



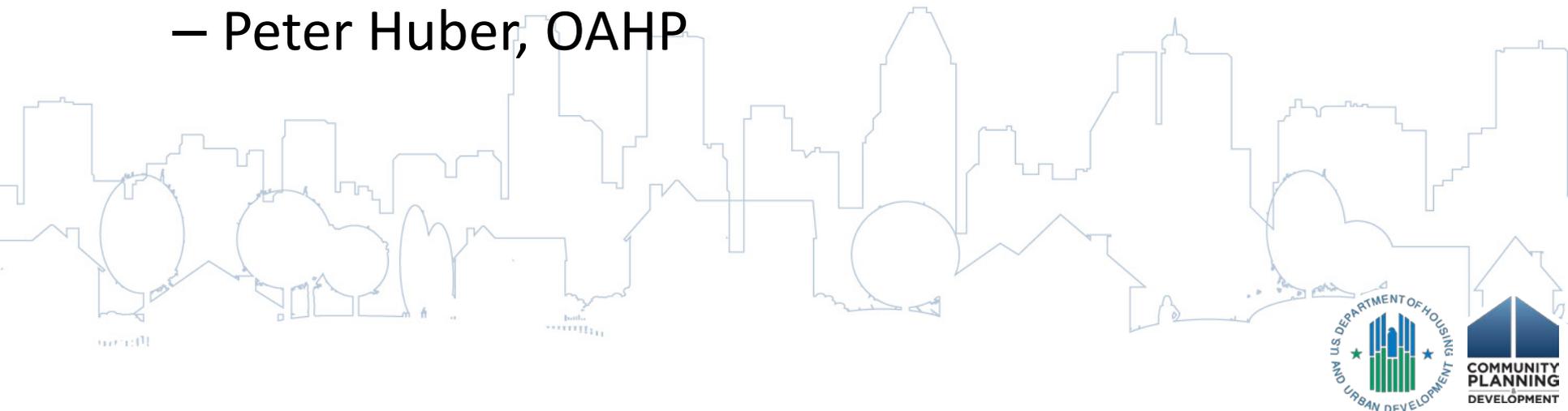
# **Consortia Grantees and the eCon Planning Suite**

**February 4, 2016**



# Webinar Instructions

- **Presenter**
  - Chris Andrews, The Cloudburst Group
- **HUD Staff**
  - Beth Hendrix, OBGA
  - Peter Huber, OAHP



# Webinar Instructions

- Webinar will last approximately 90 minutes
- Materials will be posted on the HUD Exchange
  - Slides, transcript, recording



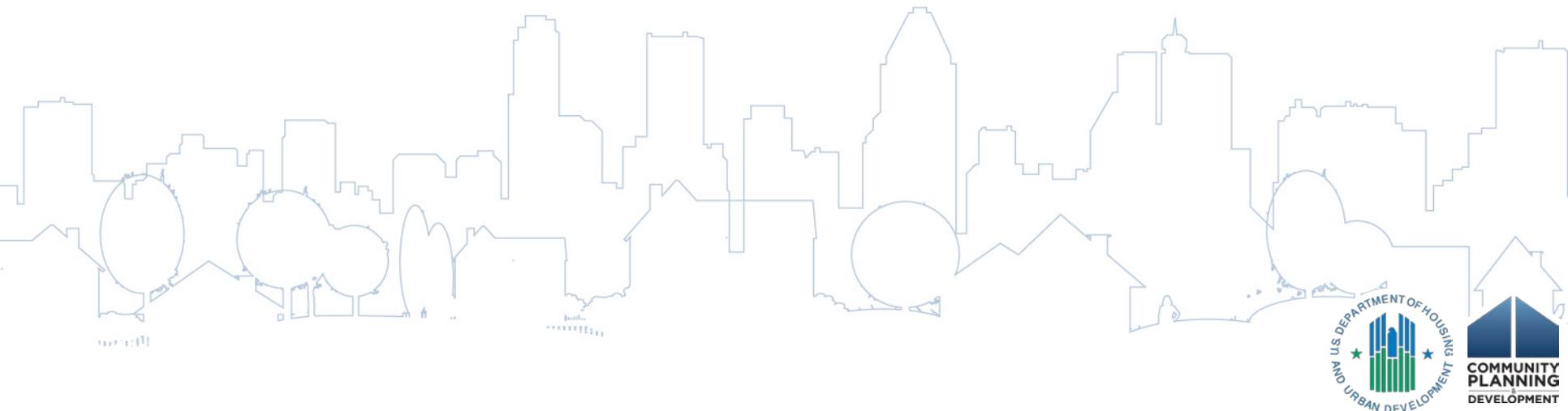
# Webinar Instructions

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  - Log off, then log in again
  - Request help through the “Questions” pane of the “Go To Webinar” toolbar



