

Chris Andrews: Good morning, good afternoon, everyone. Thank you for joining us today for the webinar on the Housing Trust Fund and the eCon Planning Suite. My name is Chris Andrews. I'm a TA provider with The Cloudburst Group and am joined by several people from HUD headquarters – Beth Hendrix, Peter Huber, and Jessica Suimanjaya. Beth, Peter, Jessica, would you like to say hello?

Beth Hendrix: Hi, everyone.

Peter Huber: Hi, everyone. This is Peter.

Chris Andrews: Great. Thank you, Beth. Thank you, Peter. And Jessica, we'll make sure we get you connected.

Just a few webinar logistics before we get started. Today's session will last about 90 minutes. And following the session, all of the materials will be posted on the HUD Exchange, and that is including the PowerPoint deck that we're presenting today, the transcript of the session, and a video recording of the webinar.

We do recommend that everyone closes your email and any other programs you may have open on your computer to keep your connection with the Go To Webinar. If you do have any technical difficulties with either the audio or the screen sharing portions of the webcast, please log off, then log in again. Or you can request help through the "Questions" pane on the Go To Webinar toolbar.

We do have a number of folks on the line today so all participants will be muted. We are asking everyone to submit your questions using the "Questions" pane in the Go To Webinar toolbar and we will answer all of those questions verbally. We'll try to get to as many questions as we can in today's session. We may not be able to get to all of them. We'll talk where you can submit your questions if we aren't able to get to them at the end of the session today.

Before getting starting, just want to have a little bit of a sense of who is on the line. So in your Go To Webinar toolbar, you'll see that you have the option to raise your hand. And so just anyone who is a State grantee, if you can go ahead and raise your hand, clicking on the "Hand" button on the Go To Webinar toolbar. [Pause] Great, a good number of you, and many familiar names. So thank you all for joining us today.

You know, just go ahead and raise your head if you are an entitlement grantee and you anticipate being an HTF sub-grantee. [Pause] Great. Welcome to all of you. I'm going to go ahead, I'm going to lower everyone's hand again.

Just a couple of more questions. As we're getting into the start of our planning for program year 2018, go ahead and raise your hand if you will be submitting your time plan or your action plan January 1, if you're on a January 1 program year cycle. [Pause] Okay, great. A number of you are on a January 1 cycle and you're getting ready to put in your action plan, put in your con plan. I'm going to lower everyone's hand one more time.

And one last question. How many of you on the line are planning to submit a con plan in program year 2018? [Pause] Okay, a good number of you will be submitting your con plan in 2018 so we'll make sure to talk through all of the requirements for HTF and your consolidated plan in today's session.

And in today's session, we'll be talking through three main topics. The first is adding the housing trust fund to your consolidated plan. What is the process to make sure that HTF is included in all of the relevant con plan screens, and how to make sure when you're creating your new con plan or copying your prior year con plan, how to make sure that HTF is included.

The second agenda item is how to add HTF to your action plan. That's for those of you who are in years two through five of your con plan cycle – how to make sure that HTF is included in your action plan.

And then finally, talk through the process for subgrantees and what are the roles and responsibilities for entitlement grantees including HTF in the eCon Planning Suite.

Our objectives for today's session, we want to start, we want to review all of the screens that are required to complete your con plan and your action plan to include the HTF and what actually needs to be going into those screens to make sure you're adding the appropriate HTF information. And then, walk through that same process for subgrantees on how HTF can be added to your consolidated plan and action plan.

We have reserved a lot of time in today's session to answer your questions. So please do type in your questions into the question pod. We'll be pausing throughout the session to answer as many questions as we can. We did the same session last week and had a great set of questions, so hoping to get a similar set of questions from you all in today's session.

Before actually getting into the HTF and the eCon Planning Suite, I just wanted to talk to a couple of high-level points. For those of you who may be already in IDIS and ready to follow along, or you're looking in IDIS for where the HTF screens and the eCon Planning Suite, the HTF eCon Planning Suites elements are scheduled to be part of the next IDIS release that is

currently scheduled to happen on October 9. And that is when all of the HTF elements will be made available in IDIS.

The second point, and the second place where we've had a number of questions, is in regards to the 2018 budget. This is especially relevant for those of you who are on a January 1 program year cycle. The 2018 federal budget is currently under continuing resolution and that right now is scheduled through the beginning of December. Grantees cannot submit the consolidated plan or your annual action plan until HUD releases allocations. And HUD will not release allocations until there is a full budget for 2018. If you do have any questions on this, the CPD Notice 16-18 that came out the very end of last year talks through the process of preparing your consolidated plan and/or your action plan during a continuing resolution and the timing for that, Reference CPD Notice 16-18 until a subsequent notice is published.

