User

Guide

for Public Trust Officer (PTO)

*Renewal Communities/Empowerment
Zones/Enterprise Communities (RC/EZ/EC)
Performance Measurement System
(PERMS) - C39*

U.S. Department of Housing and Urban Development
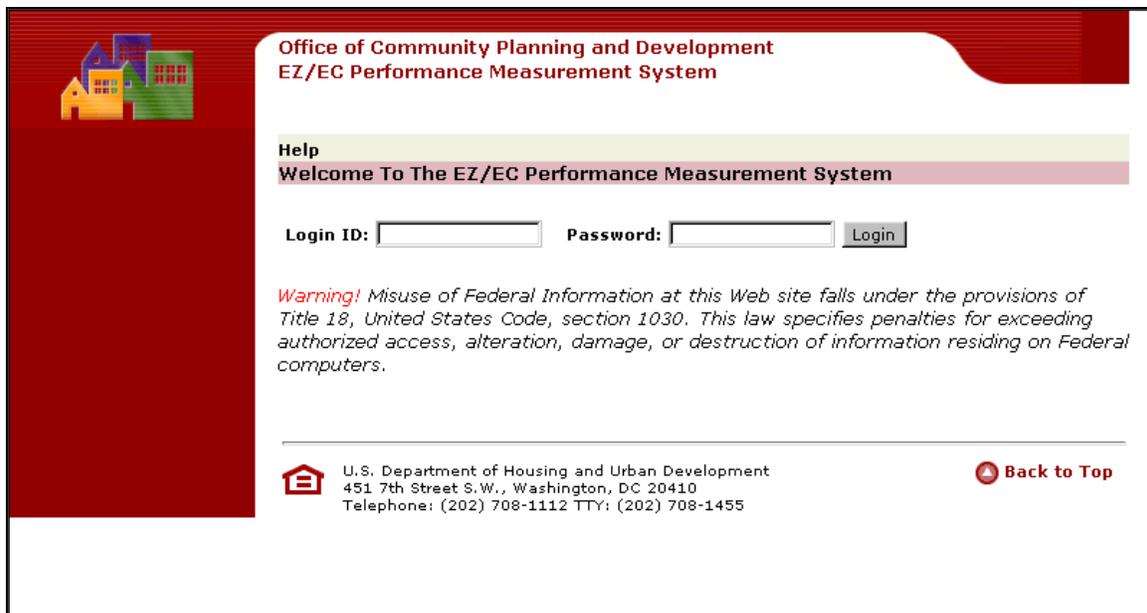
July 2002

Table of Contents

1 Introduction

The Public Trust Officer (PTO) staff is responsible for assessing whether designees are meeting the criteria established by the RC/EZ/EC program. The PERMS System guides the PTO through the assessment process of each of the following:

- Annual Report
- Implementation Plans
- Governance Report
- Overall Progress

2 Logging On

From the Login Screen you can enter the PERMS system.

- Enter you Login ID.
- Enter your password.
- Press **Login**. The following screen appears.

3 PTO Main Process

Once the login is complete, the Main PTO screen appears with the following submenus:

- Designee
- Assessment
- Search
- Change Password
- Help
- Logout

From this screen, the PTO must first select a designee to proceed. All Annual Reports and Implementation Plans are associated with this designee.

3.1 Selecting a Designee

- Press the Designee that you want to evaluate, the following screen appears.

3.1.1 Viewing an Implementation Plan

- Press the Implementation Plans link on the left margin. The following screen appears.

- Check the checkbox (es) for the Plan(s) that you want to review.

- Press **View**. The following screen appears.

Office of Community Planning and Development
EZ/EC Performance Measurement System

PTO - New Haven, CT

Designee
Select Designee
Implementation Plans
Annual Reports
Assessment

Designee | Assessment | Search | Change Password | Help | Log out

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Akron, Ohio Enterprise Community
View Implementation Plan

Plan G3.C1.P5 Utilize Private Industry Council to increase train

Goal 3: Economic Opportunity
Category 1: Workforce Development
Plan 5: Utilize Private Industry Council to increase train

I. Baseline
Program/Project
Description: Develop skills of unemployed residents
Baseline: Private Industry Council assists area residents, but does not track EC residents
Proposed Outcome: Recruit 80 EC residents annually for training, resulting in 20 placements annually.
HHS EZ Funds(Round I): $0.00
HUD EZ Funds(Round II): $0.00
Amount of HUD Round II EZ grant obligated to a subvendor by a signed contract or commitment letter: $0.00
Non-EZ/EC Grant Funds: $599,908.00
Total Budget: $599,908.00
Plan Status: Complete
Review Status: Returned

