CON PLAN QUICK GUIDE

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

# Creating a Consolidated Plan

## For Regional Grantees

*April 2020*

COMMUNITY PLANNING & DEVELOPMENT

# 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 *Regional* Grantees

These instructions are for Regional grantees. State/Entitlement grantees and Consortia grantees should use the State/Entitlement and Consortia grantee quick guides.

The Consolidated Plan template allows contiguous grantees to create a regional strategy, where the grantees only need to submit one Needs Assessment, Market Analysis and Strategic Plan to HUD.

Once a group of grantees decide to pursue a Regional Strategy, the designated lead grantee is responsible for creating and submitting the Regional Consolidated Plan. Once the Regional Consolidated Plan is created, participating grantees can edit all sections of the shared Consolidated Plan, except for the Annual Action Plan. The AAP section of the Regional Plan is only for the lead grantee. Participating grantees must create separate Action Plans and link them to the Regional Consolidated Plan.

When creating a new Regional Consolidated Plan, the lead grantee has two options: 1) copying a previous plan or 2) adding a new, blank template.

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 adding a new CPD funding source, a new PHA, or changing the grantees in the Regional Plan for the new Consolidated Plan cycle.**

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, lead grantees are able to change the participating grantees, the CPD programs and the Public Housing Agencies included in the Consolidated Plan.
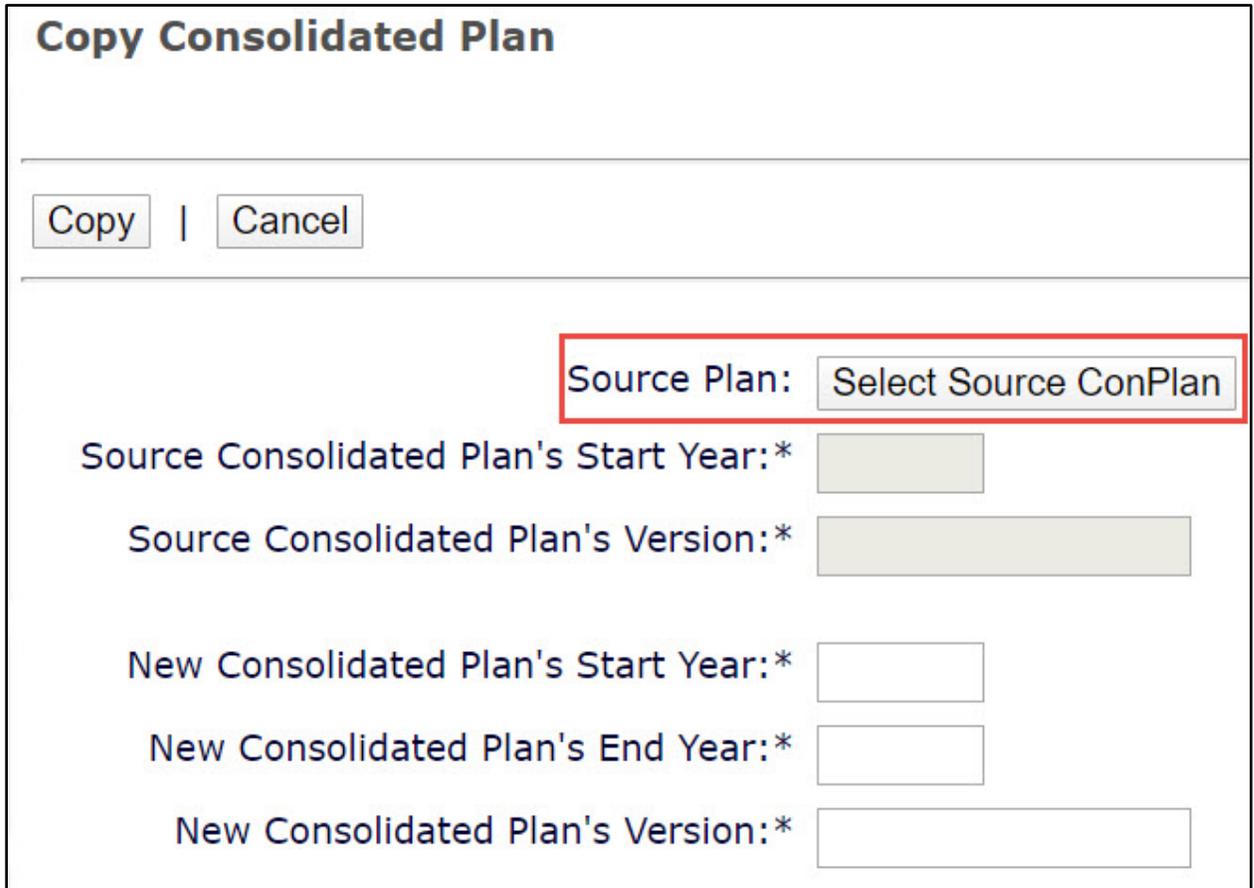
## I. CREATING A PLAN BY COPYING A PREVIOUS CONSOLIDATED PLAN

1. **Click "Copy" under the "Consolidated Plans" submenu.**



2. **Click the "Select Source ConPlan" button.**

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.

