



Best Practices for Project Set-Up in the eCon Planning Suite Webinar

May 23, 2017



Introductions

- Jon Kunz, The Cloudburst Group
- Chris Andrews, The Cloudburst Group
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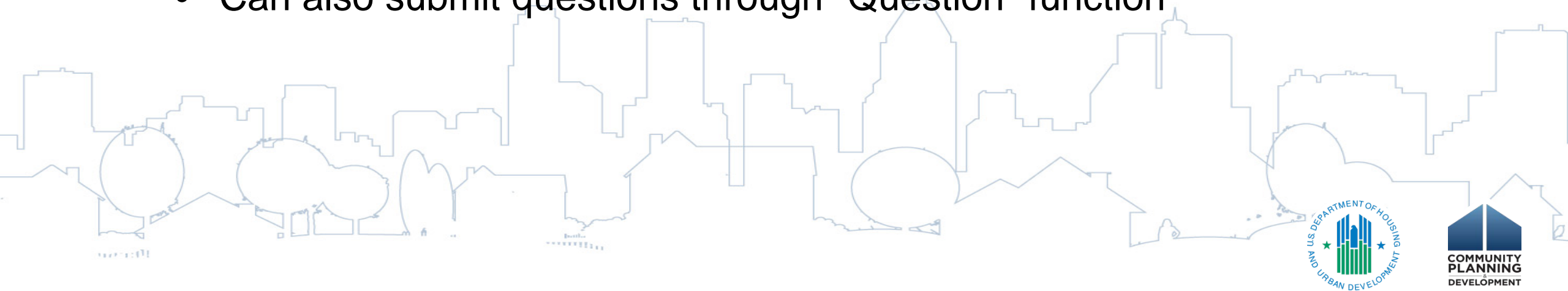
Housekeeping

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



Session Objectives

During this webinar, you will learn how to:

- Create new or add existing IDIS Projects to the AP-35 Projects screen of the Annual Action Plan
 - *Entitlement Communities*
 - *State Communities*
- Properly set-up projects in the Annual Action Plan and align IDIS Activity accomplishment data with goals in Strategic and Annual Action Plan



eCon Planning Suite Materials

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



Project and Activity IDIS Definitions

Projects	Activities
<ul style="list-style-type: none">• High level descriptions of what the grantee intends to accomplish over the next year	<ul style="list-style-type: none">• Provide details about work being carried out to meet goals
<ul style="list-style-type: none">• Include name, description, estimated budget, and expected accomplishments	<ul style="list-style-type: none">• Used to disburse funds and report specific accomplishments
<ul style="list-style-type: none">• Organize related activities in IDIS	<ul style="list-style-type: none">• Set up under a project in an Action Plan

