

Chris Andrews: Good morning. Good afternoon everyone. Thank you all for joining us. A number of familiar names and grantees on the line, so thank you all for joining today. Today's webinar is on Projects Set-Up in the eCon Planning Suite. And this webinar is being presented by Jon Kunz from the Cloudburst Group. Jon has been a lead technical assistance provider on the eCon Planning Suite. Jon, do you want to say hello?

Jon Kunz: Good afternoon everybody or good morning to some of you who are out west.

Chris Andrews: And myself. My name is Chris Andrews, also with the Cloudburst Group. And like Jon, has been working within the eCon Planning Suite now for 6 or 7 years. We're also joined by Beth Hendrix from the Office of Block Grant Assistance at HUD Headquarters. Beth, would you like to say hello?

Beth Hendrix: Hi everyone. This is Beth Hendrix from the Office of Block Grant Assistance. Before we get started in the webinar today, I wanted to make sure we got some news out to those who may not have heard yet. HUD has issues a waiver on the 30 day citizen participation public comment period for both state and local jurisdictions. This is because as you know, allocations have not come out yet and the delay in having the budget passed this year. The waiver takes the 30 day public comment period down to a minimum of a 14 day public comment period. This will help you be able to get your plans in on time and prior to the August 16th deadline that is statutory.

If you want to take advantage of that public comment waiver that we've offered, you're still going to need to make sure that you provide that public comment period and document that you did so in your FY17 plan submission, that it took place for a minimum of 14 days. Also you're going to want to document in your files the conditions that caused you to need to utilize the waiver. If questions about this... We're not going to spend a lot of time talking about it during the webinar today, but please reach out to your field office representative. In addition to that, a copy of the waiver and information I just discussed came out in the CBDG program update, that went out late last week and early this week. If you don't receive the update for some reason, please reach out to your field office rep. They will be able to send one to you as well. With that, I'm going to turn it over to the Cloudburst folks to start our webinar.

Chris Andrews: Great. Thank you Beth. If anyone does has questions on that waiver as you're working on your 2017 Action Plan, please connect with your field office rep or send in a question and we can connect you with that document. For today's session, we will be talking about project setup in the eCon Planning Suite. Before we do, just would like to go over a few logistics and housekeeping items. Today's webinar will be 90 minutes long because we have 300 folks on the line, all lines will be muted. You can send questions through the question functionality in the Go To Webinar pane. Jon, Beth and I will be stopping

throughout the session today to answer questions. We'll try to answer all the questions. If we're not able to answer your question, please submit that through the HUD Ask a Question desk and we'll make sure we get an answer to you as soon as we can.

Before turning over to Jon to start the session, I wanted to go over what our goals are for today's webinar. Number one. Making sure all of you know how to correctly create or add IDIS projects to the EP35 screen of the annual action plan. We'll be talking through the instructions for both entitlement communities and state grantees. We also want to help you learn how to properly setup your projects and make sure you're aligning your IDIS activity accomplishment data with the goals in your strategic and annual action plan. That becomes so important as it begins time for your CAPER, to make sure all that data is setup properly.

Finally and most importantly, we really want to answer most of your questions. Please type in your questions as they come up. If you have a question on setting up a certain type of project or how to operate a project within the eCon Planning Suite, please send in those questions and we'll try to answer as many as we can. With that Jon, I will turn it over to you.

Jon Kunz:

Thank you Chris. I think what we'll do today is start with a little poll so we can get a better sense on who is out there. I've launched a poll. Click the radio button and submit the response that applies to you. We're looking at what's your experience in the eCon Planning Suite first. Are you a newbie, brand new to this, have a little experience but under a year, more than a year, or are you just beyond that, you're a real professional? Go ahead and respond. Almost a quarter of you consider yourselves newbie's. We'll be sure we start from the basics. Another 20%, under less than a year. 47. Almost half are more than a year but don't consider yourself pros. And 9% are real pros.

Going to do one more poll. This is just getting a sense on your experience in IDIS, not just the eCon Planning Suite. Some of you may have been doing IDS for years, but turned over into IDIS, or it might be the opposite. Again, are you a newbie, consider yourself to be one, a little more than a newbie but less than a year, one to three years, more than three years, or you're just the pro? Looks like we have most responses in. A little less... Most of you have some experience. Only 15% consider yourself newbie's, another 13% less than a year. A little over a quarter of you are in the one to three year range. A third of you are more than three years but not quite a pro. Then 13% are IDIS pros. That's great. We have a broad range. Let me close this down.