Beth, anything else that you would just like to highlight on the budget?

Beth Hendrix: So I don't think this is any new news for those of you who are January 1 grantees. You're used to waiting until we receive allocations and release those to grantees before you submit your plan. The notice that Chris referenced – CPD Notice 16-18 – walks through how you can handle that citizen participation requirement in advance while you're waiting for the budget to pass.

Chris Andrews: Great. Thank you, Beth. Okay, moving to the HTF and the eCon Planning Suite. Just to make sure we're all on the same page, beginning in Program Year 2016, all grantees were required to amend – or all State grantees, excuse me – amended their consolidated plans to include the Housing Trust Fund throughout the strategic plan as part of the priority, meaning as a resource and as a goal. And in Program Years 2016 and 2017, action plans in the eCon Planning Suite included HTF elements based on the Consolidated Plan amendment and the HTF Allocation Plan that was also submitted separately as a paper-based document.

So moving forward and starting in October when the HTF screens and elements are included in eCon Planning Suite, grantees will include – automatically include – HTF in their con plan in the strategic plan. It will be a resource included there. It will automatically be included in the priority needs, in the goals, in the method of distribution and it will automatically be added to all grantees' con plans and/or action plans beginning in 2018.

Peter or Jessica, before getting into the details of that, anything else that you'd like to add there?

Peter Huber: Yeah, thanks, Chris, this is Peter. I just wanted to emphasize that we're really talking here about 2018 plans. And you know, we're not –as you and Beth

both alluded to – we’re not anywhere near being ready to receive 2018 plans at this point. But we’re really focusing on the 2018 plans for this functionality that was added to IDIS in the eCon Planning Suite. We understand that states are on various different program year start dates and, you know, depending on when your start date is and depending on when CP formula allocations are announced will really depend on when you can be using this functionality for your 2018 plan.

Chris Andrews:

Great. Thank you, Peter. And so we’ll take a lot of time today and we’ll go into IDIS and into the eCon Planning Suite and walk through what all of the screens look like and what those requirements look like. But to first look at it from a big picture, there’s really three primary scenarios for grantees in how HTF will be included in the eCon Planning Suite.

And the first – and this is for those of you who had indicated that you’ll be creating a new con plan in Program Year 2018. In your consolidated plan, you will create your consolidated plan either by copying or by adding a new blank plan. For State grantees, the HTF program will automatically be included on the AD-25 screen on the Admin screen. And you’ll be expected to complete all of the HTF elements in your consolidated plan, including the HTF in your strategic plan as you’re talking through your available resources and your goals and your priority needs.

And then in your action plan, complete all of the HTF elements in the Year 1 action plan. And this will include a series of questions and fields that will be replacing the paper-based HTF allocation plan that State grantees were required to complete in 2016 and in 2017.

For entitlement grantees, it will be exactly the same. You’ll just have the option to indicate if you are an HTF subgrantee or not. And if you are a subgrantee, which I’m presuming all of you who are on the line here, that you’re anticipating to be an HTF subgrantee, you would complete those same screens and complete the same HTF elements in your con plan and in your action plan.

The second is that Program Year 2018, you’ll be completing your Action Plan Year 2 through 5. And I know a number of you on the line, you all are on 2015 to 2019 cycles through your con plan and so you’re not going to be preparing your con plan for another couple of years.

No edits are required to your consolidated plan in the eCon Planning Suite to add HTF screens. That was already done when you amended your plan in 2016 to include HTF.

And on your action plan, it will be a little bit different. When you create your action plan either by copying your prior action plan or creating a new action

plan, you'll be able to include HTF as a resource. State grantees will automatically be included. And you'll be expected to complete all of those HTF elements automatically in your action plan. You, again, will not be submitting a paper-based allocation plan. And there's one caveat to that, and some of you may be wondering, "Well, what if I'm planning to amend my consolidated plan in 2018?" And even if you're amending your consolidated plan in 2018, unless you are making a change to your goals or your needs associated with the Housing Trust Fund, you would not be needing to touch anything related to the HTF in your consolidated plan or still be needing to add HTF as a resource. You can still treat that 2016 amendment that you need to originally include HTF in this con plan cycle to still have all of the appropriate information for the HTF.

And your action plan, exactly the same as above. You would still be completing all of the HTF information and content in the action plan template and would not be required to, or expected to – or be able to, for that matter – submit a paper-based allocation plan. Again, all of that will be within the action plan template.

So it's a very high-level overview. We're going to get into the details of this and walk through all three of these scenarios for both State and for entitlement grantees.