Project – Activity Structure in IDIS



Project – Activity Structure in IDIS

2017 Project #3
Liberty Rec
Center Expansion

Activity #784
Liberty Rec
Center Expansion

2017 Project #4
Senior Center
Improvements

Activity #789
Senior Center
Improvements

2017 Project #5
Lilac Park ADA

Activity #791
Lilac Park ADA

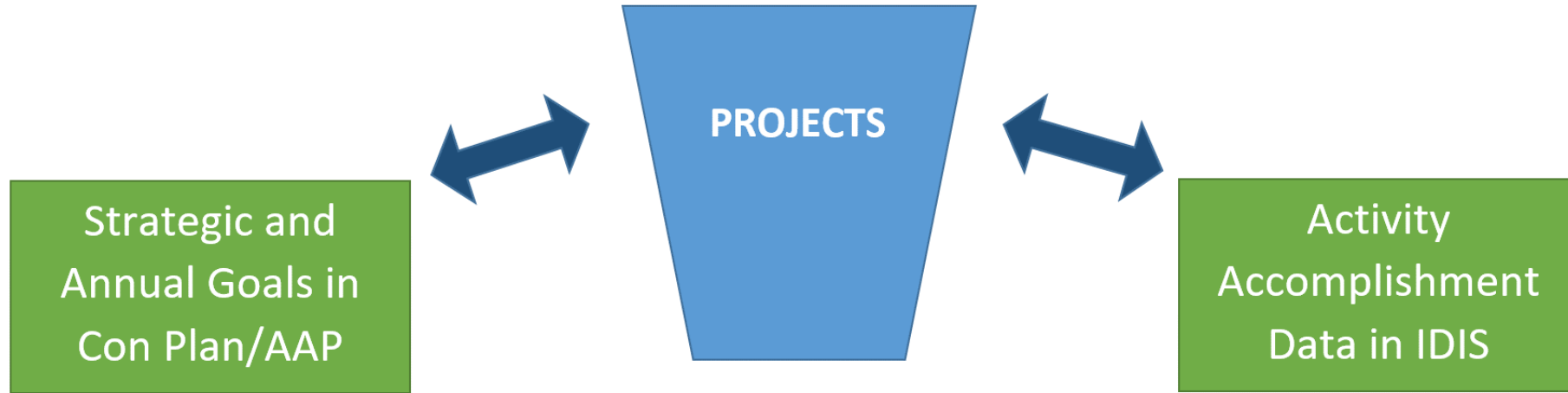


Defining a Project in IDIS

- Grantee discretion on how broadly to define CDBG/HOME projects
- May define projects broadly and show details at activity level
- ESG and HOPWA specific requirements
 - ESG: 1 Project per fiscal year
 - HOPWA: 1 Project for grantee and 1 per sponsor

