deterioration, remediate environmental hazards, and prepare properties for rehabilitation and reuse.

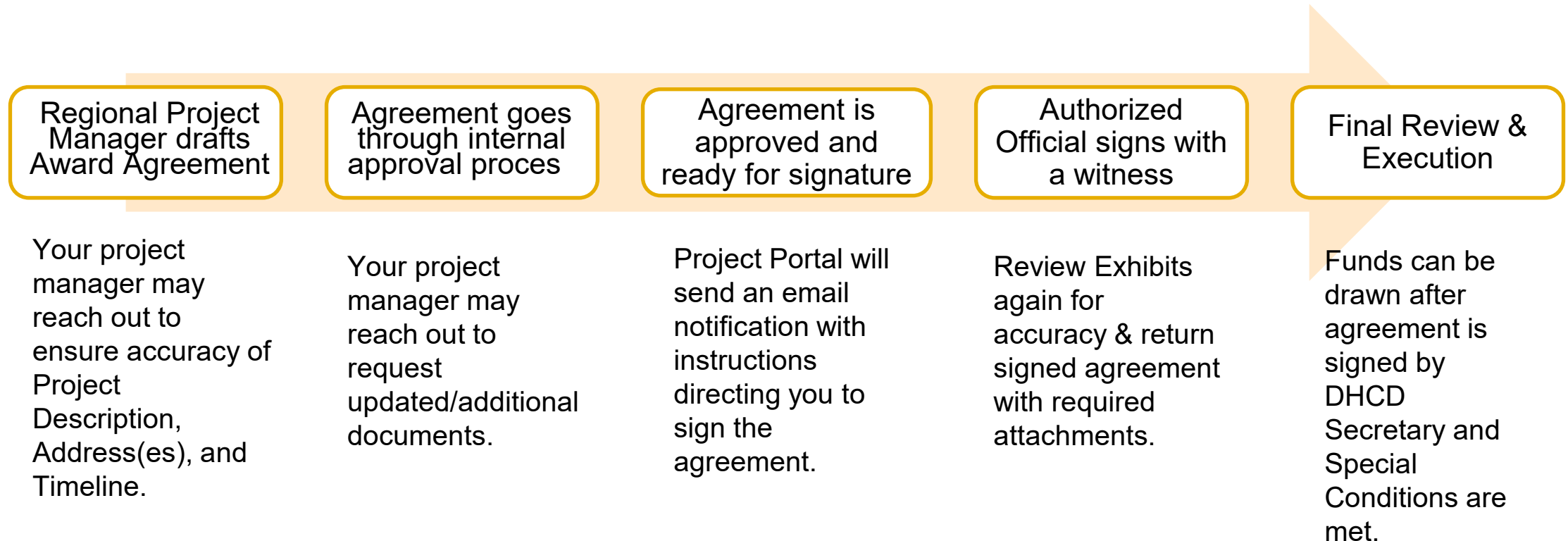
Award Life Cycle



The Award Agreement

- Award Agreement (**standard language** related to program)
- Exhibit A - Project Description, Address(es), Special Conditions
 - Will reflect any adjustment to scope as a result of partial funding
- Exhibit B - Budget
 - Only confirmed and required matching funding will be included
- Exhibit C - Timeline
 - Must include Commencement and Completion Dates.
 - Typical dates include:
 - 01/01/2025 Commencement Date
 - 06/30/2027 Completion Date
 - 08/15/2027 Final report Due

Award Agreement Drafting and Execution - Process



Award Agreement Drafting and Execution - Instructions

- 1) Regional project manager creates the award agreement using our standard template.
- 2) Draft agreement goes through internal review and approval and your project manager will reach out with any questions and missing documentation needed.
- 3) Project Portal will send a system email directing you to sign the agreement with instructions when an agreement has been approved and is ready for signature.
- 4) After reviewing, the Authorized Official must sign with a witness and return via the Project Portal
 - a) Upload signed and witnessed agreement
 - b) Return signed agreement in-system with required attachments (next slide)
 - c) Agreement must be returned within 60 days of receipt.
- 5) Award agreement will go through final review and will be signed by the Secretary of DHCD for execution
 - a) Funds cannot be drawn down until after execution and special conditions have been met

Award Agreement Drafting and Execution - Attachments

Complete Agreement Package must include:

- 1) Witnessed and signed Grant Agreement
 - a) Scanned PDF, DocuSign PDF as an upload acceptable
- 2) Official Certificate of Good Standing (nonprofit CDOs)
 - a) You must attach the official certificate (paid copy) as a PDF.
- 3) Charitable Registration
 - a) Print screen showing up-to-date registration OK
 - b) If “pending,” proof of application and payment required
 - c) If exempt due to organization type, official letter should be attached
- 4) Corporate Diversity Addendum - if any changes from application
- 5) Site control evidence and other Special Conditions as required

Submitting the signed agreement

AWARDEE DISCLOSURE AND RESOLUTION/SIGNATURE AUTHORITY

Instructions: The person signing the Award Agreement must also appear on the awardee's Signature Authorization documents. If the person signing the Agreement does not appear on the current Signature Document(s), contact the SRP Project Manager to provide updated documents.

Awardee-Signed Disclosure Authorization Form:

Awardee-Signed Corporate Resolution/Signature Authority:

Additional/Other Signature Authority:

SIGNED AWARD AGREEMENT/AMENDMENT UPLOAD

Instructions: Scan the signed Award Agreement as a PDF file and attach in the field below.

Awardee-Signed Award Agreement Upload:

No file chosen *

ADDITIONAL DOCUMENT UPLOADS AS REQUESTED OR REQUIRED BY THE PROGRAM

Instructions: Where required or requested by the program to execute the agreement, upload additional supporting documents below and provide a short description of the file(s). Examples include new and valid official MD State Certificate of Good Standing, MD State Charitable Registration, or revised signature authority (Corporate Resolution, Local Government Resolution, or other form of signature authority or delegation). Click the save button for more attachment rows.

File Upload

No file chosen

File Description

SUBMIT THE SIGNED AWARD AGREEMENT

Instructions: Click the green button below and complete the Status Change to submit the Signed Award Agreement. DHCD Program Staff will receive notice of the submission and will continue the processing of the Agreement for execution. You will be notified when the agreement is complete and the award is made active for payments or reporting.

Click the Save button on this page before changing the status.

1) Upload your signed award agreement here.

2) Upload additional documentation here (Certificate of Good Standing, etc.)

3) Hit save, then submit your signed agreement.

Questions?

Please type your questions in the Q&A.

Award Management

Active Award Management

- Financial disbursements
- Quarterly reporting
- Regulatory requirements

Monitoring

- Site visits
- Technical assistance

Award Closeout

- Final reporting and success indicators
- Final monitoring
- Financial reconciliation

Awardee Expectations

- Quarterly progress reports are due on **July 1, October 1, January 1 and April 1**
 - Final report due within 45 days of project completion.
- Project should be completed in two years of the agreement execution date.
 - At least 50 percent of the award funds should be drawn by the first anniversary of the award execution.
- Payment requests - encourage electronic funds transfer (EFT) rather than paper checks
- Maryland Historical Trust determination must be complete before work starts.
- Provide any additional documents or information, including project metrics and address-level information when requested.
- The organization should be in good standing with SDAT and have up-to-date charitable registration.
- Records should be kept for at least three years after close of the award unless the award is a loan or grant/loan combination (in which case, documents must be maintained for the duration of the loan term).

Awardee Expectations - Baltimore Vacants Reinvestment Initiative/Project CORE

- Quarterly progress reports are due on **July 1, October 1, January 1 and April 1**
 - Final report due within 45 days of project completion.
- Provide any additional documents or information, including project metrics and address-level information when requested: **KPI Spreadsheet**
 - Submit the Excel file with your quarterly progress reports or final report as an additional upload in the project portal.
 - Complete all fields for all addresses with award activity.

Award ID	Address Information				
	Where will you be conducting award activities?				
	Street Address	City	County	State	ZIP
The award ID as it appears in the Project Portal.	Include all addresses with properties undergoing award activity. List each of them separately. Do not include address ranges. The address format should include the street suffix and direction.				
SDF-CORE-2024-EXAMPLE-00000	2 North Charles Street	Baltimore	Baltimore City	Maryland	21201
SDF-CORE-2024-EXAMPLE-00000	4 North Charles Street	Baltimore	Baltimore City	Maryland	21201
SDF-CORE-2024-EXAMPLE-00000	6 North Charles Street	Baltimore	Baltimore City	Maryland	21201

Program Expectations

- Requests for payment are processed and disbursed approximately within 45 days of approval by the Comptroller's Office.
- Provide technical assistance related to project ideas, Sustainable Communities planning, general neighborhood revitalization improvements and state-wide best practices.
- Advise on agreement questions such as eligible expenses, modification requests, etc.
- Help us help you help your community!

