

Annual Planning for HUD Grantees

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Session Goals

- Our Mission: Improve the practice of grants management.
- The annual planning process can take a lot of time and money.
 - Public information and engagement can be one of the most costly components.
- Questions for the planning process.
 - Are we being efficient and effective?
 - Are we doing more than we need to do?
 - What can we do better?
- Enjoy what we do!





This is what we'd like to see.



This is what we fear will happen.



This is what actually happens.

What are we supposed to do?

- Requirements are at 91.100 and 105
- The e-Con Plan Citizen Participation Toolkit (2014)
- Basic requirements
 - Encourage participation
 - Specific groups and persons must be reached
 - General public and stakeholders
 - Inform the public
 - Provide opportunity for comment
- Your Citizen Participation Plan
 - What is in here, really?



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What are we doing?

- We asked you!
- Sent out 400+ emails
- Got 36 responses (sound familiar?)
- Had a few follow-up conversations.
- Our own experience as grantee staff, consultants, and partners in the annual planning process.



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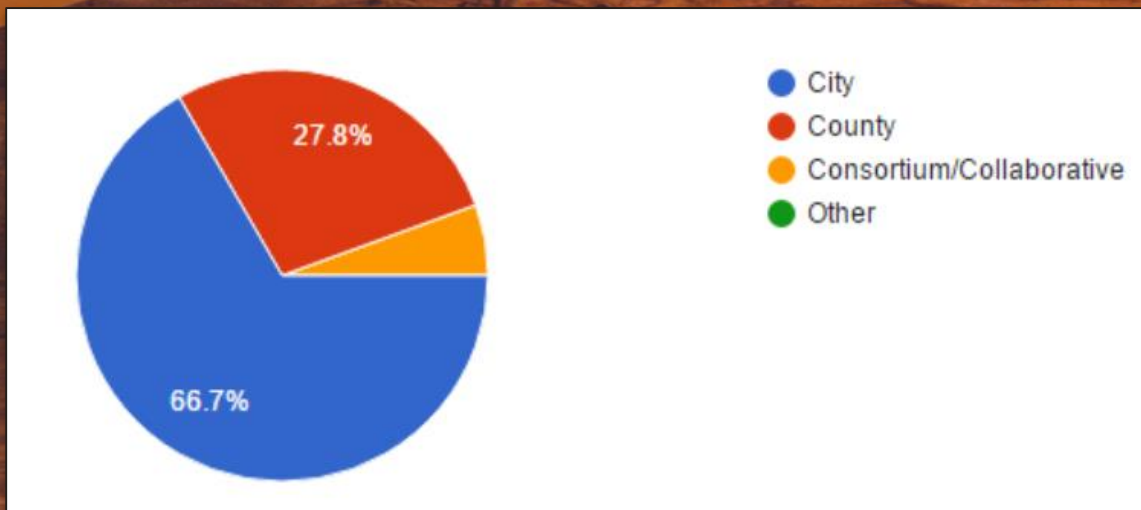


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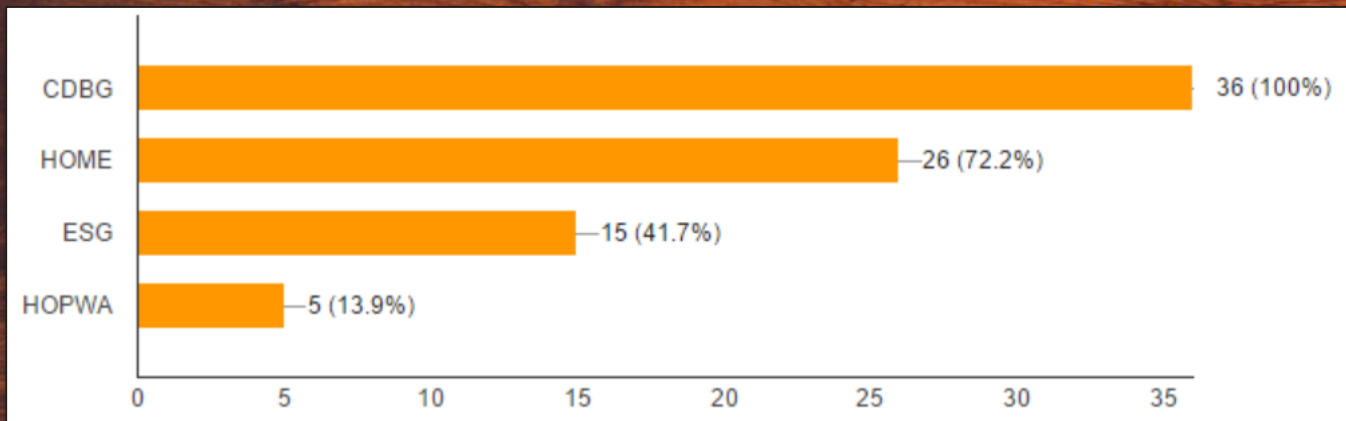
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Survey says!



