



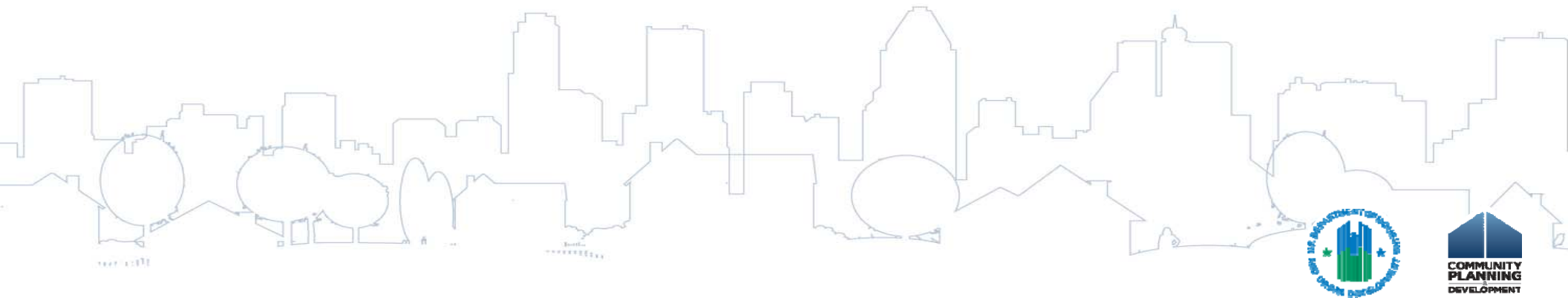
AAP and Amendments Tips and Tricks HUD Webinar

April 4, 2017



Introductions

- Jon Kunz, The Cloudburst Group
- Chris Andrews, The Cloudburst Group
- Beth Hendrix, OBGA, HUD



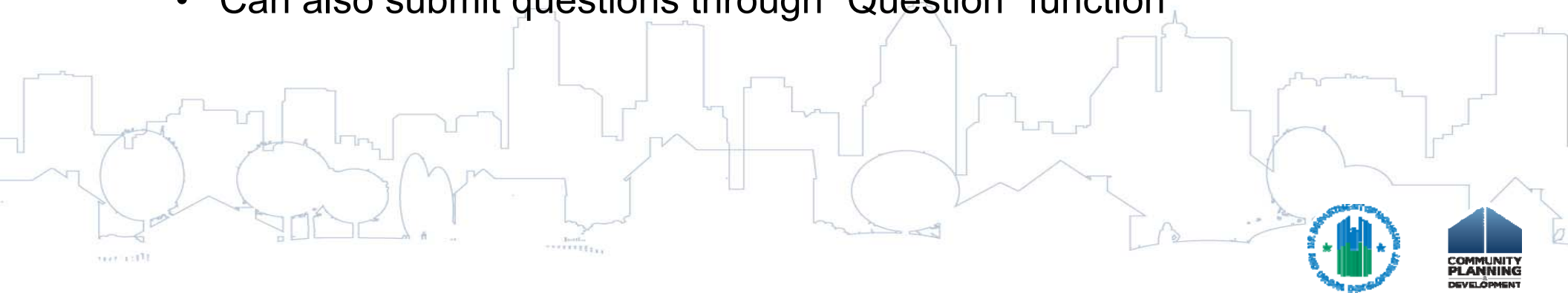
Housekeeping

Logistics:

- 90-minute webinar
- All lines are muted
- Submit technical issues through “Question” function

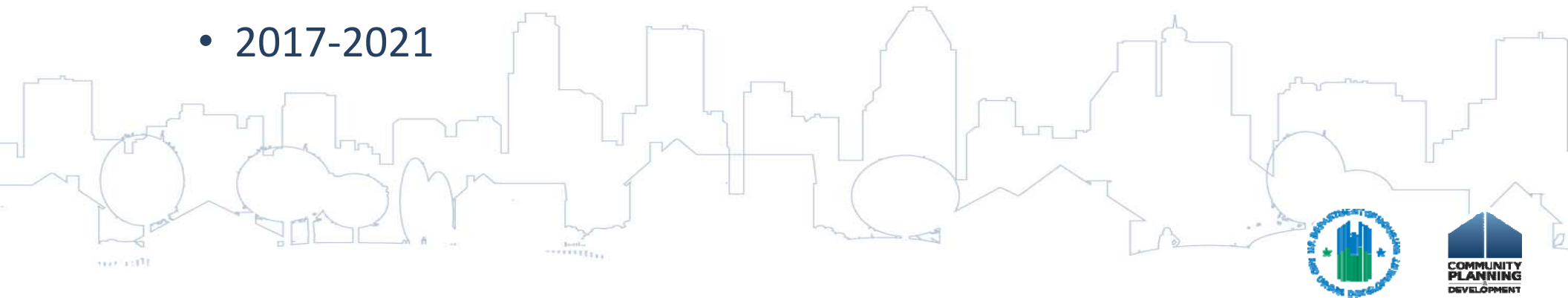
Asking questions:

- There will be periodic pauses to discuss questions
- Can also submit questions through “Question” function



Poll #1

- What is your Consolidated Plan cycle?
 - 2013-2017
 - 2014-2018
 - 2015-2019
 - 2016-2020
 - 2017-2021



Session Objectives

During this webinar, you will learn how to:

- Correctly set up the 2017 Action Plan in IDIS
- Complete amendments to the 2016 Annual Action in IDIS
- Apply key strategies and best practices to streamline Action Plan and Amendment set-up and prepare for your 2016 CAPER