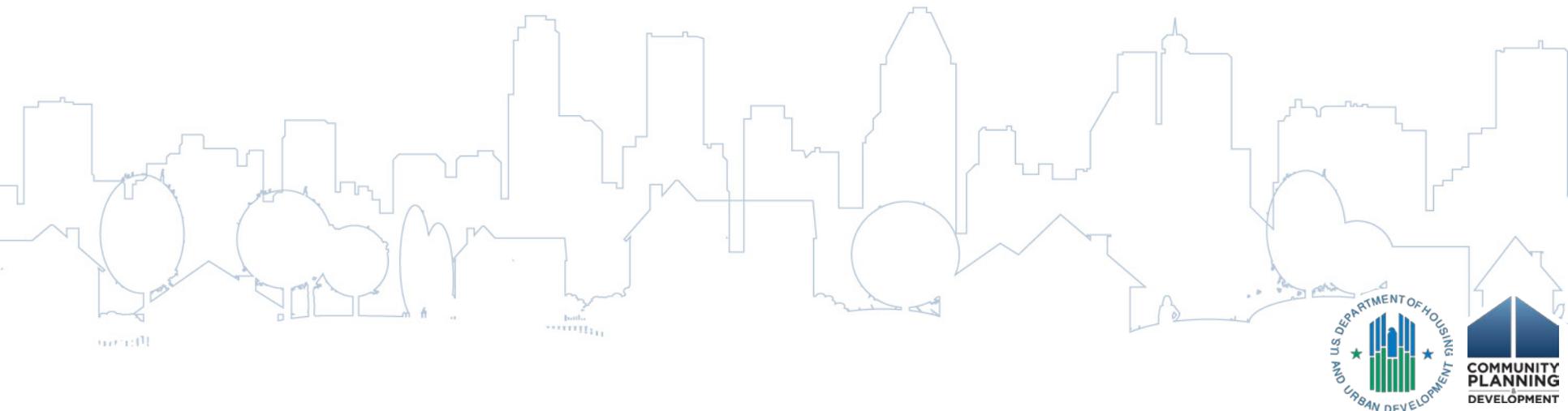
# Webinar Instructions

- All participants will be muted
- Submit questions at any time during the webinar via the “Questions” pane



# Webinar Instructions

- Questions will be answered verbally
- May not be able to answer all questions
  - Will try to answer common questions first



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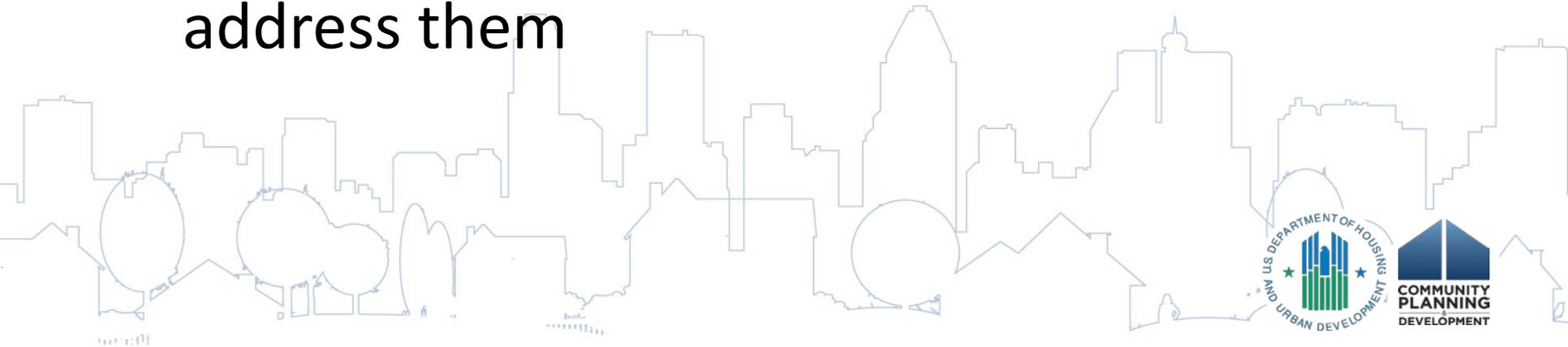
# Agenda

