

Chris: We will be pausing throughout the session to take questions, so please as you have a question, enter it in writing in the Q&A pod. And we will be pausing throughout to answer those questions. If for some reason we are not able to get to your question today, you can always submit that question through the HUD Ask A Question link. And after today's session we will make sure to send out some of the resources that we talk about today, as well as the link to the AAQ Pool on the HUD Exchange. With that we have a long primary goal for today's session, and that is making sure that all of you are going to walk away after this webinar and understanding all of the places that you need to incorporate AFH content into the Consolidated Plan and the Annual Action Plan.

All of you on the line are working on your 2018 consolidated plans, preparing your year-one action plan and we want to make sure as you are working on those plans, getting ready for submission this spring or summer that you will be able to identify all of the different places that the AFH and the Consolidated Plan and the Annual Action Plan interact. We are going to breakout today's session through looking at the requirements within the Coordination and Citizen Participation section of the eCon Planning Suite of what is called the Process Screens in the eCon Planning Suite. We will then talk about the elements of the Needs Assessment and Market Analysis where there is some overlap between the AFH and the Consolidated Plan.

Then we will spend most of the time working through the strategic plans and the annual action plan in understanding contributing factors and how the AFH goals align with the priority needs and goals within their strategic plan and within your annual action plan. We are going to be going back and forth between the PowerPoint deck that we have here up on the slide and into IDIS. If there is anything that you would like to see Beth or me demo in IDIS, please submit a question and we will be able to go into the system and demo exactly how to enter some of this information, or highlight where in the eCon Planning Suite this information goes in the template. Again, we have saved a lot of time for your questions, so if anything pops up, please enter it into the Q&A pod.

Before moving into the eCon Planning Suite template, I just want to go over the rule requirements. Once your AFH has been submitted to HUD, which for all of you your AFH has been submitted and approved by HUD; you must incorporate the AFH into your consolidated planning process. The consolidated planning process includes your Con plan, your action plan, and ultimately your CAPER. Today we are going to be focusing on the planning side of that in the Con plan and the action plan. Failure to incorporate these required elements within the AFH can put you at risk of having your plan disapproved by HUD.

Beth: So Chris if I could just step in real quick here. I want to make sure that we are all clear that this is only for AFH's that have been accepted by HUD, and now the grantee must incorporate it into the Consolidated Plan. If you have an AFH that is still in the middle of the review process and now on hold, these requirements do not apply to you.

Chris: Great. Thank you Beth. How does AFH information flow into the Consolidated Plan and we are seeing in a number of ways? First as part of your AFH you have a number of tremendous conversations, interactions, focus groups, stakeholder meetings, community meetings with stakeholders and residents, community groups. And a lot of that citizen participation and consultation can flow and also will be highlighted in the process screens, in your screens where you highlight your citizen participation and consultation. In terms of the needs assessment, a big portion of your AFH is looking at disproportionate housing need. That overlaps quite a bit with the needs assessment. And as such, you do not need to then redo that information in the needs assessment.

You can associate and link back to your AFH. And then finally in the strategic plan and the action plan is really where the rubber meets the road in your planning process. As I said earlier, those AFH contributing factors, the AFH goals, those are also informing your priority needs and your goals within your strategic plan, which then ultimately are driving your 2018, your year one, your annual action plan identifying needs and goals and projects. With that we will move into the Consultation and Citizen Participation section. But before doing that, Jon just wanted to check in to see if you had any general questions or clarifications that I may have missed in the overview.

Jon: Alright Chris we have had no general questions yet on the overview.

Chris: Great. Thank you. And I should have noted at the top that we will be making the slides available from this session and will be identifying and flagging other resource materials to help you in incorporating the AFH into your Con Plan and your Action Plan. So starting on the consultation and the citizen participation process, and this is focused in the Con Plan on the PR-10 and the PR-15 screens. Consultation is all following the regs and throughout the PowerPoint deck you will see the association to the regs. But there are two types of required consultations from the AFH that are required to be referenced in the Consolidated Plan.

The first is community-based and regionally-based organizations that represent protected class members. And the second is with organizations that enforce fair housing laws, such as fair housing enforcement agencies. These are agencies that you include as a part of your AFH, and also need to identify and flag as a part of your consultation within your Consolidated Plan. And then finally, continuing the consultation with your PHA's that are operating in the jurisdiction which is also a required consultation under the Consolidated Plan on identifying strategies for affirmatively furthering fair housing, and on any proposed actions that the PHA or the PHA and the grantee may be jointly taking to further fair housing within the Consolidated Plan program.

So what is the intent of these consultations? It is seeking input into how the goals identified in the AFH are informing the priorities and the objectives of the Consolidated Plan. Again going back just a couple of slides in thinking about how the information flows, those consultations are helping to create that link to make sure that the information, the policies, the approach, the goals identified in the AFH are flowing through and into the Consolidated Plan process.

