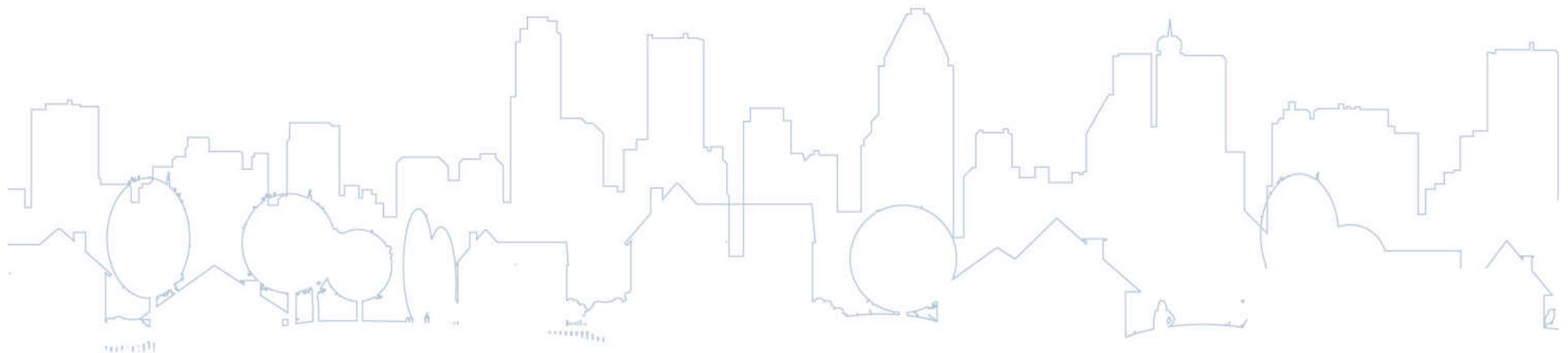




Orientation Webinar: Consolidated Plan Template in IDIS OnLine



Webinar Agenda

1. Background – eCon Planning Suite
2. Purpose and Design of Con Plan template in IDIS
3. Demonstration –
 - a. Getting Started: Access to IDIS and Planning Modules and Adding a Plan
 - b. Con Plan Template Features
 - c. Preparing for submission
4. Implementation Timeline and Key Resources
5. Questions



eCon Planning Suite

Support need-driven, place-based planning, decision-making and public participation through expanded, transparent data and tools.

Expanded Planning Data

- Pre-populated data that speaks to all grant fund uses
- Publically available

CPD Maps Data Mapping Tool

- Makes data easier to understand and manage
- User-friendly for grantees and the public
- Supports needs- and place-based investment