• Who responded

- 2/3 cities, 1/3 counties, handful consortia
- All CDBG, ¾ HOME, less than half ESG, handful of HOPWA
- Over 70% submitted a five-year Con Plan in 2015



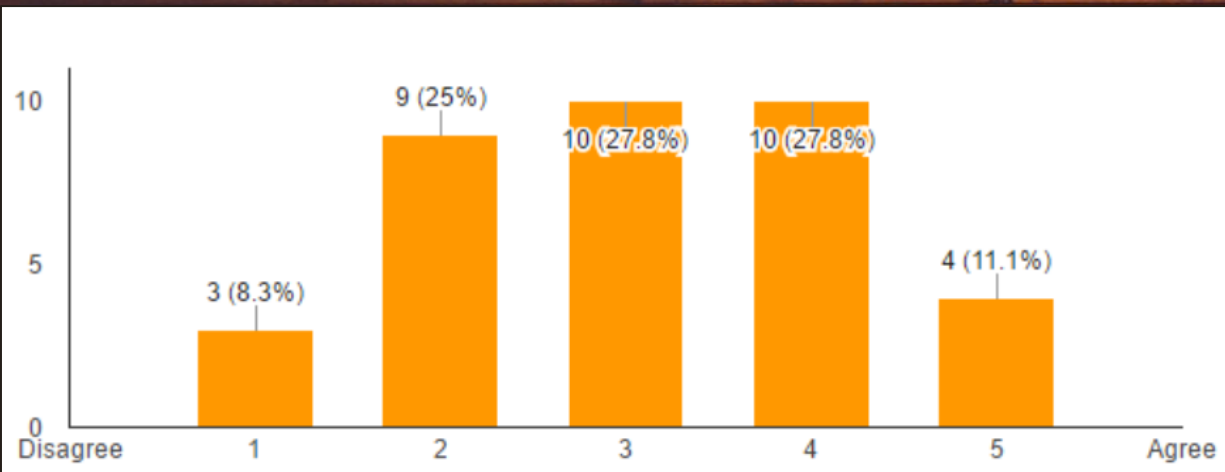
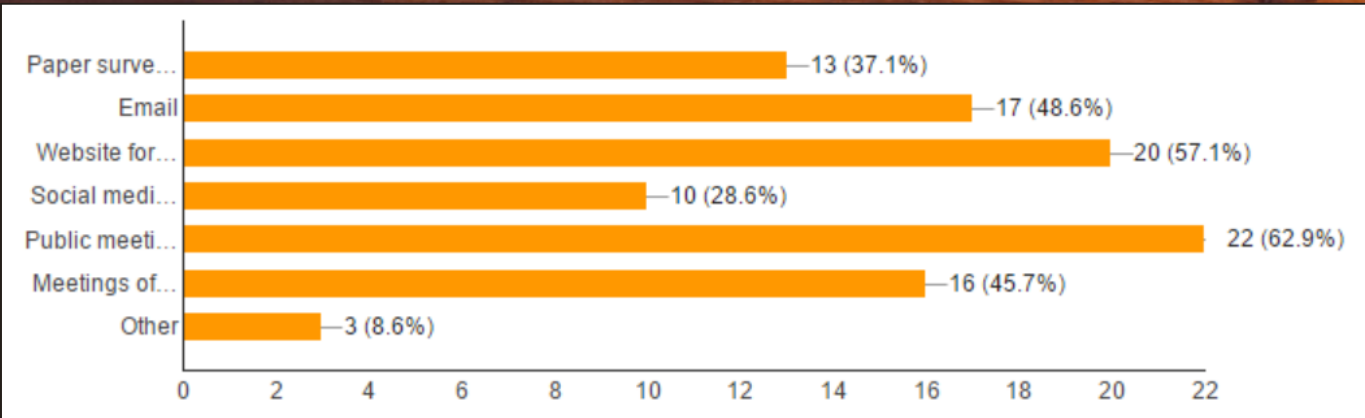
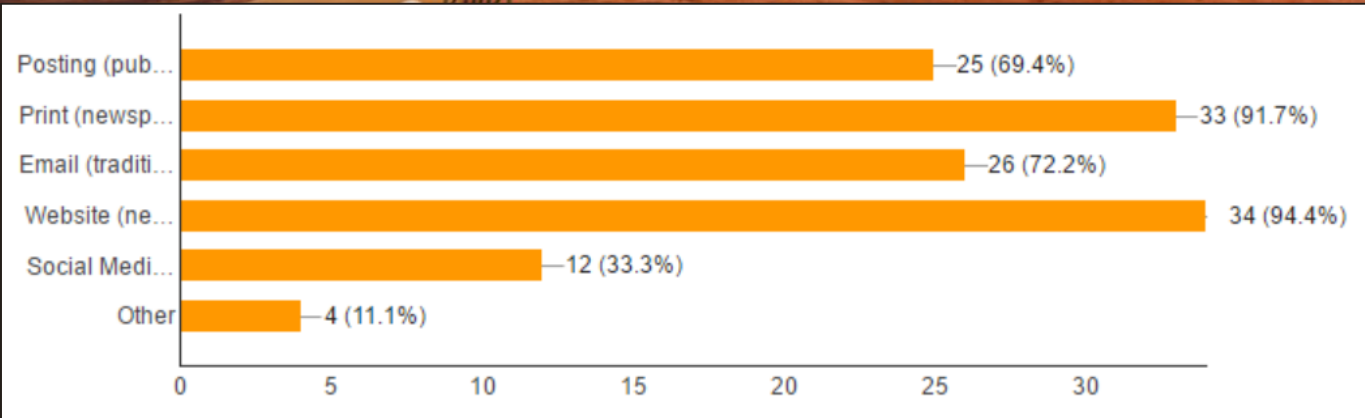
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- Communicating Program Information
 - What we use.



