



Con Plan Quick Guide

Creating a Consolidated Plan

For Consortia Grantees

April 2016





The Con Plan Quick Guides are intended to 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 – CONSORTIA GRANTEES

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

Only the Lead Entity can create the plan for ALL participating members in the Consortium. Participating members should not create a plan, even for CDBG and ESG allocations received directly from HUD. Creating the wrong type of plan will result in the plan not being approved by HUD and require all members to correct the plan.

Once the Lead Entity creates the plan, it should notify all participating members that the plan is available in IDIS.

Before setting up the Consolidated Plan, it is important to consider the following tips:

- Ensure all grantees have the same Consolidated Plan start year and program year start date.
- Determine roles and responsibilities for how the lead and participating members will enter information into the Consolidated Plan template in IDIS.
- All participating grantees will have editing rights on the lead Consortium plan; coordinate times for all members to access the lead Consortium plan.
- Develop a timeline for drafting the plan. Remember that when the lead entity submits its plan to HUD, the system will automatically submit all participating grantees' Consolidated Plan templates as well.

When creating a new Consolidated Plan, the Lead Entity has two options, copying a previous plan or adding a new, blank template. **Remember, only the Lead Entity can create and submit the Consolidated Plan for all participating members in IDIS.**

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 this option if consortium members are including a new HUD program in the Consolidated Plan or members are being added to or removed from the Consortium.**

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, grantees are able to change the CPD programs, members of the Consortium and the Public Housing Agencies included in the Consolidated Plan.

I. CREATING A PLAN BY COPYING A PREVIOUS CONSOLIDATED PLAN



1. Click "Search" under the Consolidated Plan submenu.

Results Page 1 of 1

Grantee Name	State	Year	Version	Title	Status	Action
SAN ANTONIO	TX	2015	1	San Antonio Five Year Consolidated Plan 2015-2019	Review Completed	View

2. Make note of the Year and Version of the Plan to be copied.

3. Click "Copy" under the Consolidated Plan submenu.



4. Enter the Source Year and Version from the Plan to be copied (identified in Step 2). Enter the Start and End Year and Version for the new Plan. Do not indicate that the plan is an amendment. Once completed, click "Copy."

Copy | Cancel

Source Consolidated Plan's Start Year: *

Source Consolidated Plan's Version: *

New Consolidated Plan's Start Year: *

New Consolidated Plan's End Year: *

New Consolidated Plan's Version: *

If Amendment: *



- The Consolidated Plan is now copied and includes copied templates for the Lead Entity and all participating grantees. Locate the copied Consolidated Plan by clicking “Search” under the Consolidated Plan submenu. The plan for all grantees is titled “ConPlan Copy.”

Search		Reset					
Results Page 1 of 1							
Grantee Name	State	Year	Version	Title	Status	Action	
SAN MATEO COUNTY	CA	2015	2.0	ConPlan Copy	Open - In Progress	Edit View	
SAN MATEO COUNTY	CA	2015	1.0	Consortium Con Plan	Open - In Progress	Edit View	
SOUTH SAN FRANCISCO	CA	2015	1.0	Consortium Con Plan	Open - In Progress	View	
SOUTH SAN FRANCISCO	CA	2015	2.0	ConPlan Copy	Open - In Progress	View	

- The Lead Entity should change the title of the plan on the AD-25 screen accessed by clicking “Edit” in the Action column for the corresponding Consolidated Plan. Changing the title will change the title for all grantees in the Consortium.

Key Points:

- Lead Entities can edit the Lead Entity template and view each of the other entitlement consortium member templates.
- Only Lead Entities can edit the title of the Consolidated Plan. When the lead entity changes the name of the plan, it will change the name of the plan for all participating grantees.
- Participating consortium members can provide information to the lead entity on specific housing needs and market conditions for incorporation into the lead entity’s template (except for the Lead Entity’s non-housing screens).
- Participating consortium members cannot view any of the other participating consortium members’ templates.