Electronic Submission Template

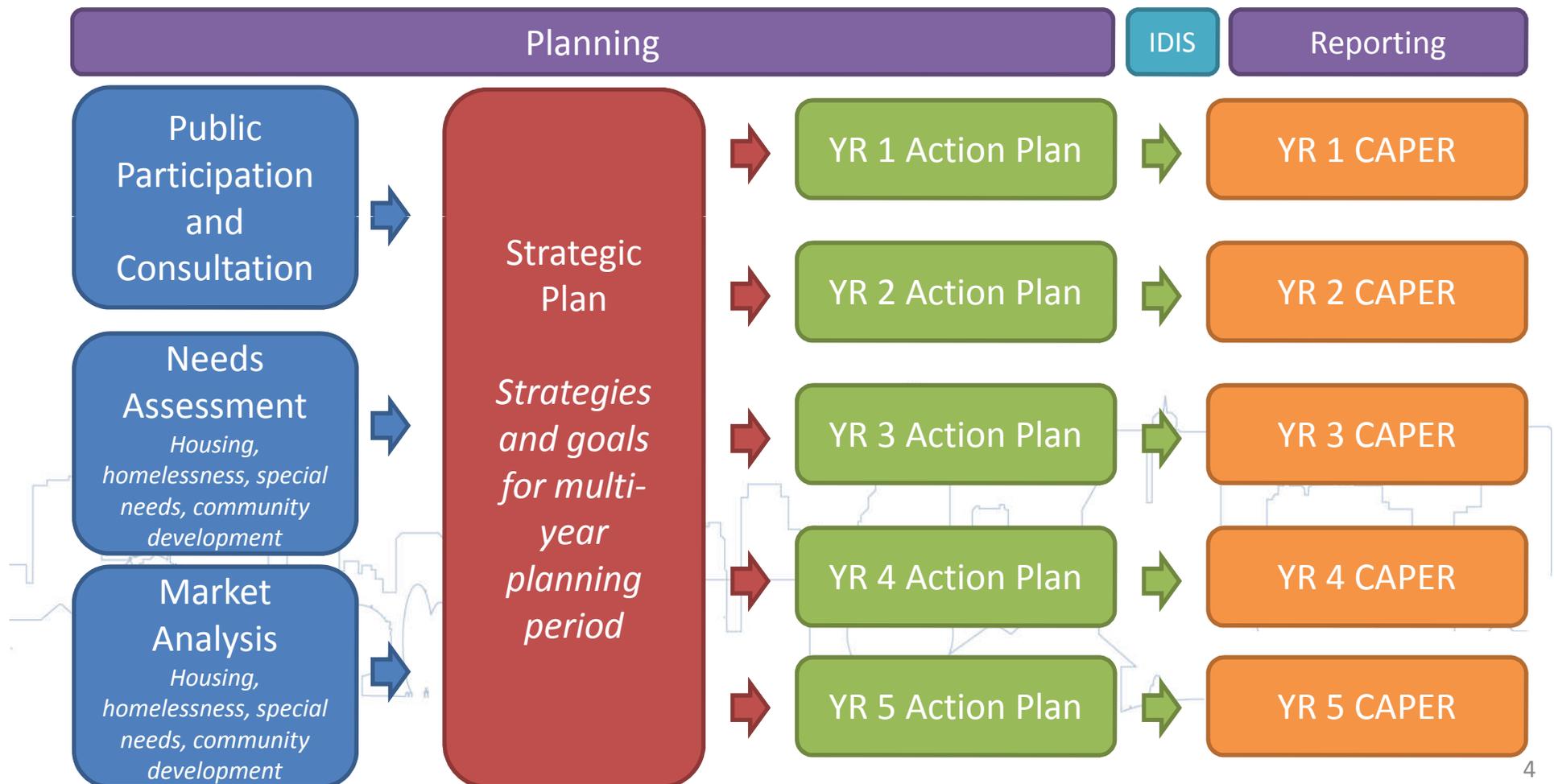
- Submission template that grantees can prepare themselves
- Greater efficiency for grantees and HUD
- Incorporated into grant and reporting system
- Connects goals to activities and outcomes



Consolidated Plan Regulatory Framework

24 CFR Part 91

- *Established by regulation in 1995 to create common planning requirements for CDBG, HOME, ESG, HOPWA*
- *Allows for plan to be submitted in a “form prescribed by HUD”*
- *By design, planning, should inform funding decisions that get help where it is needed*



Template Facilitates Integrated Planning and Decision-Making



Template designed to:

1. Set Expectations
2. Eliminate Repetition
3. Promote Collaboration
4. Based on HUD-Provided Data



A New Online Tool: The Consolidated Planning Template



Integrates the components of the grant management cycle into one cohesive planning framework within IDIS

- Incorporates data assessing need and market conditions
- Connects Goals to investments to outcome reporting



More Useful Planning tool

The IDIS Template is designed to support planning beyond compliance and budgeting by:

- Integrating data from CPD Maps to highlight need-based, data-driven decision-making
- Facilitating collaboration with partners, the public and other planning processes
- Incorporating other public and private funding leveraged by grantees



Demonstration Overview

Desk Guide available on Con Plan website:

http://www.hud.gov/offices/cpd/about/conplan/pdf/conplan_manual.pdf

Getting Started: Access to IDIS and Planning Modules

Adding a plan

Features of the Consolidated Plan Template

- Simplified, Minimal Data Collection
- Default data and Adding Alternate Data Sources
- Customize a Plan with Maps, Images, Data, Tables
- Strategic Plan/Annual Action Plan Structure