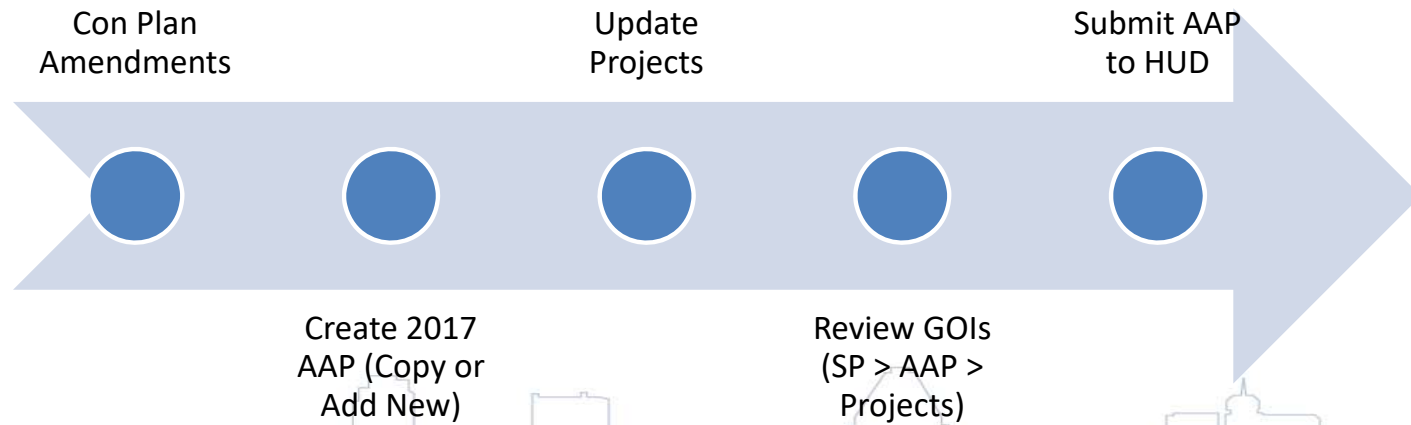


eCon Planning Suite Materials

- ✓ Desk Guides
- ✓ Toolkits
- ✓ Quick Guides
- ✓ Webinar Recordings and Transcripts
- ✓ Troubleshooting Guide
- Projects Webinar
- Self-Paced Curricula



Action Plan Road



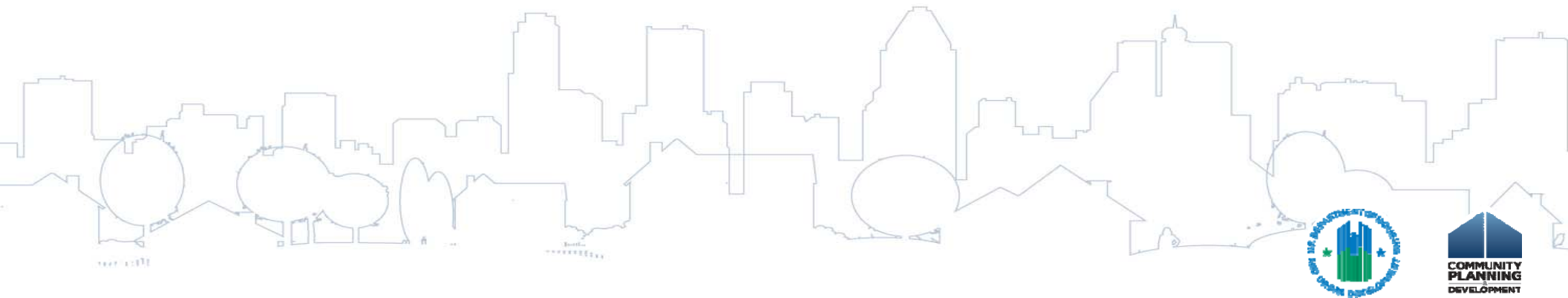
2017 Timing

- Consolidated Plans/Action Plans cannot be submitted until allocations have been made
 - CPD Notice 16-18 (<https://portal.hud.gov/hudportal/documents/huddoc?id=16-18cpdn.pdf>)
- FY2017 Action Plans **MUST** be submitted by August 16, 2017
- Grant agreements executed after plan approval and congressional release



Poll #2

- Are you planning to complete an amendment to your Consolidated Plan as part of FY2017 AAP?
 - Yes
 - No
 - Not Sure

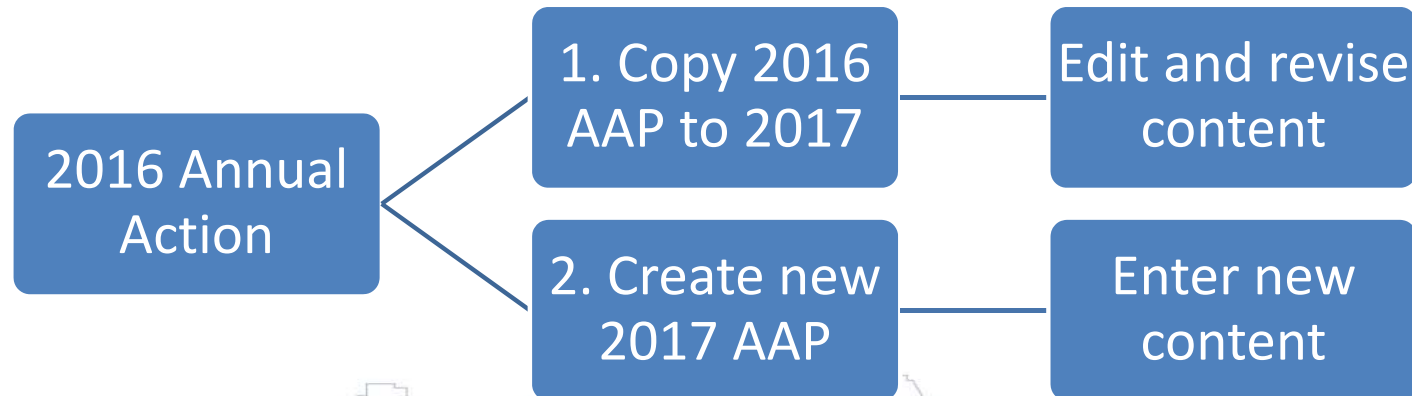


Complete Con Plan Amendments

- Amendments may be changing funding sources, adding, removing or revising goals and adjusting priority needs and/or target areas
 - CAVEAT: If your Con Plan cycle started in FY2016, this includes 2016 AAP amendments
- Ensure HUD marks amendment in IDIS as “Review Completed”
 - For Substantial and Non Substantial Amendments