1. Con Plan Basics
2. Setting up a Con Plan
3. Amending a Con Plan/Action Plan
4. Subsequent Action Plans
5. Completing the CAPER
6. Troubleshooting Common Issues
7. Question and Answer



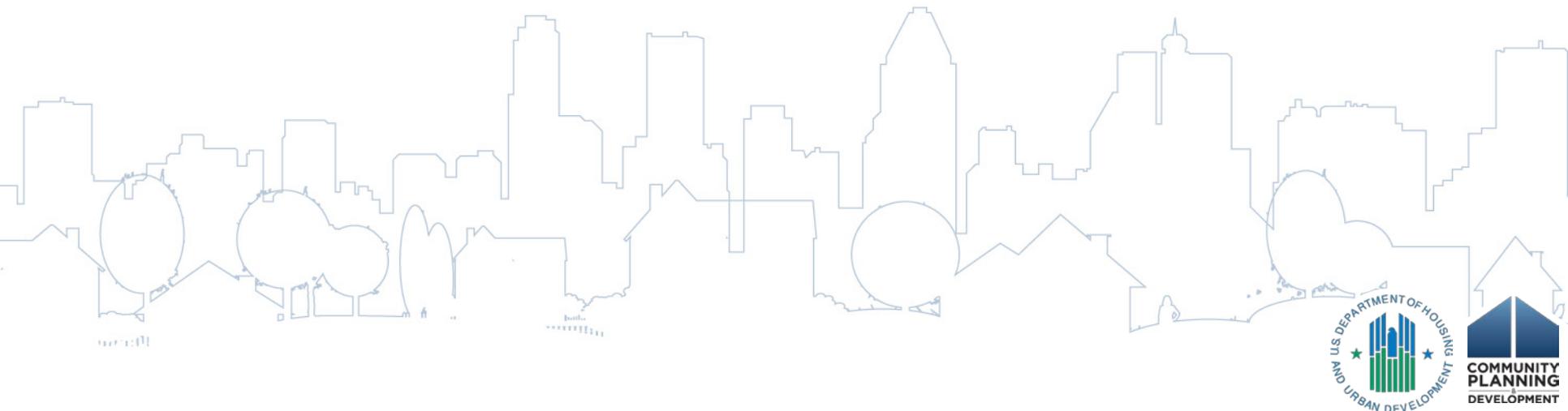
# Session Objectives

1. Define the roles and responsibilities of different consortia grantees
2. Complete Con Plan/Action Plan set up and amendments in IDIS
3. Identify common issues and describe how to address them



# Con Plan Basics

- To submit a Consolidated Plan, Consortia grantees must:
  - Be on the same grant year cycle
  - Have the same program year start date



# Con Plan Basics

- Grantee Types

- Lead Grantee: PJ receiving HOME funds directly from HUD; responsible for submitting the plan on behalf of the consortium
- Participating Grantee: Consortium members that receive CDBG, ESG, and/or HOPWA directly from HUD; prepare the non-housing community development plans
- Other Members: Local governments that do not receive CDBG, ESG or HOPWA from HUD; no specific Con Plan responsibilities



# Con Plan Basics

- Lead grantee responsibilities
  - Set up the Consolidated Plan for Consortium
  - Complete Consolidated Plan template
  - Submit Consolidated Plan for entire Consortium
  - Set-up/Submit subsequent year Action Plans
  - Coordinate ALL amendments in IDIS
  - Coordinate with members when setting up plan and completing template

# Con Plan Basics

- Participating grantee responsibilities
  - Develop non-housing community development section
  - Contribute, as required, in lead template
  - Complete subsequent year Action Plan templates
  - Coordinate with lead grantee regarding amendments