Prepare plan for submission

- Quality Checks
- Print Plan for Citizen Participation
- Submitting a Plan



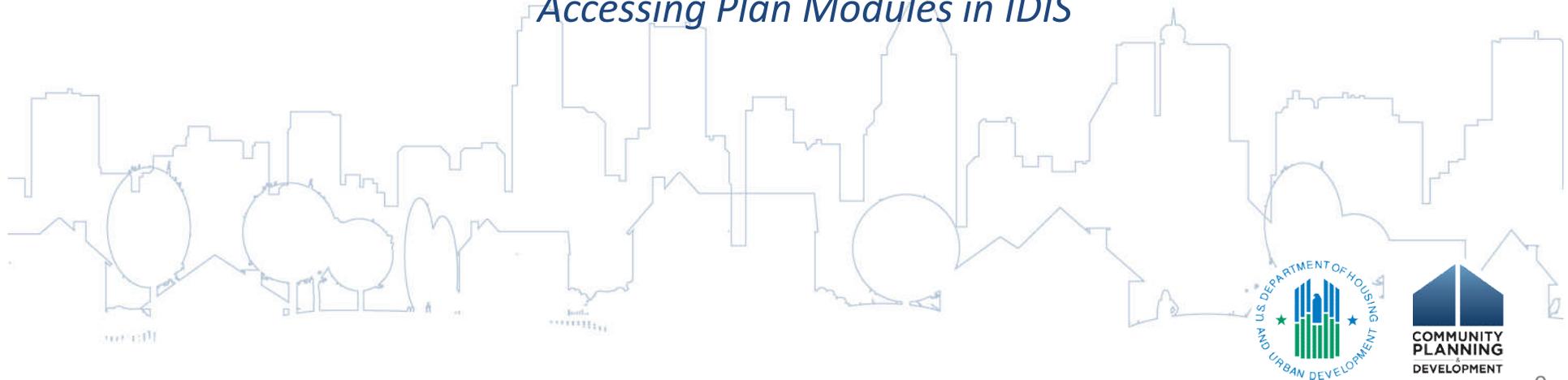
Con Plan Template in IDIS Demonstration

Getting Started: Access to IDIS and Planning Modules

Access for new IDIS Users

Granting Consolidated Plan and CAPER Access Privileges

Accessing Plan Modules in IDIS



Access for New IDIS Users

NOTE: Users should begin this process early

- Form to request access for new IDIS Users available at: <http://www.hud.gov/offices/cpd/systems/idis/idis.cfm>
- Fill out the entire form as directed in the instructions
- In “Program Areas” section of Form check “other” and write the desired Consolidated Plan role in the text box
 - Options are “create/edit/submit”; “view/edit”; and “view”

Program Areas

CDBG	<input type="checkbox"/>	HOME	<input type="checkbox"/>	ESG	<input type="checkbox"/>	HOPWA	<input type="checkbox"/>	<input type="checkbox"/>
CDBG-R	<input type="checkbox"/>	TCAP	<input type="checkbox"/>	HPRP	<input type="checkbox"/>	Other	<input checked="" type="checkbox"/>	<input type="text" value="If other, please specify name of program"/>

- Have the form notarized as directed in the instructions
- Submit it to your local CPD Representative
- The CPD Field Representative will forward the request to HUD HQ



Privileges for Existing Grantee IDIS Users

Plans/Projects/Activities

Funding/Drawdown

Grant

Grantee/PJ

Admin

You have 48 HOME activities that have been flagged. Click [here](#) to review them.