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- What is effective.

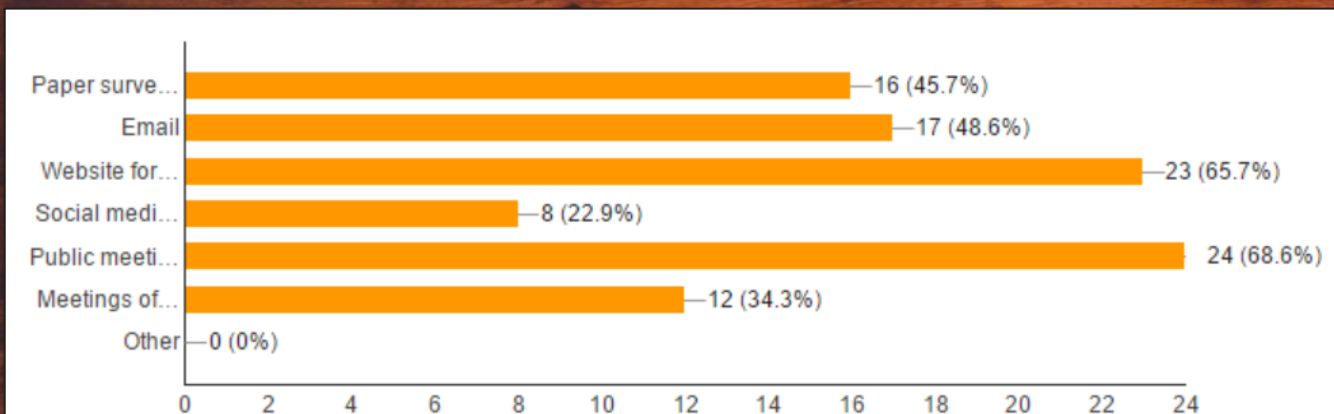
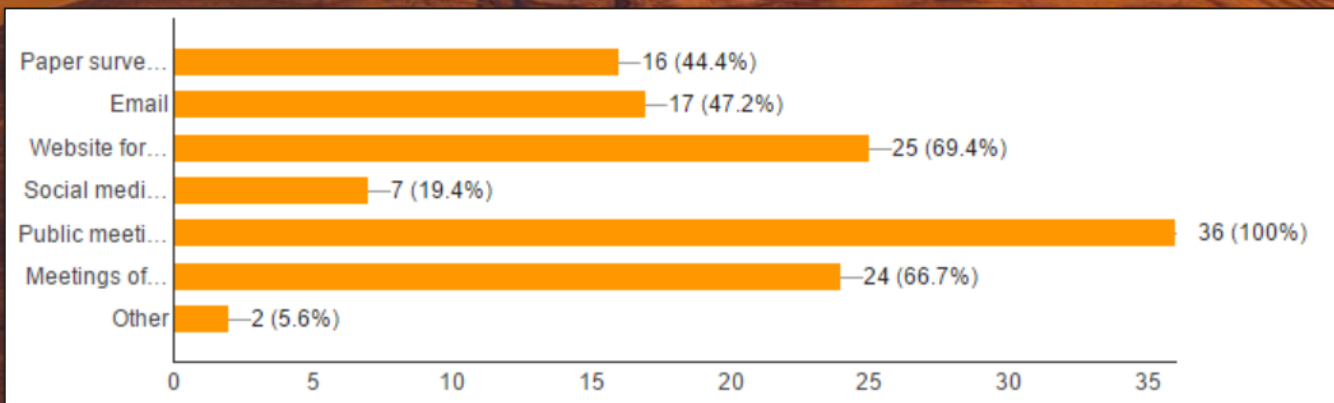