So with that, let's move to adding HTF to the consolidated plan for State grantees. You'll see HTF is now included – here, this red line – as one of the programs included in the AD-25 screen when you're setting up your consolidated plan. And that will be true if you are adding a new blank plan or if you're copying your prior consolidated plan. HTF will still be automatically included. And it's a little hard to see here on this screen shot but as we get into IDIS, you'll be able to see that it's actually grayed out and you're not able to click on that HTF radio button for State grantees. That is automatically included in your consolidated plan.

Now, one thing to note is once you add HTF and once you've started your consolidated plan, you'll come to the main menu for your consolidated plan and your annual action plan. And if you look at all the screens, there aren't any specific screens that are just HTF only. But what we'll do is we'll talk through today all of the sections of different screens through your strategic plan, through your annual action plan, that has specific elements for the Housing Trust Fund and how that information for the Housing Trust Fund should be woven into your consolidated plan and your annual action plan.

And going to switch over to IDIS but as I'm doing that, Beth or Peter or Jessica, anything that you'd like to add here in thinking about HTF coming into the consolidated plan.

Peter Huber: Yeah, sure, Chris. This is Peter. You know, hopefully, this is not news to anybody participating today. Really, we would've expected to see HTF included in the 2016 and 2017 and now, moving on into 2018, in the executive summary and consultations and also, included in the strategic plan. You know, either generally or, you know, if in those areas you, you know, call out specific CD programs and would expect HTF to be included there, as well.

So like I said, this should not be news to anybody but something that should've already been in there for the previous year's plan.

Chris Andrews: Thanks, Peter, a great point. Making sure that HTF is included throughout your program or through your plan.

So we're going to switch here to IDIS. And Beth or Peter, just confirming that you see IDIS up on your screen.

Beth Hendrix: Yes, I do.

Peter Huber: Yes.

Chris Andrews: Okay, great. So we're here in the UAT site for IDIS so we're able to look at the HTF screens that will be added to IDIS in a couple of weeks in that next release in the beginning of October. And everything that we walk through here, all of these screens are going to be included in the PowerPoint that is posted but we'll be doing a live demo in IDIS.

So the first piece here is adding your consolidated plan, and you have two options on how you add your consolidated plan. You can either add a new blank consolidated plan – and this won't copy any information from your prior plan – or you're able to make a copy of your last plan so that 2014 to 2018 plan – or the 2013 to 2017 plan. And all of the narrative, a lot of the general information from that prior plan will copy forward and then you would just be expected to be updating the narrative. We'll demo both of those with how to add HTF.

So first is adding a blank plan. And again, you'll see here, as I've pointed out in that screen shot, HTF is automatically included as a resource. So I'm going to go ahead, I'm just going to enter – it came to 22 and we'll just use today's date for my title and conversion. Indicate that the con plan is for a grantee and again, I'm in here as a State grantee. We'll select a public housing agency, and I'm just going to select one quick here just so we're able to go through and create our plan. And again, always double-check all of this information – the beginning year, the end year, your title, your version, your programs included, who the con plan is for. None of that information can be edited once I click "Save." So go ahead and click "Save." And we come to

the consolidated plan main menu and you can just double-check once you do this to make sure that HTF is indeed included. And I see there that it is still checked off and so HTF is now included in that plan.

Now, before getting into the screens that are required for your con plan, just go through the other process of creating a copy of your consolidated plan and making sure that HTF is included. And so to make a copy, you need to know what is the plan that you're going to be copying. So I'm going to go ahead, I'm going to do a search. I was in Minnesota for our demo last week so we've put in a number of plans here. But I'm going to be making a copy of this – just this 2017 Version 1 plan. We'll click "Copy" and do the source information, Version 1, new information 2018 to 2022, and I'm just going to call this 919 Version 2. And we'll click "Copy." And you'll notice here I don't have any choice of selecting what are my programs that are included, and it will – when I click "Copy," and we come to that 919 Version 2, and I go ahead to "Edit." And in the AD-25 screen, HTF is now included as one of my programs included. So regardless if you're copying your plan or creating a new blank plan, HTF will automatically be included in that con plan template for State grantees. And go ahead, click "Save" and "Return." Just update my title.

Okay, and now, we will – we'll walk through where HTF needs to be included or where are the specific elements for including HTF in your consolidated plan and in the action plan. The first location is in PR-05. And this is where you're indicating the lead and responsible agencies for each of your programs and funding sources. And you'll see that HTF is now included. So to go through the process of selecting the organization and the name of the department or agency responsible for administering the Housing Trust Fund. And you'll see here in copying the prior version, this had previously been in the narrative and it can now be moved up into this table now that HTF is included as a program in the eCon Planning Suite. I'm just going to go ahead and click "Cancel" here.