Requests for Payment

MUST:

- be submitted through our online portal for eligible expenses only
 - <https://projectportal.dhcd.state.md.us/>
- be current on most recent quarterly reporting
- include eligible supporting documentation and evidence
- Complete MHT review & approval
- Provide site control (if applicable)

CANNOT:

- request funding for activities outside of what is stated in the award agreement (Exhibit A)

Acceptable supporting documentation:

- invoices/receipts
- cancelled checks/proof of wire
- executed AIA contract
- sales contract/HUD-1
- payroll/ledger

Additional considerations:

- If the funds have been passed through the awardee, DHCD will require a copy of the canceled check and/or other transfer from awardee to sub-recipient.
- Evidence of advanced requests should be submitted before a subsequent advance is requested.
- It is recommended that individual payment requests be over \$3,000.

EFT Vendor Set Up

- Comptroller's Office on EFT:
<https://www.marylandtaxes.gov/divisions/gad/eft-program.php>
- The complete package should contain:
 - completed signed COT/GAD X-10 form
 - bank verification in the form of a voided check or bank letter stating account name, number and ABA routing number
 - W-9 (to confirm name of legal entity and Federal Employer No. (FEIN))
- Email the complete application package to: GADCSC@marylandtaxes.gov or fax 410-974-2309.
- If GAD requested additional documents from the vendor, it is better for the awardee to send the entire application package.

Capital versus operating activities

CAPITAL

- “Bricks and sticks” -Land, structures, bricks and mortar
- 15-year shelf life
- Examples: Property acquisition, construction, architectural & engineering drawings, site development, demolition, deconstruction, rehabilitation
- DGS guidebook as a *general* reference:

https://dgs.maryland.gov/Documents/grants/CGL_Booklet.pdf

OPERATING

- Costs associated with day-to-day operations of a program, organization, business, etc.
- Does not last 15 years
- Can be moved or is not directly related to real property
- Examples: Staff salaries, feasibility/planning studies, marketing, maintenance

Site Control

- Site control is the “legal nexus” between the awardee and a particular site
 - Site control comes from the entity or person with a legal interest in the property (e.g., owner, contractor (with a contract from the owner), lessee (with a lease), etc.) AND references the grantee.
- Proof of site control is required for any project involving acquisition, demolition, construction or rehabilitation
 - Required at time of award agreement execution or at time of request for payment for a program

Evidence of site control

- A document (signed by party with ownership interest) that links to DHCD Awardee such as a Memorandum of Understanding
- SDAT print out when property is owned by Awardee
- Letter from Property Owner that refers to Awardee
- Lease agreement (must be executed and between Awardee and Property Owner)
- Purchase agreement (must be executed and between Awardee and Property Owner)
- HUD-1/Closing Disclosure
- Sometimes it takes more than one document, e.g., if Awardee is acting as a pass-through.
- For facade improvement programs, the business application should include evidence of site control, although if repairs are minor in nature it is not required to provide to MDHCD

Maryland Historical Trust (MHT) Review

- A historic preservation review is required for all capital projects prior to starting work. If work is already underway or imminent, please contact your Project Manager ASAP.
- If a project was reviewed previously by another state or federal agency/program or from a prior fiscal year, evidence of that review may satisfy the requirement. Please reach out to your Project Manager to confirm.
- The project will be reviewed by MDHCD's Historic Preservation Officer who will make a determination or forward the project to the Maryland Historical Trust for review and determination. **DO NOT** submit projects directly to the Trust.
- When ready, send the following information to your Regional Project Manager and they will initiate the review: (next slide)

Information Needed:

- a) Project name/**address** in the subject line of the email
- b) Reference the award #
- c) Before **photographs** that are representative of the proposed project including exterior and interior (if applicable)
- d) A project narrative or contractor's proposal that summarizes the **scope of work**
- e) Conceptual plans, renderings, construction plans, specifications, cost estimate, contracts, etc.
- f) Make note of whether the project is subject to review from a federal agency or other state agency so we can coordinate the review (state bond bill, Heritage Area grant, MHT Easement, federal or state historic tax credits, CDBG, Home funds, CDA loans, etc.)

