

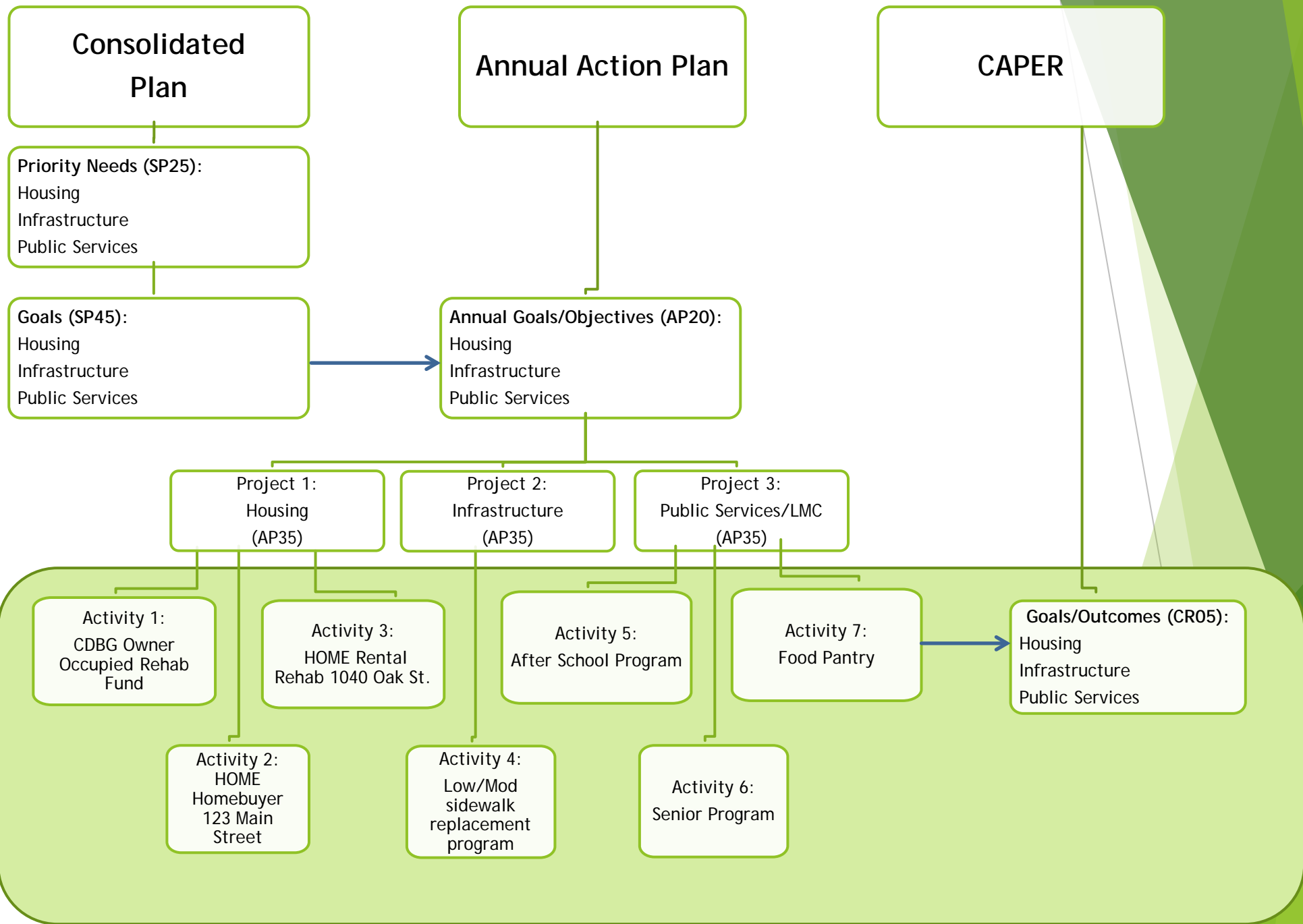
# ConPlan Structure

NCDA Winter Meeting

January 28, 2021

# ConPlan is the first step, BUT...

- ▶ How you set up the ConPlan and Annual Plan determines how useful the IDIS data for the CAPER will be.
- ▶ It is important to keep in mind how you want the CAPER data to be organized as you create the ConPlan.
- ▶ How do the ConPlan and Annual Action Plans tie to the CAPER?