Beth: So if we could just expand on that just a little bit. During your consultation process you are talking to a lot of groups about what you think the priorities and needs might be for your community. And in addition to meeting with those additional groups that you met with during your AFH that Chris just talked about, you also want to be able to talk to the rest of the groups you normally consult with about how the goals that were identified in that AFH process might also inform what priorities and objectives come into your Con Plan for the next Con Plan period. So not just those groups, but all the groups you consult with. You should be talking also about those AFH goals as well.

Chris: Thank you Beth, great clarification. And then as a part of the consultation process in the Consolidated Plan, you are required to consult with your neighboring jurisdictions and with regional government agencies. As it related to the AFH, there is the option to include those consultations if it focuses on any sort of AFH goal or solution or identified need that goes beyond the single jurisdiction and to use the PR-10/AP-10 screens in terms of describing your consultation to look at those regional needs. I think an important thing to always remember here as you are putting together

your Consolidated Plan is that your Consolidated Plan is in part the story that you are telling to your community in how you have identified the needs in your jurisdiction, in the region, and how you are working both individually and potentially collectively on a regional level to be addressing and solving those needs. And including here from the AFH perspective it helps to provide and clarify that story from the regional focus.

So where does this information go into in the PR-10 screen and the AP-10 screen? As reminder for everyone, that is the action plan version of the consultation information. On the PR-10 there is a large table. I know that all of you have been through the Con Plan process once. So you have completed the PR-10 and have completed the AP-10 screen a couple of times, but you are able to complete this table and enter all of the organizations with whom you have consulted into it. In identifying Category 1 and Category 2 organizations, you can identify the Category 1 organizations by checking the 'other' box and then entering here into this little narrative field, 'community-based or a regionally-based organization,' on this other tab. Enter in if it was a community-based or a regionally-based organization, and then using the narrative field, the narrative box below to describe the consultations that you had.

And so I am just going to pull up IDIS real quick just so that we can take a look. I am going to start sharing my screen, so hopefully you are all seeing my IDIS screen here. I am in the UAT version, the training version of IDIS. In this PR-10, you are able to both indicate the groups with whom you have consulted, and then you also have this narrative box here to describe the consultation. And if there is any coordination between those two, between you and that group, or between a set of organizations in moving your fair housing in your community development and your fair housing goals forward, flagging that here and describing that in the narrative box. Now let's go back to our slides.

On the Citizen Participation Section you also are required to engage your residents and the citizens within your community throughout the AFH and the Consolidated Plan process. Your approach to your citizen participation is summarized in the Con Plan regs and requirements, and the approach that you are taking is framed out within your citizen participation plan. In the citizen participation screen in the Con Plan template, you need to provide a summary of how through your Con Plan, through your AFH process, what efforts and what approach did you make to broaden the public participation and engagement in the development of your Consolidated Plan.

Beth: So you will remember for those of you who have done a Con Plan before, this is the area where you are going to talk about how you encouraged participation from all citizens and all residents, particularly those that were in public assisted housing, and also those non-English speaking residents.

Chris: Great. Thank you Beth. And where that is entered here on the PR-15 is where you are able to identify what is the mode of outreach. There are a couple of general buttons, public meetings, public hearings, newspaper ad, internet outreach, and then there is a box for other. And then who is the target of that outreach. As Beth just noted, were you focused on non-English speaking residents within the community, persons with disabilities, residents of public or assisted housing. And then you are able to summarize the comments received, the type of attendance, what was the outcome for that citizen participation outreach. And you are able to complete one of these forms, or one of these sets of questions for each type of citizen participation outreach in which you complete, in which you engage in.

Let's look at the Needs Assessment and Market Analysis and then we will pause for questions. The one important piece on the needs assessment and the market analysis is as you all know as part of your AFH, you conducted a disproportionate housing need study of the community and looked at that data and identified where there may or may not be any disproportionate housing needs by race ethnicity and by income levels within your community. Even if that is already undertaken in the AFH, you do not then need to duplicate this in your Consolidated Plan. You can leave screens NA-15, 20, 25 and 30 all blank. These are all of the disproportionately greater need screens with needs assessment.

In leaving those screens blank you will get a quality check error message in your Consolidated Plan. You can ignore those error messages. If you would like you can make a note on those screens in reference to your AFH or include a summary from the AFH. But you do not need to duplicate the disproportionate housing need analysis within the Consolidated Plan, given that it was already completed within your AFH. Jon, do we have any questions?

Jon: Yes Chris actually we had a couple of questions, one on the coordination citizen participation process and one on the needs assessment. The first one on the coordination citizen participation is will we need to repeat the discussion in subsequent action plans in 225?

