

CON PLAN QUICK GUIDE



Creating a Consolidated Plan For Consortia Grantees

April 2020





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](#).

CREATING A CONSOLIDATED PLAN

For Consortia Grantees

These instructions are for consortia grantees. State/entitlement grantees and regional grantees should use the state/entitlement and regional grantee quick guides.

Only the Lead Entity can create the plan for ALL participating members in the Consortium.

Participating members should not create a plan, even for CDBG and ESG allocations received directly from HUD. Creating the wrong type of plan will result in the plan not being approved by HUD and require all members to correct the plan.

Once the Lead Entity creates the plan, it should notify all participating members that the plan is available in IDIS.

Before setting up the Consolidated Plan, it is important to consider the following tips:

- Ensure all grantees have the same Consolidated Plan start year and program year start date.
- Determine roles and responsibilities for how the lead and participating members will enter information into the Consolidated Plan template in IDIS.
- All participating grantees will have editing rights on the lead Consortium plan; coordinate times for all members to access the lead Consortium plan.
- Develop a timeline for drafting the plan. Remember that when the lead entity submits its plan to HUD, the system will automatically submit all participating grantees' Consolidated Plan templates as well.

When creating a new Consolidated Plan, the Lead Entity has two options: 1) copying a previous plan or 2) adding a new, blank template. **Remember, only the Lead Entity can create and submit the Consolidated Plan for all participating members in IDIS.**

1. Copying a previous Consolidated Plan entered into IDIS: Copying a plan retains all information and narrative from the previous Consolidated Plan but updates the data to the most current data in the eCon Planning Suite. Grantees will need to manually update all narrative to reflect current conditions.

When copying a plan, grantees are unable to change the CPD programs and the Public Housing Agencies included in the Consolidated Plan. **Do not use the Copy option if consortium members are adding a new CPD funding source, changing the Public Housing Authority, or adding/removing members from the Consortium.**

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2. Adding a new Consolidated Plan: Adding a new plan produces a completely blank template with the most current data in the eCon Planning Suite. Grantees will need to complete all narrative fields and tables.

When adding a plan, grantees are able to change the CPD programs, members of the Consortium and the Public Housing Agencies included in the Consolidated Plan.