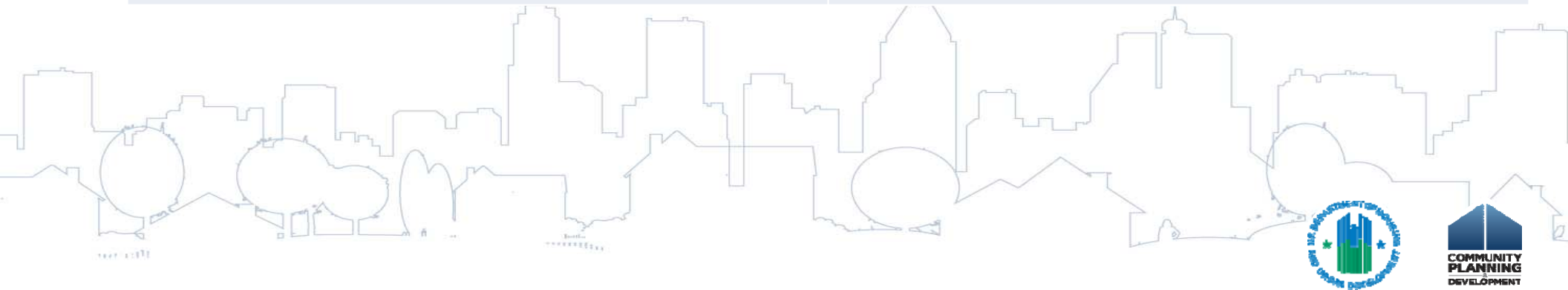


Setting up Annual Action Plan



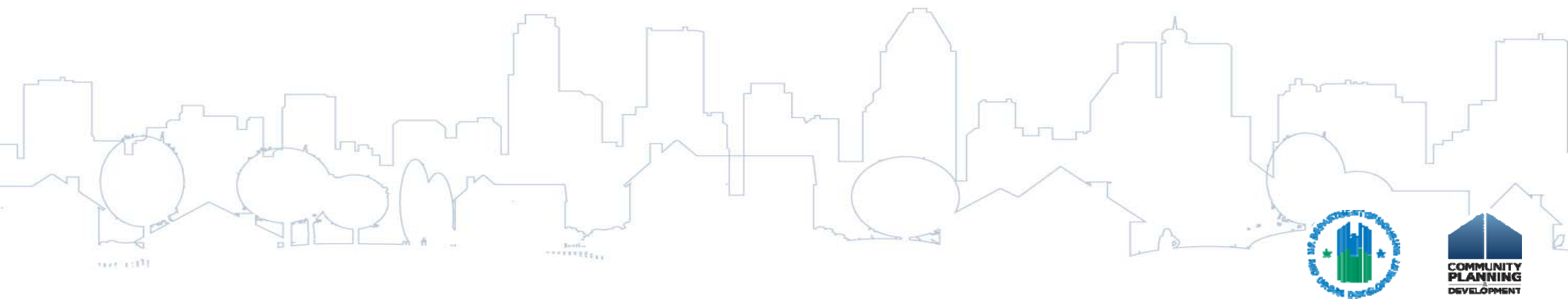
Copying versus Creating Action Plans

Copying Action Plan	Creating New Action Plan
Best if program management or approach is not changing significantly	Best if completing amendment to Consolidated Plan or making significant changes to Action Plan elements
Copies all data from previous Action Plan	Blank template linked to Consolidated Plan
Need to review and update all screens to ensure information correct for 2017	Complete all fields and screens; including projects
Remove copied projects and “create new” projects for 2017	



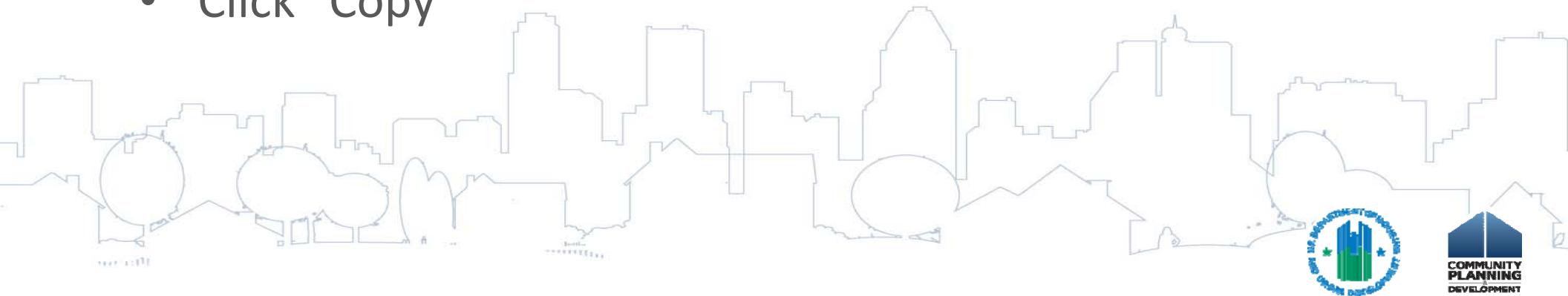
Poll #3

- Are you planning to copy or add a blank AAP for 2017?
 - Copy previous AAP
 - Add blank AAP
 - Not sure



Let's Copy!!