Chris: A great question and yes, you need to be looking at completing your citizen participation, your consultation in accordance with all of the different types of community groups and stakeholders in the same type of outreach that that described under the citizen participation throughout your Consolidated Plan cycle, so in all years of your action plan. And in each of your action plans you will be incorporating elements of your AFH and thinking through and making sure that you are carrying forward those goals of your AFH. So that is all included through your entire Con Plan cycle.

Beth: That's right Chris. So if you think about the consolidated planning process, you are spending a lot of time talking to a number of different types of groups and people in your community about what do you think the priority needs are. And then you are also going to say, what do you think we should do project-wise to address those needs and goals. So each year as you go back and are continuing to work on those goals and select those projects, you are going to want to incorporate those additional groups from the AFH into that process too. And then likewise when you do your annual performance reporting, you are going to want to be able to tell those folks what you have done, not only to reach the Con Plan, but also the goals of your AFH as well.

Jon: Thanks Beth. We have one more question and this one again is on the needs assessment. The question is wouldn't we want the NA-15, the NA-20, etcetera screen in the Consolidated Plan for public review?

Chris: That is a great question. And in looking at the disproportionately greater needs you may decide you want to collate those sections from the AFH and include those in your Con Plan if you would like. Or you can just reference to your AFH. But given that you have already completed that analysis in your AFH, you do not need to go through the same analysis again in the Consolidated Plan.

Beth: This makes a really good point. If you want to include a link that could send the public directly to that AFH document, you could easily do this. The important thing here is that we are not asking you the grantee to duplicate your burden by having to do the analysis twice. If it is important to you that the public be able to access the documents, go ahead and do that. But what we are saying to you is that you do not have to provide it to us twice.

Chris: Great and Jon any other questions before we move onto the strategic plan?

Jon: Yes in fact we did get one more question that came in again on citizen participation and consultation. It is if AFH consultations are completed within the past year, can we reference that consultation, or do we need to hold a new additional consultation?

Beth: Well it depends on what the citizen participation plan says, but also it depends on whether that consultation was taken under the guise of the Consolidated Plan, or under the AFH developmental loan. So we need a bit more detail. The important piece here is that your citizen participation process holds a consultation, not only for the AFH process, but also for the Consolidated Plan process. If you are able to do that in one meeting that is great. But the important thing is that those types of documents are able to have a consultation process undertaking.

Chris: Okay thank you Beth. Jon, are there any other questions?

Jon: That is it for now.

Chris: Okay. It looks like we are already getting a couple of Strategic Plan questions coming in, so you are ready to move onto the Strategic Plan. In focusing on the Strategic Plan we are really going to zero in on the SP-10, SP-25, SP-45 and SP-80 screens. That is the target areas, the priority needs, the goals, and the monitoring screens within the Strategic Plan. I want to focus first on the two largest pieces at a high level, the goals and the contributing factors and your priority needs and how those relate.

First in goals and this has been an AAQ that has coming in a lot over the past couple of months in seeking clarification on this. But all grantees, all of you on the line must include all of the goals that are identified in the AFH that are intended to be initiated or completed during the Consolidated Plan period in the Strategic Plan. I wanted to read that verbatim, because I think that it is important to note that all of those goals that are identified in the AFH, each and every one of goals regardless if it is receiving CPD funding or not, or if you think it is or you don't think it is, each of those goals in the AFH must be included in the Consolidated Plan. In a little bit we will talk about goals that are and that are not receiving CPD funding, but the important thing to know if that if it is a goal in the AFH, it is also a goal in the Strategic Plan.

And it looks like a few of you on the line have either completed a Collaborative Joint or a Regional AFH. And for you all you need to include all of the goals for which you are one of the responsible entities. So if you are a part of the Regional AFH and one community has a goal which is not touched and is not associated with your goal, it may be a review of zoning codes for one jurisdiction within your region, you do not need to include that goal. But any goals, any regional goals or goals specific to your jurisdiction, to your grantee, you need to include in your AFH. Again to be a little bit on repeat here, if it is a goal in your AFH, it is also a goal in your Strategic Plan.

On Priority Needs and Contributing Factors, each AFH contributing factor that is associated with an AFH goal in your assessment housing should be entered as a priority need in your Consolidated Plan. You will also enter other Con Plan only priority needs, but any AFH contributing factor should be entered as a priority need. Digging into this a little bit more and talking more about the setup of priority needs, something that gets asked a lot is if I have an AFH need or an AFH contributing factor, but it is also a Con Plan priority need, do I need to enter that twice? The answer is no. If it is an AFH contributing factor that also is tying into other Con Plan needs, that contributing factor is treated in the review and in the eyes of your Strategic Plan as a priority need. You do not need to enter that twice.

