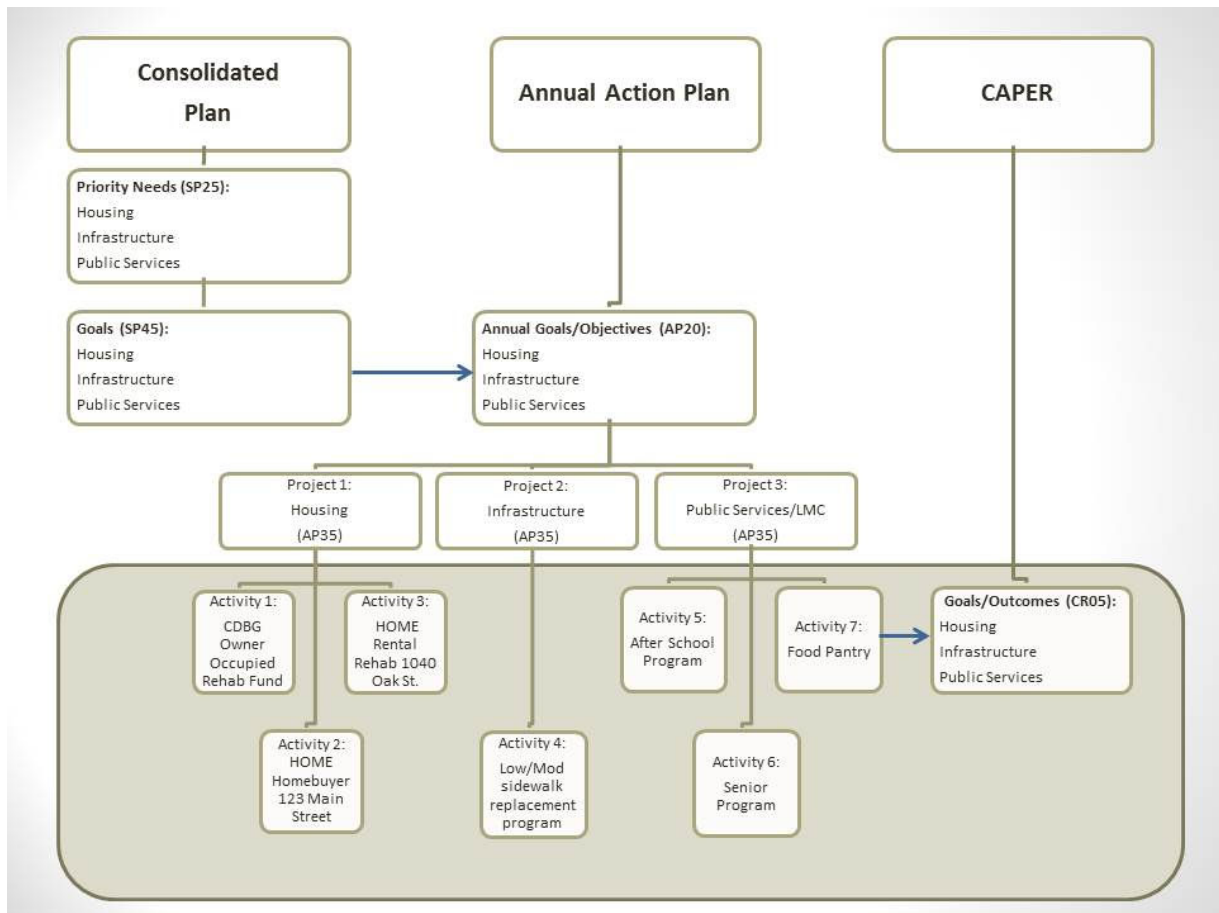**Best Practices for CAPER Reporting – June 13, 2024**

- CAPER is the last step in the grant process step, but how you set up the ConPlan and Annual Plan determines how useful the IDIS data for the CAPER will be.
- The CAPER pulls accomplishment data directly from IDIS and categorizes it by how you set up your Consolidated and Annual Plans:

Consolidated Plan

Priority Needs (SP25):
Housing
Infrastructure
Public Services

Goals (SP45):
Housing
Infrastructure
Public Services

Annual Action Plan

Annual Goals/Objectives (AP20):
Housing
Infrastructure
Public Services

Project 1:
Housing
(AP35)

Project 2:
Infrastructure
(AP35)

Project 3:
Public Services/LMC
(AP35)

Activity 1:
CDBG Owner Occupied Rehab Fund

Activity 3:
HOME Rental Rehab 1040 Oak St.

Activity 2:
HOME Homebuyer 123 Main Street

Activity 4:
Low/Mod sidewalk replacement program

Activity 5:
After School Program

Activity 6:
Senior Program

Activity 7:
Food Pantry

CAPER

Goals/Outcomes (CR05):
Housing
Infrastructure
Public Services

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

- CAPER: Goals and Outcomes
    - Goal Outcome Indicators are key – the ones you put in the ConPlan will be in the CAPER, whether you have any beneficiaries for them or not.
    - % progress towards goals in CAPER will be skewed if you use GOI you didn't originally choose in the ConPlan and/or don't use the ones that were in the ConPlan.
    - Accomplishments come straight from IDIS, you can edit in the CAPER if you have to.

- Goal Outcome Indicators 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

- Set Up your plans for CAPER Success:
  - Con Plan
    - Priority Needs are distinct from each other and have logical subjects (e.g., Housing, ED, Public Services)
    - Goals tie to only one need each and contain only items related to that need (Example: Under Housing goal list Rehab and Rental Production)
    - Projects tie to only one goal each and account for all the activities you intend to do
    - Goal Outcome Indicators for Goals/Projects match each other and are correct for the Matrix Codes you intend to use in IDIS
  - Annual Action Plan
    - Goals match those in the ConPlan (unless new public input demands new ones – might trigger amendment)
    - Projects tie to only one goal each, match the ones in the ConPlan and account for all the activities you intend to do
    - $$ amounts per goal/project total the same as actual grant/PI
    - Goal Outcome Indicators for Goals/Projects match the ones in the ConPlan
  - IDIS
    - Projects match the ones in the ConPlan/Annual Action Plan
    - Activities are set up under the correct Project
    - $$ amount in the projects matches what is in your approved Annual Action Plan (and/or amendments)
    - Matrix Codes for Activities match the Goal Outcome Indicators for the correct Goal/Project from the ConPlan/Annual Action Plan

Questions?
Heather Johnson
Community Development Resources Manager
Davenport, Iowa
Heather.johnson@davenportiowa.com
563-888-2004