# ConPlan Structure = CAPER Structure

- ▶ In IDIS, most of the data for the CAPER is automatically pulled from individual IDIS activities.
- ▶ In the CAPER, the beneficiary data is sorted by the projects, goals, and needs in the plans.
- ▶ How you set up the ConPlan and Annual Action Plan determines how the data will be reflected in the CAPER

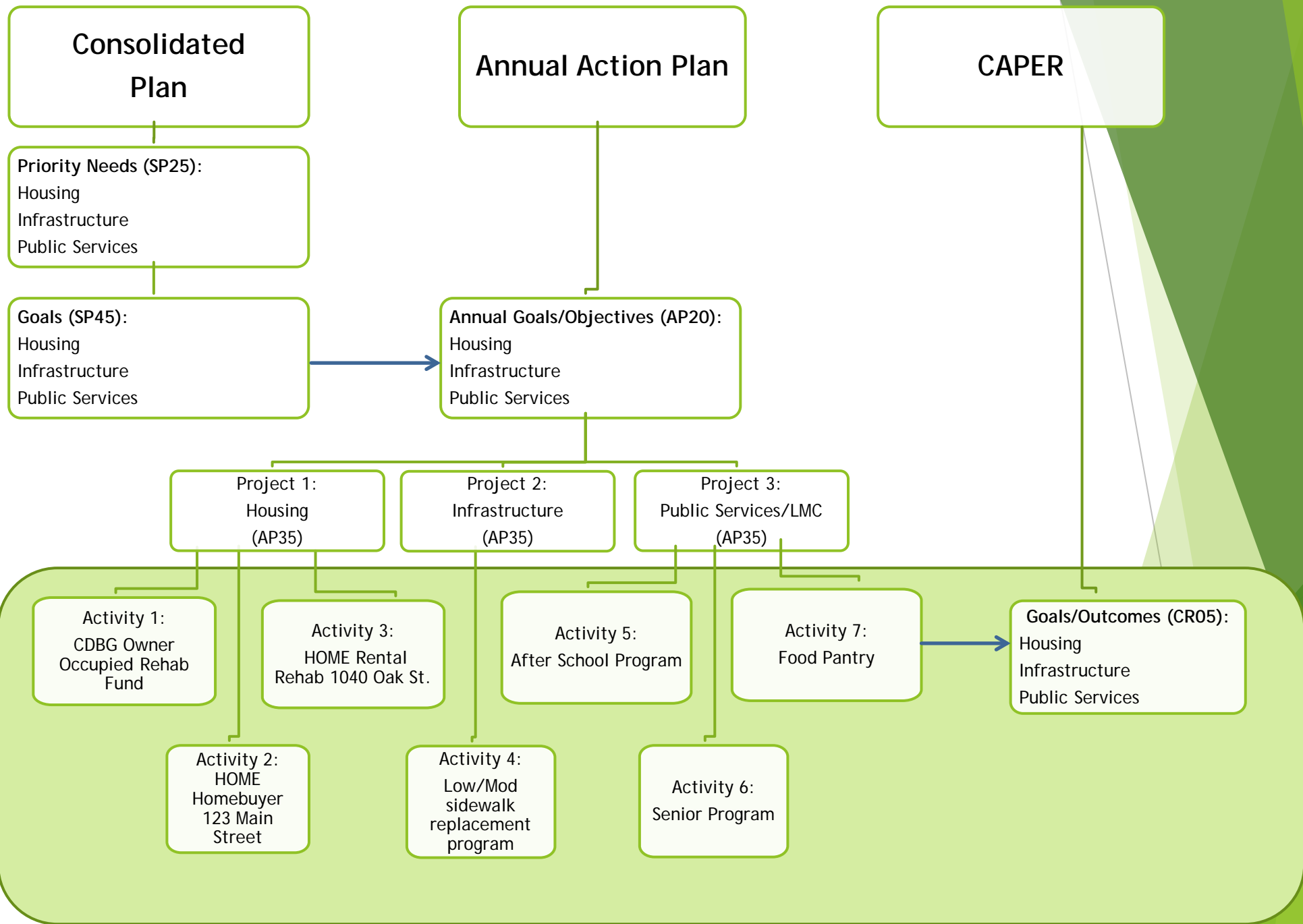
# ConPlan Goals & Accomplishments Report (same as CR05 in CAPER)