Special Conditions

- Please refer to your award agreement - Exhibit A, Special Conditions
- Any and all special conditions will be listed here, such as:
 - Require certificate of good standing for award execution
 - Loan requirements
 - Site control requirements
 - HB 1210

Special conditions need to be satisfied before we can disburse funds

Minority and Women Business Enterprises (MBE/WBE)

- Minority and Women Business Enterprise Plan is required for awards of and over \$250,000
- Applicability will be determined at the onset of the active award cycle
 - Refer to your regional project manager with applicability or any questions

Disclosing conflicts of interest

- You must disclose conflicts of interest or potential conflicts of interest
- You should have a “conflict of interest policy”
- Examples of potential conflicts of interest:
 - Businesses or properties owned by the board where work is to be done
 - Operating support
 - Potential conflict of interest members should not be part of the decision-making e.g. a staff person should not be involved in approving salary raises paid by State operating funds

Department signs and ceremonies

We love to celebrate our neighborhood revitalization successes with you!

- Please remember to invite DHCD to your groundbreaking and ribbon cutting events
 - DHCD would like the option to send a representative
- The Department may also request the display of a DHCD sign
- To invite Secretary Day or other DHCD senior leadership, use the Schedule Request Form
 - <https://dhcd.wufoo.com/forms/scheduling-request-form/>

Award Management Best Practices

- Contact your regional project manager with any questions or concerns
- At the time of award execution:
 - Any special conditions, e.g. send in Certificate of Good Standing with signed award agreement? Loan documents?
- Prior to the first disbursement:
 - Budget requirements, all special conditions satisfied?
 - MBE/WBE plan?
 - MHT determination, SC check and site control evidence for all addresses?
- Prior to subsequent disbursements:
 - Evidence of previously advanced funds to be submitted?
 - Current with quarterly reports?
 - Budget requirements, all special conditions satisfied?
 - MHT determination, SC check and site control evidence for all addresses?

Award Management Best Practices cont'd

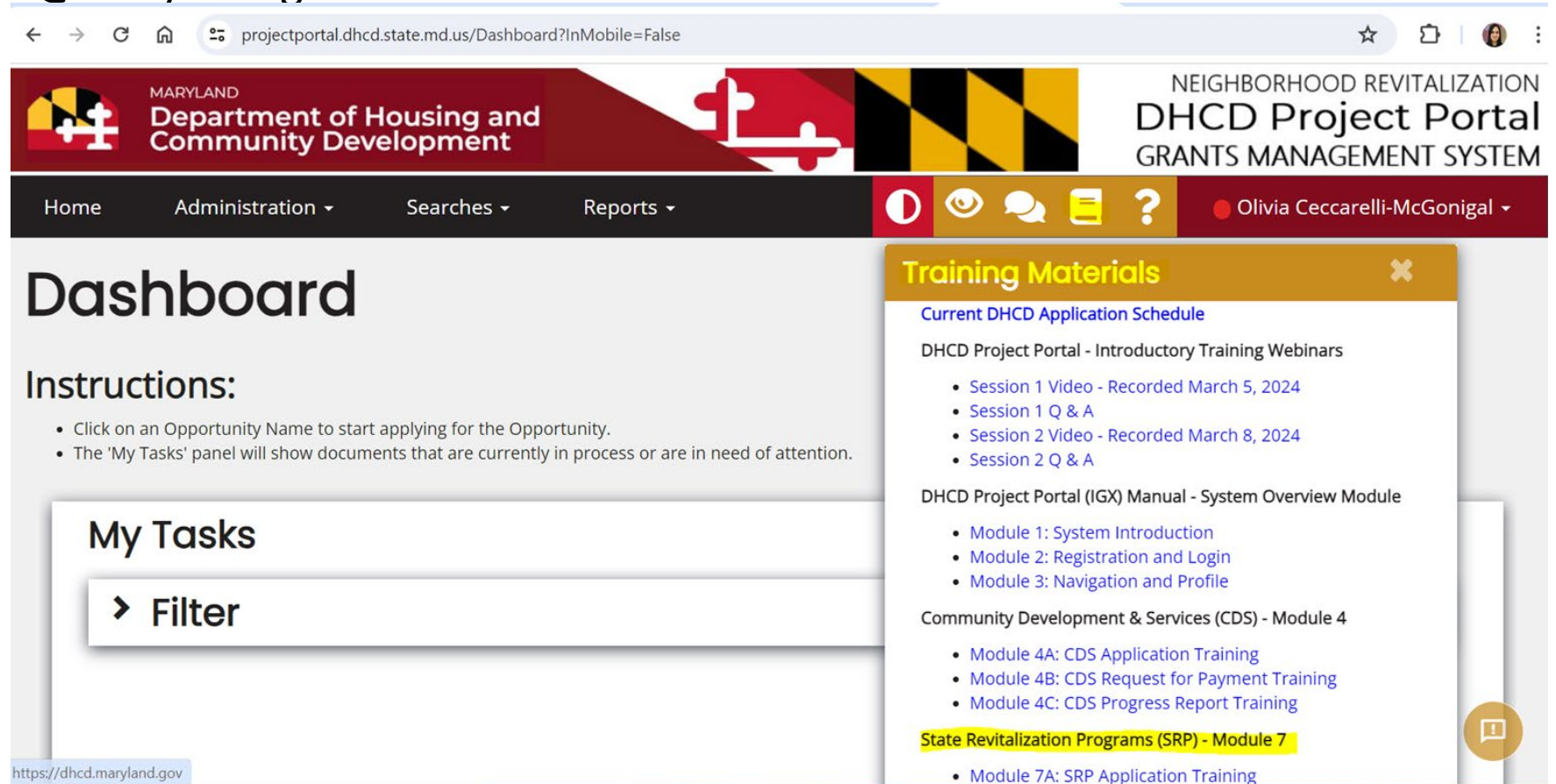
- Consider a process for collecting and submitting address-related scope information
- Facade improvement program example:
 - Application requires address, description of scope of work, interior and exterior pictures, Sustainable Communities check, proof of business owner lease or ownership.
 - This packet can be submitted to satisfied several requirements at once.