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- Are we effective?



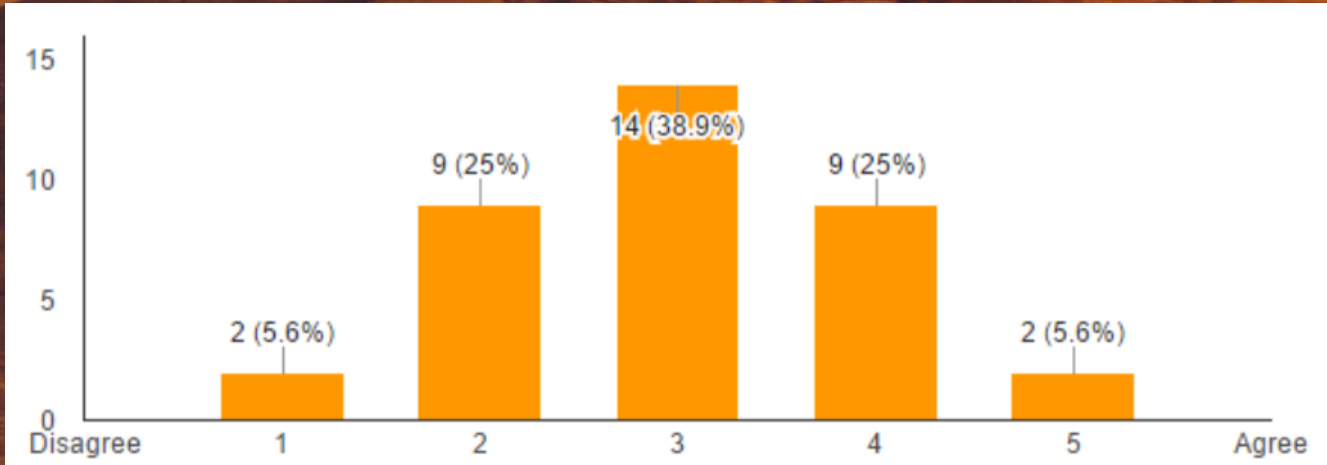
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- Engaging the Public
 - How do we do it?

Which means are effective?