- Source Plan Year and Version
 - For Year 2 AAP, use Con Plan Source Year and Version
- Click “Copy” under Action Plan submenu
- Enter Source and New information
- Click “Copy”



How to Copy your Action Plan

<ul style="list-style-type: none">- Switch Profile- Manage Profile- Logout	Activity Search Activities
Activity <ul style="list-style-type: none">- Add- Search- Search HOME/HTF	Search Criteria Program: <input type="text" value="All"/> <input type="button" value="v"/> Activity Name: <input type="text"/> Program Year: <input type="text" value="Select"/> <input type="button" value="v"/>
Project <ul style="list-style-type: none">- Add- Search- Copy	IDIS Project ID: <input type="text"/> IDIS Activity ID: <input type="text"/> Grantee/PJ Activity ID: <input type="text"/>
Consolidated Plans <ul style="list-style-type: none">- Add- Copy- Search	<input type="button" value="Search"/> <input type="button" value="Reset"/>
Annual Action Plans <ul style="list-style-type: none">- Add- Copy- Search	



How to Copy your Action Plan

Annual Action Plans
Copy Annual Action Plan

Copy | Cancel

Source AAP Program Year: *

Source AAP Plan Version: *

New AAP Program Year: *

New AAP Plan Version: *

If Amendment: * N/A ▼

Copy | Cancel

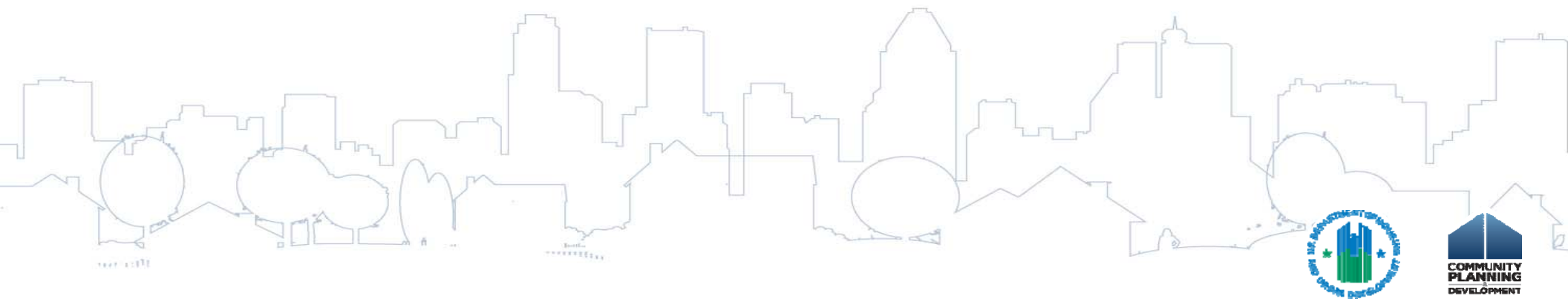
Enter source year and version

Enter new PY and Version



Create New AAP

- Click “Add” Action Plan
- Enter Program Year
- Associate with current Consolidated Plan



How to Create New AAP

<ul style="list-style-type: none">- Switch Profile- Manage Profile- Logout	Activity Search Activities
Activity <ul style="list-style-type: none">- Add- Search- Search HOME/HTF	Search Criteria Program: All <input type="text"/> Activity Name: <input type="text"/> Program Year: Select <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Reset"/>
Project <ul style="list-style-type: none">- Add- Search- Copy	IDIS Project ID: <input type="text"/> IDIS Activity ID: <input type="text"/> Grantee/PJ Activity ID: <input type="text"/>
Consolidated Plans <ul style="list-style-type: none">- Add- Copy- Search	
Annual Action Plans <ul style="list-style-type: none">- Add- Copy- Search	



How to Create New AAP

AD-26 Administration of the Annual Action Plan

Save | Cancel

AAP Program Year:*

AAP Title:*

AAP Plan Version:*

If Amendment: N/A ▼

Programs included:*
 CDBG
 HOME
 ESG
 HOPWA

Is this Annual Action Plan associated with a Consolidated Plan?*

These fields **CANNOT** be edited once saved

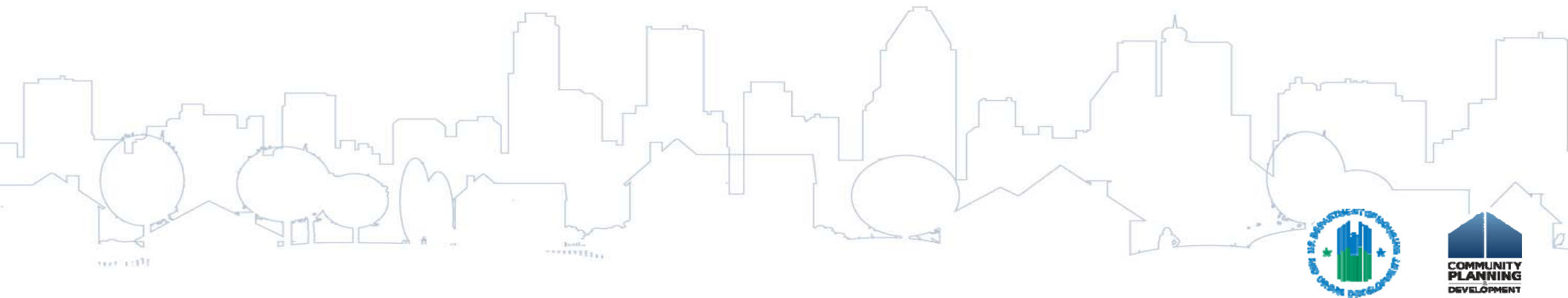
Complete all fields

ALL GRANTEES SELECT YES
Select the most current Consolidated Plan



Consortia Exceptions

- Consolidated Plans and Action Plans can only be created by Consortia Lead
 - Includes copying prior year Action Plans
- Consortia lead can only submit AAP in IDIS



AAP Reminders

- Start Year = HUD Program Year
 - Start Year **MAY NOT**= Jurisdiction Fiscal Year
- Confirm plan is associated with correct Consolidated Plan
- Align GOIs from SP to Projects
- Ensure Projects are correctly set up



AAP Reminders

AD-26 Administration of the Annual Action Plan

Save and Return | Cancel

AAP Program Year:* 2017

AAP Title:* 2017 AAP

AAP Plan Version:* v1

If Amendment: N/A

Programs included:*
 CDBG
 HOME
 ESG
 HOPWA

Is this Annual Action Plan associated with a Consolidated Plan?* Yes

Consolidated Plan Title: San Antonio Five Year Consolidated Plan 2015-2019

Consolidated Plan Beginning Year: 2015

Consolidated Plan Ending Year: 2019

Consolidated Plan Version: 1



Aligning GOIs

SP Goal: Rehabilitate existing housing stock in Neighborhood x.