II. Sources of Program Funds
A. HHS EZ Funds (Round I): $0.00
B. HUD EZ Funds (Round II): $0.00
   Amount of HUD Round II EZ grant obligated to a subvendor by a signed contract or commitment letter: $0.00
C. Non-EZ/EC Grant Funds: $599,908.00

Participating Entity (Non EZ/EC Grant Funds)	Private	Cash	In-Kind
1.	No	$0.00	$0.00
2. JTPA (1996-1997)	No	$126,380.00	$0.00
3. JTPA (1997 - 1998)	No	$112,495.00	$0.00
4. JTPA (1998-1999)	No	$121,033.00	$0.00
5. JTPA (1999 Summer Youth Employment)	No	$150,000.00	$0.00
6. JTPA (1999-2000)	No	$90,000.00	$0.00
Total		**$599,908.00**	**$0.00**

III. Uses of Program Funds

Lead Implementing Entity	Amount
A. Private Industry Council	$599,908.00
Total	**$599,908.00**

IV. Status of Projected Milestones

Milestone(s)	Start Date	End Date
A. Hold quarterly meetings with PIC staff and Employment Services.	1/1/1996	6/1/1998
B. Contact economically disadvantaged youth and older workers.	1/1/1996	1/1/2006
C. Increase involvement of OBES in training program graduate placement.	1/1/1996	1/1/2006
D. Increasereferrals to OBES for direct job placement for out of school youth.	1/1/1996	1/1/2006
E. Place 20 EC residents in employment	7/1/1996	6/30/1997
F. Recruit 80 residents for training and placement	7/1/1996	6/30/1997
G. Sign contract with Private Industry Council	10/31/1996	12/31/1996
H. Request OBES to provide list of resident job seekers	1/1/1997	1/1/2006
I. Contract with area training facilities to prepare EC residents for identified employers	1/1/1997	1/1/2006
J. Place 20 EC residents in employment	7/1/1997	6/30/1998
K. Recruit 80 EC residents for training and placement	7/1/1997	6/30/1998
L. Develop Website to advertise training and employment assistance opportunities (Summit / Medina Employment Training Connection)	1/1/1998	1/1/2000
M. Recruit 80 EC residents for training and placement	7/1/1998	6/30/1999
N. Place 20 EC residents in employment	7/1/1998	6/30/1999
O. Phase-out of PIC program and stewardship of duties by Summit County Dept. of Human Services.	1/1/1999	12/31/2000
P. Enroll 200 EC youth in 1999 PIC Summer Youth Employment and Training Program	3/1/1999	6/1/1999
Q. Recruit 80 EC residents for training and placement	7/1/1999	6/30/2000
R. Place 20 EC residents in employment	7/1/1999	6/30/2000

V. Progress Towards Projected Outputs

Outputs	Projected
A. Job Training	
1. Number of EZ/EC residents trained	320
2. Number of EZ/EC resident trainees placed in jobs	80
B. Job Match	
C. Job Fairs	
D. Other Workforce Development Programs	
1. Number of youth programs	1
2. Number of EZ/EC youths served	200

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3.1.2   Viewing an Annual Report

- Select the Annual Reports link. The following screen appears.

- Choose the Year link for the Report that you want to view. The following screen appears.

- Press one of the Executive links to view an Executive Summary. The following screen appears.

Designee

Select Designee

Implementation Plans

Annual Reports
- Report Summary
- Strategic Vision
- Community Partnerships
- Economic Opportunity
- Community Development
- Tax Incentive
- Other Accomplishments
- Governance Board
- Governance Contact

Assessment

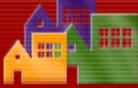Designee | Assessment | Search | Change Password | Help | Log out
Akron, Ohio Enterprise Community (1999)
Annual Report - Community Based Partnerships

AKRON ENTERPRISE COMMUNITY
July 1, 1998-June 30, 1999

I. Community Based Partnership

A. EC NETWORK ACTIVITY

The Enterprise Community Network met every two months during the program period. An ad hoc Program committee met during the spring to consider reallocation of funding from the amount originally presented in the application for Child Care subsidy and Recruitment and Training. This committee recommended to the Network that funds be reserved for the recruitment and training activity taken over by Info Line's Child Care Connection to enable a second year of operation. Additional child care activity was approved for the YWCA (discussed below) as well as child oriented service activities of the Boys and Girls Club, Black Inner City Educational Excellence (BICEE) and Akron Unified. As part of this same recommendation, the committee recommended, with Network concurrence, that funds be reserved for the fifth year of the School Service Center program with the Akron Public Schools, the first and largest funding initiative of the City's Enterprise Community program.