We do have a range of experience among today's participants. We want to first make sure we're clear on a couple of keywords for the session. The projects and activities are sometimes used interchangeable with some HUD programs, will stay consistent with the very specific meanings as they apply to IDIS and the eCon Planning Suite. In other words, we're going to go into

IDIS speak now. Projects. IDIS projects generally correspond to the grantees and annual action plan projects. Each IDIS project is setup under a specific plan year. These projects are high level descriptions. What the grantee intends to accomplish over the next year. Grantees enter information about each project, such as name, description, estimated budget, and expected accomplishments. Projects also serve as a chief mechanism for organizing and tracking related activities in IDIS.

Now let's turn to activities. Bear with me. Many of you are familiar with this but I think it's important we're all together. Each activity in IDIS is setup under one of the projects in an action plan. The activity level is where grantees supply HUD with details about the work they carry out to meet the project goals. Information entered at the setup includes activity name, location, proposed accomplishments, and program specific data. Grantees will disperse funds against the activities in IDIS and report actual accomplishments as work is completed within the activities.

Let's look at example. Here's a little diagram. There is a distinct relationship between projects and activities. This is an example of a grantee that broadly defines the project. In this case, public facilities, under CDBG 2017 program year. The project narrative can be used to more fully describe the public work that will be undertaken. Regardless of how many projects defined, the activities which will be entered into IDIS after the annual action plan has been submitted and program year is underway, we'll need to be specific enough to meet their respective CPD program requirements. The activities in the example here are site specific and can be identified as an eligible activity and so forth. They can be entered as the activity is ready to commence. Notice that the activity numbers are not exactly concurrent but they are all associated with the same 2017 project. The activity numbers reflect the time in which they are entered into the system. In this case, the projects serves as means to organize activities and grantees can choose to organize their CDBG data in a way that helps track and communicate their plans, finances, and accomplishments.

Let's look at another example. The broadly defined projects will work well for many grantees. There are some that prefer to more narrowly define their projects. In this example, the grantee is chosen to setup three narrowly defined projects in the eCon Planning Suite. Each of which covers the same narrow scope as its corresponding activity. They setup a project, liberty rec center expansion. They setup a single activity under the same project for the liberty rec center expansion. Then they created a separate project for senior center improvement and so forth. They went with a one to one relationship.

A key point is that grantees really do have the discretion to define their projects more broadly. You may want to give some thought on how to organize and define your projects, at least CBD and HOME. We do want to note that each CPD program has some specific protocols for setting up

projects and activities. Information can be found in their respective IDF documents on the HUD Exchange. Specifically, ESG. Grantees need to setup one project each year for the entire grant amount. Then setup an activity under the project for each eligible activity category undertaken. HOPWA will setup one project for the grantee and one project for each sponsor funded for that program year. Good documentation exists in the IDIS documents on the HUD Exchange for some of those program specific requirements.

Now let's move a little deeper on how projects work within the eCon Planning Suite. Within the eCon Planning Suite, projects act as a bridge, linking activities, accomplishments in IDIS to strategic and annual goals; identified in the consolidative plan and annual action plan in the eCon Planning Suite. The projects serve as the integral role for lining data along all the different components; the consolidative plan, the action plan, IDIS activities, and the CAPER. Now that we've covered a little bit of that, I'm going to turn this back over to Chris. He's going to talk a little bit about the goal outcome indicators.

Chris Andrews: Thank you Jon. Continuing to make sure we're all on the same page of how projects fit into the eCon Planning Suite and into IDIS together, we'll talk through how the flow of data from your strategic plan all the way through the activities. Then talk about the role that projects play in that. Primarily in your reporting.

You'll see here on the screen, have a diagram of a strategic plan for a five year period. 2015 to 2019. The five corresponding action plans. We'll zero in on the second action plan for 2016. Within that action plan, that action plan has three goals. A goal of decent housing, public facilities, and of neighborhood services. We'll focus on one goal to talk through on projects. That's the goal of decent housing.

Within that, there may be any number of projects. Jon was describing the definition and the structure of creating projects. The first project could be related to homeowner rehab, the second to rental rehab, the third could be emergency repair. Within that rental rehab is where you would break down and have your specific activity. Those specific activities are where you're reporting on your accomplishment related data and highlighting and bragging, telling this is what we did, this is what we accomplished with our HUD resources.