User Profile

Search User Profiles

In the Admin Tab, search user profiles for each user and select "edit"

Search Criteria

User ID: <input type="text" value="H56606"/> <small>(ex: xxxxxxx)</small>	First Name: <input type="text"/>	Last Name: <input type="text"/>
Select Role: All	Organization Name <small>i</small> : <input type="text"/>	Status: Select Status
State: Select State		

|

Results Page 1 of 1

User ID	First Name	Last Name	Status	Action
H56606	MEG	BARCLAY	Active	Edit View



User ID: C16964
User Role:
Grantee
Organization:
IRVINE
- [Logout](#)

[Plans/Projects/Activities](#)

[Funding/Drawdown](#)

[Grant](#)

[Grantee/PJ](#)

[Admin](#)

You have 9 HOME activities that have been flagged. Click [here](#) to review them.

Admin

Edit User Profile (Page 1)

Under Existing User Roles, click the Grantee link.

| | |

Admin
- [Search User Profiles](#)
- [Table Maintenance](#)

Utilities
- [Home](#)
- [Data Downloads](#)
- [Print Page](#)
- [Help](#)

Links
- [Rules of Behavior](#) 
- [RAMPS](#)
- [Support](#)
- [CPD Home](#)
- [HUD Home](#)

*Indicates Required Field

User ID:
C17472

*Status:
Active

Status Modified Date:
09/11/2009

User Information

*First Name:
DIANE

Existing User Roles:
[Grantee](#)

Department:
Economic Development Dept.

Images: 6/6 Loaded: 28 KB Speed: 16.52 KB/s Time: 1.696



Admin

Edit Grantee/PJ User Profile (Page 2)

Save

Cancel

*Indicates Required Field

User ID:

C17472

Name:

DIANE M. COTTO

Assigned User Role:

Grantee

In the Action column, click the Edit Access link.

Grantee/PJ Profiles

Grantee/PJ Name	City	State	EIN/TIN #	Status	Action
EL MONTE	El Monte	CA	95-6000708	Active	No Access
IRVINE	Irvine	OH	95-2759391	Active	Edit Access
NEWPORT BEACH	NEWPORT BEACH	CA	95-6009751	Active	No Access
ORANGE	Orange	CA	95-6000755	Active	No Access
PARAMOUNT CITY	Paramount	CA	95-6005780	Active	No Access



[- Logout](#)

Admin

Edit Grantee/PJ User Profile (Page 4)

[Save](#) | [Cancel](#) | [History](#)

User ID:
H56606

Name:
MEG T. BARCLAY

Assign User Role:
Grantee

Status:
Active

Grantee/PJ Name:
PHILADELPHIA

Program Privileges

- CDBG
- HOME
- ESG
- HOPWA
- CDBG-R
- HPRP
- TCAP
- HESG
- HOPWA-C

Administrative Privileges

- Administration
- Report
- Table Maintenance
- Add Subordinate
- Edit Subordinate

Plan Privileges

- Create/Edit/Submit Plan
- Edit Plan
- View Plan

Caper Privileges

- Create/Edit/Submit CAPER
- Edit CAPER
- View CAPER

Activity Privileges

- Set up Activity
- Update Activity
- View Activity

Drawdown Privileges

- Drawdown Approval
- Request Drawdown
- View Drawdown

Report Group Privileges

[Save](#) | [Cancel](#) | [History](#)

• In the “Edit Grantee/PJ User Profile Screen” select the Plan and CAPER privileges you wish to assign to each user

User ID: H56606
User Role: Grantee
Organization:
PHILADELPHIA
[- Logout](#)

[Plans/Projects/Activities](#)

[Funding/Drawdown](#)

[Grant](#)

[Grantee/PJ](#)

[Admin](#)

You have 48 HOME activities that have been flagged. Click [here](#) to review them.