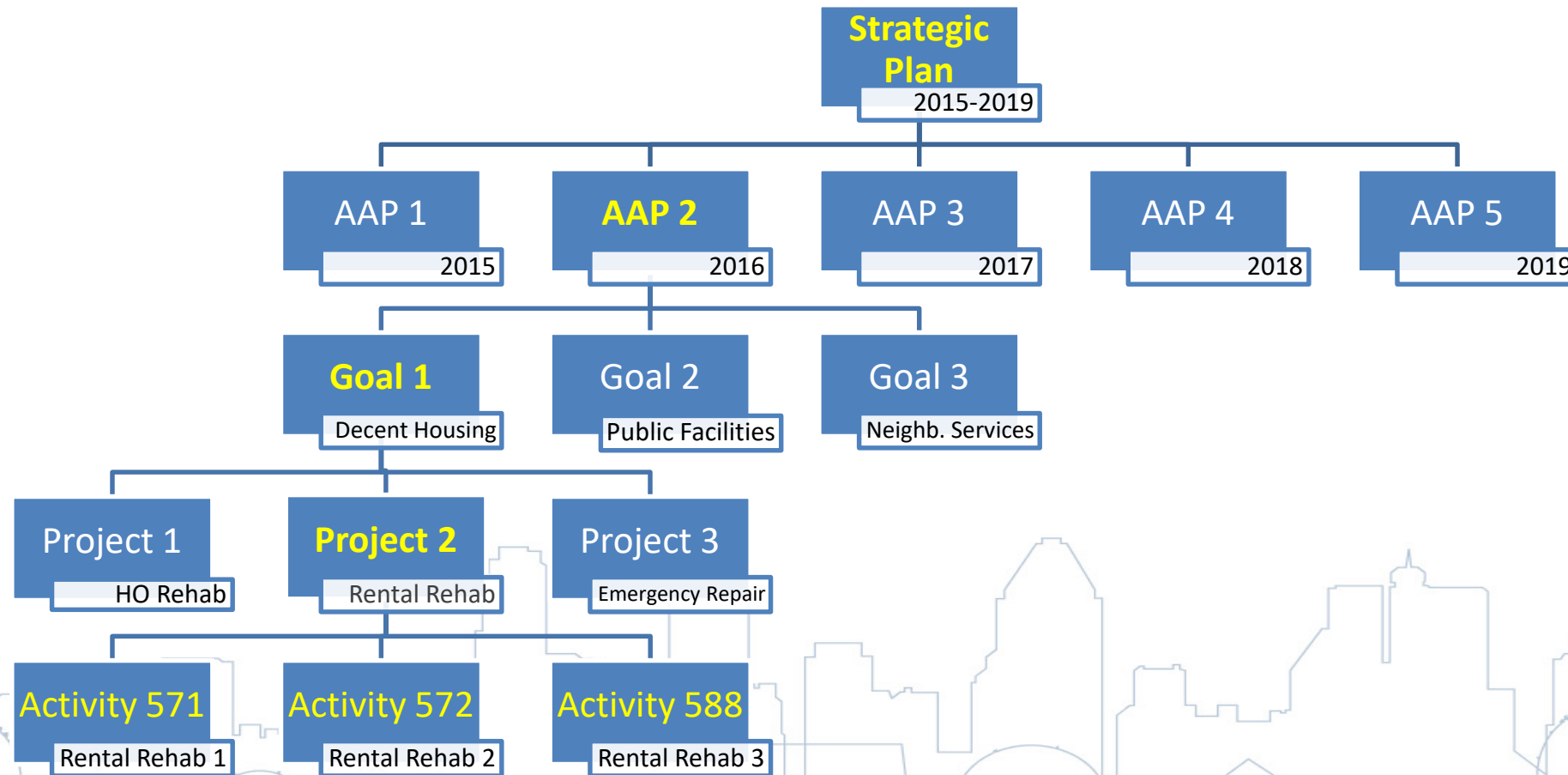


The Role of Projects in IDIS



- Describe eligible programs/activities that take place during PY to address needs/objectives
- Bridge activity accomplishments in IDIS with associated goals
- Ensure data alignment among AAP, IDIS and CAPER

Projects Link Activities to Goals



Aligning GOIs

**SP Goal:
Rehabilitate
Rental Housing
Stock**

**GOI: 350
rental units
rehabbed**

**AP Goal:
Rehabilitate
Rental housing
stock**

**GOI: 70 rental
units
rehabbed**

**Project: Rental
Rehab**

**GOI: 70 rental
units
rehabbed**



Aligning GOIs



Aligning GOIs - CAPER

Business Development	Indicator	Expected	Actual	Unit of Measure	Percent complete
	Businesses assisted	40	45	Businesses Assisted	112.50 %
Housing Development	Indicator	Expected	Actual	Unit of Measure	Percent complete
	Rental units constructed	85	57	Household Housing Unit	67.06 %
	Rental units rehabilitated	70	67	Household Housing Unit	95.71 %
	Homeowner Housing Added	5	0	Household Housing Unit	0.00 %
	Homeowner Housing Rehabilitated	5	0	Household Housing Unit	0.00 %
	Buildings Demolished	5	5	Buildings	100.00 %



Project Set-Up

- Create new projects for each program year (exceptions apply)
- IDIS Activity's program year is provided by associated project

Activity Name	Program Year/ Project ID	IDIS Activity ID	Grantee/PJ Activity ID	Status	Activity Owner	Action
28-0410138 Lead Based Paint - 306 E. Hermitage	2015/1	8444	150000000138	Open	SAN ANTONIO, TX	Edit View
25-0250211 Homebuyer Incentive Program - 423 Surrells	2016/23	8443	150000000211	Open	SAN ANTONIO, TX	Edit View
25-0250211 Homebuyer Incentive Program - 5819 Jerome Rd.	2016/23	8442	150000000211	Open	SAN ANTONIO, TX	Edit View

Project Set-Up

AP-35 Projects screen
of the AAP

Projects section in
IDIS

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User: C59819
Role: Grantee
Organization: SAN ANTONIO

- Switch Profile
- Manage Profile
- Logout

Plans/Projects/Activities

You have 11 CDBG and 6 HOME activities that have been flagged. Click on the number to view details.

