

CHDO Travel Scholarship

Program Statement

BACKGROUND: The 2013 HOME Final Rule made significant changes to the requirements for certifying and funding community housing development organizations (CHDOs). It also increased performance expectations on all development projects, further affecting how CHDOs interact with the HOME Program. As part of the ongoing effort to provide policy guidance, training, and technical assistance, HUD is sponsoring a series of CHDO Workshops “Understanding the 2013 HOME Final Rule” across the country for CHDOs and their PJ partners.

To help ensure that CHDOs and prospective CHDOs can attend this 2.5 day training, HUD is sponsoring a CHDO Travel Scholarship Program to help defray the travel costs associated with attending this training.

THRESHOLD QUALIFICATIONS: Travel Scholarships will be provided to organizations that are CHDOs or prospective CHDOs. The scholarship participants are selected by the organization’s executive director or designee. In order for an organization to qualify for a scholarship:

- A staff member or board member of the organization must have been confirmed for attendance at a specific CHDO Workshop. To be confirmed, an organization must be verified by its HOME Participating Jurisdiction (PJ). The PJ must verify that either i) the organization has been certified as a CHDO and funded from the CHDO set-aside at least once since January 1, 2011; or b) in the case of prospective CHDOs, the PJ is actively working with the organization toward the award of funds from the CHDO set-aside.
- To be eligible for CHDO Travel Scholarship, the organization’s office must be located at least 50 miles driving distance from the site of the CHDO Workshop.¹. Organizations with offices located less than 50 miles driving distance from the site of CHDO Workshop will not be eligible for a CHDO Travel Scholarship. Scholarship participants are strongly encouraged to attend the closest CHDO Workshop. Exceptions may be made if the closest workshop to a given scholarship participant was closed for registration prior to the announcement of this CHDO Travel Scholarship Program and the participant was unable to attend that session. (See Eligible Costs below for additional detail.)
- To receive a CHDO Travel Scholarship, the organization must not be expected to receive more than 50 percent of its annual operating budget or \$50,000, whichever is greater, in combined CHDO operating assistance from PJs and CHDO Travel Scholarship funding. If the combined amount of any CHDO operating assistance received and a CHDO Travel Scholarship would exceed \$50,000, the organization will be required to submit additional information to ensure compliance with this requirement.

¹ All miles will be measured using Google Maps driving directions for the route that is the least miles.

- The organization must indicate that it is currently incorporated and recognized by the state in which it is incorporated and document that it has an appropriate IRS nonprofit determination letter as part of its request for a CHDO Travel Scholarship. Note that if approved for a Scholarship, the organization must submit a Certificate of Good Standing from the state of incorporation with its request for reimbursement or the request will not be processed.
- The organization must submit an executed request form with Training & Development Associates, Inc. (TDA) and/or the Housing Assistance Council (HAC), the HUD technical assistance providers, which will be providing the grant funds for the CHDO Travel Scholarship Program.

MAXIMUM AWARD: Within the further limitations below, the maximum amount is \$1,500 per approved participant. For CHDOs or prospective CHDOs outside the continental United States, the maximum amount is \$2,000 per approved participant. No more than two participants per organization may receive scholarships, and in order to allow maximum participation in the CHDO Workshops, HUD, TDA, and/or HAC reserve the right to limit scholarships or workshop attendance to one representative per organization based on the availability of space at each Workshop.

ELIGIBLE COSTS: The purpose of the Travel Scholarship Program is to assist eligible organizations in attending the CHDO Workshops, not to fully fund all costs of attendance. In all cases, the Travel Scholarship will be paid on a reimbursement basis and limited to actual costs documented by appropriate receipts submitted to TDA and/or HAC. Travel Scholarships may be used to help cover transportation and/or lodging costs based on the distance between the organization’s location and the workshop.

Distance to Workshop	Eligible for Lodging	Eligible for Ground Transportation	Eligible for Air Transportation
50 miles or more	✓	✓	
150 miles or more	✓	✓	✓

LODGING: For organizations located at least 50 miles driving distance from the workshop location, a Travel Scholarship can be used to defray lodging expenses.

- **Hotel:** Three nights of lodging costs at or below the U.S. Government Services Administration’s government rate (plus state and local taxes) are eligible expenses. (GSA’s maximum lodging rates for each locality can be found by searching at the following website: http://www.gsa.gov/portal/content/104877?utm_source=OGP&utm_medium=print-radio&utm_term=perdiem&utm_campaign=shortcuts.) Additional charges for food/beverage, in-room entertainment, internet access, hotel parking, bell service, etc. are not eligible. If more than one participant from an organization has been approved, each participant may receive lodging assistance. There is no expectation that participants share a room.

Note: While reimbursement is limited to the GSA government rate, no specific provision has been made to reserve rooms near the training sites. Nor can HUD, TDA, or HAC provide any guarantee that participant organizations will be eligible for or actually receive government rates.

TRANSPORTATION: For organizations located at least 50 miles driving distance from the workshop location, a Travel Scholarship can be used to defray transportation costs, subject to the limitation described below based on the organization's distance from the workshop site. Any given participant can only receive reimbursement for one of the following modes of transportation (e.g., if the scholarship is used for airfare, it cannot also be used for a rental car). Participants are encouraged to identify the most cost effective means of travel.