If you do have AFH factors that you are entering, you can distinguish it; call it out as being associated with your AFH by using something like AFH Factor and then the name of that contributing factor. So it is very clear for anyone looking at your plan to say, okay this is a contributing factor coming from the AFH and that is why it is included here as a priority need. Just to look at what that will look like in the system, we can go into IDIS to look at setting up a priority need and how that information can be entered, you will see if you have an AFH factor that is an inaccessible public or private infrastructure, lack of public investment in specific neighborhoods.

And you will see here in pulling this information together you do have a 60 character limit in the title of your needs. You may need to shorten those needs a little bit, but I recommend keeping it as close as you can to those AFH factors. Then you may have another need that is just a Con Plan only priority need that would not have the AFH factor, and you can distinguish them by using that introduction of AFH factor or not.

Beth: And you know Chris the reason why we give you the suggestion of listing the AFH factor clearly at the beginning of the title is to make it easy for yourself and also for your citizens to be able to follow clearly what was in the AFH and now is incorporated in your Consolidated Plan. Even more importantly, think about you as the grantee when you have to do your CAPER, to be able to easily follow and track what was a Con Plan priority need versus what was an AFH factor and being able to report on that clearly and succinctly.

Chris: Great thank you Beth, and I think that again just reiterates the point that we made at the beginning of this session is that a part of your Con Plan you are telling your story and you want to make it as clear and as open to your community and to your public reading and understanding what you are doing within your Consolidated Plan, and showing that connection between the AFH and the Consolidated Plan. We are going to walk through our goals first, and then we are going to talk through both the priority needs and the goals in the IDIS.

So for all of you on the line, you will see that if you look at the participant pod on the WebEx panel on the right that you can raise your hand by clicking on the little hand symbol. We would just like everyone to go ahead and raise your hands if you had any AFH goals that will not be receiving CPD funding and are not tied to a Consolidated Plan funding, but it might be a goal like a task force or a review of zoning code that you are going to address through your AFH plan, but it is not going to be receiving any CPD funding. Go ahead and raise your hand if that is the case. Okay it looks like a number of you have your answer. Click on your hand again to lower it.

So to that point there are two types of goals in thinking about your AFH goals. There are those AFH goals that are tied to a Consolidated Plan priority, something like addressing a lack of public

investment in specific neighborhoods. That may be tied to your goal for funding public facilities or infrastructure or public services, to be targeting certain neighborhoods for public investment. And that may be receiving CPD funding. As many of you indicated, you also have AFH goals that are not tied to Consolidated Plan priorities. These can be things such as a fair housing task force, review of city ordinances, looking at your zoning codes, other resources being used to fund fair housing needs and needs identified through your AFH. And both of these goals need to be entered in your Consolidated Plan as we said a few minutes ago, all of these goals need to go into your Strategic Plan, but they are entered in two different ways.

First let's talk about the AFH goals that are tied to a Consolidated Plan priority. Each of these goals needs to be assigned with a priority need associated with a priority need or a contributing factor. You need to highlight the strategies and the actions that will be taken to implement the AFH goal. Identify what are the metrics and the milestones in reaching and achieving that goal that were references in the AFH. Identify what the outcome is and the proposed accomplishments. This is primarily in the goal outcome indicator component. And then any additional narratives on strategies and actions that will be undertaken to affirmatively further fair housing.

So in your goal setup screen, that AFH goal, and again similar to the contributing factors, we recommend that there is something to distinguish it as an AFH goal. You would enter that AFH goal, so AFH goal in housing rehab for accessibility. You describe the goal, the metrics, the milestones, the strategies and the actions all in the description column. Indicate the category, your start year, your end year, and then identify any geographic areas that are included. What are the corresponding priority needs? What is the CPD funding that will be allocated to that goal if you are using Block Grant money or Home money, you should be addressing that goal through your Con Plan cycle.

And then finally is the goal outcome indicator that you will be using to measure your progress, to report on your success and the outcomes of achieving that goal. I think that it is important to note here that an AFH goal that is receiving CPD funding you will need to enter all of your AFH-relevant information. But you also need to enter the funding allocated making sure that you are including a goal outcome indicator that will ultimately be linked in reporting in line with the outcomes that are associated with metrics, your activities and projects, as you will be able to report on your accomplishments. Both before moving to AFH goals not tied to Con Plan priorities, are there any other points that you would like to make for AFH goals that are connected to a Con Plan priority?

Beth: If they are having difficulty thinking about whether your goal is tied to a Con Plan priority or not, think about whether you will be spending CPD resources on it, and also think about the fact that whether you would want to be able to track outcomes and objectives that are already built into IDIS in that CAPER in your performance, some of them are very clear-cut. Things like I am going to do a study or we are going to have a task force clearly are not going to be things that you would tie to the Con Plan, or put CPD resources to. But if you are on the line and you think you might, you may want to go ahead and set up a Con Plan priority that aligns with that AFH goal.