Activity

Search Activities

Search Criteria

Program:

All

IDIS Project ID:

Status:

All

Activity Name:

IDIS Activity ID:

Program Year:

Select

Grantee/PJ Activity ID:

Activity Owner:

PHILADELPHIA, PA

Consolidated Plans

[- Add](#)
[- Search](#)

Annual Action Plans

[- Add](#)
[- Search](#)

Consolidated Annual Performance Evaluation Report

[- Add](#)
[- Search](#)

Utilities

[- Home](#)
[- Data Downloads](#)
[- Print Page](#)
[- Help](#)

Links

[- Rules of Behavior](#)
[- RAMPS](#)
[- Support](#)
[- CPD Home](#)
[- HUD Home](#)

The next time users log in Plan options will appear in the "Plans/Activities/Projects" tab

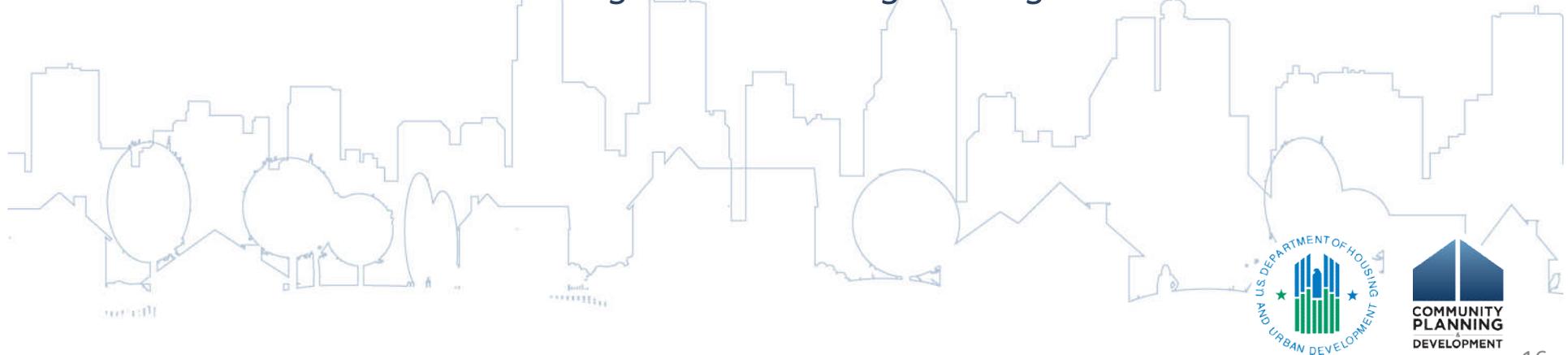
Con Plan Template in IDIS Demonstration

Adding a Plan

Creating a New Consolidated Plan

Plan Types

Searching For and Editing Existing Plans



Con Plan Template in IDIS Demonstration

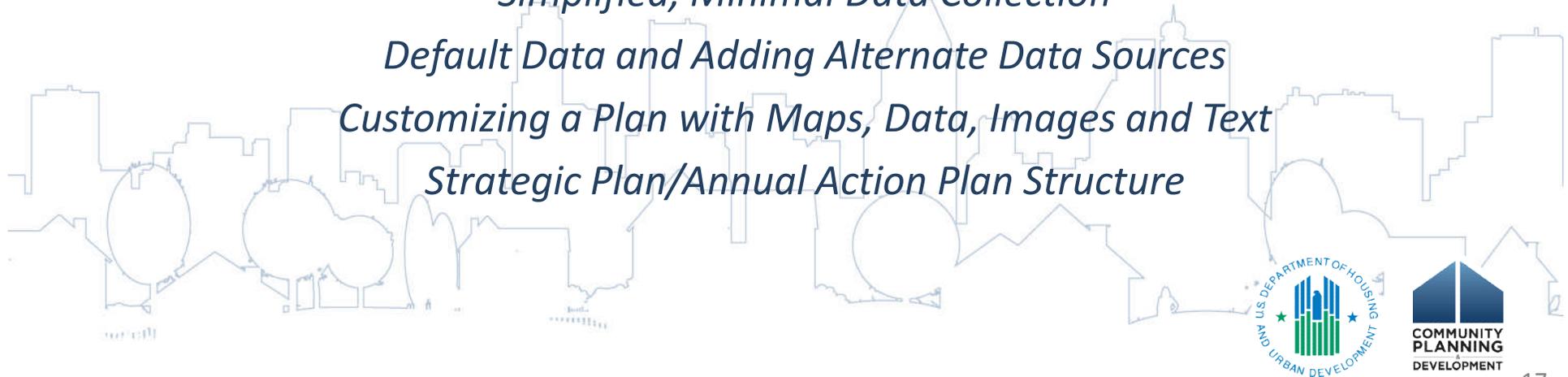
Using Features of the Consolidated Plan Template