Organizations located at least 50 miles driving distance from the workshop location may request reimbursement for ground transportation, which includes automobile costs or bus/rail fares as noted below.

- **Automobile Costs:** Automobile travel may be reimbursed as follows:
 - For personal or organization owned vehicles, mileage measured via Google Maps from the organization's address to the address of the workshop location will be reimbursed at the 2014 IRS rate \$0.56/mile; or
 - If a car rental is more cost effective (i.e., less than mileage based on round trip distance), rental charges will be reimbursed up to the actual cost of the rental, including taxes and mandatory fees. Unless prior approval has been granted, rental charges will be limited to standard mid-size passenger cars or smaller vehicles. Additional expenses for supplemental insurance, navigation systems, satellite radio, gasoline, etc., are ineligible.

- **Bus/Rail Fare:** For travel by bus or rail, economy class train fare is an eligible expense. As applicable, fees for one checked bag may be reimbursed. No reimbursement will be made for first or business class fares and any additional fees related to preferred seating, early boarding, overweight bags, additional checked bags, on-board food/beverage, internet access, etc.

Organizations located at least 150 miles driving distance from the workshop location may request reimbursement for either ground transportation, as described above, or airfare. As noted above, participants are encouraged to identify the most cost effective means of travel.

- **Airfare:** Economy class airfare for participants is an eligible expense. Additionally, fees for one checked bag on the outbound flight and one checked bag on the return flight can be included. No reimbursement will be made for first or business class airfares or additional fees related to preferred seating, early boarding, overweight bags, additional checked bags, in-flight food/beverage, internet access etc.

INELIGIBLE COSTS: Organizations will be responsible for all other costs of their representative(s) attendance. Travel Scholarships may not reimburse food/beverage costs, local ground travel (e.g., taxis, shuttles, subway fare, other mileage beyond the distance calculated between the organization's office and the workshop location, parking, etc.), entertainment, other costs not specifically included as eligible, or costs in excess of the limits above.

REQUEST PROCESS: To request a CHDO Travel Scholarship, an organization's representative(s) must **first register to attend a scheduled CHDO Workshop** through the OneCPD Resource Exchange. TDA will process the registration requests, including overseeing the PJ verification process.

Organizations identified as CHDOs or prospective CHDOs will be emailed a CHDO Travel Scholarship Request Form and instructions for submitting it. TDA will coordinate with HUD and HAC to conduct preliminary reviews of all requests received according to the Threshold Qualifications above and the Approval Criteria below. Following HUD approval of proposed scholarship amounts, preliminary approval notifications will be made as further described herein.

Note: Do not make nonrefundable or non-cancellable travel arrangements—including but not limited to airfare, bus/rail fare, rental car, and/or hotel reservations—prior to receiving official notification that a CHDO Travel Scholarship has been approved or prior to carefully reviewing the terms of the scholarship agreement that will be presented. HUD, TDA, and HAC will not be responsible for costs incurred prospectively prior to the preliminary approval of a travel scholarship.

SELECTION CRITERIA: A limited number of CHDO Travel Scholarships are available for each workshop. Organizations may request travel assistance during the first two weeks that registration is open for a given CHDO Workshop location. If more requests are received than can be accommodated, then preference will be given to organizations meeting one or more of the following factors:

- Length of time the CHDO has been in operation as a CHDO with greatest preference to organizations with less than one year of operation as a CHDO;
- Annual operating budget of less than \$500,000;
- Staff of 6 or fewer full-time equivalents;
- Organizations serving rural areas as listed on Appendix 1 of the CHDO Travel Scholarship Request Form; and
- If ties still remain, preference will be given based on the order of submission of a completed CHDO Travel Scholarship Request.

Following the initial registration period, any remaining scholarships will be given on a first-come, first-serve basis to organizations meeting the threshold requirements.

PRELIMINARY APPROVAL: Recipient organizations initially approved for CHDO Travel Scholarships will be notified by TDA and/or HAC. The approval will indicate which technical assistance provider will actually fund the specific scholarship.

Following that initial approval, the recipient organization will be required to:

- Execute a written agreement with the assigned TA Provider; and
- Submit any additional document needed to verify the organization's eligibility for a CHDO Travel Scholarship.

Failure to properly execute and return the agreement with required documentation within 5 business days of receipt will result in the cancellation of the CHDO Scholarship.

WORKSHOP ATTENDANCE REQUIRED: To receive reimbursement for eligible costs, the designated representatives of the recipient organization whose attendance was supported must actually attend and participate in the entire CHDO Workshop. Participants will be responsible for ensuring they properly signed into the workshop before each morning and afternoon session. Failure to sign-in as required will result in the loss of the CHDO Scholarship and no expenses will be reimbursed.

PAYMENT PROCESS: To be reimbursed for travel expenses for attending a CHDO Workshop, the organization must submit an invoice (form to be provided), a Certificate of Good Standing issued from the state of incorporation, and the final report to the TA provider funding its scholarship. The invoice must be accompanied by copies of receipts for claimed transportation and lodging expenses. Scholarship reimbursements will be limited to the lesser of the actual, properly documented, eligible costs and the maximum scholarship amount defined herein. For TDA reimbursement, invoices must be submitted via email by the third business day of the month for expenses incurred during the prior month. Reimbursements will typically be disbursed within 14 business days of TDA's receipt of funds from HUD.