

CONSOLIDATED ANNUAL PERFORMANCE AND EVALUATION REPORT INFORMATION

The following information and data items are useful in tracking subrecipient performance and regulatory compliance. They are also required for the Consolidated Annual Performance and Evaluation Report (CAPER). If you collect or up-date this information throughout the program year, preparation of the CAPER is much easier. You will also be able to monitor your subrecipients more closely. This information can be obtained from the activity and drawdown information in IDIS, and you can use screen prints or various reports to collect the data that has already been entered into the system.

- Activity name and number.
- Subrecipient name, address, telephone number, responsible individual.
- Activity description.
- Activity location, including census tract/block group where activities occur.
- Month/year activity funded.
- National Objective being met and how it meets program criteria.
- Type of activity—eligibility category.
- Financial status for activity:
 - Amount authorized
 - Amount expended this reporting period
 - Total expended to date (all sources as well as CDBG)
 - Unliquidated obligations (for public service activities only)
 - Unobligated balance
- Program income expected to be generated and received.
- Other HUD funds involved in an activity.
- Accomplishments/Units of Measurement (as applicable):
 - Numbers of persons assisted (for all non-housing activities)
 - Number of households assisted (for housing activities)
 - Number of businesses assisted
 - Number of organizations assisted
 - Number of housing units completed
 - Number of public facilities completed
 - Number of full-time equivalent jobs created
 - Number of full-time equivalent jobs retained
- Status of activity not completed major milestones, problems, or delays.
- If activity is to benefit low- and moderate-income persons:
 - For acquisition, construction, or rehabilitation of multi-unit residential buildings:
 - Number of units in each structure at project start, and number of units in each structure at project completion
 - Number of units per structure occupied at project start and number which are occupied by low- and moderate-households
 - Number of occupied units per structure at completion and number occupied by low- and moderate-income households at completion
 - Total cost and share of total that is CDBG
 - Total rehab administrative costs

For job creation/retention activities:

- Listing of permanent job titles, which have been or will be created, and which are part-time jobs. If any positions require special skills/training, describe the efforts being made to provide such skills/training
 - Cumulative number of permanent full-time equivalent jobs created
 - Cumulative number of permanent full-time equivalent jobs retained
 - Identify which jobs are held by low- and moderate-income persons
 - Identify which jobs were made available to low- and moderate-income persons
 - Actions taken or to be taken by subrecipient or business to ensure first consideration was or will be given to low and moderate persons
- Family size and income characteristics of beneficiaries (or household size and income for housing activities).
 - Information on racial groups being served. Collect separate data counts where these individuals are also Hispanic or Latino.
 - White
 - Black or African American
 - Asian
 - American Indian or Alaskan Native
 - Native Hawaiian or other Pacific Islander
 - American Indian/Alaskan Native and White
 - Asian and White
 - Black/African American and White
 - American Indian/Alaskan Native and Black/African American
 - Other Multi-Racial
 - Information on female-headed households served.
 - Information on multi-unit structures assisted.
 - Information on number of households/businesses displaced or temporarily relocated for each assisted project (e.g., acquisition, rehabilitation).
 - One-for-one replacement data.