GOI: 200 HO units rehabbed

AP Goal: Rehabilitate existing housing stock in Neighborhood x.

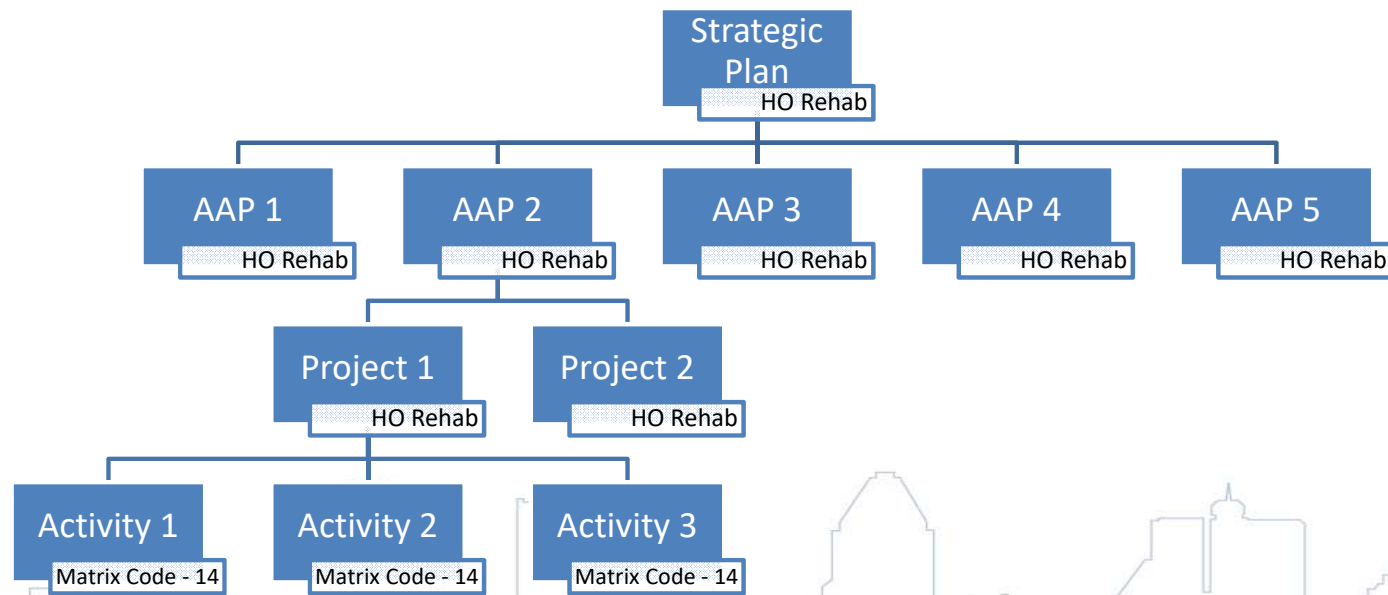
GOI: 40 HO units rehabbed

Project: Homeowner Rehab

GOI: 40 units rehabbed



Aligning GOIs



Aligning GOIs - CAPER

Table 1 - Accomplishments - Program Year

Goal	Category	Funding	Outcome				
1A: Rehabilitate Existing Housing Stock	Affordable Housing		Indicator	Expected	Actual	Unit of Measure	Percent complete
			Homeowner Housing Rehabilitated	132	237	Household Housing Unit	179.55%
1B: Development of New Housing for Ownership	Affordable Housing		Indicator	Expected	Actual	Unit of Measure	Percent complete
			Homeowner Housing Added	40	60	Household Housing Unit	150.00%
1C: Provide homebuyer assistance	Affordable Housing		Indicator	Expected	Actual	Unit of Measure	Percent complete
			Direct Financial Assistance to Homebuyers	35	79	Households Assisted	225.71%
1D: Develop New Affordable Rental Housing	Affordable Housing		Indicator	Expected	Actual	Unit of Measure	Percent complete
			Rental units constructed	10	6	Household Housing Unit	60.00%
1E: Further Fair Housing Opportunities	Affordable Housing Homeless		Indicator	Expected	Actual	Unit of Measure	Percent complete
			Public service activities for Low/Moderate Income Housing Benefit	225	1195	Households Assisted	531.11%
2A: Integrate Mixed Income Communities	Non-Housing Community Development		Indicator	Expected	Actual	Unit of Measure	Percent complete
			Public service activities for Low/Moderate Income Housing Benefit	250	0	Households Assisted	0.00%
			Businesses assisted	12	22	Businesses Assisted	183.33%



Projects

- If you Copy your AAP, it automatically copies prior year projects
- Must delete and create new projects
 - Double click “Remove”
 - Click save at the very end
- If name has special character such as &, -, ‘, or #; rename project without character, save then click remove

Program Year:
2016

IDIS Project ID:
1

Status:
Open

Project Title:
Administration

Grantee/PJ Project ID:



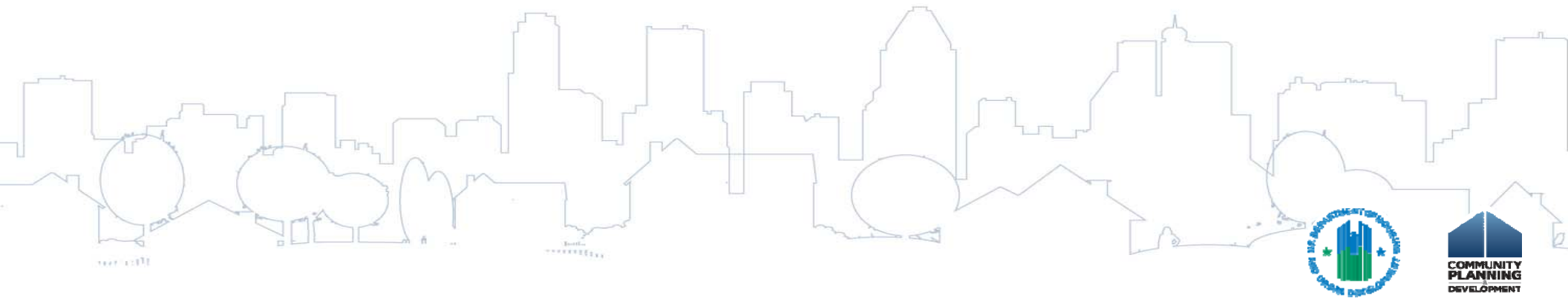
Projects

Projects

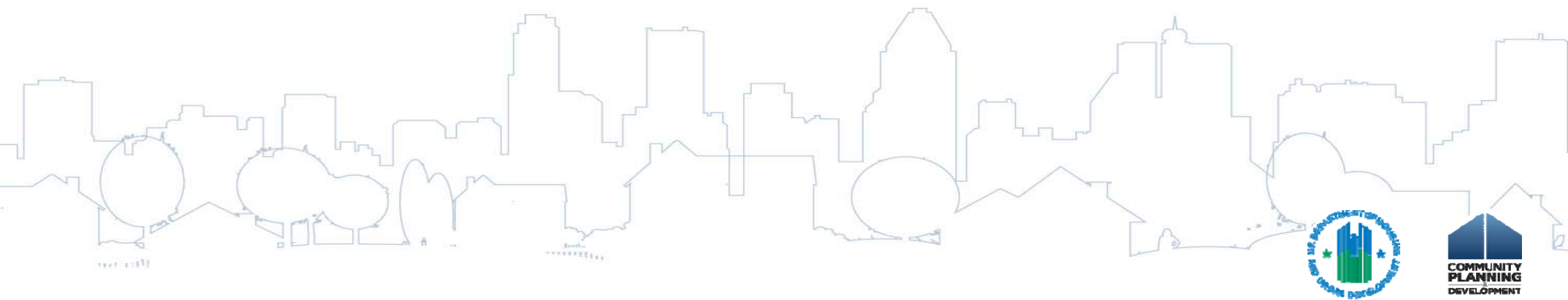
Sort*	Project Title	Action
1	CDBG: Legal Administration	View Edit Remove
2	CDBG: Grant Administration	View Edit Remove
3	CDBG: Housing Delivery	View Edit Remove
4	CDBG: Fair Housing Administration	View Edit Remove
5	CDBG: Green and Healthy Homes Grant Match	View Edit Remove
6	CDBG: Minor Repair Activities	View Edit Remove
7	CDBG: Facade Improvement Program	View Edit Remove
8	CDBG: Code Enforcement	View Edit Remove
9	CDBG: EastPoint Neighborhood Infrastructure	View Edit Remove
10	CDBG: Red Berry Infrastructure Improvements	View Edit Remove