New Network board members joining during this period were Pat Munka, Downtown Akron Partnership, and Bernet Williams, Akron Community Service Center and Urban League.

B. NEW ASSOCIATIONS

1. An important aspect of the EC Network is the opportunity for different elements of the EC program to make new connections with each other. A new collaboration with the Sebert Training program included the Family Loan program, an EC funded activity which offers low cost loans for job-related transportation needs, and the Generations program of the Akron Health Department (also EC funded), which presented program participants with health education related to nutrition and lifestyle which improve health and productivity and reduce absenteeism.

2. A significant effort involving the EC Network and expanded representatives of the community was the preparation of the City's Empowerment Zone application. Drawing on the collaboration developed from the initial application and the four years of activity of the EC program, the City and its partners held numerous meetings during the summer and early fall involving over a hundred participants. The initiative further developed ideas begun during the EC program, and a significant number of exciting, new proposals for economic development, enhanced regional cooperation and educational initiatives. Although unsuccessful in securing EZ designation, this activity furthered the collaborative spirit developed within the EC program and laid the groundwork for new initiatives and a community sense of purpose. This effort was boosted when the City hosted a visit by Andrew Cuomo, Secretary of Housing and Urban Development, at Landmark Plastics in the EC in July, 1998, who praised the City and its EC program.

3. The Summit Medina Training Consortium, associated with the Private Industry Council, agreed to utilize unspent resources to provide Internet service to several locations within the EC.

C. APPROVAL OF APPLICATIONS

1. The Network approved an application by the City of Akron on behalf of the East Akron Neighborhood Development Corporation(EANDC) to the U.S. Department of Housing and Urban Development for an Economic Development Initiative grant to support the development of a grocery store in the EC within the Middlebury area of Akron (see below).

2. The Network approved an application by the Akron Metropolitan Housing Authority in 1998 to the U. S. Department of Housing and Urban Development for the HOPE 6 program for the Elizabeth Park Homes. Only the demolition portion of the project was approved.

3. In January, 1999, the Network approved an application by the Westside Neighborhood Development Corporation (WENDCO) to the Ohio Department of Development for a First Time Home Buyer Education and Down Payment Assistance Program.

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- Press Governance Report to view the Governance Report link. The following screen appears.

- Press the Governance Contact List to see a list of contacts. The following screen appears.

- Press the link for the Contact that you want to see. The following screen appears.

- Press the link for the Implementation Plan that you want to review. The following screen appears.

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Designee | Assessment | Search | Change Password | Help | Log out

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Designee
Select Designee
Implementation Plans
Annual Reports
Assessment

