

CON PLAN QUICK GUIDE



Action Plan Tips & Tricks Must Do's Before Starting an Action Plan

March 2018





WHAT ARE CON PLAN QUICK GUIDES?

The Con Plan Quick Guides provide a brief summary of the steps required to set up and complete certain elements of the Consolidated Plan, Annual Action Plan and CAPER. For complete guidance and screen by screen instruction, review the [Con Plan in IDIS Desk Guide](#).

ACTIONS PLANS TIPS & TRICKS

*For **all** Grantees*

The following tips will help grantees have the most accurate information in the next Annual Action Plan and reduce the amount of reconciliation required in future CAPERS and Annual Action Plans.

I. COMPLETE ALL CONSOLIDATED PLAN AMENDMENTS FIRST

1. Click “Search” under the Action Plan submenu.



2. Make note of the Program Year and Version name for the plan to be copied.
3. Click “Copy” under the Action Plan submenu.



ACTION PLAN TIPS & TRICKS – MUST DO'S BEFORE STARTING AN ACTION PLAN

4. Enter the Source Action Plan's Program Year and Version (identified in step 2). Enter the Program Year and Version for the new Action Plan. Do not indicate that the plan is an amendment. Once completed, click "Copy."

Copy Annual Action Plan

Copy | Cancel

Source AAP Program Year: *

Source AAP Plan Version: *

New AAP Program Year: *

New AAP Plan Version: *

If Amendment: *

5. The Action Plan has now been copied. Locate the copied Action Plan by clicking "Search" under the Action Plan submenu. Grantees can change the title from "AAP Copy" on the AD-26 Screen.
- Complete all amendments to the Consolidated Plan (adding or modifying goals, changing funding sources, etc.) prior to creating the Annual Action Plan (AAP). Directions for non-Consortia members, States and Regional plan amendments can be located at <https://www.hudexchange.info/resources/documents/Amending-a-Con-Plan-Action-Plan-for-State-Entitlement-Regional-Grantees.pdf>.

Best Practice Tip

Throughout the program year, follow your citizen participation plan for all amendments. At the end of your program year and prior to starting the next CAPER and Annual Action Plan, update the e-Con Planning Suite with all amendment information once. This will limit the number of plan versions in the system.

ACTION PLAN TIPS & TRICKS – MUST DO’S BEFORE STARTING AN ACTION PLAN

- Make sure the Field Office has changed all amendments to “Review Completed” before starting the Action Plan in the system. This status tells IDIS to transfer any updates made in the amendment(s) into future Action Plans and CAPERS.
- Make sure the AAP is correctly associated with the most recent amended Consolidated Plan.
- **Consortia Specific:** Only the lead can create an amendment, even if only the participating grantee needs to undertake an amendment. Participating consortia members will need to consult with the lead entity to initiate an amendment update in the system. When the amendment update has been entered into IDIS, only the lead entity can submit the amended version to HUD. Directions for Consortia amendments can be located at <https://www.hudexchange.info/resources/documents/Amending-a-Con-Plan-Action-Plan-for-Consortia-Grantees.pdf>.

Best Practice Tip

Consortia members should coordinate with each other to update the system at the same time. This will limit the number of amendments in the system. Follow the Best Practice Tip above to schedule when all consortia members will update their linked plans.

- **State Specific:** Project-level detail was not required for a state grantee’s when it submitted its last Annual Action Plan. However, once a state grantee allocated funding via its Method of Distribution, and set up those program year projects in IDIS, it will need to amend its plan so the projects may be associated with a con plan goal and can be tracked in the e-Con Planning Suite.

II. UPDATING GOALS & PRIORITY NEEDS IN THE ACTION PLAN

- Goals and Priority Needs cannot be changed in the Annual Action Plan. Information entered into the strategic plan (SP screens) of the consolidated plan automatically downloads to Annual Action Plans and CAPERS.
- Any edits to the goals, priority needs, anticipated resources or geographic priorities must be made in the strategic plan (SP Screens) of the consolidated plan. This would require an amendment to the Consolidated Plan. (See Tip #1 for directions on amendments).