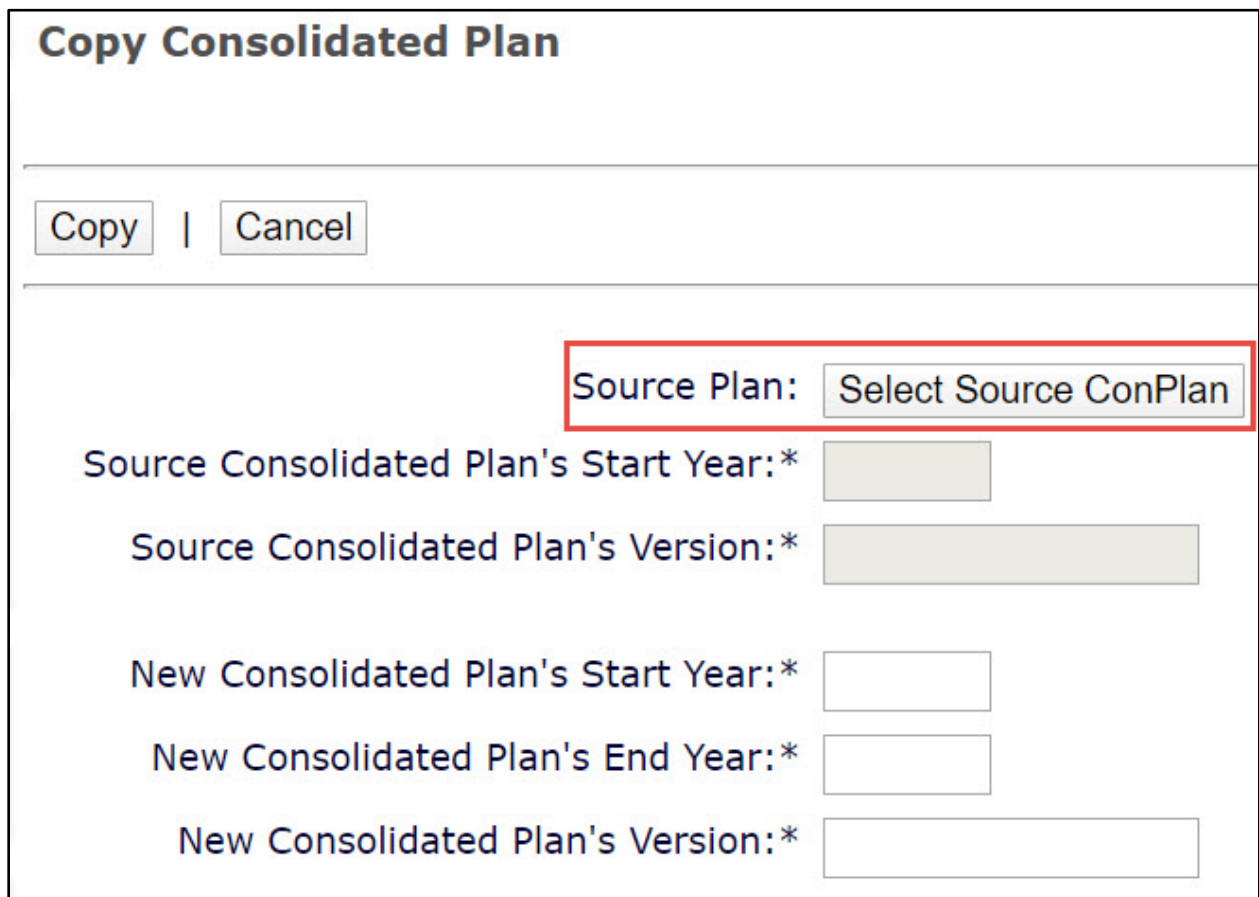
CREATING A CONSOLIDATED PLAN FOR CONSORTIA GRANTEES

I. CREATING A PLAN BY COPYING A PREVIOUS CONSOLIDATED PLAN

1. Click “Copy” under the “Consolidated Plans” submenu.



2. Click the “Select Source ConPlan” button.

A screenshot of a web application form titled 'Copy Consolidated Plan'. The form has a header bar with the title. Below the header bar is a horizontal line, followed by two buttons: 'Copy' and 'Cancel', separated by a vertical line. Below this is another horizontal line. The main content area contains several input fields. The first field is labeled 'Source Plan:' and has a dropdown menu with the text 'Select Source ConPlan'. This field is highlighted with a red rectangular box. Below this are five more input fields, each with a label and an asterisk: 'Source Consolidated Plan's Start Year:*', 'Source Consolidated Plan's Version:*', 'New Consolidated Plan's Start Year:*', 'New Consolidated Plan's End Year:*', and 'New Consolidated Plan's Version:*'. Each label is followed by an input field.

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3. The system will display a search screen. Click the “Search” button to locate and select the source plan to be copied, and then click the “Select” button. Only one Consolidated Plan for each Strategic Plan timeframe will be available. A plan will be displayed for selection only if: a) it has a status of “Review Completed,” and b) it is the most current plan for a particular start year. If the target year entered already has a plan that has been submitted, reviewed, and/or amended, the new copy cannot be edited or submitted to HUD.

Select Source ConPlan

Search

Select

Cancel

Search Criteria

Year:
All Years ▼

Status:
Select ▼

Search

Reset

Results Page 1 of 1

Select	Grantee Name	State	Year	Version	Title	Status
<input checked="" type="radio"/>	SAN MATEO COUNTY	CA	2013	3	2013 - 2017 Con Plan Minor Amendment	Review Completed

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4. Enter the New Consolidated Plan's Start Year, End Year, and Version. Click the "Copy" button.