Akron, Ohio Enterprise Community
View Implementation Plan

Plan G3.C1.P5 Utilize Private Industry Council to increase train

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V. Progress Towards Projected Outputs
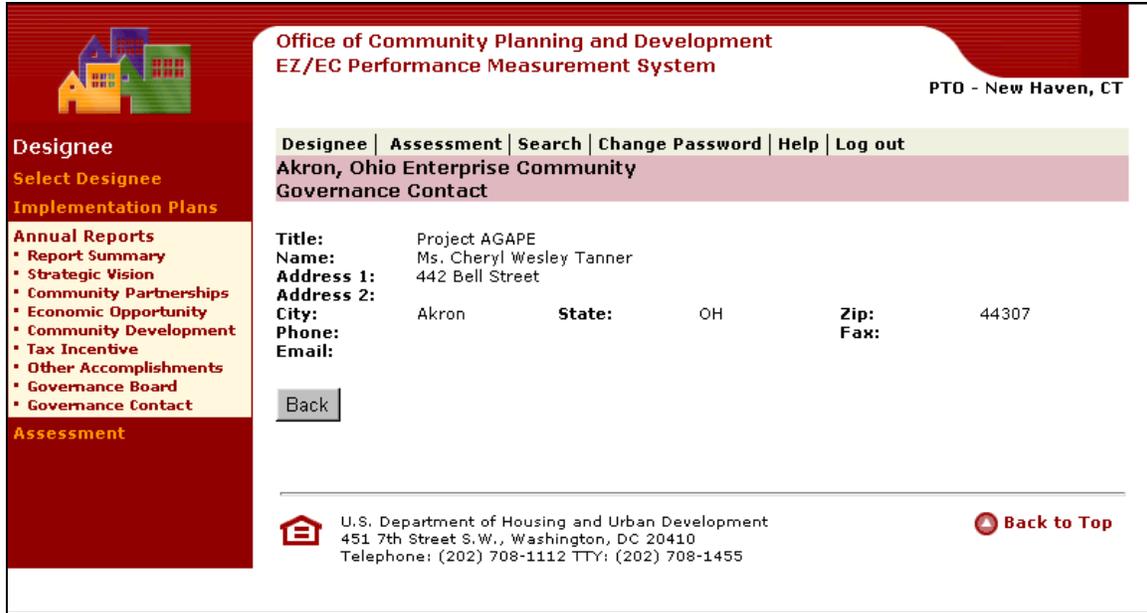| Outputs	Projected
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Performance Measurement System User Guide
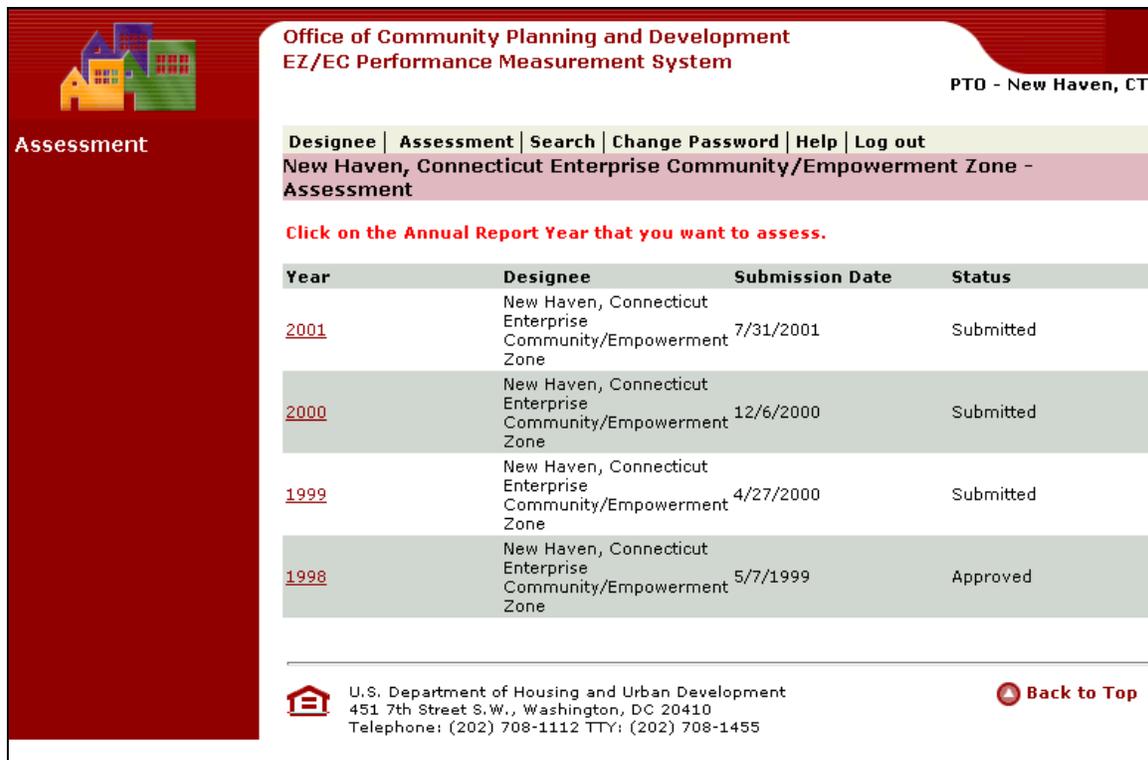
4   Assessing a Designee

You can access the Assessment screen in one of two ways.

If the Designee you selected was assigned to you for PTO Assessment, then you will see a list of the Annual Reports available for Assessment. If the selected Designee is not assigned to you, you may view the Implementation Plans and Annual Reports but not process the Assessment.