Question Break

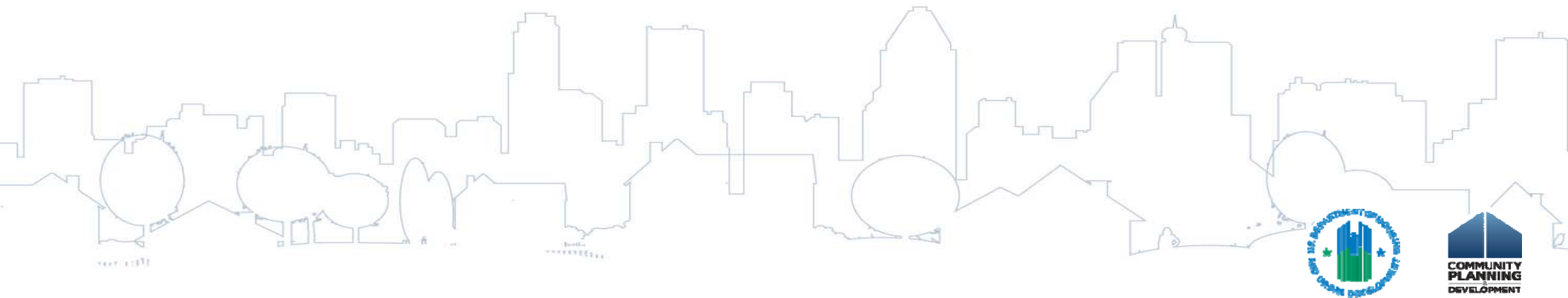


Amendments

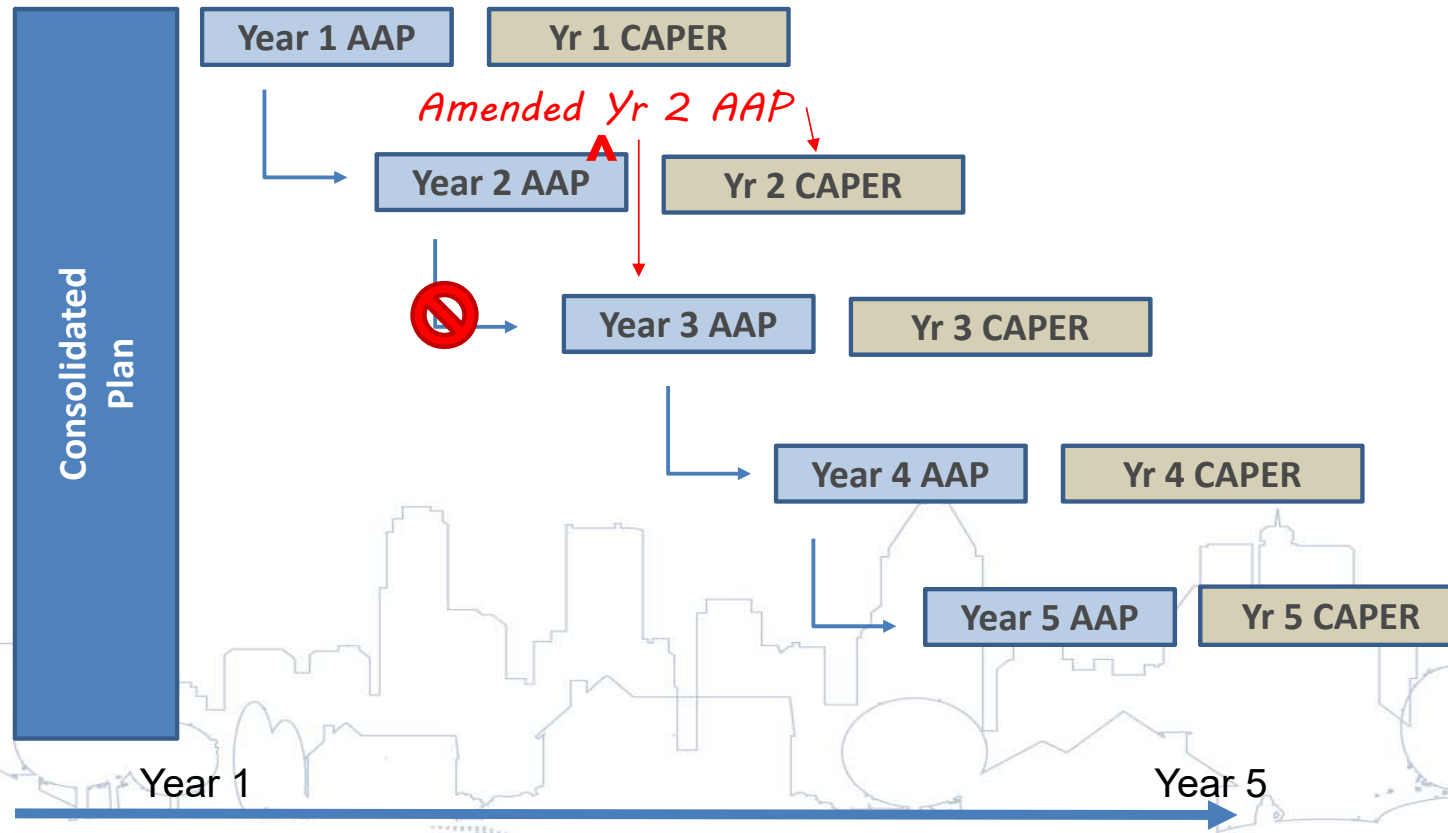


Poll #4

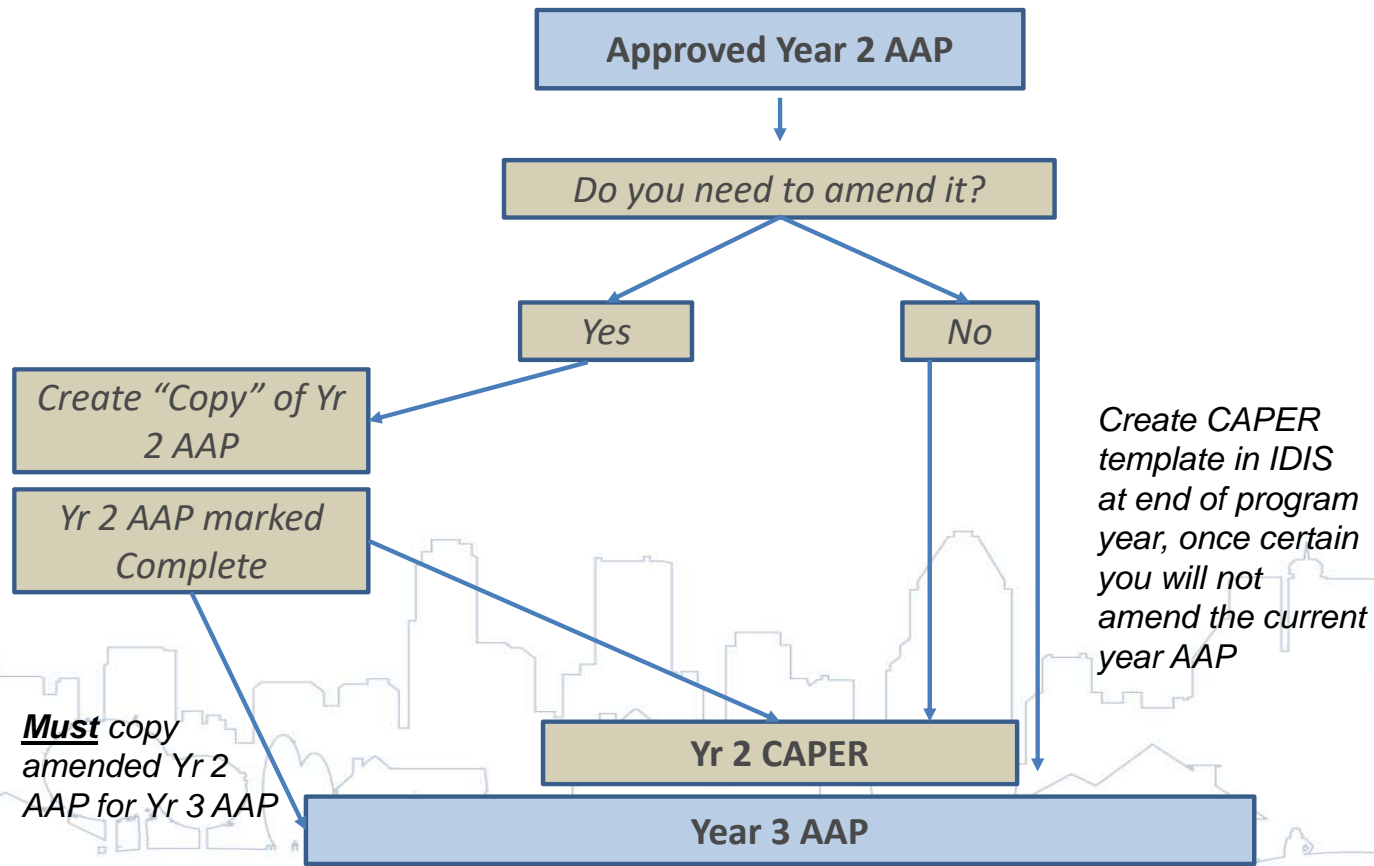
- Have you completed an AAP amendment in eCon Planning Suite?
 - Yes
 - No
 - Not yet, but I will before the end of PY2016