And again, for the point that Peter made, you will want to make sure that HTF is included throughout your executive summary and throughout your consultation and citizen participation. It may come into your Needs Assessment Overview and your Market Analysis Overview with the summary of your needs and market analysis just as you would be referencing or describing any other program that you are receiving.

But moving to the Strategic Plan, I am going to start in the Anticipated Resources just to make sure that we're including it as a resource. And scrolling down, I see now that HTF is now automatically included as a source funding. Because I made the copy of the plan, you know, the HTF that I'd added as an additional resource is still included. And you can go ahead and you can delete that because it's now automatically included. And sometimes

UAT doesn't want you to delete that. We'll just come back into it. We'll come into the blank version here.

Coming into Anticipated Resources, you see now that HTF is included, as are all of our sources of funding. So you can go ahead and you can just make sure – I'm just going to go ahead and just enter some general numbers to each program. And just so that everything is populating in our sample table here and you're able to use the narrative description to be describing your source of funding. But the important note here is that HTF is automatically included in your Anticipated Resources.

So we'll return and save, and you'll also want to make sure that HTF is being included if you have any target areas that are HTF-specific target areas, that you're including them as a geographic priority as part of your strategic plan. And you'll see here there's a number of target areas that I plugged into this plan, and you are able to add additional target areas if there is an HTF-specific target area, or to update the narrative and the language associated with any of these target areas, to indicate how or where HTF would be leveraged in that geography.

Next is Priority Needs. We'll just go ahead and we can add our default priority needs. So we can just put in a need related to housing rehab, enter a brief description, indicate the corresponding population, family types, if they're homeless or non-homeless, special needs, and indicate if you did – are including any target areas and their goals. And we'll come back and update the goals but go ahead and click "Save and return" and make sure that you're including those priority needs that may be tied to your HTF program. We'll just leave one need in for now so we'll go ahead and click "Save and return."

We will first just go to Goals and Continuing Resources to Priority Needs to Goals. Or had an added goal and we'll just add Goal Number 1 and complete a description so we can save. Category and Corresponding Start Year and End Year, I'll just indicate that it's a five-year goal. The duration of the con plan cycle and associate it with the priority need that I had already established and then, indicate the funding that's included. Just indicate those goals that will be funded with HTF. Of course, your corresponding goal outcome indicators.

The exact same process that you went through in your con plan that you go through in your action plan in adding goals, just now making sure to be including HTF throughout all of that.

We'll come back, and the last place in the Strategic Plan to be including HTF is in the institutional delivery structure. And just talking through, including here in your consolidated plan the structure of carrying out HTF just as you

do in talking through carrying out your other programs in the institutional delivery structure. Also now, be including the organization and entities responsible for carrying out the Housing Trust Fund program.

So we're going to pause there on the Consolidated Plan, alright? And Jon, just if we've gotten any questions coming in on the consolidated plan, we can address those before moving to the action plan.

Jon: Yeah, Chris, the questions we did receive are more related to the – mostly it's to the action plan but we do have one here. And the question is, "How do I add the HTF program to my con plan?"

Chris Andrews: So that's a great question and it's a little bit different for State and entitlement grantees. So just focusing here on the State grantee, you actually don't need to do anything to add it to your consolidated plan, it will automatically happen. So whether you're adding a new blank plan as we did here, or if you're copying your prior year con plan, HTF will automatically be included as a resource in your programs included here. And then, it will then be included throughout your strategic plan and can be added in that version in your resources, in your goals, and so on. So it will automatically be included.

Jon, it looks like most of the other questions are more action plan oriented?

Jon: Yeah, so we can hold off on those just for a few minutes. But we should be able to – there's some good questions and I'm sure we'll be able to answer them.

Chris Andrews: Okay, great. So I'm going to pause here and we're going to actually switch to adding HTF to the action plan and just walk through that process for State grantees who are in Years 2 through 5 of their action plan, and just how to add those action plans to make sure that HTF is included. And then, we'll walk through the specific HTF screens.

So just coming back to the Plans, Projects and Activities menu in IDIS, when you're adding your annual action plan, you again, just like your con plan, you have two options. You can add a new blank action plan template for the program, or you can copy a prior year action plan and it will carry forward all of the information from that action plan that you can then just go through and update.

So first, we'll walk through copying. And again, you need to know your source action plan program here. So I know we're copying from 2017 Version 1. We'll initiate 2018 and I'm going to go ahead and call it 919 AAP. Go ahead and click "Copy." Okay, we see here now that we have 919 AAP. And go ahead and click on "Edit" and when I come to the AD-26 screen, I

see that HTF has automatically been added to my 2018 action plan and my action plan is still associated with my prior year with my consolidated plan for that period.