- Assessment Summary

- View Annual Report

- Executive Summary

- Governance Summary

- Implementation Plan Progress

- Overall Progress

You can also access the Assessment screen by pressing the Assessment tab. The following screen appears.

This screen contains the following columns:

Public Trust Officer   **11**

- Annual Report Year

- Designee

- Submission Dates

- Status

The screen lists all Designees that have submitted Annual Reports who are assigned to you.

- Press the link for the year/designee that you want to assess.

The Assessment Summary Screen follows.

Office of Community Planning and Development
EZ/EC Performance Measurement System

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Designee | Assessment | Search | Change Password | Help | Log out

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New Haven, Connecticut Enterprise Community/Empowerment Zone (2000)
Assessment Summary

Annual Report Sections	Assessment
Executive Summary Overall	Not Available
Community-Based Partnerships	Adequate
Economic Opportunity	Adequate
Community Development	Adequate
Tax Incentive Plan	Adequate
Other Accomplishments	Adequate

Governance Assessment

Governance Board	Adequate

Approved Implementation Plans

Plan #	Title	Assessment
G2.C1.P1	Empowerment Zone Governance Structure	Adequate
G2.C1.P2	Empower New Haven, Inc.: Administration of the New Haven's E	Adequate
G2.C2.P1	EC Governance Structure and Administrative Office	Adequate
G2.C2.P3	Staff Empower New Haven	Adequate
G2.C2.P4	EZ Neighborhood Worker Project	Inadequate
G2.C2.P5	Host and convene the Newhallville Neighborhood Summit	Adequate
G2.C2.P6	Enroll 8 EC residents in approved grantwriting seminars	Adequate
G2.C2.P7	Provide administrative funds for Dixwell EC/Neighborhood Imp	Adequate
G3.C1.P1	The ACES Collaborative .	Adequate
G3.C1.P2	Create a YOUTHBUILD program to enhance employment credential	Adequate
G3.C1.P3	Creation of Skin & Nail Care Training Program	Adequate
G3.C1.P6	Establish Summer Jobs for Youth Program 1997&1998	Adequate
G3.C1.P7	Create a Computer Assembly Workshop Program	Adequate
G3.C1.P8	Expand Career High School	Adequate
G3.C1.P9	Establish the West Rock Neighborhood Computer Training Netwo	Inadequate
G3.C1.P11	Culinary Arts Training Program	Adequate
G3.C1.P13	Establish Youth Fair Chance	Adequate
G3.C1.P14	Establish an Entrepreneurial TrainingProgram at Gateway Comm	Adequate
G3.C1.P15	Establish a Construction Training Program	Adequate
G3.C1.P16	Create RHEAP	Adequate
G3.C1.P17	Summer Jobs 1999	Adequate
G3.C1.P18	Establish Urban Solutions	Adequate
G3.C1.P19	Create Springside Farms Youth Work Program	Adequate
G3.C1.P21	Create Minority Worker Training Program	Adequate
G3.C1.P22	Establish greater New Haven Retail Academy	Adequate
G3.C1.P23	EZ Construction Training Apprenticeship Program	Adequate
G3.C1.P25	EZ Outreach, Assessment,Placement and Retention Services	Adequate
G3.C1.P26	Customized Training	Adequate
G3.C1.P27	EZ Summer Youth Employment for 83 Empowerment Zone Youth	Adequate
G3.C1.P28	Expand outreach of existing Computer Assembly Workshop Progr	Adequate
G3.C1.P29	Create Hospitality Training Program	Adequate
G3.C1.P30	Create Manufacturing Training Program	Inadequate
G3.C2.P1	Open Shaws Supermarket in EC	Adequate
G3.C2.P2	Foodtech Expansion	Adequate
G3.C2.P5	Improve streetscapes in DixwellCommercial Business District.	Adequate
G3.C2.P6	Create four star Omni Hotel	Adequate
G3.C2.P7	Hardy Press	Adequate
G3.C2.P12	Establish a Business Resource Center in the EC	Adequate
G3.C3.P6	Create HUD 108 Loan Program through NH Office of Business De	Adequate
G4.C1.P2	New Life Corporation	Adequate
G4.C2.P1	Establish Weed & Seed Initiative in Fair Haven	Adequate
G4.C2.P2	Establish Safe Night	Adequate
G4.C2.P3	Dwight Central Management Team	Adequate
G4.C3.P2	Improve West River Commercial Business District	Adequate
G4.C3.P4	Establish a Regional Growth Partnership to provide enhanced	Adequate
G4.C3.P5	Develop six strategic neighborhood plans.	Adequate
G4.C3.P6	EZ Neighborhood Plans	Adequate
G4.C4.P5	Cleanup Truman Street site	Adequate
G4.C4.P6	Cleanup vacant contaminated site for commercial use	Inadequate
G4.C6.P1	Wexler & Grant Elementary School -Math/ Science Curricul	Adequate
G4.C6.P2	Create Gateway Early Childhood Certification Program	Adequate
G4.C6.P3	Create Jackie Robinson Project	Adequate
G4.C6.P5	Create EZ Laptop Computer Pilot for fifth graders	Adequate
G4.C6.P6	Create All Our Kin	Adequate
G4.C7.P2	Provide Leadership & skills-building workshops; goal ori	Inadequate
G4.C7.P3	Create Urban Fellows Program	Inadequate
G4.C7.P5	Establish Youth Development Training Resource Center	Adequate
G4.C7.P7	Create Project Safe to coordinate GED youth services for out	Adequate
G4.C8.P2	Provide administrative funds for outreach to NewhallvilleEC	Adequate
G4.C8.P3	Create Daedreams Musical Production Mentoring Project, usin	Adequate