Annual Action Plan (2017-sample.1)

AP-35 Projects - 91.220(d)

Save | Save and Return | Cancel

Activity

- Add
- Search
- Search HOME/HTF
- Review
- CDBG Cancellation

Project

- Add
- Search
- Copy

Consolidated Plans

- Add
- Copy
- Search

Annual Action Plans

- Add
- Copy
- Search

Consolidated Annual Performance Evaluation Report

- Add

***Indicates Required Field**

***Introduction:**

Projects

No Projects have been added to this Annual Action Plan.

Add an Existing Project

Describe the reasons for allocation priorities and any obstacles to addressing underserved needs:

Community Development Systems
Integrated Disbursement & Information System (IDIS)

User: C59819
Role: Grantee
Organization: SAN ANTONIO

- Switch Profile
- Manage Profile
- Logout

Plans/Projects/Activities

You have 11 CDBG and 6 HOME activities that have been flagged. Click on the number to view details.

Project

Add Project

Save | Reset

***Indicates Required Field**

Grantee/PJ Name:
SAN ANTONIO

Program Year

***Program Year:**
▼

☐ Add New Program Year:
(ex: yyyy)

IDIS Project ID:

***Project Title:**

Grantee/PJ Project ID:

Description:

Activity

- Add
- Search
- Search HOME/HTF
- Review
- CDBG Cancellation

Project

- Add
- Search
- Copy

Consolidated Plans

- Add
- Copy
- Search

Annual Action Plans

- Add
- Copy
- Search

Consolidated Annual Performance Evaluation Report

- Add
- Search

Creating New Projects in the Action Plan

Entitlement grantees should create Projects in the AP-35 Projects screen of Action Plan

State grantees are also encouraged to use AP-35 screen to create projects

AP-35 Projects - 91.220(d)

Save | Save and Return | Cancel

* Indicates Required Field

*Introduction:

B *I* U | | | HTML

Projects

No Projects have been added to this Annual Action Plan.

[Add an Existing Project](#)

Project Details

Estimated Amount (Including Program Income)	
Section 108 Loan amount	\$ 0.00
CDBG	\$ 275000
HOME	\$ 0.00
ESG	\$ 0.00
HOPWA	\$ 0.00
CDBG-R	\$ 0.00
HPRP	\$ 0.00
TCAP	\$ 0.00
HESG	\$ 0.00
HOPWA-C	\$ 0.00
HTF	\$ 0.00
Total	275,000.00

Expected Resources	
CDBG	\$ 275000
HOME	\$
ESG	\$
Other - County Housing Trust Program	\$

The amounts in these two sections must be the same

Project Details

Annual Goals Supported

Eliminate Slum and Blight	<input type="checkbox"/>
Further Fair Housing	<input type="checkbox"/>
Improve Public Facilities	<input checked="" type="checkbox"/>
Improve Public Infrastructure	<input type="checkbox"/>
Improve Quality of Life	<input type="checkbox"/>
Provide Affordable Housing for Homeowners	<input type="checkbox"/>
Provide Affordable Housing for Renters	<input type="checkbox"/>
Serve Homeless Families and Reduce Homelessness	<input type="checkbox"/>
Spur Economic Development	<input type="checkbox"/>

Priority Needs Addressed

Increasing Affordable Housing	<input type="checkbox"/>
Improving Public Facilities and Infrastructure	<input checked="" type="checkbox"/>
Reducing Homelessness	<input type="checkbox"/>

Goal Outcome Indicators

No.	Goal Outcome Indicator	Quantity	Unit of Measures
1	Public Facility or Infrastructure Activities other than Low/Moderate Income Housing Benefit	500	Persons Assisted
2	Public Facility or Infrastructure Activities for Low/Moderate Income Housing Benefit		Households Assisted
3	Public service activities other than Low/Moderate Income Housing Benefit		Persons Assisted
4	Public service activities for Low/Moderate Income Housing Benefit		Households Assisted
5	Facade treatment/business building rehabilitation		Business

Streamline CAPER data by selecting only one annual goal

Use the same GOIs that were used for the associated goal



New Projects Automatically Added to IDIS

Note: The “Sort” number is not the IDIS Project ID.