That data links back up through the project, through the goal outcome indicators, and then to the goal, action plan, and the strategic plan. We'll show how all of that reports into the CAPER. We'll start with the process of the lining of the goal outcome indicators. We were looking earlier at rental rehab projects. We'll keep the focus on that here, as we look at how goal outcome indicators are used within the eCon Planning Suite and how they tie the projects and how projects are tying those to action plans.

In the strategic plan goal, it may be tied to rehabbing the rental stock. In that strategic plan, indicate that the goal is to rehab 350 rental units. Spread out over a five year period. In your annual plan that would be the same goal. That goal may just be 70 units for the year. That ties down to our project, in which the project of that goal outcome indicator should also be matching the annual outcome plan. Here's the same numbers. It's just one project accomplishing that goal.

We talked about this in the action plan webinar and I just want to reiterate it here. The importance of making sure, and you will have to do this manually, that your goal outcome indicators from your strategic plan are the same as your action plan and they're the same as your project. That will make reporting in your CAPER so much easier. Looking at this flow chart, we'll again just come back to this chart of aligning our goal outcome indicators. Now at the top of the strategic plan is where we had our 350 units indicated that we would accomplish within that goal. In our annual plan, in that goal number one indicated that would be 70 units of rental rehab that we would complete during the year.

That ties down to those three activities. For those three activities, as long as they're linked to that project and are linked to using the appropriate matrix code that lines up with the corresponding goal outcome indicator. We can make sure to send out a chart on that for you all. That will report all of that data for you, into your CAPER. You see here, we have our report that comes out of our paper. Our accomplishments screen. This is where we get so many questions of how to setup projects and enter content into the eCon Planning Suite, to make sure this data is lining up correctly and everything is populating correctly in the CAPER. The trick is making sure that your strategic plan goals, using the same goal outcome indicators are connected appropriately to your action plan goals, which are connected with one project. That project is associated with the corresponding activities and those activities are using the matrix code that lines up with the goal outcome indicators.

Before pausing here, I know we've got a few questions. I want to reiterate that your action plan is a plan. In this example where the grantee had a goal of 70 rental units rehabbed and the actual value was only 67, we had a number of questions come in where, do you need to amend or revise your action plan so that your expected equals the actual. Unless there's another change that needs to be addressed through that amendment, or a different change that could be the cause of that difference, that is just your planning document and if those actuals are below or over, that's okay. Your CAPER is the time to report on that and tell your story.

Beth Hendrix:

That's a really good comment, Chris. The numbers don't have to add up. Like it was said before, it's a planning document. You just need to be able to

describe why you were only able to do 67 units versus the expected 70 in that narrative piece. It doesn't always have to match up because life happens and sometimes the project changes. At the end of the day, you did what you told the public you were going to do, which is rehab rental units.

I also want to add on one other piece here. Prior to creating your CAPER, it's really important that you go back to those projects and activities and make sure all the accomplishment data is in there and verify it's in there correctly. The reason why is when a CAPER is created, it tells the system to pull all of that accomplishment data and attach it to the projects, activities, and goals that were in the action plan and download that into the CAPER. If your information isn't up to date, it will not download to a CAPER once it's setup. The system knows to pull it all at the time of creation but once a CAPER has been created, it can't pull new info into it, you will have to reconcile it manually in the system. Save yourself some work, do the work beforehand before you create the CAPER in the syste,.

Chris Andrews: Great. Thank you Beth. Jon, just a couple of clarifying questions came in on your overview of projects and activities. Can you provide any guidance on how to define a project in the eCon Planning Suite to make sure that the field office and community has enough information about the plan?

Jon Kunz: That's a good question. Different field offices may have different takes on this. The important thing is you're looking at this as a way to communicate with your field office and your citizens. If you are not going into detail that we looked at of that one to one relationship, activity level detail, you have the option within each project in the action plan, there are two narrative fields. In the top there's a description field that you can give an overview. Near the bottom you'll find the narrative field called planned activity. This is an area where you can go into greater detail about the type of activities you're going to do. That's a good way to use that space, to provide information to your field office that does not require breaking down your projects into finite scopes.

Chris Andrews: That's a great setup. In a few minutes we'll demo the process of creating a project and we can highlight those fields. Jon, a grantee asked you to clarify what you were saying about ESG projects and the requirements specific to ESG project setup.

Jon Kunz: Sure. That's really important for ESG grantees. The ESG program has thought through and they use IDIS in a different way than some of the other programs. They have specific requirements. That is that first, you only setup one ESG project per federal fiscal year and set it up for the entire grant amount. Once you get going, you'll be setting up activities and each activity corresponds to one of the six different activity categories. Outreach, shelter, homeless prevention, rapid rehousing, data collection, and administration.