Accomplishments Associated With a Single Strategic Plan Goal

Goal	Category	Funding Source & Amount	Outcome Indicator	Outcome Unit of Measure	Outcome Expected - Strategic Plan	Outcome Actual - Strategic Plan	Percent Complete	Outcome Expected - Program Year	Outcome Actual - Program Year	Percent Complete
Administration and Planning	1	Planning and Administration CDBG: \$ / HOME: \$	Other	Other	0	0				
Housing	2	Affordable Housing CDBG: \$ / HOME: \$	Rental units constructed	Household Housing Unit	25	6	24.00%	3	0	0.00%
			Rental units rehabilitated	Household Housing Unit	10	0	0.00%			
			Homeowner Housing Added	Household Housing Unit	25	6	24.00%	2	2	100.00%
			Homeowner Housing Rehabilitated	Household Housing Unit	75	59	78.67%	15	10	66.67%
			Direct Financial Assistance to Homebuyers	Households Assisted	75	282	376.00%	17	0	0.00%
Economic Development	3	Non-Housing Community Development CDBG: \$	Facade treatment/business building rehabilitation	Business	0	1		5	0	0.00%
			Jobs created/retained	Jobs	250	48	19.20%	10	19	190.00%
			Businesses assisted	Businesses Assisted	25	25	100.00%	0	9	

# Relate Needs/Goals/Projects

- ▶ Priority Needs
  - ▶ Should be clearly distinct from each other
  - ▶ Have logical connection to the Goals/Projects/Activities you will carry out
  - ▶ Should be very broad
  - ▶ Should have the fewest of these
- ▶ Goals
  - ▶ Should tie to only one need each
  - ▶ Should be clearly distinct from each other
  - ▶ Should contain only projects/activities related to that need
  - ▶ Goal Outcome Indicators match the ones chosen for Projects under the Goal
- ▶ Projects
  - ▶ Should tie to only one goal each
  - ▶ Should contain logically separate divisions of the broader goal
  - ▶ Should contain all the activities related to it
  - ▶ Goal Outcome Indicators match the ones for the Goal each Project is under



# 1<sup>st</sup> Priority Need

# 2<sup>nd</sup> Priority Need

ConPlan

## Goal A

## Goal B

## Goal C

## Goal D

ConPlan

### Project A1

### Project A2

### Project B1

### Project B2

### Project C1

### Project C2

### Project D1

### Project D2

Annual Plan

Activity A1.1

Activity A1.2

Activity A2.1

Activity A2.2

Activity B1.1

Activity B1.2

Activity B2.1

Activity B2.2

Activity C1.1

Activity C1.2

Activity C2.1

Activity C2.2

Activity D1.1

Activity D1.2

Activity D2.1

Activity D2.2

IDIS

8



# Relate Annual Plan to Con Plan

- ▶ Goals in Annual Plan agree with Goals in ConPlan
- ▶ Projects in Annual Plan placed under correct Goal in BOTH Annual Plan & ConPlan
- ▶ Goal Outcome Indicators for Annual Plan Goals and Projects match those used in the associated ConPlan Goals and Priority Needs

# Relate IDIS Activities to Annual Plan

- ▶ Assign IDIS activities to correct Annual Plan Projects. This one step ties the activity to:
  - ▶ Annual Plan Project (and associated Goal Outcome Indicators)
  - ▶ Annual Plan Goal (and associated Goal Outcome Indicators)
  - ▶ ConPlan Goal (and associated Goal Outcome Indicators)
  - ▶ ConPlan Priority Need (and associated Goal Outcome Indicators)
- ▶ Choose Correct Matrix Code:
  - ▶ Matrix Code should match the GOI of the associated Project/Goal/Need, BUT:
  - ▶ IDIS will let you choose any of the Matrix Codes, even if not in the Plan(s), AND:
  - ▶ If the Matrix Code does not agree with the Goal Outcome Indicators for the associated Need/Goal/Project, the CAPER Report will be confusing

# Goal Outcome Indicators (GOI)

- ▶ Key component that ties together all three documents:
  - ▶ Con Plan SP 45: GOI chosen, 5 year estimated \$\$ and # served set by GOI
  - ▶ Annual Action Plan AP20: Estimate annual \$ spent/# served by GOI
  - ▶ CAPER CR05: Report actuals against estimated GOI for both Annual and 5 year plans.

# GOI v. Matrix Codes

- ▶ GOIs and Matrix Codes are linked - even though nowhere in IDIS or the Con Plan does it say so!
- ▶ Choose GOIs carefully to correspond with the Matrix Codes you plan to/typically use to save yourself headaches at CAPER time.
- ▶ Appendix B in eCon Planning Suite Desk Guide has reference table:
  - ▶ <https://www.hudexchange.info/resources/documents/eCon-Planning-Suite-Desk-Guide-IDIS-Conplan-Action-Plan-Caper-Per.pdf>

# CAPER: Goals and Outcomes

- ▶ Goal Outcome Indicators are key - whatever you put in the ConPlan will be in the CAPER, whether you have any beneficiaries or not.
- ▶ % progress towards goals in ConPlan/Annual Action Plan will be skewed if you use GOI you didn't originally choose and don't use those you did.
- ▶ Accomplishments come from IDIS, you can edit if needed, but try to avoid it.

# Questions?

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