II. CREATING A NEW PLAN BY ADDING A NEW CONSOLIDATED PLAN

- Click “Add” under the Consolidated Plan submenu.



- Enter the Beginning Year and Ending Year, Title and Plan Version. Fields marked by an asterisk (*) are required.



AD-25 Administration of the Consolidated Plan

Save | Cancel

Strategic Plan Beginning Year:*

Ending Year:*

Title:*

Plan Version:*

If Amendment: N/A ▼

Programs included:*
 CDBG
 HOME
 ESG
 HOPWA

Consolidated Plan is for*: Select ▼

3. In the Programs Included section, only enter the programs received by the Lead Entity
4. In the “Consolidated Plan is for” section, select “Consortia.”

Consolidated Plan is for*: Select ▼

- Select
- Grantee
- Consortia
- Regional

5. Once Consortia is selected, the screen will display a second question: “If consortia, does it have participating grantees?”
 - Select “Yes” only if participating consortium members received CPD allocations directly from HUD such as CDBG and ESG.
 - If “Yes” is selected, the screen will display a button labeled “Add Participating Grantee.” Click this button to view the “Select Participating Grantee” screen.



Consolidated Plan is for*:

If consortia, does it have participating grantee's?*:

- Search for and select each participating consortium member that is part of the HOME consortium and also receives a grant directly from HUD. Click the radio button next to the name of the searched participating member and click “Select.”

Select Participating Grantee

Search Criteria

Organization Name (i):

City:

DUNS #:
(ex: nn-nnn-nnnn)

EIN/TIN #:
(ex: nn-nnnnnnn)

|

- Repeat this process for each participating consortium member.
- Select the CPD formula grants received directly by each participating consortium member by selecting the appropriate radio button for the CPD program.

If consortia, does it have participating grantee's?*:

Grantee(s) participating in the plan:

Name	City/State	DUNS	TIN	Programs	Delete
SOUTH SAN FRANCISCO	South San Francisco, CA	00-495-2263	94-6000435	<input type="checkbox"/> CDBG <input type="checkbox"/> ESG <input type="checkbox"/> HOPWA	<input type="checkbox"/>

- Once all entitlement consortium members have been entered, click the “Select Public Housing Agency” button at bottom of the screen.
 - Use the Search fields provided to find and select all of the public housing agencies that share jurisdiction with the HOME Consortium.
- Review all of the information on the screen. All information on this page cannot be changed after creating the template except for the title. If everything is correct, click “Save” at the bottom of the screen.



8. The system will create the template for the Lead Entity and all participating members. To see these templates, click “Search” from the Consolidated Plan submenu. A separate template is listed for the Lead Entity and each participating consortium member.
- Lead Entities can edit the Lead Entity template and view each of the other entitlement consortium member templates from the “Search” screen.

Search Reset						
Results Page 1 of 1						
Grantee Name	State	Year	Version	Title	Status	Action
ST. CHARLES	MO	2015	1.0	Consortium Con Plan	Open - In Progress	View
ST. CHARLES COUNTY	MO	2015	1.0	Consortium Con Plan	Open - In Progress	View
ST. LOUIS COUNTY	MO	2015	1.0	Consortium Con Plan	Open - In Progress	Edit View

- Participating consortium members can edit the Lead Entity’s template (except for the Lead Entity’s non-housing screens) and edit their own template from the “Search” screen.

Search Reset						
Results Page 1 of 1						
Grantee Name	State	Year	Version	Title	Status	Action
ST. CHARLES COUNTY	MO	2015	1.0	Consortium Con Plan	Open - In Progress	Edit View
ST. LOUIS COUNTY	MO	2015	1.0	Consortium Con Plan	Open - In Progress	Edit View

- The Lead Entity template will contain screens for the HOME Consortium and the Lead Entity’s other CPD programs.