There's a great document called Using IDIS Online for the Emergency Solutions Grant Program. That can be found on the HUD Exchange.

Chris Andrews: We can make sure to send that out to everyone after today's session. One last question before we move on. Can you clarify, is the project in the action plan the same as an activity in IDIS or is there a difference between those two?

Jon Kunz: The answer is no. We want to distinguish using IDIS speak first, the projects are what you have in your AP35 screen. You have different options for how narrowly defined those can be. They could be broad categories like public facilities or street programs. Then you put more specific, detailed activities underneath those. You want to focus on projects on the AP35 screen, then later on once your action plan is approved, you'll be ready to setup the more detailed activities in IDIS. They will be linked to your projects but they are not the same thing.

Chris Andrews: Great. Thank you Jon. Great questions. I'll talk quickly on project setup and the process of creating the setup. We'll go into IDIS and demonstrate this process. Generally, every grantee is creating new projects for each program year. There are exceptions that apply for multi-year projects and we'll talk about multi-year projects a little bit later. You'll see when setting up your projects, you have both your program year project ID and your corresponding IDIS ID. That is always associated with your projects.

There's two ways to setup a project. We'll talk through both of these; the first is through the AP35 screen. This is when you're creating your action plan or if it's your year one, it would be embedded within the Con Plan template. But you do it from the AP35 screen. When you create a project within the AP35 screen, that will automatically link that project to your annual goals, strategic plan goals, and tie all of that data together in the paper. Beth and I were just discussing the value of making sure everything is connecting through your strategic plan down to your action plan, down through your project.

Setting up your projects within the AP35 screen helps in that process and makes it much easier to do so. The second option of setting up a project is through the project tab in IDIS. For state grantees, you may do this. State grantees can also setup projects within the AP35 screen, definitely benefits to that. But if during the course of the program year, if you're starting an amendment and you're not ready to create that amendment within the eCon Planning Suite, or if as a state grantee you're setting up your project after submitting your action plan, you can do that by clicking on the project tab, creating that data.

Then you need to at some point at some point during the program year, go back into the eCon Planning Suite and make sure that project you created from the project screen in IDIS, is linked and connected to your AP35 screen,

to make sure all of that data carries forward in your CAPER and your reporting.

Beth Hendrix: Chris, that's an important comment. I want to jump in real quick. I talked before about when you create a CAPER, it tells IDIS the system, to pull information into that CAPER. The same is true when you create your next action plan or that CAPER. If you didn't put that project to begin with in your action plan, when you generate that CAPER, the system doesn't know to pull that project into the CAPER. It wasn't there, it was only in IDIS. It's important you go back, put it in your action plan if you started it in IDIS first. To make sure that information flows directly into your CAPER and subsequent plans going forward.

Chris Andrews: Great point. I want to highlight a few things before we go into the demo and we'll point these out in the demo. The state grantees, you are encouraged... it will say optional on the AP35 screen, we do recommend using the AP35 screen to create your projects for the exact reasons that Beth just described in setting up your data so everything is flowing and tied together correctly.

When creating your project in the AP35 screen, there are two different fields to enter the dollar value of that project. The estimated amount and the expected resources. These fields are what are tying together the eCon Planning Suite and the financial side of IDIS. The eCon Planning Suite is the lower table. That's what's tying back to your annual resource screen and strategic resource screen, to make sure your resources are fully allocated and if there's a difference you may get a quality check or a warning. The estimated amount at the top, includes all of the HUD programs. This is what will carry forward into your project setup in the rest of IDIS. We'll go through and show that process.

In setting up your project, you're able to select your annual goals that are supported. Selecting one. We do recommend that you select only one goal and that will make that accomplishment reporting easier at the time of your CAPER. The corresponding accomplishment data from those activities that come from that project, will automatically be tied to that one goal. If you select multiple goals, IDIS doesn't want to double count your accomplishment data. Therefore, it does not report those accomplishments with either goal and you would need to manually do that and select which goal to associate that data. Then use the narrative to describe it was also supporting a second goal or that there was a second or third goal involved.

Again, the goal outcome indicators. You want to make sure you're using the same goal outcome indicators with your strategic plan, annual action plan, and your projects. This is when I am working on an action plan or a consolidated plan, this is the mantra I work with. Make sure all that data is lined up from your strategic plan, all the way down to your projects and that

will make all of your reporting, all of your future action plans so much easier. It will streamline that data and make your CAPER process much smoother.