AP-35 Projects - 91.220(d)

Save | Save and Return | Cancel

* Indicates Required Field

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Projects

Sort*	Project Title	Action
1	Public Facility Improvements	View Edit Remove

Add a Project | View Summary

As soon as the Project is created and added to the AP-35 screen, that Projects is automatically added in IDIS.

- Logout

Activity

- Add
- Search
- Search HOME/HTF
- Review
- CDBG Cancellation

Project

- Add
- **Search**
- Copy

Consolidated Plans

- Add
- Copy
- Search

Annual Action Plans

- Add
- Copy
- Search

Project

Search Projects

Search Criteria

Program Year: 2017 ▼

Program: ▼

IDIS Project ID:

Grantee/PJ Project ID:

Search | Reset

Results Page 1 of 1

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title
2017	1		Public Facility Improvements



Project Set-up for State CDBG Grantees

- Projects
 - Are not required to include activity-level detail
 - Should align with state's method of distribution
- Activities
 - Set up after awards made to UGLGs per method of distribution
 - Associated with the appropriate project to ensure eCon Planning Suite pulls correct CAPER data



Project Set-up for State CDBG Grantees

- Setting up Projects during AAP development (AP-35) creates structure for a successful CAPER
- If projects not set up in AP-35 during AAP development, create projects in the Projects sub-menu in IDIS
 - To align activity accomplishments with goals in the CAPER, States must create an amendment before the end of program year to add projects in IDIS to the AP-35 screen



Project Set-up Directly in IDIS

Who?

- State grantees that did not use AP-35
- Grantees with amended plans that are not yet entered in the eCon Planning Suite

How?

- First create Projects in IDIS
- Before the end of the Program Year, amend AAP to add IDIS Projects

Project - Add - Search - Search HOME/HTF - Review - CDBG Cancellation	Project Add Project Save Reset
Activity - Add - Search - Search HOME/HTF - Review - CDBG Cancellation	*Indicates Required Field Grantee/PJ Name: ILLINOIS
Project - Add - Search - Copy	Program Year *Program Year: <input type="text"/> <input type="checkbox"/> Add New Program Year: (ex: yyyy)
Consolidated Plans - Add - Copy - Search	IDIS Project ID:
Annual Action Plans - Add - Copy - Search	*Project Title: <input type="text"/>
Consolidated Annual Performance Evaluation Report - Add - Search	Grantee/PJ Project ID: <input type="text"/>
Utilities - Home	Description: <input type="text"/>

Adding Existing Projects to the Action Plan

- Projects that have already been set-up in IDIS should be added to AP-35 Projects table instead of creating new projects

AP-35 Projects - 91.220(d)

Save | Save and Return | Cancel

* Indicates Required Field

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Projects

No Projects have been added to this Annual Action Plan.

[Add an Existing Project](#)



Adding Existing Projects to the Action Plan

1.

Project

Search Projects

Search Criteria

Program Year: All **Program:** **Project Title:**

IDIS Project ID: **Grantee/PJ Project ID:**

[Search](#) | [Reset](#) | [Return to AP-35 Projects](#) | [Create a New Project](#)

2.