Total Plans: 60   Reviewed: 60   Making Progress: 54   Not Making Progress: 6

Overall Progress Assessment

Overall Assessment: **Adequate**
Final: **Yes**
Public Trust Officer: Gary Reisine
Phone Number: (860)240-4800 x3070
Email Address: gary_r._reisine@hud.gov

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4.1 Assessment Summary

You can move to any part of the Annual Report for assessment by pressing the appropriate link. You can also see which sections have already been evaluated and which need to be entered. The hyperlinked sections follow:

- Executive Summary Overall
- Community-Based Partnerships
- Economic Opportunity
- Sustainable Community Development
- Tax Incentive Utilization Plan
- Other Accomplishments
- Governance Board Report
- Implementation Plans
- Overall Assessment

4.2 Assessing an Annual Report

- Press Executive Summary Overall to make your Assessment. The following screen appears.

- Check the Adequate or Inadequate on the appropriate Radio Button.

- Enter Comments in the narrative field.

- Press **Next**. The following screen appears.

- Press **Next** to save changes.

Each of the following hyperlinks in the Annual Report section contains similar Assessment windows. You can navigate each of these assessments in the same way.

- Community-Based Partnerships

- Economic Opportunity

- Sustainable Community Development

- Tax Incentive Utilization Plan

- Other Accomplishments

- Press the link for the Annual Report sections that you want to assess. A screen similar to the following appears.

- Check the Adequate or Inadequate on the appropriate Radio Button.

- Enter Comments in the narrative field.

- Press **Next**. The following screen appears.

- Press **FINISH** to save changes

4.3 Commenting on Governance Board Reports

- Press the Governance Board Link. The following screen appears.

You are presented with six questions that can be answered by clicking on a Yes/No radio button. You have an option to write comments for each question.

- Press Yes or No for Questions 1-5.

- Press Adequate or Inadequate for Question 6.

- Enter Comments that you think are appropriate in the Narrative fields for each of the six questions.

- Press **Next**. The following screen appears.

- Press **Next** to save changes.

4.3.1.1   Evaluating Implementation Plan Progress

If there are Implementation Plans associated with an Annual Report, you are presented with a list from which the PTO can select. You are then presented with the Implementation Plan and can evaluate it based on the projected milestones and outputs.

Press the Implementation Plan link on the left margin. The following screen appears.

- Press the link for the Plan Number for the Implementation Plan that you want to assess. The following screen appears.

Assessment

- Select Report Year
- Assessment Summary
- View Annual Report
- Executive Summary
- Governance Board
- Implementation Plans
- Overall Progress

**Office of Community Planning and Development
EZ/EC Performance Measurement System**

PTO - New Haven, CT

Designee | Assessment | Search | Change Password | Help | Log out

**New Haven, Connecticut Enterprise Community/Empowerment Zone (2001)
G2.C1.P3 Empower New Haven, Inc. 2001-2003**

Plan G2.C1.P3 Empower New Haven, Inc. 2001-2003

Goal 2: Community-Based Partnership
Category 1: Governance Board
Plan 3: Empower New Haven, Inc. 2001-2003

I. Baseline

Program/Project Description:	Non-profit to manage the governance of the federal empowerment zone allocation.
Baseline:	Non-profit created in 1999 to manage the governance of the EmpowermentZone.
Proposed Outcome:	Oversight and managment of the Empowerment Zone strategic plan implementation.