Going to pause here and pull up IDIS. We'll do a quick demo.

Beth Hendrix: While you're logging in, I want to reiterate particularly for those of you who are IDIS pros or have been doing this for some time and are used to the CAPER process versus the eCon Planning Suite process. I know you're used to in your CAPER, reporting how many houses you built or people you served by project or activity. The difference in the eCon Planning Suite and the CAPER is it's pulling your accomplishment data based on the goal that you selected, not that project or activity. If you remember the CRO5 screen, that goal screen in the CAPER, it's pulling all the accomplishment data based on the goals you selected. If you selected more than one goal, the data doesn't know where to land. That's when you'll have to go in and manually reconcile. If you select only one goal per project, the system knows where to assign that accomplishment data based on the goal. Kind of a different way of looking at accomplishment data than you have in the past. It is goal driven tied in the CAPER.

Chris Andrews: Great point. I am going to pull up IDIS here. We're in the UAT region of IDIS. The first thing when setting up a goal is to make sure you're adding... Oops. Let me pause here. Make sure you have your corresponding strategic plan goals. We'll start that here. Beginning to make sure you do have your... Strategic plan goals. We have all of our goals. From here, we'll begin by making an action plan. We'll copy it off this consolidated plan. Confirm the beginning year and the version to 2013. I'm going to create that. 2017. We'll use today's date. Now we have this version we just created. Now you see we have all of our goals that are here.

One of the things we're going to talk about, I'm going to highlight it right here, is when you're creating a copy of an annual action plan, you do want to make sure you remove your prior year projects. Jon and I will talk about the process of removing projects. Let me use this as a chance to also very quickly demo that. To remove a project year project, you double click the remove button. That removes it from the copied action plan, it does not remove it from all of IDIS.

Here we are in our AP35 screen. To create a new project... Click on add a project. I'm going to go back to the PowerPoint. IDIS is being off. We'll talk through here from the screen. You'll click on the add an existing project field. Then select create project and then fill out all your corresponding project details. As we're describing, this is where you can put in all of the narrative information related to your project. Jon was talking about using those narrative fields to make sure you're providing enough information. You can do that in the AP35 screen from the edit field. I can now use that description, enter your project title, estimated amount, which we were discussing. Select

your corresponding annual goals, corresponding priority needs, estimate the number and types of families that will benefit. Fill out all this content within the AP35 screen. Most importantly, connecting it with your goal outcome indicators.

If you're adding a project within from the project functionality within IDIS and not creating it within the eCon Planning Suite within the AP35 screen, you'll need to go back through and add that project here and make sure all of that content gets filled out to create that linkage to the CAPER as Beth was describing. As you create those new projects, they are added within IDIS, within the AP35 screen. Those projects are also saved in IDIS. You go to create an activity, you can search for, identify, find that project and link your activities and associate your activities to those projects that are entered in your AP35 screen. The takeaway there is when you create a project in the AP35 screen, it automatically creates the project in the projects tab.

With that Jon, we'll pause and turn it over to you to talk about setup for state grantees.

Jon Kunz: Thanks Chris. Let's talk about some specific things we need to deal with for states. Activity level detail is not required in the state CBGD grant annual action plan. Projects should align with the state's method of distribution, however. Once the state has made awards to units of local governments in accordance of the method of distribution, you'll then report those awards by setting up the activities in IDIS. The activities come later after these projects are setup.

To ensure that the eCon Planning Suite can pull the correct CAPER data, the activities must be associated with the appropriate project in the AP35 screen. Specifically, states are encouraged to setup projects during the action plan development, this will create the structure to ensure that the data aligns with the goals. That accurate CAPER can then be generated in IDIS. However, if projects are not setup in the AP35 screen during the annual action plan development, then states will turn to the second method Chris identified earlier. Creating projects in the project sub menu in IDIS.

Beth Hendrix: For states, it really doesn't matter to us whether you put the projects in at the time you're submitting your action plan because you do that method of distribution process and enter that screen as well. Or if you set them up in IDIS first and then pull them into your action plan later. What's really important regardless of which way you go is that you make sure that those projects are in your action plan prior to creating a CAPER, so that your accomplishment data can align correctly in the CAPER at the end of the year.

Jon Kunz: Thanks Beth. Good input there. Now we're going to turn to the second method of entering projects in IDIS. In addition to the state grantees that did not use the AP35 screen to enter projects, this method also applies to any

grantee that amended its plan during the program year but did not enter the projects into the eCon Planning Suite on the AP35 screen. To do so, the grantee will add the project directly using the add projects link on the left side of the planned project/activities screen. This is again within the traditional IDIS area, not going into the action plan itself. Before the end of the program year, the action plan must be amended to add these projects entered in a more direct fashion into the AP35 screen.