The second option of adding your action plan is that you can add a blank action plan template, and you do that by clicking on “Add.” And you’re then able to fill out the information for your action plan program year, it’s 2018, title, your version. Select your programs included and again, you’ll see HTF is automatically checked off to select your other corresponding programs. Is this action plan associated with a consolidated plan? Yes, it should be associated with a consolidated plan. And then, you can go ahead and you can search for that consolidated plan. I’m just going to search for 2017 and select that consolidated plan and then, go ahead and click “Save.” So that should work and that sometimes just caught up in UAT but that should be going in production.

So coming back, we’ll just come back to your action plan we just created by copying. Go ahead and just search for 2018. And then, we have here our 919 Action Plan.

So now, we’re going to talk through all of the screens that are required in your annual action plan to include HTF. And we’re looking at this here from a Year 2 through 5 action plan. But the important note is for any grantee creating a consolidated plan in 2018, all of these screens would also be required to include in your Year 1 action plan. Just remember that Year 1 action plan is imbedded in your consolidated plan template.

And lastly, to the point that Peter made at the beginning of the session is that just linking your consolidated plan, the HTF should be included throughout the description of your action plan in your executive summary, in your consultation, in your participation, and highlighting HTF just as you do all of your other CPD programs.

Again, just like in the strategic plan, you’ll want to make sure that you’re updating your PR-05 screen to be including HTF. And you can go ahead and again, select that organization and name the department or agency.

In the action plan – just to come back to the PowerPoint here – in the action plan, really, we’ll be focused on the expected resources on the AP-15; on the goals, the AP-20, on the allocation priorities; it’s the AP-25 screen; the method of distribution, AP-30; your projects, AP-35; and the program specific requirements, AP-90 screen.

So let’s go back into IDIS and just we’ll walk through each of those. So beginning with the AP-15 is again, you’ll see that HTF is now automatically included as an additional resource. And let’s see here if we can just – and

you'll need to delete the other Housing Trust Fund resource that was added from your prior action plan when you were having to add it as an additional resource. Let's just see here if the Delete button works. No. Maybe we should just edit it and just save it that way so we only have one Housing Trust Fund here.

So again, you'll want to enter your annual allocation for HTF, enter a narrative description, and update all of your sources of funding. And remember, this is the information that you can't update in your action plan until HUD releases the allocation map. So again, go back and review CPD Notice 16-18 to talk through that process in lining your program year with continuing regulations and potentially, later allocation announcements coming from HUD. Cancel that and come back in. UAT is being a little sleepy here.

Okay, once your anticipated – or expected resources are updated, you'll again want to update your goals to make sure that you're including HTF in your goals and that you're including HTF funding as one of the resources in your goals. And you can do that by editing any one of your goals and making sure that HTF is included as the resource in those goals. So here, we'll just go ahead, we'll add HTF here and click "Save and return."

The next is under Allocation Priorities and you'll see now that HTF is added as a resource. You now have a line for indicating the funding allocation priorities for HTF. And the same is true for your method of distribution. It is now included as one of your funding sources.

And finally on your Projects, as State grantees, you're not required to enter projects as part of your action plan but you're very strongly encouraged to, during the course of the program year, to update your projects through an amendment in the eCon Planning Suite to make sure all of that data carries forward in your CAPER. And in doing that, you'd want to make sure to include any projects in your – that are funded with HTF.

The final section – and this is the big section for HTF – is the AP-90 screen. This is the Program Specific Requirements screen. And in scrolling down, you'll see there is now an HTF section, and these are all new fields. And these are a verbatim match of the allocation plan questions that you previously submitted as a paper-based allocation plan. And as the HTF recipient, you know, you will be expected to answer all of these questions in narrative and some radio buttons. And if you scroll down, a number of options to upload supporting or additional content using the "Browse to attach" functionality. But all of your HTF information and your program specific information for HTF should be going into the AP-90 screen.

And I do want to pause. I want to talk a little bit about these radio buttons and especially if you select – or if you have some grantees that are other State agents who just want additional requirements. But before I move away from this screen, Peter or Beth, anything else that you'd like to add here?

Peter Huber: Yeah, sure, Chris, this is Peter. So just a note to all of the State HTF grantees on the call. If you have listened to nothing else on this call, pay attention to this part. Because basically, everything that you've submitted for the past two years in your HTF allocation plan is going to go onto this screen. So the AP-90 screen is basically replacing your paper HTF allocation plan. So you know, listen in real close. You'll recognize these questions. These questions should look very familiar to the questions in the guide that HUD published for, you know, for submission of the HTF allocation plans for 2016 and 2017.