# Setting up the Consolidated Plan

- LEAD GRANTEE ONLY**

Strategic Plan Beginning Year: \*

Ending Year: \*

Title: \*

Plan Version: \*

If Amendment: N/A ▼

Programs included: \*

- CDBG
- HOME
- ESG
- HOPWA

Consolidated Plan is for: \* Consortia ▼

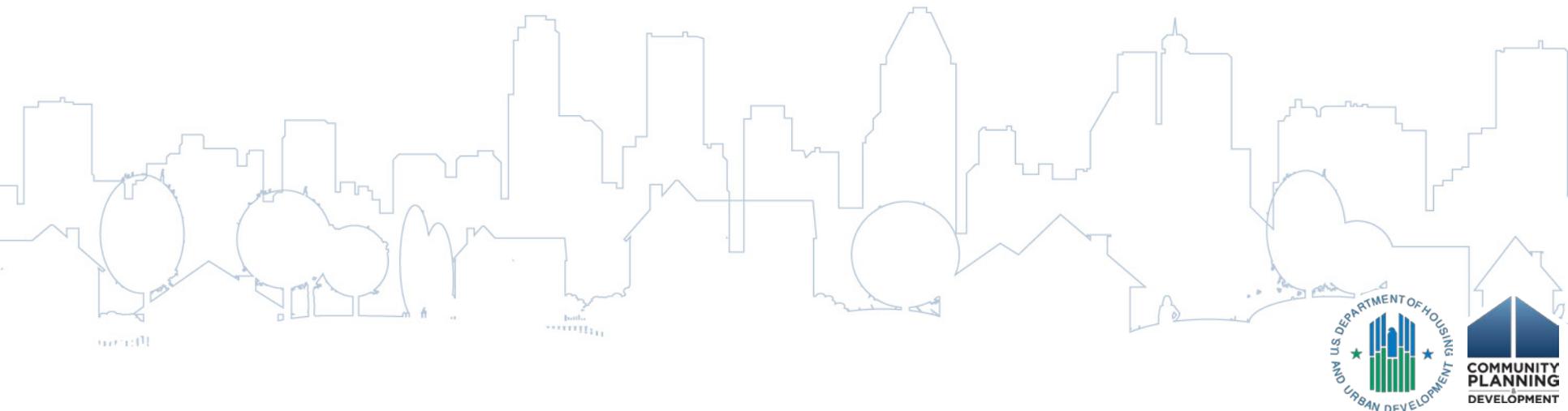
If consortia, does it have participating grantee's? \* Yes ▼

[Add Participating Grantee](#)



# Locating your Con Plan

- To locate your Consolidated Plan/Action Plan, use the search function to find current plans
- Remember, the Year 1 Action Plan is embedded in the Consolidated Plan



# Amending a CP/AAP

- It is time to amend your plan, now what?
  - Lead grantee initiates the amendment EVEN IF it is just for participating grantee
  - Lead grantee and/or participating grantee input amendments as appropriate
  - Once amendment is made in template, lead grantee resubmits amendment to HUD
  - Best practice to submit amendments in system only at one point during year

# Year 2-5 AAPs

- Lead grantee creates the Action Plan templates for entire consortium
- Two ways to create the Action Plan:
  - Adding a new AAP
  - Copying previous AAP
- Lead grantee submits AAP templates for all members



# Year 2-5 AAPs

- Key Tips:

- Use Copy function to limit need to manually copy and paste text
- If adding new AAP, be sure to associate with most current Consolidated Plan
- Remove old projects from copied AAP
  - System automatically copies previous year projects and you CANNOT update project year. You will need to remove projects from AAP and create new projects

# CAPER

- ALL Consortium members are responsible for setting up, completing and submitting their own CAPER
- Prior to setting up CAPER, all grantees should:
  - Ensure amendments are complete and Action Plan is approved
  - Enter all accomplishment information for activities in IDIS

# Troubleshooting Issues

**Issue:** A participating grantee is not included in the Consolidated Plan template

When setting up the Consolidated Plan template, the lead grantee did not include a participating grantee in the AD-25 screen and saved the Consolidated Plan template.



# Troubleshooting Issues

**Issue:** A participating grantee is not included in the Consolidated Plan template

**Solution:** Create a new Consolidated Plan with all members and manually copy and paste all information into the plan and resubmit to HUD for review.

If you have already created your Year 2 AAP, you will need to first create new Con Plan then AAP



# Troubleshooting Issues

**Issue:** A participating grantee creates a stand alone Consolidated Plan

A participating grantee creates a stand-alone Consolidated Plan in addition to the participating grantee template (non-housing community development section)



# Troubleshooting Issues

**Issue:** A participating grantee creates a stand alone Consolidated Plan

**Solution:** 1) The lead grantee will need to ensure the plan is open and editable.

2) The participating grantee must manually copy and paste all information into the Consortium Consolidated Plan

3) The participating grantee will need to associate projects with the AAP connected with the lead grantee



# Question and Answer

- Please submit any questions you have via the Questions pane.
- If you submit questions that are not answered, please submit them to the HUD Exchange Ask-a-Question