From the AP35 screen, if no projects have been added yet such as what we're showing here, you want to click on the add existing project at the bottom of the screen. If the projects already exist, some of them setup, then you will click on add a project that is below the list of existing projects. Then in this first screen, the number one example, you'll come to this search project screen. You want to enter the appropriate search criteria or click on the search button to display a list of all the projects within your jurisdiction. Once that is done you'll come to screen number two and locate the project. Select add to your annual action plan. Click add link on the action column to the right hand side.

Come to the next screen, number three. On this edit project screen you'll complete all the information and the expected resources, annual goals supported, goal outcome indicators for the project, and so forth. Then click on save. The project will be added to the project table in AP35. Once you do that, you have it into the AP35 screen and you will have it as part of your action plan. Chris, did we want to do a poll now?

Chris Andrews: Sure. Pull up poll number three.

Jon Kunz: I'll launch it. Everybody can see on your screen. When setting up your action plan, you expect to copy it to the previous year's action plan or create a new one from scratch? If you're not sure you can click on the not sure. Here we see some results. About 68% of you wants to copy the previous year's action plan and 20% want to create a new one from scratch. 12% of you are not sure what you're going to do.

Chris Andrews: Just a couple of clarifying questions I'd like to address... In terms of confirming when you would setup a project in the project tab in IDIS versus in the AP35 screen. Generally, we recommend setting up your projects in the AP35 screen because this prevents you from in the future, having to open up that action plan or create an amendment to that action plan and link projects that were already created just from the projects tab, so that they're tied to and connected to the action plan. However, as Beth noted for state grantees, the focus is on the method of distribution at the time of action plan development and you may not be certain on what your projects are for state grantees and you may not be setting up within the AP35 screen.

There is another question asking if as a result projects were setup twice. No, you're never setting up a project twice. The important step is always making sure you're linking your project to the action plan and that is done through the AP35. You want to make sure that you create that connection and tie that together. You're never required to and never should create the same project in two separate places in the AP35 and the projects tab, when you set up in the AP35 screen it will automatically copy forward into the projects tab in IDIS.

We talked this through a little bit, about removing prior year projects. We want to highlight a few points. If you are copying your action plan. For the 70% or so of you, it will automatically copy your prior year projects into the new plan. We see we created a 2017 action plan and it copied it forward. That program year is still 2016. You can't update that year to become 2017 or your current year. Generally, you should be removing those prior year projects and creating new projects for the upcoming program year. You do that by clicking remove. You'll be prompted with a screen confirming you would like to remove it. You are only deleting it from IDIS you're just removing it from that action plan.

Jon, we'll turn it over to you to talk through multi-year funded projects.

Jon Kunz:

Okay great. Thanks Chris. Let's talk about a special case that we sometimes receive questions about. Setting up projects for a grantee, maybe setting aside resources from two or more action plans. Plan years... to come up with a sufficient budget to fund a large project. I think we've got a question on this that I saw came in a little earlier. Hopefully this will cover that.

For CDBG, an example might be a large public facility or public approved project. This relates to another question that came in. This should not be confused with projects that may centrally be repeated in consecutive years, such as funding a public service activity. This isn't that uncommon where you might fund Meals on Wheels on a few consecutive years. These are not considered multi-year funded activities/projects and should typically be setup for each action plan year in which they are funded.

Let's look at an example. We're going to look at an example that's a planned public facility project, that's going to be funded by three separate years. This is a planned budget of \$320,000 and they're taking three years to set aside the funds to go forth with this project that won't begin construction until that third year. We can go to the next slide. In this case, the first year, the 2015 action plan and the grantee will setup a project. Project number 7 for 2015 is the Oak Park and Rec Center Improvements. Year one, there's \$150,000 set aside from year one action plan. At that point, the grantee sets the project budget at \$150,000.

Then along comes year two, 2016. The grantee is going to add another \$120,000 from year two and that will bring the funding up to \$270,000. The

grantee would... in this case the grantee is not setting up a brand new project, but adding this 2015 project into its 2016 AP35 screen. It is increasing the budget from \$150,000 to \$270,000 by overwriting the amount that's there. That will transfer to the single project that's set up. We move into the third year, another \$50,000 added this year. The grantee does not setup a brand new project, but adds the project in the AP35 screen as a 2015 project into the 2017 AP35 screen. Since there's additional funds, it increases the budget from \$270,000 to the full amount of \$320,000.