We did have a question that came in in the middle of this conversation about if my PHA has a goal, should I put it into the plan? And the answer really is no. Remember we said if you did a Joint or a Regional plan, you only need to include the goals that you are the responsible entity for. If you did an AFH alone, you are going to put all of the goals in. If you did a Joint or a Regional you are

including all of the goals that you as a grantee are a responsible entity for. For PHA they would be responsible for that specific goal based on the question that came in, and they would report on their progress made on that PHA-specific goal.

Chris: Great, thank you Beth. So for AFH goals not tied to your Consolidated Plan, you still need to include your AFH goal information into the strategic plan goal screen, and you need to identify what are the strategies and the actions that are going to be taken. What are the outcomes and the proposed accomplishments, the metrics, the milestones? But in lieu of using as Beth just said the outcomes factors are already build into the IDIS in terms of number of units built or rehabbed or people served, you would be designating 'other' as the goal outcome indicator is it is the number of times that a task force is meeting or completing your review of the city ordinance.

That outcome is not contained within the outcome IDIS programs and projects. So you can use the 'other' outcome indicator to indicate what that outcome will be and to measure your success in achieving that outcome. Again just like in the needs tied to the Consolidated Plan you would enter your AFH goal and use the description and the category, the start year, the end year, and if there are corresponding geographic areas, making sure to fill those out.

In the goal outcome indicator you will see at the very bottom you have the 'other' category that you can be using to measure and indicate what your outcome will be. I think it is important to note that if you are using 'other' it just shows up here in the goal outcome indicator as other. You see there is not a text box to be entering. You need to make sure that, as we noted a couple of slides ago, that you are using this description box to make it clear what are the metrics and the milestones and the strategies that you will be employing and using to measure your success in achieving this goal. Again that is all of the language, matching that language to your goals within the AFH.

Beth: So why do we have to put all of these goals into the strategic planning process to begin with, and really it is about being able to coordinate between these two planning processes, the AFH and the Consolidated Plan. By bringing those goals in the AFH into the Consolidated Plan, so that the public and our citizens understand what goals you will be working on not only from the AFH, but also from the consolidated planning process over the next three to five years. In addition to that from a system perspective, the reason why we are pulling all of those goals regardless of whether it is going to be a Con Plan goal or an AFH goal.

Have money assigned to it or not have money assigned to it, so that we can then have them available for us to select when we are doing the action plan part of the Con Plan in selecting projects and assigning resources towards those over the years.

In addition to that, we want to be able to put them in a strategic plan so that not only do they feed into our action plan process, but also that information now will automatically download into our CAPER each year so that you can report on the progress you are making not only for Con Plan goals, but also for AFH goals with each CAPER report as well.

Chris: Great, thank you Beth. Just to move forward a little bit before going into IDIS, Geographic Priorities. In talking with some of you on the line about your AFH's, many of you identify target areas and identified RCAP's and ECAP's and other areas of opportunity that you focused on in your AFH. And any of those areas can be included if you like as target areas within your Consolidated Plan as a specific local target area. And if you are identifying those local target areas in your AFH, again for consistency and to make it clear and to make that connection for your community who is



reading and looking at your Consolidated Plan and going from your AFH to your Consolidated Plan, you want to use the same name, and a name that the community would be able to identify, versus Target Area A or Target Area B.

You really want to make sure that it is a neighborhood name, a district area or if it is a cluster of neighborhoods that you are using a name that can be connected and associated by your community looking at your plan. Before moving on from target areas I do just want to note that in the Consolidated Plan you are not required to use target areas within your strategic plan. But you can as a way to help describe and direct where your funding is going within your strategic plan.

The final portion of the strategic plan that must include information from your AFH is the Monitoring section. Here in addition to describing the monitoring that you will be taking to oversee your general CPD programs, you need to highlight the monitoring that you will be taking to address fair housing issues identified in the AFH. And I believe that we have a couple of consortia on the line. Just as a reminder, each consortia member needs to complete this screen separately in terms of what your own monitoring will be if you have a consortia-wide monitoring approach.

Okay I am just quickly going to go into IDIS here and just highlight a few of these things. So you again are looking at my screen. We are just talking through here your geographic priorities. This is where you can be adding a local target area. The priority needs section here is where you are entering all of your contributing factors from your AFH that were identified in your AFH. All of those are being included as priority needs in your Con Plan. The goal section is where all of your AFH goals, regardless if they are receiving CPD funding or not, are entered into your Consolidated Plan.

And then finally the monitoring strategy that we just talked about, of making sure that your monitoring strategy includes not just how you are monitoring your CPD programs, but also how you are monitoring against your AFH. Beth do you have anything that you would like to point out in IDIS before moving onto the action plan?

Beth: No I think that we are good.