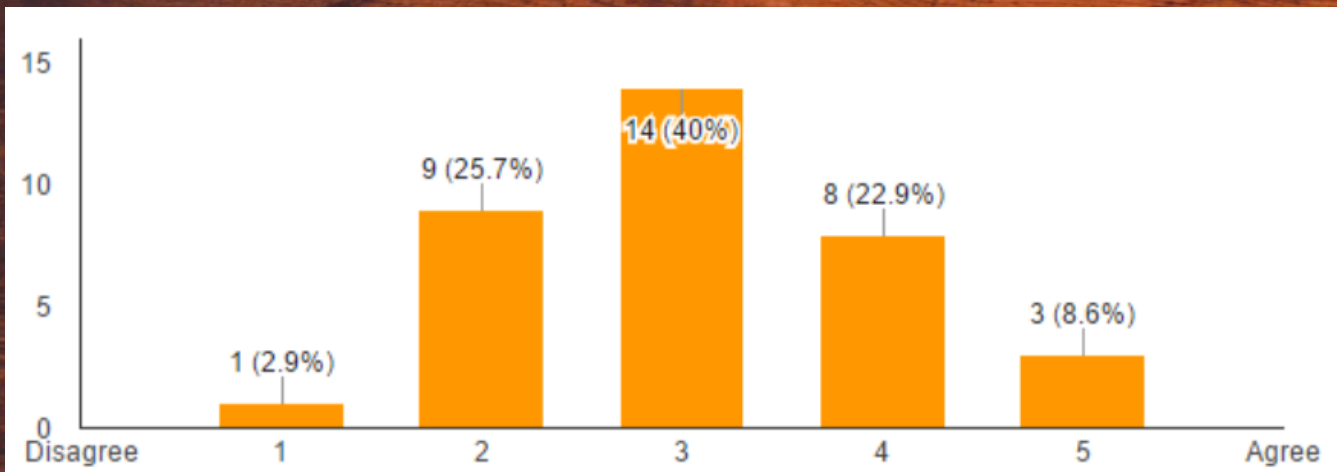
- Our planning process is effective.



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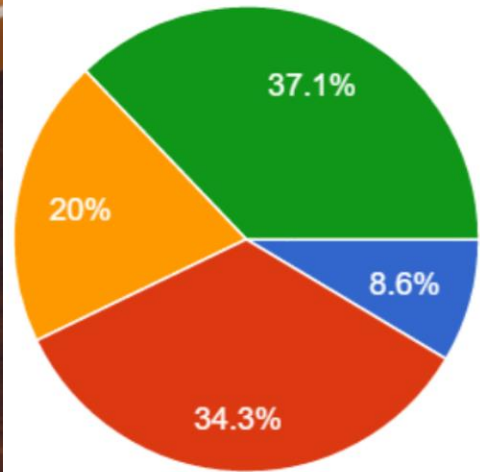
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- We are using the most effective tools.



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- Non-competitive (discretionary)
- Competitive - uses a numeric scoring system without a threshold score
- Competitive - uses a numeric scoring system with a threshold score
- Competitive - does not use a numeric scoring system

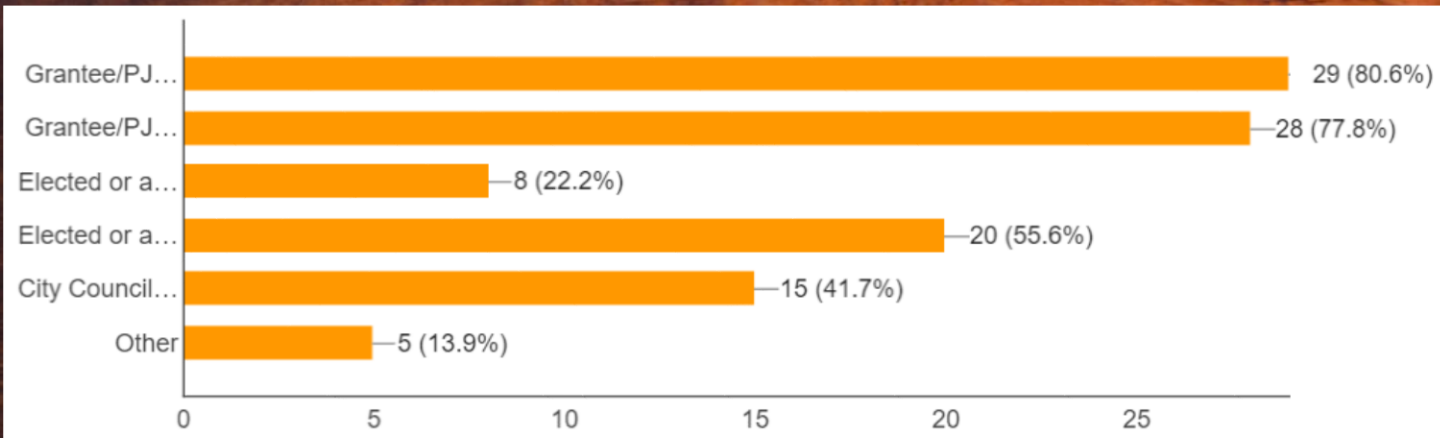
- Deciding who and what is funded.