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:* | 2016 |
| 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. **The new plan has been created 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.**

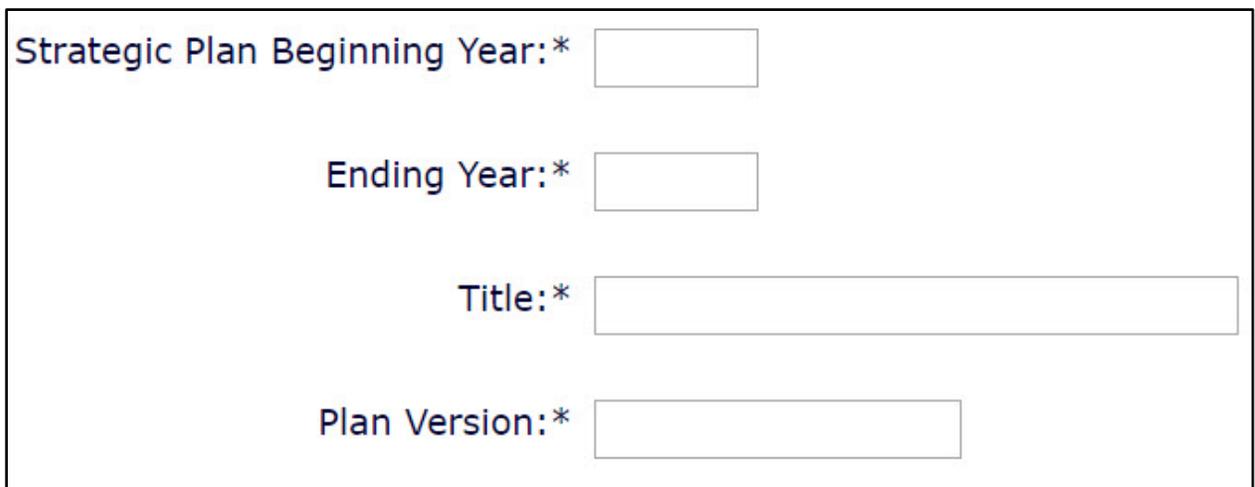| Grantee Name | State | Year | Version | Title | Status | Action |
|---|---|---|---|---|---|---|
| MUSKEGON | MI | 2016 | 1 | 5 year- Regional Consolidated Plan | Review Completed | Amend \| View |
| MUSKEGON | MI | 2021 | 1 | [COPY] 5 year- Regional Consolidated Plan | Open - in Progress | Edit \| View |

## 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.**



3.  **Enter a title. HUD has not provided any guidance for the title. The title will be displayed on the 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.**

5.  **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.**
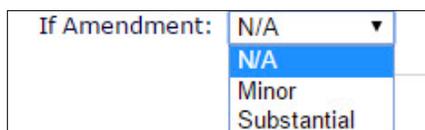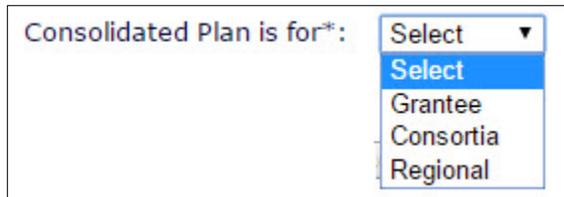
6.  **Ensure the programs included are correct for the lead grantee. Grantees can change the default selection if it is incorrect. At least one selection must be indicated.**



7.  **Select the type of plan. Regional grantees will choose "Regional."**



8.  **Click the "Add Participating Grantee" button.**



9.  **On the "Select Participating Grantee" screen, use the search field provided to find and select the other grantees participating in the plan.**

10. **Once a second grantees is added, the AD-25 Screen will display a table listing the plan's participating grantees.**

| Grantee(s) participating in the plan: | | | | |
|---|---|---|---|---|
| **Name** | **City/State** | **DUNS** | **TIN** | **Delete** |
| MUSKEGON HEIGHTS | Muskegon Heights, MI | 05-147-9962 | 38-6004639 | ☐ |
| NORTON SHORES | Norton Shores, MI | 04-952-2493 | 38-6006141 | ☐ |
| | | | | Delete |

Add Participating Grantee

11. **Click the "Select Public Housing Agency" button.**

Select Public Housing Agency

The system will display a search screen. Search for the public housing agencies operating within the jurisdiction 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 3 of 5**

| Organization Name | Code | City, State/Territory |
|---|---|---|
| ☐ Albion Housing Commission | MI014 | MI |
| ☐ Algonac Housing Commission | MI114 | MI |
| ☐ Allen Park Housing Commission | MI053 | MI |
| ☐ Alma Housing Commission | MI121 | MI |
| ☐ Alpena Housing Commission | MI022 | MI |

12. **When finished, click the "Save" button at the bottom of the screen to create the Consolidated Plan template. Locate the new Consolidated Plan by clicking "Search" under the "Consolidated Plan" submenu.**