Source Plan:

Select Source ConPlan

Source Consolidated Plan's Start Year:*

2015

Source Consolidated Plan's Version:*

1

New Consolidated Plan's Start Year:*

New Consolidated Plan's End Year:*

New Consolidated Plan's Version:*

Housing Trust Fund Subgrantee:

No ▼

Copy | Cancel

5. Select whether any participating grantees are a Housing Trust Fund subgrantee, and then click "Copy."

Copy Consolidated Plan - page 2

Copy | Cancel

Housing Trust Fund Subgrantee: No ▼

Grantee(s) participating in the plan:

Name	City/State	DUNS	TIN	HTF Subgrantee
SAN MATEO	San Mateo, CA	02-556-8028	94-6000422	<input type="checkbox"/>
SOUTH SAN FRANCISCO	South San Francisco, CA	00-495-2263	94-6000435	<input type="checkbox"/>

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6. The new plan has been created for the Lead Entity and all participating grantee and will appear on the Search ConPlan screen. The default title of the plan will include [COPY] at the beginning of the original title. Grantees should update the title on the AD-25 Administration screen.

Grantee Name	State	Year	Version	Title	Status	Action
SAN MATEO	CA	2018	2	San Mateo County Consortia	Review Completed	View
SAN MATEO	CA	2013	6	Consolidated Plan Substantial Amendment	Open - In Progress	View
SAN MATEO	CA	2020	1	[COPY] 2013 - 2017 Con Plan Minor Amendment	Open - In Progress	View
SAN MATEO	CA	2013	7	2013-2017 Con Plan Substantial Amendment	Open - In Progress/FO Review	View
SAN MATEO	CA	2013	3	ConPlan Copy	Review Completed	View
SAN MATEO	CA	2018	3	ConPlan Substantial Amendment	Submitted for Review	View
SAN MATEO	CA	2018	1	San Mateo County Consortia Con Plan	Open - In Progress	View
SAN MATEO COUNTY	CA	2013	Five	ConPlan Copy	Open - In Progress	View
SAN MATEO COUNTY	CA	2020	1	[COPY] 2013 - 2017 Con Plan Minor Amendment	Open - In Progress	Edit View
SAN MATEO COUNTY	CA	2018	3	ConPlan Substantial Amendment	Submitted for Review	View

7. The Lead Entity should change the title of the plan on the AD-25 screen, which can be accessed by clicking “Edit” in the Action column for the corresponding Consolidated Plan. Changing the title will change the title for all grantees in the Consortium.

Key Points:

- Lead Entities can edit the Lead Entity template and view each of the other entitlement consortium member templates.
- Only Lead Entities can edit the title of the Consolidated Plan. When the lead entity changes the name of the plan, it will change the name of the plan for all participating grantees.
- Participating consortium members can provide information to the lead entity on specific housing needs and market conditions for incorporation into the lead entity’s template (except for the Lead Entity’s non-housing screens).
- Participating consortium members cannot view any of the other participating consortium members’ templates.

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II. CREATING A NEW PLAN BY ADDING A NEW CONSOLIDATED PLAN

1. Click “Add” under the “Consolidated Plan” submenu.



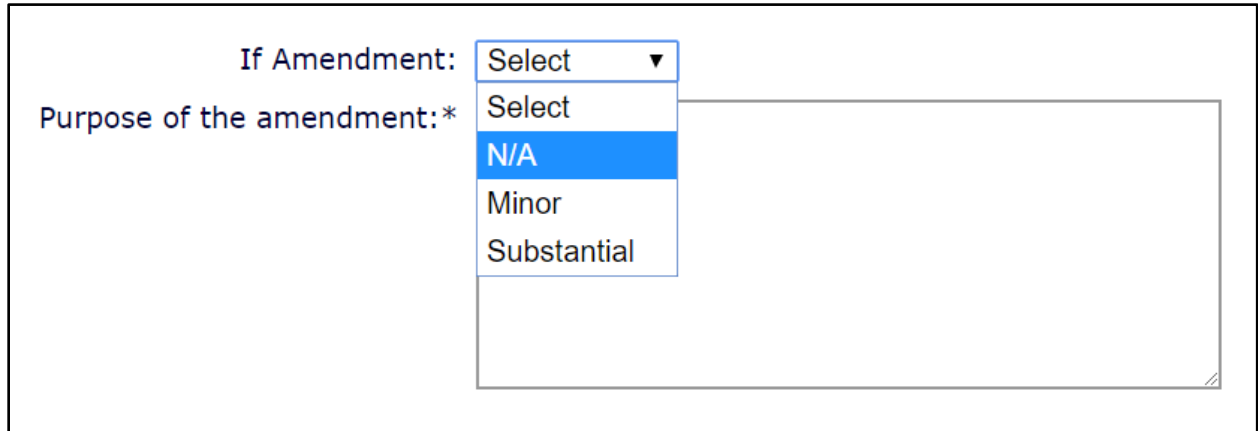
2. Enter the Strategic Plan beginning year and ending year. Enter the first program year of the Consolidated Plan. This is the federal fiscal year in which the plan begins. Enter the last program year of the Consolidated Plan. This is the federal fiscal year in which the last program year begins.

