eCon Planning Suite
e-Tutorial: Managing Development of a Consortia Consolidated Plan

Hello and welcome to the eCon Planning Suite online tutorials. This is one in a series of video tutorials demonstrating the functionality and components of the eCon Planning Suite.

This tutorial will demonstrate how to create a Consolidated Plan for a HOME Consortium. The intended audience includes Lead Entities as well as other consortium members, especially consortia participants that receive their own allocations of CPD formula grant funds. At the end of this tutorial, you will be able to understand how grantees participating in a consortia will work together to submit plans via IDIS Online

Before we get to the demonstration, let's review the different types of agencies that participate in the consortia and how that will affect the planning process. First, there is the LEAD ENTITY. Under the HOME program, the lead entity is the agency that assumes overall responsibility for compliance with the HOME program requirements. In terms of using the Consolidated Plan template, the Lead Entity has the responsibility of creating the template and submitting the plan to HUD.

All other governments participating in the consortium are referred to as consortium members. Some of these members receive CDBG or ESG directly from HUD. These members are PARTICIPATING GRANTEES. Participating grantees are unique in that they will contribute to the development of the plan for the Consortium and will also complete their own plan for the grants they receive directly from HUD.

Other consortium members are those that do not receive CDBG or ESG directly from HUD. Unless the Lead Entity requests IDIS access for these members, they will not be able to input data into the template. They will need to provide the information to the Lead Entity, which will then enter the data into IDIS.

Let's review the roles of the Lead Entity and participating grantees in completing the IDIS Con Plan template. First, the Lead Entity will add the Consolidated Plan template in IDIS. IDIS will create a template for the Consortium and a separate template for each participating grantee. The Lead Entity will need to coordinate with the participating grantees in regards to how the data will be entered into the Consortium template. Participating grantees will be responsible for completing their own respective template. At the end of the planning process, once all of the templates have been completed, the Lead Agency will submit all of the templates on behalf of the Consortium via IDIS.

To access the plans sub-menu, click on Plans/Projects/Activities in the Main Menu. Along the left side of the screen, you should see the Consolidated Plan submenu. To add a new Consolidated Plan, click Add. Remember only the Lead Entity will be able to Add the Con Plan. Provide a Beginning and Ending Year, Title and Plan Version. The Programs Included section refers to the Lead Entity CPD Programs only. The next question is crucial. From the dropdown, select Consortia. Once Consortia is selected, the screen will display a second question, "If consortia, does it have participating grantees?" Answer Yes ONLY IF other consortium members receive CPD formula allocations directly from HUD, such as CDBG or ESG.

If Yes is selected, the screen will display a button labeled "Add Participating Grantee". Use the Search fields provided to find and select each participating grantee that is part of your HOME Consortium.

You will need to repeat this process for each participating grantee. When finished, the system will list all of the participating grantees selected. Indicate the CPD formula grants received by each participating grantee.

If you made a mistake and added a member that does not receive a CPD formula grant from HUD, use the Delete button to remove it from the list. Once you have entered all participating grantees, click the "Select Public Housing Agency" button at the bottom of the screen. Use the Search fields provided to find all of the public housing agencies that share jurisdiction with the HOME Consortium.

Review all of the information on the screen. Some of the information on this page cannot be changed after creating the template so it's important to get it correct the first time. If everything is correct, click <SAVE> at the bottom of the screen. The system will load the template for the Lead Entity. This template will contain screens for the HOME Consortium and also non-housing-related screens for the Lead Entity only.

When the Lead Entity template was created, IDIS also created a separate template for each participating grantee. To see these, click <Search> from the Con Plan submenu on the left. A separate template is listed for the Lead Entity and each participating grantee. If you are the Lead Entity, you can edit the Lead Entity template and view each of the other participating grantees' templates. If you are a participating grantee, you can edit your template and the Lead Entity template (except for the lead entity's non-housing screens). You will not see any of the other participating grantees' templates.

The Lead Entity version of the plan contains the housing-related screens that apply to the consortia as a whole. This includes all screens in the Process section, Needs Assessment and Market Analysis except for the Non-Housing Community Development Needs screens, and the Strategic Plan.

The participating grantee plan version contains screens related to non-housing community development and homelessness - determined by the HUD grants it receives. Participating grantees can contribute to the housing screens in the lead entity plan version.

Please refer to the additional handouts associated with this e-tutorial for a list of screens available in each template.

The housing-related default data in the lead entity's template is based on the entire HOME Consortium geography. On the other hand, the template for each grantee – whether the lead entity or a participating CDBG grantee - will include the non-housing data only for its CDBG boundaries. If you want to include the same data for the Lead Entity or another member of the HOME consortium, you can use Additional Content links found below each table.

When all members of the consortia are finished with their respective templates, the Lead Entity will update the status of the Consortia plan to "Submitted for Review" on AD-25, which will trigger the submission of ALL of the templates. The templates cannot be submitted separately.

To ensure the process goes smoothly, take the following steps early in the process.

1)   Determine roles and information flow, including who will enter data into IDIS.

2)   Make sure that each person tasked with entering data has a working IDIS ID that has rights to the Planning screens in IDIS.

3)   Develop a timeline for drafting the plan.

Thank you for watching this online tutorial on creating a Consolidated Plan for HOME Consortia. For additional tutorials and resources, please go to the OneCPD Resource Library.