Results Page 1 of 6

Program Year	IDIS Project ID	Grantee/PJ Project ID	Project Title	Project Owner	Status	Action
2017	1		2017 Infrastructure	DECATUR, IL	Open	Add
2017	2		2017 Administration	DECATUR, IL	Open	Add
2017	3		2017 CHDO Set-Aside	DECATUR, IL	Open	Add
2017	4		2017 Residential Rehabilitation Program	DECATUR, IL	Open	Add
2017	5		2017 Project Delivery	DECATUR, IL	Open	Add
2017	6		Emergency Program	DECATUR, IL	Open	Add
2017	7		2017 Section 108 Loan Repayment	DECATUR, IL	Open	Add
2017	8		2017 Code Enforcement	DECATUR, IL	Open	Add
2017	9		Public Service-Adult Education for Training and Employment	DECATUR, IL	Open	Add

3.

AP-35 Projects - 91.220(d)

- Project has been saved.
- Annual Action Plan Project Data has been saved

[Save](#) | [Save and Return](#) | [Cancel](#)

* Indicates Required Field

*Introduction:

B *I* U |

Projects

Sort*	Project Title	Action
1	2017 Infrastructure	View Edit Remove
Add a Project View Summary		



Removing Prior Year Projects

- If you Copy AAP, it automatically copies prior year projects into the new plan
- ★ Must **remove prior year projects** and create new projects for upcoming Program Year ★
 - Double click “Remove”
 - Click “Save”

Edit Project	
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	
*Indicates Required Field	
Grantee/PJ Name: CHESTER COUNTY	
Program Year: 2016	
IDIS Project ID: 1	
Status: Open	
*Project Title: Housing and Community Support Services	



Removing Prior Year Projects

Projects		
Sort*	Project Title	Action
1	Housing and Community Support Services	View Edit Remove
2	Homeless Shelter	View Edit Remove
3	Home Construction and Community Revitalization	View Edit Remove
4	Planning and Administration	View Edit Remove
5	HESG15 Chester County	View Edit Remove
Add a Project View Summary		



Error messages may occur for one of two reasons, either there is an apostrophe (') in the project title or the project has Priority Needs selected

AP-35 Projects - 91.220(d)

- Failed to remove project from Action Plan: Row was updated or deleted by another transaction (or unsaved-value mapping was incorrect): [gov.hud.cpd.idis.business.domain.AapProjGeoArea#900000000250975]; nested exception is org.hibernate.StaleObjectStateException: Row was updated or deleted by another transaction (or unsaved-value mapping was incorrect): [gov.hud.cpd.idis.business.domain.AapProjGeoArea#900000000250975]



Removing Prior Year Projects

- Once all projects have been removed, click “Add an Existing Project” link at bottom of the Projects table to create new or add existing projects

Projects
No Projects have been added to this Annual Action Plan.
Add an Existing Project



Multi-Year Funded Project

- A single, larger project that is planned to be funded from two or more years of funding (Action Plans)
 - Examples: large Public Facility or Public Improvement projects
- Projects started and completed annually are not considered multi-year funded projects
 - Example: Food Bank, Meals on Wheels and other Public Services



Multi-Year Funded Projects Best Practices

- Use a single project that will include funding from all years
- Create project in Year 1 AP-35 screen
- In Subsequent years:
 - Add same existing Year 1 project in AP-35 screen (Do not create new project)
 - Reference that project is funded from multiple years in project description
 - Increase funds by amount of that year's funding
- ESG Projects must be funded with a single year

