



# eCon Planning Suite

National Community Development Association  
Winter Legislative and Policy Meeting  
January 23, 2014



# Agenda

1. Review of eCon Planning Suite Components
2. Con Plan Template in IDIS
  - Overview and benefits
  - Overall Structure
3. Major Sections of the Template – Overview and Tips
  - The Process
  - Needs Assessment and Market Analysis
  - Strategic Plan
  - Annual Action Plan
4. Assistance and Resources
5. Questions



# eCon Planning Suite

## *New Data, Planning Tool & Template*

### Expanded Planning Data

- Data that speaks to all grant fund uses
- Publically available

### CPD Maps Data Mapping Tool

- Make data easier to understand and manage
- User friendly for grantees and the public
- Support need-based, strategic investment planning

### Electronic Submission Template

- Incorporated into fund management and reporting system
- Connect goals to activities and outcomes
- Save Grantees preparation time
- Save CPD Staff review time



# Consolidated Plan Template

Existing regulations and guidance remains

- Only the format of plan has changed

Data Entry template integrated into IDIS

- Mandatory for Consolidated Plans due after November 15, 2012
- Action Plans optional until Con Plan template used

Two scenarios

- Consolidated Plan and 1<sup>st</sup> Year Action Plan
  - Accommodates CDBG Participants in HOME Consortia who are not the lead grantee
- Stand-alone Action Plan



# Con Plan Template Benefits

## Framework

- Integrated into IDIS
- Ease of use / ability to find information
- Minimizing duplicative data entry
- Streamlining the CAPER/Goals and Accomplishments Microstrategy Report

## Pre-populated data tables

Template provides baseline expectation, with room for customization

- Alternate data sources
- Additional maps, pictures, data, and narrative

Provides option to create a Regional Strategy



# Getting Started – User Access

## IDIS Users who work on Con Plan need Con Plan/CAPER Privileges

- For existing IDIS Users
  - Local IDIS Administrator or Field Office IDIS Administrator can provide needed access
- Form for Access requests for new IDIS users can be found at <http://portal.hud.gov/hudportal/documents/huddoc?id=27055.PDF>
  - Completed forms must be notarized and sent to local field office
  - Begin this process as soon as possible

## Con Plan Privileges

- At least one user needs “Create/Edit/Submit” privileges for Con Plan and CAPER
- Any users that will work on plan, but are not authorized to submit the plan to HUD on behalf of the grantee will need “Edit” privileges for Con Plan and/or CAPER
- Any users that will add/edit projects in the AAP will need “Set Up Activity” and “Edit Activity” privileges



# Getting Started – Learn the Data and the Template

## Get started early

- Browse the template in IDIS to familiarize yourself with the structure and function
  - *NOTE: If creating a practice plan, that will not be submitted, make it clear in the title to avoid confusion and/or submission of the wrong plan.*

## Print out a blank copy of the template

- Word document can be more easily shared with staff working on the plan
- Can be used to draft narratives that can be pasted into the IDIS screens
  - *NOTE: before downloading a blank plan, open and save NA-40 and MA-30, or the tables on these screens will not appear in the downloaded document*

All pre-populated data tables in the Con Plan template screens are available in CPD Maps reports

- Use CPD Maps data reports to get feedback from Consultation Partners and the Public



# Transition from CPMP Template to eCon Planning Suite

## CPMP Template

**Housing**

- Needs
- Market/Inventory
- Priorities
- Goals

**Homeless**

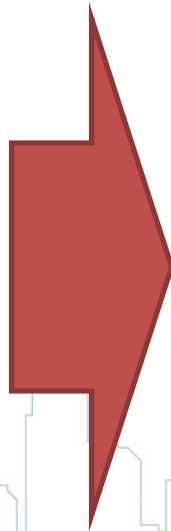
- Needs
- Market/Inventory
- Priorities
- Goals

**Special Needs**

- Needs
- Market/Inventory
- Priorities
- Goals

**Community Development**

- Needs
- Market/Inventory
- Priorities
- Goals



## IDIS Template

**Needs**

- Housing
- Homeless
- Special Needs
- Community Development

**Market/Inventory**

- Housing
- Homeless
- Special Needs
- Community Development

**Priorities**

**Goals**

Planning template reorganized to:

1. Integrate assessment of needs and market conditions across program types
2. Be driven by one set of priorities and goals based on need and market conditions





# Con Plan Template: The Process

Citizen Participation and Consultation screens collect information about these processes in tabular format

- Data entered on these screens copies to next year's AAP

Template reflects changes to consultation requirements in new ESG regulations

## *Tips:*

- *CPD Maps can be useful for identifying areas of low/moderate income and racial/ethnic concentration to target outreach*
- *Make sure to include data needed for NA-40 and MA-30 in consultations with Continuums of Care*



# Needs Assessment and Market Analysis

Data tables associated with regulatory requirements are prepopulated with ACS data

- Data helps make stronger link between need and market conditions and allocation decisions
- Data in housing-related Need and Market screens based on HOME grantee area (NA-10 through NA-30 and MA-10 through MA-25)
  - If grantee only receives CDBG, this data based on the CDBG grantee area
- Data in Public Housing Screens based on data provided by Housing Authorities selected on the AD-25 screen (NA-35, MA-25)
- Data in Non-Housing Community Development Assets screen is based on the CDBG grantee area (MA-50)