III. CHOOSE WHETHER TO “COPY” OR “ADD” A YEAR 2-5 ACTION PLAN

- To create an Annual Action Plan, a grantee has the option to copy a previous action plan or to create a blank action plan.
- The following chart may help a grantee decide which process is used. Depending on the process selected, it is important the grantee correctly associates the Annual Action Plan to the Consolidated Plan (See Tip #4).

Option	What the System Will Do	What Grantee Will Need to Do
Copy a Previous Action Plan already in the System	<ul style="list-style-type: none"> • All data from the source Action Plan copies into the new version. • The copy will include any attachments and all additional content, such as images, maps and text boxes that were inserted. • The copy will be automatically associated with the Con Plan in the system. 	<ul style="list-style-type: none"> • You will need to review the plan’s overall content and adjust it to reflect any goals, projects, outreach and other elements that are unique to the new year’s Action Plan. • The system will automatically copy previous year projects without updating the project year. You will need to remove previous year projects and create new projects for the new Action Plan
Add a New Annual Action Plan	<ul style="list-style-type: none"> • Produces a blank template associated with the identified Con Plan. 	<ul style="list-style-type: none"> • You will need to complete all narrative fields and tables.

- If copying, a grantee should make sure that it is copying an AAP that is associated with the most current Consolidated Plan.
- Directions on how to copy or add a Year 2-5 Annual Action Plan are available at:
 - State and Entitlement Grantees: <https://www.hudexchange.info/resources/documents/Creating-a-Year-2-5-Annual-Action-Plan-for-State-and-Entitlement-Grantees.pdf>
 - Consortia Grantees: <https://www.hudexchange.info/resources/documents/Creating-a-Year-2-5-Annual-Action-Plan-for-Consortia-Grantees.pdf>
 - Regional Grantees: <https://www.hudexchange.info/resources/documents/Creating-a-Year-2-5-Annual-Action-Plan-for-Regional-Grantees.pdf>

IV. CORRECTLY ASSOCIATE THE ACTION PLAN TO THE CON PLAN

- If a grantee has an approved (“Review Completed” status) Consolidated Plan in the e-Con Planning Suite, then all AAPs must be associated with it.
- An AAP’s association to a Consolidated Plan can only occur when the plan is created.
- If the new AAP is created by adding a blank template, then manually associate the correct Consolidated Plan version with the AAP.
- If the new AAP is created by copying a previous action plan, the AAP will be associated with the same Consolidated Plan version.

Error Check

If the previous action plan is not associated with a Consolidated Plan, or it is associated with a previous Consolidated Plan version and not the most recent amendment, a grantee will need to add a new blank template and manually associate the AAP with the amended Consolidated Plan.

V. USE THE HUD PROGRAM YEAR – NOT LOCAL PROGRAM YEAR

- In the eCon Planning Suite, the plan’s year must be the grantee’s HUD Program Year.
- Once the new AAP is created, a grantee will not be able to change the plan’s year on the AD-26 screen.

VI. MAKE SURE ALL COPIED PRIOR YEAR PROJECTS ARE REMOVED

- When copying an Action Plan, IDIS will automatically copy projects from the prior year without creating new projects for the upcoming program year.
- To avoid duplication of projects in IDIS, a grantee must delete all copied projects and then create new projects for the upcoming program year.
- **State Specific:** Project-level detail is not required for a state grantee’s Annual Action Plan. Once a state grantee has allocated funding via its Method of Distribution, the State grantee will use the

Projects sub-menu in IDIS Online to add its projects for the program year. To have the projects appear in the e-Con Planning Suite and to associate projects with a consolidated plan goal, State grantees will need to amend their plans to add the projects. See Tip #1 for additional direction.

VII. CONSIDER HOW GOALS ARE ASSOCIATED TO 2017 PROJECTS

- The CAPER reports outcomes by how they are associated to the grantee's goals. The more goals associated with a project, the more reconciliation a grantee will need to undertake at the end of the program year.
- When adding projects, it is a best practice to associate projects with only one annual goal. Next ensure that the goal outcome indicator used for the project aligns with the goal outcome indicator listed under the corresponding annual goal.
- Grantees may choose to associate more than one goal to a project. However, this best practice will make reconciliation of the CR-05 (Goals and Outcomes) Screen in the CAPER easier for the grantee.