Chris Andrews: So if you're wondering – if you're really wanting to get into the system and you want to see all of the questions, all of the questions are the same questions that were used as part of your paper-based HTF allocation plan that are here on the AP-90 screen.

The last pause here is if you do have some grantees that are State agents you know, and you should all that apply here. But if you have subgrantees that are State agencies, there's a little bit more detail that you need to provide. I'm going to go ahead and click "Save." And you'll see now when I scroll down my menu, I now have a new screen – AP-91, Program Specific Information for State Agency Subgrantees. And in this, it asks to just provide additional detail about that subgrantee, about that State agency subgrantee, as it relates to the Housing Trust Fund on the AP-91 screen. And you'll need to go through and complete all of these fields. And again, you do have the option of uploading additional content if needed, but you do have all of these narratives – narrative-field questions here.

So Jon, with that, I think we can pause and if there are any action plan questions that are coming in, we can start to work through those action plan questions.

Jon: Sure, Chris. Yes, we did get a few questions regarding the action plan. So the first one is, "Will HTF automatically appear in my action plan if I added it to my consolidated plan?"

Chris Andrews: That's a great question. So for those of you thinking ahead to future action plans as of 2018 con plan grantee, HTF will then automatically be included in all of your subsequent action plans. And we'll talk through what that looks like for entitlement grantees as it's a little bit different.

For those of you who added HTF in the amendments in 2016 or in your 2017 consolidated plan as an other funding source and included it that way, when

you do add or copy your action plan, HTF will automatically be included as one of the programs included in that action plan.

Jon: Thanks, Chris. Here's another question. "We have already starting working on the 2018 action plan. We know that it most likely won't be submitted until late 2018. Should we wait to download the action plan until after the IDIS release so these elements are included?"

Chris Andrews: And so you know, it's a great question. Would definitely recommend for anyone – and especially grantees whose program year begins at the earlier end of the HUD program year cycle – to wait to add your 2018 consolidated plan or your 2018 action plan in IDIS until after the release for the inclusion of the HTF screens. Otherwise, you'd need to go back through and you'd be making a copy or an amendment of that plan to be including the HTF-relevant screens. So I do recommend for folks to wait until after that release to be creating your plan in the system.

Jon: Great.

Beth Hendrix: Chris, could you talk a little bit about if you've already created your plan how you could add those screens?

Chris Andrews: Yeah, absolutely. So if you have – and I know that some of you who are on a January 1 cycle, you may have already created your consolidated plan or created your action plan. And you can, after the update that's scheduled for the beginning of October, after that update is made, to add the HTF screens to your con plan or to your action plan, you actually would be able to just go ahead and you can make a copy of that plan – of either that action plan or that consolidated plan. And in making that copy – and just as we demo'd here today – but in making that copy, you just wouldn't be updating your year. You would be keeping the years the same. So it would be 2018 and then your new plan start year would also be 2018. And that would carry, or update, to include the HTF screens.

And I think if you do have any questions on that, I would strongly recommend you to submit a question to the HUD eCon Planning Suite AAQ pool and someone will be able to walk you through and send you specific instructions on that if you are finding yourselves in that situation.

Jon: Alright, Chris, we have one more on the action plan. A State was wondering whether they will need to resubmit an allocation plan each year after the new release.

Chris Andrews: That's a great question and Peter, you may have more to add to this. But I think the important thing to know – and we can pull this back up – is the allocation plan, all of those requirements still exist. They are just now starting

in Program Year 2018. They're included throughout the eCon Planning Suite primarily in the AP-90 screen in all of these questions. And every year in your action plan, you will be completing and updating this program specific information to the Housing Trust Fund. And this is what will be reviewed and considered to be the same as the HTF allocation plan that you have been submitting in 2016 and in 2017.

Peter Huber: Yeah, Chris, this is Peter. Just to add onto that, you know, we obviously expect States to submit their HTF allocation plan each year. With that being said, you know, that doesn't mean it has to change a whole lot from year to year. You know, we didn't see a whole lot of changes in allocation plans between '16 and '17. Most of that was probably due to the length of time it took to get the 2016 plans approved and you know, the relatively short turnaround before the 2017 plans were due.

But yeah, we would expect an allocation plan to be included in each year's action plan. But again, that doesn't mean it has to be significantly different.

Chris Andrews: And once you put that information in – just to build off of that point, Peter – is in going – in thinking forward for all of your planners out there to 2019 is you can create a copy of your 2018 action plan to then be the basis for your 2019 plan and it will carry forward all of the HTF information that was included in your 2018 action plan. And then, you're just able to go in and update and revise as necessary.

Okay, we're going to – even though there's a few more questions coming in, and keep those questions. I do want to just pivot and talk through HTF for subgrantees. So pulling back our PowerPoint and scrolling through everything that we're able to just demo.