Chris: Okay moving onto the action plan here we are really focused on talking about your goals, your projects, and then also your geographic distribution. In the Annual Action Plan this is where you are identifying, we have our five-year plan, we have our strategy. This is what we are doing in the upcoming program year. And as it relates to the AFH, describing the actions that you will be taking in the program year to be addressing those fair housing goals that were identified in the AFH, including metrics and milestones in your AFH goals, and wanting to address those metrics and milestones for the 2018 year in your Annual Action Plan. Again including all of the goals, AFH-specific goals that are receiving CPD funding or not. And for those that are receiving CPD funding, including those as a project just as you would any other time in your action plan.

On goals, all strategic plan goals that are being addressed during the program year, all of those goals need to be included as an Annual Goal. This includes AFH only goals. So even from those goals that are not receiving CPD funding, but you that you are doing something to address or move forward or advance that goal during the program year needs to be included as an Annual Goal.

For Projects, this is for any AFH goal that is receiving CPD funds, just like any goal in your Con Plan or Action Plan, any goal that is receiving CPD funding needs to have a project related through that goal that is identifying what you will be doing during the program year, should be addressing that goal and meeting the metrics and the milestones that you set for yourself in that goal. And I think that it is important to think about as you are writing the description and the summary of your project, that you are making it where anyone in the community can open it up and understand, okay I know what my community, my city, my county is going to be doing with their CPD funding. What the project is, where the activity will be located. Who is benefitting and why, how they are benefitting as a result of this project, indicating that it is an eligible use of the proposed funding source. Each project must be associated with one of your priority needs, or contributing factors. And it must be associated with at least one goal from the set of goals that you said you would be achieving during the year. And in all projects you need to describe what the accomplishments are and when you are going to realize those accomplishments.

And again all of that information going into the AP-35 screen is where you are entering the title, entering your description. This is where you can really tell that story of what you are doing and why that is going to have an impact on your targeted community. What is the amount of funding? Just as a general reminder for everybody in your action plans, make sure that you are entering something and the estimated amount, and the expected resources. I know that looks like it is a table repeating twice, but that is where IDIS and your action plan are communicating. And that is going to make everything sync up for you in your CAPER.

Flagging the goals, the priority needs, your target date, who you are benefitting, how they are benefitting and where the location of the project is, and the specific activities that you will be undertaking to complete that project. So again all of that information is going in and just for those projects that are tied to an AFH goal, but are receiving CPD funding, those project descriptions should be lining up with the metrics and milestones and approach going back to your planning in your AFH, which is then lining up with your strategic plan goals, which are lining up with your annual plan goals, and ultimately lining up with your projects.

Again you have the outcome goal indicator, and just as a general reminder on all goal outcome indicators for any projects, it is the best practice and it will make life easier for you in your CAPER if you make sure that your goal outcome indicators in your projects line up with the goal outcome indicator from your annual goals, which lines up with your goal outcome indicators on your strategic plan. I will tell you with myself if I am working on a Consolidated Plan I have all three of those documents printed out in front of me so that I can double-check and make sure that those units and measured outcome goal indicators are the same across the board. That makes life much easier when it comes to your CAPER.

Beth: That is a really important point Chris, because this is another place where IDIS is talking to itself between the eCon Planning Suite and the rest of IDIS in what goes into your CAPER later on.

Chris: And lastly in Geographic Distribution if you have any geographic areas that were identified in the AFH or in the Consolidated Plan, it needs to describe where and how assistance will be directed in those areas that you identified. And how you are prioritizing and selecting resources to go within those certain target areas.

We have a couple of case study examples to talk through this, but it looks like we are getting a number of questions coming in. So I think if we pause on those examples and go to your questions we can talk through the different case studies. Jon?

Jon: Yes, so you certainly have gotten a few questions in. One of them is how would you know HUD RCAP or ECAP areas? Would you do this as a target area?

Beth: You would have identified that in your AFH. If you identified a RCAP area in your AFH, then you may want to designate it as a geographic priority area. That is up to you. But you would have had that designation already established in your AFH.

Jon: Thanks Beth. Here is another question. How do we account for an AFH priority that is also a Con Plan priority in a much larger encompassing goal?

Chris: That is a great question and I think that it is great that your AFH goals are lining up with your Con Plan goals. I think it is really the goal of the planning process is to see that coordination in your planning. And if you have an AFH goal, you can definitely include elements that are tied to your Con Plan goal in that so that you are not having to necessarily repeat it as two separate goals. So if you have an AFH goal that is associated with a Con Plan goal, you can treat those as one. I think the important thing to note though is that all of that AFH information that we highlighted earlier that is coming from your AFH goals, metrics, milestones, strategy, approach, your target dates, all of that is still being included in that goal. But you want to make it clear to anyone looking at your plan to see how the AFH has progressed and how you are now addressing these goals that you made is being reflected in your Con Plan.