Final Monitoring and Close Out

- A final report is due within 45 days of project completion (Exhibit C)
 - If all funds are disbursed and evidence of advanced funds have been received, the project may be considered “complete”
- Final report asks additional questions and updates including project/program outputs and success indicators.
- MDHCD should be able to visit (monitor) your project/program during the life of the award.
- MDHCD will be able to move forward with final monitoring and close out once a final report has been approved
 - Final monitoring can be in-person site visit or phone interview
 - Includes financial reconciliation
 - Close out letter will be sent if all conditions are determined to be met

Project Portal Support

nrsystemsupport.dhcd@maryland.gov



The screenshot shows the DHCD Project Portal Dashboard. The browser address bar displays projectportal.dhcd.state.md.us/Dashboard?InMobile=False. The header includes the Maryland Department of Housing and Community Development logo and the text "NEIGHBORHOOD REVITALIZATION DHCD Project Portal GRANTS MANAGEMENT SYSTEM". The navigation bar contains "Home", "Administration", "Searches", and "Reports", along with user information for Olivia Ceccarelli-McGonigal. The main content area is titled "Dashboard" and includes "Instructions:" with two bullet points: "Click on an Opportunity Name to start applying for the Opportunity." and "The 'My Tasks' panel will show documents that are currently in process or are in need of attention." Below this is a "My Tasks" panel with a "Filter" button. A "Training Materials" sidebar is open, listing various training resources such as "Current DHCD Application Schedule", "DHCD Project Portal - Introductory Training Webinars", "DHCD Project Portal (IGX) Manual - System Overview Module", "Community Development & Services (CDS) - Module 4", and "State Revitalization Programs (SRP) - Module 7".

projectportal.dhcd.state.md.us/Dashboard?InMobile=False

MARYLAND
Department of Housing and
Community Development

NEIGHBORHOOD REVITALIZATION
DHCD Project Portal
GRANTS MANAGEMENT SYSTEM

Home Administration Searches Reports Olivia Ceccarelli-McGonigal

Dashboard

Instructions:

- Click on an Opportunity Name to start applying for the Opportunity.
- The 'My Tasks' panel will show documents that are currently in process or are in need of attention.

My Tasks

> Filter

Training Materials

Current DHCD Application Schedule

DHCD Project Portal - Introductory Training Webinars

- Session 1 Video - Recorded March 5, 2024
- Session 1 Q & A
- Session 2 Video - Recorded March 8, 2024
- Session 2 Q & A

DHCD Project Portal (IGX) Manual - System Overview Module

- Module 1: System Introduction
- Module 2: Registration and Login
- Module 3: Navigation and Profile

Community Development & Services (CDS) - Module 4

- Module 4A: CDS Application Training
- Module 4B: CDS Request for Payment Training
- Module 4C: CDS Progress Report Training

State Revitalization Programs (SRP) - Module 7

- Module 7A: SRP Application Training

<https://dhcd.maryland.gov>

Congratulations on your award!
Please reach out to your regional project manager directly with additional questions, we're here to help you navigate this process.

Questions?

Please type your questions in the Q&A.