Moving to HTF & Subgrantees, or Entitlement Grantees. For entitlement subgrantees, when you are creating your action plan, either copying or adding a new blank action plan or a consolidated plan, you are able to indicate if you are a Housing Trust Fund subgrantee. And just looking here at the screenshot in the right hand corner of the PowerPoint, as you can see, we're copying a 2017 action plan. And our new action plan, 2018, I now have an option to indicate if I am a Housing Trust Fund subgrantee. And when I select "yes" to that question, that point of copying or creating a new blank action plan, I will now have those HTF relevant screens displayed there, or fields, in AP-90 screen and throughout my action plan and con plan just like the State grantees did, albeit geared to being a subgrantee.

An important note is that if you create that action plan in 2018 and you indicate that you are a Housing Trust Fund subgrantee, in subsequent action plans regardless of if you are a subgrantee or not, those HTF screens will be included in your action plan. Which is great in that it gives you the option of

being able to continue to include HTF or if HTF comes out a little bit later after you submit your action plan and you don't need to go through creating a brand new blank action plan to now include a new program. But you may find yourself not receiving HTF resources every year, and that is okay that that Housing Trust Fund subgrantee is selected "yes." And you can just choose to leave those HTF relevant screens blank or put in "N/A" on it. And would recommend everyone to make a note in their executive summary or elsewhere in the plan indicating, you know, when you've received HTF, when you haven't, and describing the process of receiving HTF through the State.

And so we're going to go back into IDIS here and we'll now come in as an entitlement grantee, so let me just swap this over real quick. Okay, and we're now coming in here as an entitlement grantee. And we'll start just in adding an action plan and indicating if you are a HTF subgrantee. So again, you do have the option of adding a blank plan and starting with a blank action plan, or copying a prior action plan. And you'll see here you do now have a new field that asks you to indicate if you are or are not a Housing Trust Fund subgrantee. And if you are adding a new blank action plan, you would again, you'd make sure to associate it with your consolidated plan and go through that process.

We're going to go ahead, we're going to make a copy of the action plan because I know that's what most of you on the line do to go from year to year. So I'm going to go ahead, I'm going to search for my 2017 action plan. Should have just been submitted or in this year, the last release, it wasn't. I'm just going to make a copy of this, the 2017 draft. And then, I'll click "Copy" here, then version draft. The new year's 2018, I'm just going to call this 919 and I have the option again to indicate am I a Housing Trust Fund subgrantee. Select "yes," go ahead and click "Copy." Search now for all the years and I see here now I have this 2018, my 919 copy that I just made. Go ahead and click on "Edit" to open up to my new 2018 action plan. And you'll see here under the AD-26 screen, it now indicates that I'm a Housing Trust Fund subgrantee.

Now, for entitlement grantees, the process of including HTF is a little bit different than State grantees of how it gets entered into your action plan and into your goals. It's primarily through the Expected Resource. As a subgrantee, HTF will not be populating automatically in either your con plan or in your action plan Source of Funding table. You will need to add it using the "Add" button here on the far right hand corner of this table as the Housing Trust Fund and indicate the expected amount available, enter a brief description, source and the uses of funding, kind of whatever those uses may be that you'll be using as a subgrantee of Housing Trust Fund resources. Go ahead and click "Save and return." HTF is now included on the table here.

And coming into my annual goals, I'm just going to go ahead and will add a goal here. We'll just check one of these and you'll see that I'm now able to include HTF as one of the resources funding that goal as part of my annual action plan. Cancel. Generally, we'd want to make sure that HTF was included in your projects on the AP-35 screen. And lastly, just like a State grantee, on the AP-90 screen.

Scrolling down, you will see a similar set of questions related to the Housing Trust Fund in describing how as a subgrantee, you will be using HTF as a resource. And again, just like in the AP-90 screen for State grantees, you're able to upload attachments to help support your documentation and description of the HTF as you work through all of the program specific requirements.

So I'm going to pause there. I know that was a quick review for entitlement subgrantees. I think the important thing that I just want to – that I mentioned at the very beginning but want to highlight again is if I now create a copy of this 2018 plan for 2019, it would still indicate that I'm a Housing Trust Fund subgrantee. But if I am not an HTF subgrantee in 2019, that's okay, it can still say yes. I would just want to zero out the resources that would be indicated in the Expected Resources screen in the AP-15 screen. And I would just leave out HTF in the AP-90 in the Program Specific Requirements screens and would not be including any references to HTF there.