Jon: Thanks Chris. Other good questions are coming in. Here is another one. How do you calculate the allocation for the five-year goal? Do you multiply your FY17 allocation by 5?

Chris: That really depends. I think as a part of your strategic planning process you are identifying what is that need, what do you expect that need to be, and how you want to prioritize that need and ultimately the outcomes of that goal in relation to your other goals. You may have a strategic plan goal that is just for one year. You know that you are just going to be addressing it in 2018 or 2019 and then you will achieve the outcome that you are seeking. You may have others that stand three years or five years with relatively level funding or fluctuating funding. It really varies on the goal and in thinking about how you are going to be planning to address it and what it is, and how it ties to your community.

Jon: Thanks Chris. Are you ready for another one?

Chris: Sure.

Jon: Okay. We have a goal to support development of more housing in AFH due to a shortage of vacancy rates. In this case we would want to expand this goal in the citizen participation to be specific, i.e., homeless housing, family housing. In this case it is critical to label as AFH.

Chris: Is the question is it critical to label?

Jon: Yes.

Beth: Yes and the reason why is because you have identified that goal in the AFH. And those folks in your community who were involved in the AFH want to be able to easily see how that goal moves from the AFH into the consolidated planning process. So if you are going to change that title, you want to be able to amend your AFH to have that new title name, but then also incorporate that new title name in your Consolidated Plan. You are going to want to label it AFH so you can clearly be able to show how that goal moved from the AFH over to the Con Plan. If you decide to put resources to it, then you will follow the directions we have been discussing as well.

Jon: Thanks Beth. Do you have time for one more Chris?

Chris: Sure.

Jon: Okay. Our AFH was accepted in October. We just completed one of the goals this month, which was adopting source of income protection. We do not want to report on this for five more years as it is already complete. Can we leave this out?

Beth: So the regulations for the consolidated planning process now incorporate the AFH. And it says that you need to report on your performance of the AFH goals in the consolidated planning process. What you probably want to do is to be able in your next CAPER to report; here is what we did towards that goal and how we met it over this past program year. That does not necessarily mean you need to put it into your next Con Plan if you are done and completed with it, but in this program in your CAPER report you are going to want to report on the progress you have made there.

Chris: Yeah I think to that point where we were talking about the difference between the strategic plan goals and the annual plan goals, we may have some goals that were identified in your AFH step was adopting source of income protection or a review of zoning, or updating ordinances. And those goals, in that period of performance for those goals may have only been one year or two years. Those need to be included in the strategic plan so that you can identify that those were completed. But they are not necessarily been needing to become goals that you are repeating every year, but once that goal has been completed. And so I think you have to look at what are the years that you set and the timeline that you set. And then calibrate accordingly to match that within your Consolidated Plan.

Beth: If you take a step back we are really thinking about how your citizens would know what progress you made towards that goal that you set. The CAPER is how you would report on it. But more importantly, separated apart from this AFH and before that even existed, when you were working on various Con Plans you may work on one of them for two years and another one not until year three or four. And you are not reporting on it necessarily throughout those entire five years, but just those years that you are actually designated your work on it and receiving accomplishments towards it. That is when you are reporting.

Chris: Those are all great questions, and if you do have other questions, please keep them coming. I think that if there is anything that you want to see us demonstrate in IDIS, we are happy to go into the system and look at how the AFH can be entered and incorporated into the eCon Planning Suite. But please keep those questions coming. Just to give another way of thinking about this, we are

going to step back and think about it from a case study perspective in thinking about how the information from your AFH translates into your Consolidated Plan and into your Action Plan. So I will summarize a brief case study and then we will talk through what does that look like from an AFH perspective? And then how does that flow into your strategic plan.

In the first example in the AFH that one of the reasons that families with children were experiencing disproportionate housing needs in the jurisdiction was due to a lack of affordable housing in areas that provided access to proficient schools. One of the elements identified is that there was little or no multi-family housing in those areas. A further review of the city zoning ordinance showed that certain restrictions, such as density setback requirements, have prevented the construction of new, affordable housing in those neighborhoods.

So pausing there and thinking about fair housing issues, you may be seeing disparities in access to opportunity. Looking further into it we could be identifying RCAP's or ECAP's, or potential issues of segregation, along with contributing factors like zoning and land use, the location of proficient schools, the location and type of affordable housing. Those are all contributing factors that we identified in looking at that fair housing issue. In the AFH, the city set the goal that within one year it would amend its zoning ordinance to remove the barriers to construction of affordable multi-family housing, and that in the first year it would construct 25 units of new, affordable housing in these areas. And within five years build a total of 100 units of new, affordable housing. The city's community development department and the public housing agency would be responsible for carrying out those goals and strategies.