Strategic Plan Beginning Year:*	<input type="text"/>
Ending Year:*	<input type="text"/>
Title:*	<input type="text"/>
Plan Version:*	<input type="text"/>

3. Enter a title. HUD has not provided any guidance for the title. The title will be displayed on the cover and at the top of each page of the printed report. The title can be changed after the plan is created.
4. Enter the plan version. This field identifies different versions of a plan for the same beginning year. The version cannot be edited after the plan has been created.

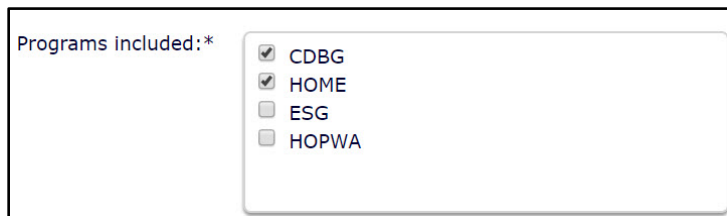
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- For “If Amendment,” select N/A. The default is set to “Select” and if this is not changed to “N/A,” the system will generate an error message that will prevent grantees from saving the screen and creating the new plan. Minor or substantial amendments should not be selected on this screen.



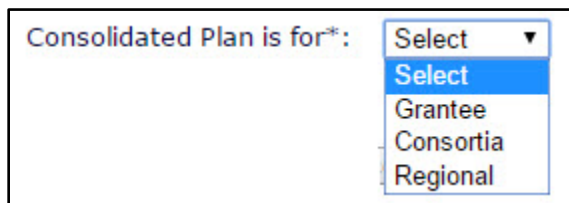
The screenshot shows a form field labeled "If Amendment:" with a dropdown menu. The dropdown menu is open, showing four options: "Select", "N/A", "Minor", and "Substantial". The "N/A" option is highlighted in blue. To the left of the dropdown, the text "Purpose of the amendment: *" is visible.

- In the Programs Included section, only select the programs received by the Lead Entity



The screenshot shows a form field labeled "Programs Included: *" with a list of four programs: CDBG, HOME, ESG, and HOPWA. The CDBG and HOME programs are checked with checkboxes, while ESG and HOPWA are not.

- In the “Consolidated Plan is for” section, select “Consortia.”



The screenshot shows a form field labeled "Consolidated Plan is for: *" with a dropdown menu. The dropdown menu is open, showing four options: "Select", "Grantee", "Consortia", and "Regional". The "Consortia" option is highlighted in blue.

- Once Consortia is selected, the screen will display a second question: “If consortia, does it have participating grantees?”
 - Select “Yes” only if participating consortium members received CPD allocations directly from HUD such as CDBG and ESG.
 - If “Yes” is selected, the screen will display a button labeled “Add Participating Grantee.” Click this button to view the “Select Participating Grantee” screen.

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Consolidated Plan is for*: Consortia ▼

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

Add Participating Grantee

- Search for and select each participating consortium member that is part of the HOME consortium and also receives a grant directly from HUD. Click the radio button next to the name of the searched participating member and click “Select.”

Select Participating Grantee

Cancel

Search Criteria

Organization Name (↑): City: DUNS #: EIN/TIN #:

(ex: nn-nnn-nnnn) (ex: nn-nnnnnnn)

Search | Reset

- Repeat this process for each participating consortium member.
- Select the CPD formula grants received directly by each participating consortium member by selecting the appropriate radio button for the CPD program.