Amendment Flowchart

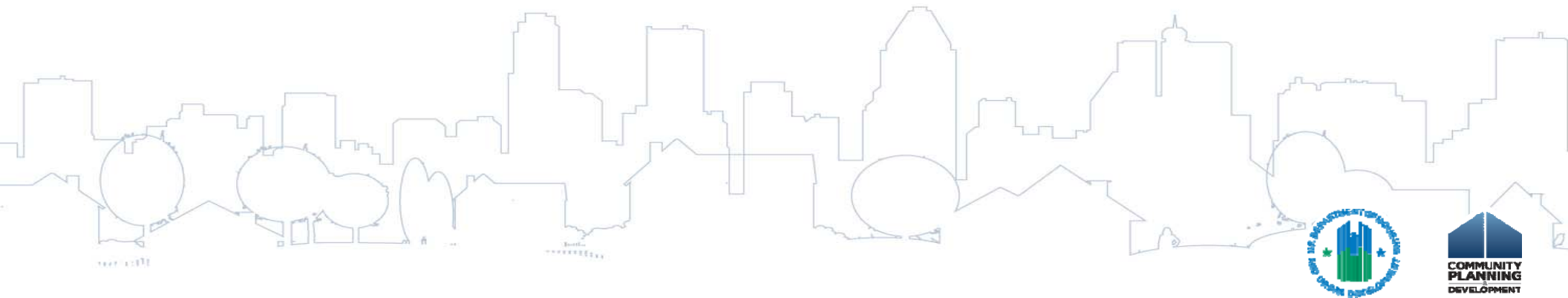


Amendment Flowchart



Consortia Exceptions

- Consortia lead must initiate all amendments
- Should coordinate among all members to complete amendments at one time
- Consortia lead must submit amendments

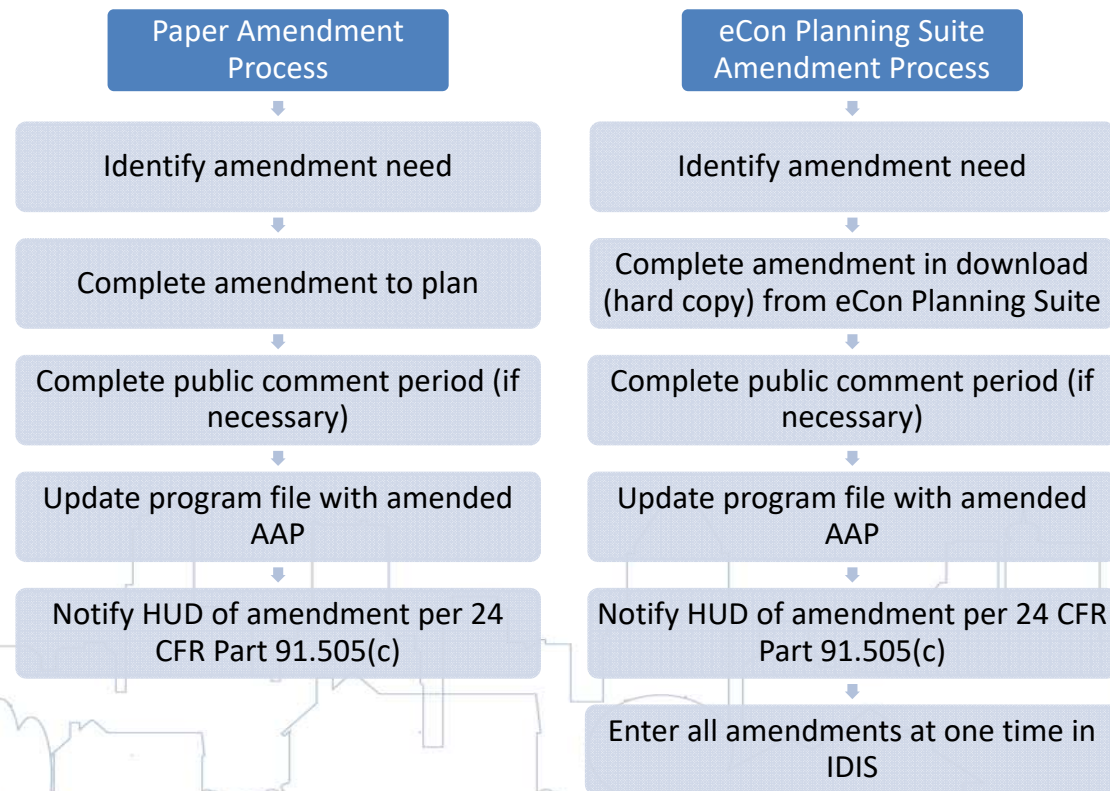


Amendment Best Practices

- Always work off of your most recent AAP/CP
- Complete amendments in IDIS at one time; at end of program year
 - Follow all requirements of Citizen Participation Plan
 - Document in program file
 - Enter in IDIS at one time
 - Saves multiple versions in IDIS
 - Must be review completed prior to your CAPER



Amendment Process – Recommended Approach



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