Let's just think about that from the AFH. We have identified the fair housing issue, the contributing factors; the goal was 100 units of subsidized or affordable housing in those target neighborhoods that were identified with proficient schools. And the metrics and the milestones and the timeline, the details within the AFH were that within the first year there would be a review and an amendment to the zoning ordinances to eliminate barriers to construction of new multi-family housing, and in year one to build 25 units of new, affordable housing. And then within five years build an additional 75 units of new, affordable housing in those areas. The program participants that were identified were the community development department and the PHA. So how does that go into the Consolidated Plan and in the Action Plan?

We have the geographic target areas that were identified as neighborhoods where currently affordable multi-family housing could not be built. We identified the priority needs through the three AFH factors, location and type of affordable housing, zoning and land use, and location of proficient schools and school assignment policies. Then we identified what the outcome of the goal is, which is 100 units in those three neighborhoods. And then in year one is developing 25 units of affordable housing. So all of that information of your AFH is going in and forming each level of your strategic plan and your action plan. Contributing factors are priority needs, and I saw a question just come in on this.

So yes, any contributing factor identified in your AFH that is a Consolidated Plan priority need. Those contributing factors that are informing your AFH goals become a need that is informing the goals in your Consolidated Plan. It is the same relationship where a contributing factor informs an AFH goal is a priority need and informs a Con Plan goal. So therefore, you would be including both within your strategic plan. It looks like Jon we may have just received one or two more questions before we go into a second scenario.

Jon: Yes. We did get one that just came in. Usually jurisdictions do not identify a targeted area. It usually states the targeted area is county-wide. How do you get jurisdictions to identify actual target areas?

Chris: Again I think this is absolutely up to the community to determine how they want to identify target areas and include target areas from their AFH into their Consolidated Plan, into their action plan. And it is all based in thinking about how and where those resources will be targeted.

Beth: So targeted areas are not a requirement. But we want to be able to tell the public in HUD if you are going to target CPD resources in one particular area, or efforts to reach an AFH goal in one particular area, we would like for you to identify that in your Consolidated Plan. But it is not a requirement that you have to target.

Chris: Thank you Beth. Let's just look at one more case study here and thinking about how the information flows again from your AFH into your Consolidated Plan. Within the AFH the community identifies that existing zoning laws greatly restrict where multi-family housing can be built because of a zoning for lower density development. Multi-family development is scarce in areas where the city has the best schools, the best access to transit, and it closest to parks, retail, and job centers. Most multi-family development is located in segregated areas, primarily the downtown area. And many of which are in or bordering racially and ethnically concentrated areas of poverty.

So again in thinking about fair housing issues, we are seeing questions of segregation and disparities in access to opportunity. Contributing factors are location and type of affordable housing, zoning and land use, available, type, frequency and reliability of public transit, and access to resources. The goal that was developed in the AFH was to amend zoning ordinances to eliminate restrictions to multi-family housing development in integrated areas and areas with educational, transportation and low poverty exposure opportunities. The milestones that were associated with that goal is to review and amend happening within one year. And the city is responsible for that. How is that entered into the Consolidated Plan?

This is an example, and again many of you raised your hands to this, of an AFH goal that may not be receiving CPD funding. So the priority needs are all entered as the contributing factors that were identified in the AFH. And if a geographic target area is identified as Beth just made the point, target areas are optional. And then the goal is amending the zoning to eliminate the restrictions on multi-family development within the jurisdiction. This is a goal that does not have any CPD resources tied to it. And so there is not a project in the annual action plan. That goal is just being entered in the strategic plan and just being entered in the annual goals. Beth, are there any additional details that you would like to add in thinking about how the information transfers from the AFH into the Consolidated Plan and the Action Plan?

Beth: I think that you have covered it Chris.

Chris: Great. It does not look like we have received any additional questions. So let's pause here for one more second in case anyone has any questions. While we are pausing I just want to share with you all a couple of resources. As I said at the beginning we will be sharing the PowerPoint slides after the presentation. But I also want to flag other resources. Let me just share my screen.

On the HUD Exchange on the Consolidated Plan site, there is a set of Con Planning quick guides, and one of those quick guides' talks through the process of incorporating the AFH into the Consolidated Plan. And step-by-step, just like we went through today, walks you through the information that needs to go from your AFH, from your contributing factors, from your AFH goals, from the monitoring, citizen participation, all of that information that needs to go from your AFH and be incorporated into the Consolidated Plan. It walks through how to do that in the eCon Planning Suite. And we will make sure to send this link out to everyone after today's session. With that it does not look like we have any more questions. Beth do you have any closing remarks?

Beth: I thank everyone for spending time with us today, and we cannot say enough to please use the resources on the HUD Exchange, and this PowerPoint will be posted as well. If you have any additional questions after today, please feel free to send it into the AAQ under Consolidated Plan.

Chris: Great, thank you Beth and thank you all for joining us today. Have a great afternoon. Thanks for joining us today.