Okay, before we open it up for more questions, just want to – we'll wrap things up here and just give everyone a couple of takeaways. The first for State grantees, your consolidated plans beginning in 2018, they need to include HTF in the eCon Planning Suite. And the same is true for action plan. So even if you're in Year 3 or Year 4 of your action plan – or of your con plan cycle – your action plan starting in Program Year 2018, and that is the program year that we're just about to start, that those are including HTF. And HTF, you know, it is included in both your strategic plan, in your consolidated plan, and in your action plan.

But again, to the point that Peter made at the very beginning, HTF should be included throughout your plan just as you're including your other programs and talking it through in your executive summary, in your consultation, in your citizen participation, right along with your other CPD programs. And then finally, completing the AP-90 and the AP-91 and those program specific requirements for HTF. That is replacing your paper allocation plan.

Now, for entitlement subgrantees, a little bit different. If you are receiving HTF as a subgrantee, you have to make sure that you're marking HTF subgrantee, that you're saying "yes" to that dropdown when you're creating your consolidated plan or your action plan. And then, that you're including

HTF in your strategic plan and in your action plan and your resources and your priority needs and your goals and your projects, and that you're completing the AP-90 program specific requirements for HTF.

And finally, for those, if you're not receiving HTF in subsequent years, leave those HTF elements blank or just enter "N/A" or something else to indicate that you're not receiving HTF in that program year.

Beth or Peter, anything you would like to add here before we open it up for questions?

Beth Hendrix: Just the Must-Dos are really important to be aware of. It's really important that you select "HTF" when you're starting either your 2018 consolidated plan or action plan if you're a State grantee this year.

Chris Andrews: Great. Thank you, Beth. And just before we open it up for more questions, it looks like we have a few coming in. If after this session if you're still working on your action plan or your con plan, or if you're thinking through your HTF program, for any general HTF related questions, I recommend that you contact your local CPD representatives or email HTF@HUD.gov.

For HTF and eCon Planning Suite questions, you can submit an AAQ to the eCon Planning Suite Help Desk on the HUD Exchange. And for any general HTF and IDIS questions, you can also submit an AAQ to the IDIS Help Desk on the HUD Exchange.

We'll be sending – you know, this PowerPoint will be posted on the HUD Exchange in a couple of days and we'll make sure to send you all a note of when that is posted. And there is also a quick guide that will be posted on the con plan site on the HUD Exchange, as well, and we'll make sure to send that out to everyone, as well that walks through the process of doing everything that we just talked about in the last 70, 75 minutes or so.

So with that, Jon, any other questions?

Jon: Yeah, we actually had a question that come in a little earlier just as we were transitioning from con plan that had to do with the con plan. This question was, "We did a 2017 consolidated plan," and they're wondering what happens if they need to do a substantial amendment to the plan that is not related to HTF. Will they need to change HTF items in the amendment?

Chris Andrews: That's a great question. And the short answer is no, if you're not – if you're making that amendment to your 2017 consolidated plan and HTF had already been included as an other resource, you won't need to go through in that 2017 con plan and re-add HTF as a new resource in that con plan. All of that will be included in your subsequent 2018 and after action plans. So as long as

you're not making any changes that are, you know, affecting your HTF, then you won't need to make any specific HTF changes in that amendment.

Other questions, Jon?

Jon: Yes, so there is one that should come in on subgrantees. The question is, "Can you repeat what to do if you are an entitlement and don't receive HTF in subsequent years?"

Chris Andrews: Absolutely. So if in 2019 I am not receiving HTF as a subgrantee, even though it's saying "yes" there, I would just on my Expected Resources make sure that HTF is zeroed out. And you do that through the "Edit" button there or you can remove it completely as a resource in that 2019 action plan. And then, just make sure that it's not included throughout your action plan, that you're not describing it, that you're receiving it in your executive summary, and that you're leaving the specific requirements blank in the AP-90 screen and that you're not including any projects or goals that are including HTF as a program.

Are there any other questions coming in, Jon?

Jon: I believe that's it as of now.

Chris Andrews: Before we wrap up, Beth, do you have any last parting thoughts or recommendations and including HTF in the consolidated plan and in the action plan?

Beth Hendrix: We're really glad that you were able to take the time to join us today. We wanted to make sure you had information about the slides before they were released and you started plans and suddenly saw them appear. The good news is the information that you're completing is not new information. It's the same information you've been doing in the paper process leading up to here.

And if you have any questions or concerns after this, please use the AAQ system and we'll also be releasing, in addition to this presentation on the HUD Exchange, also a quick guide to walk you through everything we talked about today, as well.

Chris Andrews: Thank you, Beth. Thank you, Peter and Jessica for joining us. And thank you, everyone on the line for joining us and asking so many great questions. If you do have more questions, please submit them through the AAQ and someone will help you as soon as possible. But thank you, everyone, and have a great afternoon.