Simplified, Minimal Data Collection

Default Data and Adding Alternate Data Sources

Customizing a Plan with Maps, Data, Images and Text

Strategic Plan/Annual Action Plan Structure



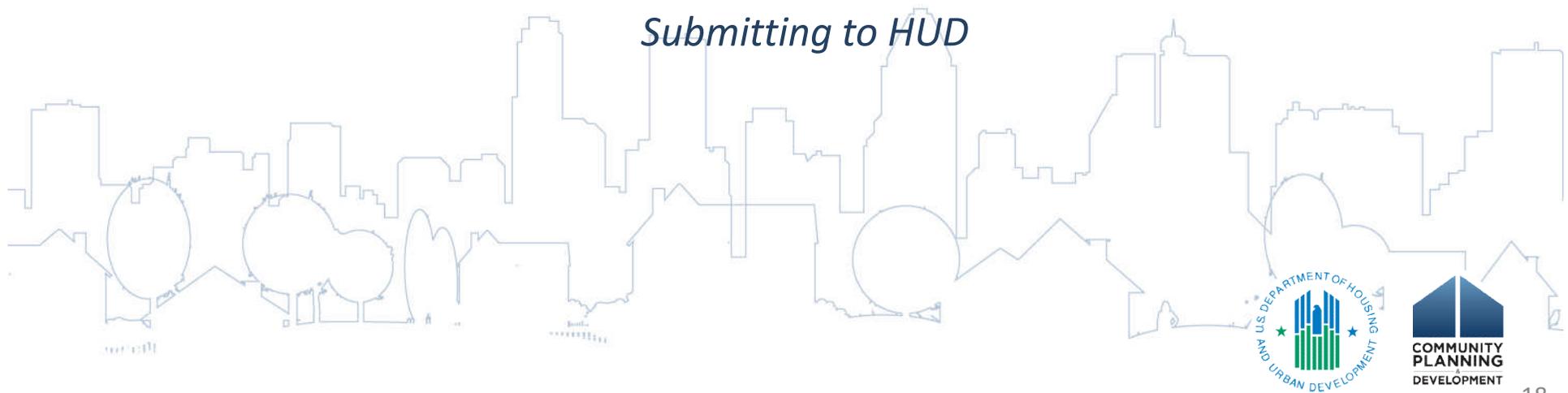
Con Plan Template in IDIS Demonstration

Preparing a Plan for Submission

Quality Checks

Printing a Plan for Public Participation

Submitting to HUD



Timeline for Implementation

Consolidated Plan template

- Mandatory for Con Plans submitted on or after November 15, 2012

CPD Notice describing new requirement at:

<http://portal.hud.gov/huddoc/12-09cpdn.pdf>

Action Plan template

- Optional until Con Plan submitted in IDIS
- Stand-alone Action Plan is available
 - Instructions in *“A Desk Guide for Using IDIS to Prepare the Consolidated Plan, Annual Action Plan, and CAPER/PER”*



Summary of Key Resources

- *Website for the Consolidated Plan Template in IDIS*
http://www.hud.gov/offices/cpd/about/conplan/cp_idis.cfm
- *Desk Guide for Using IDIS to Prepare the Consolidated Plan, Annual Action Plan, and CAPER/PER*
http://www.hud.gov/offices/cpd/about/conplan/pdf/conplan_manual.pdf
- *Form to request IDIS access for Grantee Staff*
<http://www.hud.gov/offices/cpd/systems/idis/idis.cfm>
- *Con Plan email address: conplan.mailbox@hud.gov*
- *Information on future webinars will be posted on the Con Plan Training and TA page:*
http://www.hud.gov/offices/cpd/about/conplan/cp_training_ta.cfm