Best Practice Tip

Associate projects with only one goal. It will make accomplishment data easier to reconcile in the CAPER.

ADDITIONAL RESOURCES

The HUD Exchange provides a variety of resources to assist grantees in completing the consolidated planning process. Access the e-Con Planning Suite Desk Guide, Quick Guides, short on-line tutorials and the Ask A Question (AAQ) Consolidated Plan at <https://www.hudexchange.info/programs/consolidated-plan/>.

The screenshot shows the HUD Exchange website with the URL <https://www.hudexchange.info/programs/consolidated-plan/>. The page title is "Consolidated Plan". The main content area describes the Consolidated Plan and provides links to learn more about the process, grant programs, and related HUD programs. A sidebar on the right contains links to "Join a Mailing List", "Ask a Consolidated Plan Question", "Reporting System", "Grantee Consolidated Plans, Action Plans, and CAPERS", and "Featured Resources". A large red box highlights the "Consolidated Plan Guides, Tools, and Trainings" section, which includes links to "View Consolidated Plan Guides and Tools", "View eCon Planning Suite Trainings", and "View Archived Consolidated Plan Guidance". Another red box highlights the "Consolidated Plan in IDIS Desk Guide" and "Consolidated Plan Quick Guides" links in the sidebar.

Resources and assistance to support HUD's community partners

HUD EXCHANGE
Secretary Ben Carson

My HUD Exchange Programs Resources Trainings

Consolidated Plan

The Consolidated Plan is designed to help states and local jurisdictions to assess their affordable housing and community development needs and market conditions, and to make data-driven, place-based investment decisions. The consolidated planning process serves as the framework for a community-wide dialogue to identify housing and community development priorities that align and focus funding from the CPD formula block grant programs: Community Development Block Grant (CDBG) Program, HOME Investment Partnerships (HOME) Program, Emergency Solutions Grants (ESG) Program, and Housing Opportunities for Persons With AIDS (HOPWA) Program. The Consolidated Plan is carried out through Annual Action Plans, which provide a concise summary of the actions, activities, and the specific federal and non-federal resources that will be used each year to address the priority needs and specific goals identified by the Consolidated Plan. Grantees report on accomplishments and progress toward Consolidated Plan goals in the Consolidated Annual Performance and Evaluation Report (CAPER).

- Learn about the Consolidated Plan Process, Grant Programs, and Related HUD Programs
- View Regulations and Federal Register Notices

The eCon Planning Suite: Consolidated Plan Template in IDIS OnLine and CPD Maps

In May 2012, HUD's Office of Community Planning and Development (CPD) introduced the eCon Planning Suite, including the Consolidated Plan template in IDIS OnLine and the CPD Maps website. The eCon Planning Suite is designed to support grantees and the public to assess their needs and make strategic investment decisions by providing better data and tools and by creating a seamless planning and grants management framework.

[Learn more about the eCon Planning Suite](#)

Consolidated Plan Guides, Tools, and Trainings

Training manuals, guides, tools, trainings, and other resources related to the eCon Planning Suite and Consolidated Plan data sources are provided to assist grantees in developing their Consolidated Plans, Annual Action Plans, and CAPERs. Archived resources related to the Consolidated Plan are also available here.

[View Consolidated Plan Guides and Tools](#)

[View eCon Planning Suite Trainings](#)

[View Archived Consolidated Plan Guidance](#)

Reporting System

IDIS

Grantee Consolidated Plans, Action Plans, and CAPERS

[Browse Consolidated Plans, Action Plans, and CAPERS](#)

Featured Resources

- [Promising Practices in Consolidated Planning Guide](#)
- [Housing Trust Fund eCon Planning Suite FAQs](#)
- [CPD Memo: Incorporating 24 CFR Part 5 AFFH into the Consolidated Program Year and Citizen Participation Plan](#)
- [Consolidated Plan Updates to Reflect Disaster Recovery Needs and Associated Priorities](#)
- [Consolidated Plan in IDIS Desk Guide](#)
- [Consolidated Plan Quick Guides](#)