This time, the activity is ready to go. Ready to start construction. The grantee adds an activity. The add a single one under 2015, in this case its Activity #789. Puts in the address and so forth. It's now ready to go to activity funding and actual fund the activity. We go into the activity funding screen. It would add the 2015 grant amount. With grant based accounting, we're past that type of funding. We're really into grant specific funding. They would add \$150,000 from the 2015 grant. Go ahead and in the same screen, enter a new year for 2016 grants, adding \$120,000 from this grant. Then it could go ahead and add the third year funding \$50,000, from the 2017 grant. That equals \$320,000 shown under a single activity related to the same 2015 project but that 2015 project is linked to three separate action plans and you're able to track the funds by delineating the amount of funds committed from each year. So, we can use a single project that will include funding from all years and they will create the Action Plan for 2015 in the AP35 screen. Reference that a project is funded over multiple years in the project description. Each year increase the amount of funding in the project as you add it to your new action plan. Note, ESG projects are funded differently, within a single year.

Beth Hendrix: Jon, if I could just add in. For those of you looking at CDBG projects, it's important that we differentiate what's a multi-year funded project versus what is an annual project. Generally, multi-year funded projects tend to be infrastructure, public facility type of projects. A multi-year funded project is not a public service project that you would be entering into a new grant agreement each year with that service provider. That's a separate activity and separate project each year.

Jon Kunz: Thanks Beth. That's an important point to note. Along with this multi-year funded project, talk a little about the activities. In the example we showed... You may setup a single activity in IDIS or a single project. One project, one activity that's going to cover all three years. You typically don't want to setup the activity until you're ready to commence. You don't want to get flagged for going 12 months without a draw. We want to avoid that by setting up the activity when you're ready to begin. You would add funding for each grant year as required in activity funding. That's going to help delineate where the funds are actually coming from.

For CDBG, some grantees like to setup separate activities for each year to really break it down a little bit more. That's okay but one thing to really keep

in mind, really two things. You'll continue to associate, in this example we did, with that same 2015 project. You have that year one project, continue to setup activities that delineate each year with that project. In order to avoid double counting, as you setup the CDBG activity, you're able to click on the radio button or answer yes to the question; will accomplishments be reported at another activity? You would indicate yes and then identify the other activities within IDIS that you'll provide the accomplishment reporting and other details. We're avoiding double counting accomplishments by using this method.

It's a lot to take in. Another look at that. You'll be able to download these slides after the presentation. We'll send them out and provide a link for these. You can see this example shows the first point I was talking about where you're doing a single activity, but you could just as well have three separate activities all linked to the same project. You would be able to delineate just like you are here, that activity funding for 2015 is \$150,000 or 2016 is \$120,000 and for 2017 it's \$50,000.

Chris Andrews: Great. Thanks Jon. A number of questions coming in on multi-year funded projects. We'll get to those in a minute. I want to talk about prior year funds being reallocated. What is the process within the eCon Planning Suite for re-allocating prior year funds? If you have funds that you are reallocating, you would include those funds on the AP15 expected resources screen under prior year resources, for the current or new year action plan. You'd be using those prior year funds as part of your current or new year action plan.

To break that down further, when you are reallocating those funds, you would only be amending projects that are required by 24CFR 91505 and your citizen participation plan. You only need to amend a project if it meets the criteria either in participation plan or 24CFR part 91505.

Beth Hendrix: If you think about it this way, you're going out for public comment to tell your community, here's what I'm going to fund this year and here's what I'm going to do to reach the goals we set in our consolidated plan. If you're using reallocated funds from prior years, this is the time to tell folks. Here are the projects I'm going to undertake this year. Within IDIS, the color of the money matters. But within the eCon Planning Suite, you're telling the public and your citizens, here's my projects I'm going to do over the next program year.

Chris Andrews: Exactly. The community, counsel, stakeholders, they're just excited to learn what you will be doing in the program year. If you are reallocating funds, those new projects would be part of your current year action plan. You would not be needing to make those revisions in a prior year action plan. We don't recommend reallocating funds among projects in prior year action plans and opening those back up. We strongly encourage you to operate just in the current year.

I know we've covered a lot. It looks like we've had a number of questions that have come in. I think Jon, do you have some questions ready to go?