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

Grantee(s) participating in the plan:

Name	City/State	DUNS	TIN	Programs	Delete
SOUTH SAN FRANCISCO	South San Francisco, CA	00-495-2263	94-6000435	<input type="checkbox"/> CDBG <input type="checkbox"/> ESG <input type="checkbox"/> HOPWA	<input type="checkbox"/>

Delete

Add Participating Grantee

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- Once all entitlement consortium members have been entered, click the “Select Public Housing Agency” button.

Select Public Housing Agency

The system will display a search screen. Search for all the public housing agencies operating within the jurisdiction with the HOME Consortium. Search by agency name, code, or by clicking “Search” to see all the public housing agencies in the state. In the results, click the checkbox next to each public housing agency that operates within the jurisdiction and click the “Select” button.

- Grantees must select at least one PHA in order to create the Consolidated Plan.

AD-15 Select Public Housing Agency

Select Cancel

Search Criteria

Agency Name Code:

Search Reset

Name of Public Housing Agencies

Results Page of

Organization Name	Code	City, State/Territory
<input type="checkbox"/> 1260 Housing Development Corporation	PA889	PA
<input type="checkbox"/> ALLEGHENY COUNTY HOUSING AUTHORITY	PA006	PA
<input type="checkbox"/> ALTOONA HOUSING AUTHORITY	PA031	PA
<input type="checkbox"/> Adams County Housing Authority	PA091	PA
<input type="checkbox"/> Allentown Housing Authority	PA004	PA

- Review all of the information on the screen. All information on this page cannot be changed after creating the template except for the title. If everything is correct, click “Save” at the bottom of the screen.
- The system will create the template for the Lead Entity and all participating members. To see these templates, click “Search” from the Consolidated Plan submenu. A separate template is listed for the Lead Entity and each participating consortium member.
 - Lead Entities can edit the Lead Entity template and view each of the other entitlement consortium member templates from the “Search” screen.

Grantee Name	State	Year	Version	Title	Status	Action
ARLINGTON	MA	2020	1	North Suburban Consortium Consolidated Plan 2020-2024	Open - In Progress	View
ARLINGTON	MA	2015	108	ConPlan Section 108 Amended	Review Completed	View
ARLINGTON	MA	2015	1	North Suburban Consortium Consolidated Plan	Review Completed	View
MALDEN	MA	2015	108	ConPlan Section 108 Amended	Review Completed	Amend View
MALDEN	MA	2020	1	North Suburban Consortium Consolidated Plan 2020-2024	Open - in Progress	Edit View
MALDEN	MA	2015	1	North Suburban Consortium Consolidated Plan	Review Completed	View
MEDFORD	MA	2020	1	North Suburban Consortium Consolidated Plan 2020-2024	Open - in Progress	View
MEDFORD	MA	2015	108	ConPlan Section 108 Amended	Review Completed	View
MEDFORD	MA	2015	1	North Suburban Consortium Consolidated Plan	Review Completed	View
REVERE	MA	2015	1	North Suburban Consortium Consolidated Plan	Review Completed	View

*View from Lead Entity screen – Malden

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- Participating consortium members can edit the Lead Entity's template (except for the Lead Entity's non-housing screens) and edit their own template from the "Search" screen.

Grantee Name	State	Year	Version	Title	Status	Action
ARLINGTON	MA	2014	1	Town Of Arlington- not NSC	Open - In Progress	Edit View
ARLINGTON	MA	2015	108	ConPlan Section 108 Amended	Review Completed	View
ARLINGTON	MA	2020	1	North Suburban Consortium Consolidated Plan 2020-2024	Open - In Progress	Edit View
ARLINGTON	MA	2015	1	North Suburban Consortium Consolidated Plan	Review Completed	View
MALDEN	MA	2020	1	North Suburban Consortium Consolidated Plan 2020-2024	Open - In Progress	Edit View
MALDEN	MA	2015	108	ConPlan Section 108 Amended	Review Completed	View
MALDEN	MA	2015	1	North Suburban Consortium Consolidated Plan	Review Completed	View

**View from Participating Grantee screen - Arlington*

- The Lead Entity template will contain screens for the HOME Consortium and the Lead Entity's other CPD programs.