

(1) When requested by a HUD Headquarters or a Field Office GTR/GTM, market the availability of their services to existing and potential recipients within the jurisdictions in which the assistance will be delivered;

(2) Respond to requests for assistance from the HUD Headquarters or HUD Field Office GTR/GTM responsible for overseeing TA within a specific geographic service area, including responding to priorities established by the Field Office in its Grants Management System. HOME PJs, CHDOs, and McKinney-Vento Act Homeless Assistance grantees may request assistance from the CD-TA provider directly, but the CD-TA provider is responsible for obtaining the local HUD Field Office's approval before responding to such requests. For CHDO (HOME) TA, the Field Office will coordinate with the affected HOME PJ in which the CD-TA provider proposes to work;

(3) When requested by a HUD Headquarters or a Field Office GTR/GTM, conduct a Needs Assessment to identify the type and nature of the assistance needed by the recipient of the assistance. Needs Assessments identify the nature of the problem to be addressed, the plan of action, the type of TA to be provided, the duration of the assistance, the staff assigned to provide the assistance, anticipated products and/or outcomes, and the estimated cost; and

(4) CHDO (HOME) TA providers will be responsible for securing a technical assistance designation letter from a PJ stating that a CHDO, or prospective CHDO to be assisted by the provider, is a recipient or intended recipient of HOME funds and indicating, at its option, subject areas of assistance that are most important to the PJ.

(D) *Technical Assistance Delivery Plan (TADP)*. After selection for funding but prior to executing the cooperative agreement, applicants must develop in consultation with the respective HUD Headquarters or Field Office GTR/GTM, a TADP for each national program or Field Office jurisdiction for which the applicant has been selected.

In developing the TADP, the applicant must follow the HUD Headquarters' or Field Office's management plan in determining the priority work activities, location of activities, and organizations to be assisted during the cooperative agreement performance period. The HUD Headquarters or Field Office GTR/GTM will direct TA activities and establish expected outcomes. Applicants will use the logic model to identify their planned outcomes and

report on actual accomplishments in relation to the planned outcomes.

For national HOME TA, applicants must work cooperatively with the GTR and GTM in the Office of Affordable Housing Programs to develop a TADP that addresses the national priorities, as identified in Section III (C), paragraphs (1) and (2) of this CD-TA NOFA, and meets the needs of HOME PJs and their partners.

The TADP must delineate all tasks and sub-tasks for each CD-TA program the applicant will undertake either nationally or in each Field Office jurisdiction. The TADP must specify the location of the proposed CD-TA activities, the level of CD-TA funding and proposed activities by location, the improved program performance or other results expected from the CD-TA, and the methodology to be used for measuring the success of the CD-TA. A detailed time schedule for delivery of the activities, budget summary, budget-by-task, and staffing plan must be included in the TADP.

In the case of pooled Field Office HOME TA funds, applicants will work with the GTR and GTM in HUD Headquarters to develop a TADP that includes the elements contained in the previous paragraph except for the detailed time schedule for delivery of the activities, budget summary, budget-by-task, staffing plan, and scope of work which will be negotiated in the form of a Technical Plan for Assistance (TPA) with the Field Office in which the TA is to be provided to ensure that the TA provider is working under the control and direction of the Field Office. The TPA must be consistent with the approved TADP.

(E) *Training Sessions*. When conducting training sessions as part of its CD-TA activities, CD-TA providers are required to:

(1) Design the course materials as "step-in" packages (also called "train-the-trainer" packages) so that a Field Office or other CD-TA provider may independently conduct the course on its own;

(2) Provide all course material in an electronic format that will permit wide distribution among TA providers, Field Offices, and HUD grantees;

(3) Arrange for joint delivery of the training with Field Office or Headquarters participation when requested by the HUD Headquarters or Field Office GTR/GTM; and

(4) When required by HUD, deliver HUD-approved training courses that have been designed and developed by other HUD contractors or HUD cooperating parties on a "step-in" basis for CD-TA clients, and send trainers to

approved "train-the-trainers" sessions. The costs associated with attending these required sessions are eligible under the cooperative agreement.

(F) *Reports to HUD Headquarters and Field Office GTR/GTMs*. CD-TA providers will be required to report to the HUD Field Office(s) with oversight of the geographic area(s) in which CD-TA services are provided or to Headquarters GTR/GTMs in the case of national providers. At a minimum, this reporting will be on a quarterly basis unless otherwise specified in the approved TADP.

(G) *Financial Management and Audit Information*. After selection for funding but prior to award, applicants must submit a certification from an Independent Public Accountant or the cognizant government auditor, stating that the applicant's financial management system meets prescribed standards for fund control and accountability required by 24 CFR part 84 for Institutions of Higher Education and other Non-Profit Institutions, 24 CFR part 85 for States and local governments, or the Federal Acquisition Regulations for all other applicants. The information should include the name and telephone number of the independent auditor, cognizant Federal auditor, or other audit agency as applicable. In addition, the applicant must submit a certification that the organization is in compliance with the statutory limitations placed on HOME and CHDO (HOME) TA.

(H) *Affirmatively Furthering Fair Housing*. Section V (D) of the General Section of the SuperNOFA does not apply to these technical assistance programs.

(I) *CHDO (HOME) "Pass-Through Funds"*. CD-TA providers may propose to fund the purchase of equipment and supplies, salaries and operating expenses, and training scholarships for eligible CHDOs that directly assist these organizations to own, develop, or sponsor affordable housing. CD-TA providers proposing "pass-through" grants are required to:

(1) Establish written criteria for selection of CHDOs receiving pass through funds which include the following: Participating jurisdictions must designate the organizations as CHDOs; and, generally, the organizations should not have been in existence more than 3 years.

(2) Enter into an agreement with the CHDO that the agreement and pass through funding may be terminated at the discretion of HUD if no written legally binding agreement to provide assistance for a specific housing project (for acquisition, rehabilitation, new