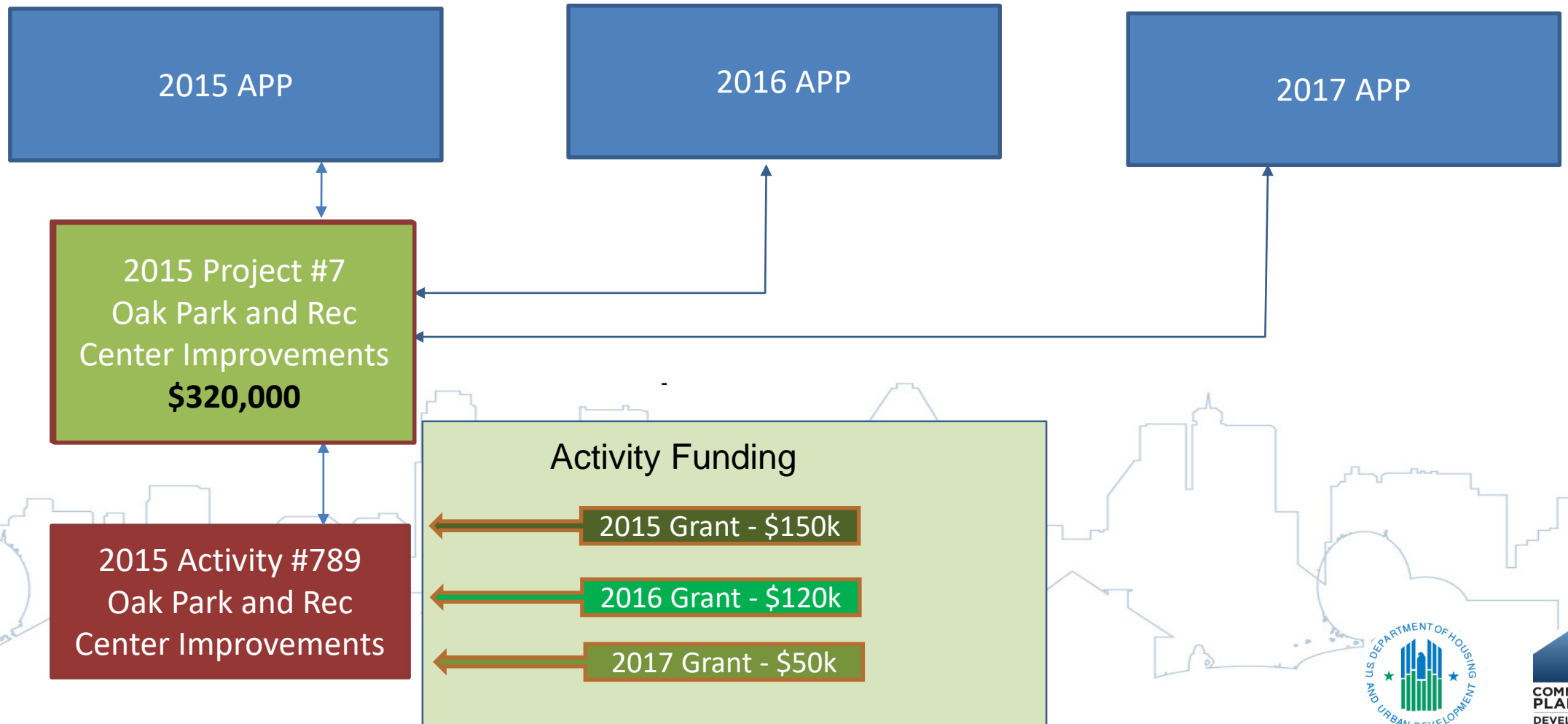


Multi-Year Funded Projects Best Practices

- May set up single activity in IDIS for single project
 - Set up when activity ready to commence
 - Add funding for each grant year as required in Activity Funding
- For CDBG, may set up a separate activity each year
 - Associate with same year 1 Project
 - Click on Yes next to “Will accomplishments be reported at another activity?” on CDBG Set Up Detail Screen



Multi-Year Funded Project Example



Prior Year Funds Reallocation

- If reallocating prior year funds under new Action Plan:
 - Include reallocated funds in AP-15 Expected Resources screen under “Prior Year Resources”
 - Use prior year funds as part of expected resources to fund projects under new year’s Action Plan



Reallocating Funds Among Prior Year Projects

- Only amend projects that are required per 24 CFR Part 91.505 and Citizen Participation Plan
- Reallocate funds to new projects as part of new Action Plan process
- It is not recommended to reallocate funds among projects in prior year Action Plans
- If shifting funds from one project to another, address in narrative and not in projects included in the AP-35 screen



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