Jon Kunz: I do, Chris. We have one question. Do we move all prior year projects even if the activities in those projects are still active? I believe in this case they're referring to when you copy your annual action plan, which also copies the prior year project. These must be deleted from the new action plan, but this does not impact the actual projects from the original action plan being copied, which will still exist. It will not affect the actives associated with the projects being copied. The answer is yes.

Chris here... Let's look at this one. When setting up the action plan activities, how do you link them to a specific Con Plan goal? First, let's make sure we're clear on the use of the word activities. When setting up an action plan, we have projects not activities. Activities will be setup later. In either case, both the projects and associated activities are linked to the Con Plan goal of going up the tree, as Chris showed earlier so projects are linked to the annual action plan goal which in turn is linked to the Con Plan goal. Let's look at this one, Chris. Maybe you want to take a crack at this one. Would a multi-year funded project result in double counting of the accomplishments?

Chris Andrews: Great question. A multi-year funded project should not result in double counting of the accomplishments. You would still be entering your accomplishment data at the activity level only once and Jon talked about either having a single activity or for a CBGD grantee, potentially having multiple activities, but indicating that the accomplishments are only being reported in one activity. In your CAPER, in that example, in 2015 and 2016, you won't have any accomplishments to show in those CAPERs. There won't be any outcomes to highlight but you can use the narrative of the CAPER to indicate the public improvement, facility, or the larger multi-year funded project that you're currently engaging in, just to indicate that there will be an accomplishment. This money will be realized in a completed project in one, two, or three years from now. Accomplishment data should only be reported once within an activity.

Jon Kunz: Let's do another one here. When an annual action plan is copied, is the copied project a new, unique project from the copied year or is it the same project that was created in the prior year?

Chris Andrews: Great question. I think this is a question a lot of people have had today. When you copy that annual action plan, it is bringing forward a copy of that original project from the prior year. It is not a new project that you can update the funding for. For example, if you fund a certain public service project year after year, when you copy that project forward, if you change the project budget when it copies forward, it will change it for that 2016 project, which your activities are associated with. That's why it is so important to remove those prior year projects as they come up and create new projects year after

year. Just as you would in IDIS prior to the eCon Planning Suite, you're still creating a new project every year for those activities.

Jon Kunz: Okay. We have plenty more but let's look at this one. As an entitlement jurisdiction, if we want to setup a multi-year project, how do we do this in the AP35 screen?

Chris Andrews: Great question. You would start by setting up that project. In this case, the 2015 project number 7. In 2015, you would just set it up with that original grant amount. The \$150,000. I would recommend using the narrative, the planned activity field to describe that this will be a multi-year funded project and that funding from 2016 and 2017 will be included in the project. The project will be completed in two years, three years, one year down the road. In 2016, you would need to create a new project every year. It is the opposite for a multi-year funded project, such as the public facility or public improvement, or infrastructure project that Jon was describing. You would search for and add that as an existing project on the AP35 screen. Jon, anything to add on multi-year funded projects?

Jon Kunz: No. I think you covered that well.

Chris Andrews: I think one thing that has come in, is the number of state grantees have asked on the process for adding a project during the program year and what is that process and why would a grantee need to do that? This ties back to the very beginning. We were talking about you CAPER and adding up all the data from your consolidated plan through your action plan, through your CAPER. Bringing in those projects, linking your projects in the AP35 screen. That ties all of the data in IDIS to the eCon Planning Suite, to the Con Plan, to the action plan, and to the CAPER. To ensure that reporting is streamlined and data is carrying forward automatically into your CAPER, you will want to amend your CAPER – excuse me, you action plan during the program year and link those existing projects to your action plan. Make sure that you associate them with a goal. Make sure that you add the appropriate and corresponding goal outcome indicator, so all of that data will carry forward.

We have just about a minute left. I want to share some resources we have. Beth, as I'm going forward to that screen, if you have anything else you would like to share?

Beth Hendrix: I think the take away here is really your AP35 screen is the bridge between IDIS and your activity and project information in IDIS. And the activity and accomplishment data that appears in your CAPER. If your AP35 screen is not setup correctly, your data doesn't flow between IDIS and your CAPER correctly... It will cause you more work and reconciliation at CAPER time, something none of us want. It's important you take a look and get your AP35 screen setup correctly. Particularly prior to generating a CAPER.

Chris Andrews: Great. Thank you, Beth. Highlighted on the screen we have a number of resources. We will send out links to all of these resources and a notice when the PowerPoint deck is posted on the HUD exchange. Thank you all for joining us all today. If you do have questions that we weren't able to get through, please submit them to the HUD Ask a Question Desk. Thank you all so much and have a great rest of your day.