- Competitive
- Scoring

- Many hands

- Elected or appointed
- Management and staff

- Annual process with annual awards





So what have we learned?

Informing the Public

- We take a shotgun approach. (Hoping to hit the target?)
 - Desperation or design?
- In-person meetings are still in use and “trusted.”
 - Preference, tradition, requirement?
- “Highly effective” grantees use email and website.
 - Actual or perceived?
- Social media is a non-starter. Why?
 - Labor intensive or prohibited?
- Self assessment is “meh.”



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Engaging the Public

- We sure seem to like those meetings.
 - Measured or we experience engagement?
- Surveys are “just ok” we thinks.
 - This “should” be a powerful tool. Are we targeting?
- The “public hearing” is not the best means.
 - This is one of the required means and it’s less than effective?
 - When are we holding them?
- We give ourselves a luke warm score.



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Slicing up the pie.

- Process and structure vary.
 - As many forms as grantees.
- Nearly all of us are confident in our process.
 - Effective use of funds. Transparent and accountable.
- Types
 - Staff-driven
 - Committee/Commission
 - Hybrid



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What little treasures did we find?

What have we here?

- There is a good portion who think the website is not effective.
 - The media or the method?
 - Many government websites are very poorly designed and used.
- There are methods some use even when “not effective.”
 - Meetings, web, survey. Why keep using them?
- Public hearings don't seem to serve a purpose.
 - Only holding (and noticing) because required?
 - Get in front of HUD?
- Social media is DOA?
 - High maintenance? Fear-based policy?



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The Community Workshop

- The “Fall of 2014,” a tale of two cities.
 - Authentic engagement vs. “what’s the score?”
- Take the meeting to the people.
 - Stakeholder groups (like your COC)
 - Neighborhood groups
- A viable year-round structure.
 - “Pop-up” doesn’t work
 - Be part of a larger participatory planning and budgeting process
 - Use your committee or commission



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Websites need to work.

- Can't be effective if the experience is sub-par.
 - Anything short of easy.
- Design and use.
 - Mobile-friendly
 - Text on the page, not hosted documents to download.
 - Simplify navigation, part of a larger design effort.
 - Dynamic and living.
- Push the public to the website.
 - If nothing else, Twitter and Facebook point to the website.



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Email is essential

- The million dollar mess.
 - Two spreadsheets, a Word doc and forwarded email.
- Email is “sticky.”
 - Email can tell you when it’s opened and clicked.
 - Manage your email: MailChimp, ConstantContact ...
- Use it with a purpose
 - Direct to the website
 - Ask for action



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Have a readable document.

- Deviate from the eCon Plan template.
 - You don't need to publish in this format.
 - Consider web-friendly, web only
 - Review the regs and talk to your CPD Rep
- Charts and tables.
- Discuss how activities were selected.
 - Transparent and accountable.
- Publish early, track comments, revise and re-publish.



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Use a committee to guide your process.

Have a standing committee.

- Year-round focus on oversight and guidance.
 - Legitimacy, accountability, and transparency.
 - Many hands make light the work.
 - Take the spotlight off of staff.
- A time and place for citizen participation.
 - Year-round conversation.
 - Mid-year adjustments (timeliness)
 - Advocates for the process.



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Bits and pieces

- Schedule
 - Leave room for participation
 - Change up the order
- Year-round process
 - Keep CDBG in front of decision-makers.
 - Lessen the boom and bust.
- Branding programs and projects.
 - Signage and program materials



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Have goals and strategy.

- There is no single solution.
- Think critically about what you are doing and why.
 - Look at the regs
 - Have a conversation with local leadership
- Revisit the requirements.
 - Not enough? Too much?
- Make planning a year-round process.
 - And informing the public, and engaging citizens



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Let's discuss!

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