

IM 15-01 Real Property Reporting and Request Requirements

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Real Property Reporting and Request Requirements ACF-IM-HS-15-01

U.S. DEPARTMENT
OF HEALTH AND HUMAN SERVICES

ACF
Administration for Children and Families

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INFORMATION MEMORANDUM

TO: All Head Start and Early Head Start Grantees

SUBJECT: Real Property Reporting and Request Requirements

INFORMATION:

Effective for budget periods beginning on or after Dec. 26, 2014, all grantees, including those with no covered real property, are instructed to use and submit Standard Form (SF) 429. It includes the following real property reporting and request forms:

- [Instructions for 429](#) [PDF, 111KB]
- [SF-429-A](#) (General Reporting; includes the cover page) [PDF, 163KB]
- [SF-429-B](#) (Request to Acquire, Improve, or Furnish; includes the cover page) [PDF, 143KB]
- [SF-429-C](#) (Disposition or Encumbrance Request; includes the cover page) [PDF, 117KB]

The status of real property purchased, constructed, or subject to major renovations paid for in whole or in part with federal Head Start funds and real property claimed as match for a Head Start award must be reported annually on forms SF-429 and SF-429-A. Please carefully read the Instructions for SF-429 provided by the Office of Management and Budget to ensure that all required forms are complete and accurate. A description of each form follows.

SF-429 Required Forms

- **SF-429 Cover Page** must be submitted annually by all grantees and accompany all reports and requests.
 - It provides recipient (grantee) information and must accompany any submission of forms SF-429-A, SF-429-B, or SF-429-C.
 - Use the Comments section (Item 9) to indicate that there is no real property (as defined above) to report, identify real property with no change in status, and note parcels with changes. Additional attachments are required only for previously unreported real property and parcels with changes.

- **SF-429-A General Reporting** must be submitted annually on the same date the grantee's first SF-425 Final Federal Financial Report for the budget period is due.
 - A separate sheet is required to provide real property details for each parcel of real property being reported, including land, buildings, and modular units. Information for every parcel of real property that is purchased, constructed, or subject to major renovations with Head Start funds as defined in [45 CFR 1309.3](#) and real property claimed as match for a Head Start award must be included.
 - The term purchase includes outright purchase, down payment, and the use of Head Start funds to make mortgage payments (both principal and interest).
 - A federal interest created by the use of Head Start funds does not end until it is released by the Administration for Children and Families (ACF). In Item 13, grantees should note the funding period in which the federal interest began as the "From" date and enter "Until released by ACF" in the "To" space.

- **SF-429-B Request to Acquire, Improve, or Furnish** must be submitted along with the additional information required by 45 CFR Part 1309 whenever a grantee is seeking ACF approval to use Head Start funds to engage in purchase, construction, or major renovation of facilities covered by 45 CFR Part 1309.
 - Information included in SF-429-B can be cross-referenced in the Part 1309 application.
 - The appraised value (valuation) required in Item 14f must be provided by an independent real property appraiser licensed or certified by the state in which the property is located.

- **SF-429-C Disposition or Encumbrance Request** must be submitted at closeout and whenever a grantee is seeking ACF approval to sell, transfer, or encumber property subject to a federal interest, including the refinancing of existing indebtedness and subordination of a federal interest to the rights of a lender.
 - SF-429-C implements the requirements for grantees making requests for disposition of real property previously addressed at [45 CFR §74.32](#) and [45 CFR §92.31](#). Interim final U.S. Department of Health and Human Services grants management regulations address disposition of property at 45 CFR §75.318.
 - Item 14a asks grantees to indicate a disposition preference; however, the final decision as to method of disposition of property subject to a federal interest resides with ACF and will be communicated to the grantee through written disposition instructions.
 - An independent real property appraiser licensed or certified by the state in which the property is located must provide the appraised value required in Item 14e.
 - Subordination requests are initiated through the use of form SF-429-C. Requests for subordination should be identified in Item 14i and accompanied by the proposed subordination agreement, which must meet the terms and conditions noted in [45 CFR §1309.21](#) and [45 CFR §1309.22](#).
 - [ACF-IM-HS-12-08](#) remains in effect and provides a simplified disposition process for older modular units as defined in the Information Memorandum (IM).
 - SF-429-C is required whenever real property, subject to a federal interest, is pledged as collateral for a loan or mortgage. A pledge of collateral includes financing for ongoing purchase, such as a long-term mortgage, as well as any use of the property as collateral for future borrowing, such as lines of credit or refinancing of existing debt.

How to Submit Forms:

Head Start and Early Head Start grantees are directed to submit reports in paper form (original and two copies) to their respective regional grants management officer. A [fillable PDF version of form SF-429, attachments, and instructions](#) is available on the Early Childhood Learning and Knowledge Center (ECLKC) website. Further updates will be provided when electronic submission through the GrantSolutions system is available.

Further Guidance:

[ACF-IM-HS-12-02](#) SF-428 Tangible Personal Property Report and SF-429 Real Property Status Report is superseded insofar as form SF-429 and its attachments are concerned. The Office of Head Start (OHS) will publish new guidance regarding form SF-428 and its attachments separately.

Please direct any questions to your OHS Regional Office.

/ Ann Linehan /

Ann Linehan
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See PDF Version of Information Memorandum:

[Real Property Reporting and Request Requirements](#) [PDF, 124KB]



[Required Viewers:](#)

This is a Historical Document.

Other "2015" Resources

- [IM 15-05 Supervision and Transitions](#)
- [IM 15-04 Mandated Reporting of Child Abuse and Neglect](#)
- [IM 15-03 Policy and Program Guidance for the Early Head Start-Child Care Partnerships \(EHS-CCP\)](#)
- [IM 15-02 Native Language Preservation, Revitalization, Restoration, and Maintenance in Head Start and Early Head Start Programs](#)
- [IM 15-01 Real Property Reporting and Request Requirements](#)

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