Homeless data needed for tables on NA-40 and MA-30 should be obtained as part of consultation with Continuum of Care

- NOTE: Data requested in these tables is based on data provided at the Continuum of Care geographic level in reports to HUD. (It is also available at that level in CPD Maps)



# Con Plan Template: Strategic Plan

- Geographic Priority (SP-10), Priority Needs (SP-25), Anticipated Resources (SP-35) and Goals (SP-45) screens are related and share information
- Levels of Priority for Priority Needs are “High” or “Low”
  - “Medium” priority is not included
- Goal Outcome Indicators
  - correspond with existing accomplishments recorded in IDIS at the activity level
  - multiple goal outcome indicators can be chosen for each goal
  - Goal Outcome Indicator Descriptions are in the Manual for the Con Plan template (Appendix B)

*Tip:*

- *A good exercise to prepare for an upcoming plan is to take the goals and strategies of your existing plan and think about how it would fit into the template*
- *When choosing Goal Outcome Indicators, think about the types of activities that will likely be used to accomplish each goal and choose the Goal Outcome Indicator(s) that corresponds to the accomplishments for those activities*



# Con Plan Template: Annual Action Plan

Year 1 Annual Action Plan shares Expected Resources screen with the Strategic Plan to save duplicative data entry

## AP-35 Projects:

- Projects created on this screen are automatically created in regular IDIS
  - Better to practice adding projects in the User Acceptance Testing Environment
  - If practicing in live IDIS, make sure to delete unwanted projects
- When associating a project with a goal, consider the Goal Outcome Indicators associated with that Goal and ensure that accomplishments for anticipated activities under the project are consistent

## Tip:

- *Keep the CAPER in mind when establishing Annual Goals and Projects in the Annual Action Plan*
  - *Associating projects with multiple goals will make CAPER preparation more complicated*
  - *Register for the January 31 [Completing a CAPER/PER in IDIS Webinar](#) and familiarize yourself with the [Goals and Accomplishments Microstrategy Report](#)*

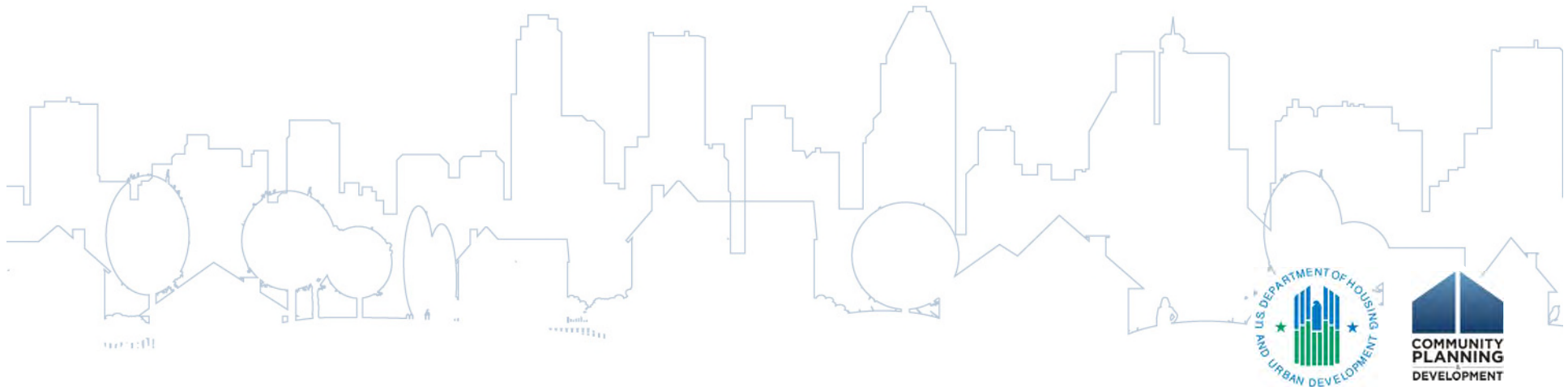


# Assistance for Grantees

Send questions through the OneCPD Ask A Question Virtual Help Desk

- Make sure to select “eCon Planning Suite” from the drop-down menu at the top of the second page of the question form

Contact your CPD Representative directly



# Key Resources

## *Consolidated Plan Website*

<http://www.hud.gov/offices/cpd/about/conplan/index.cfm>

- *eCon Planning Suite – Consolidated Plan and IDIS Page*
  - *Manual for using the Consolidated Plan template in IDIS*
  - *Troubleshooting Guide*
- *eCon Planning Suite – Mapping Page*
  - *Link to CPD Maps*
  - *CPD Maps Desk Guide*
  - *Glossary of terms and definitions*

## *OneCPD Resource Exchange Resource Library (<http://www.onecpd.info>)*

- *Information and registration links for future webinars and/or trainings*
- *Links to recordings and slides for past webinars*

## *Coming Soon:*

- *Series of short “how-to” videos for basic features of eCon Planning Suite*



# Questions?