HHS EZ Funds(Round I): $0.00
HUD EZ Funds(Round II): $1,959,066.42
Amount of HUD Round II EZ grant obligated to a subvendor by a signed contract or commitment letter: $0.00
Non-EZ/EC Grant Funds: $0.00
Total Budget: $1,959,066.42
Plan Status: Active
Review Status: Approved

II. Sources of Program Funds

A. HHS EZ Funds (Round I): $0.00
B. HUD EZ Funds (Round II): $1,959,066.42
   Amount of HUD Round II EZ grant obligated to a subvendor by a signed contract or commitment letter: $0.00
C. Non-EZ/EC Grant Funds: $0.00

Participating Entity (Non EZ/EC Grant Funds)	Private	Cash	In-Kind
Total		$0.00	$0.00

III. Uses of Program Funds

Lead Implementing Entity	Amount
A. Empower New Haven, Inc	$1,959,066.42
Total	$1,959,066.42

IV. Status of Projected Milestones

Milestone(s)	Start Date	End Date	Percent Complete as of July 01,2000	Percent Complete as of June 30,2001
A. Hire a marketing and pubic relations director	7/1/2001	8/1/2001	0	100
B. Hire a new Program Manager	7/1/2001	9/1/2001	0	50
C. Maintain office enviroment for community and committee meetings	7/1/2001	12/31/2003	0	0
D. Develop concept program strategies and oversee the development of request for proposals and develop contracts for funding	7/1/2001	12/31/2003	0	0
E. Submit benchmarks and outcomes to HUD	7/1/2001	12/31/2003	0	0
F. Monitor all activities funded throught the Ez funding	7/1/2001	12/31/2003	0	0
G. Market Products and Services of the EZ and other partners to the zone residents	7/1/2001	12/31/2003	0	0
H. Develop all fiscal and programatic reports required by HUD or the City of New Haven	7/1/2001	12/31/2003	0	0
I. Create partnership and opportunities of leverage for the EZ activities for economic development	7/1/2001	12/31/2003	0	0
J. Manage the governing bodies of the EZ including the Program Council and the Board of Directors	7/1/2001	12/31/2003	0	0
K. Approve funding for all EZ projects recommended by the Program Council	7/1/2001	12/31/2003	0	0
L. Maintain staffing of the Empower New Haven Office	7/1/2001	12/31/2003	0	0

V. Progress Towards Projected Outputs

Outputs	Projected	To Date
A. Governance Board		
1. Number of public meetings	128	0

Assessment: ○ Adequate ○ Inadequate

Comments:

[text area]

[Next]

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- Make your Assessment by checking either the **Adequate** or **Inadequate** Radio Button.

- Enter Comments in the narrative field.

- Press **Next**. The following screen appears.

- Press **FINISH** to save changes.

4.3.1.2   Overall Progress

- Press the Overall Progress link. The following screen appears.

This screen indicates that some Implementation Plans need to be assessed. But you may still enter the following data.

- Enter your Name
- Enter your Phone number
- Enter your Email
- Enter your Comments
- Make your Overall Assessment by checking either the **Adequate** or **Inadequate** Radio Button

If all of the Implementation Plans have been assessed by the PTO, the following screen appears.

This screen indicates that the all the Implementation Plans have been assessed as either Adequate or Inadequate.

When all Implementation Plans for the Designee have been assessed as either Adequate or Inadequate, you can make the Assessment Final. Click on Yes to **Make Assessment Final**. Otherwise click on No (this will save the data entered without finalizing the assessment. Once an Assessment is finalized you may not make any changes unless HUD Headquarters returns the assessment to you.)

The following screen appears.

- Press **Finish** to save changes.

5   Search Process

You can enter search criteria that are desired. The system will produce existing Implementation Plans and Annual Reports that contain the Search Criteria. You then can display the plans.

5.1 Search

You can use the Search function from the top menu bar to access existing Implementation Plans and Annual Reports for editing or review.

- Press the Search tab. The following screen appears.

- Enter Word(s) or Phrase you want to search for.
- Choose the geographical area radio button.

You can narrow your search by :

- Highlighting the specific EZ, if desired.

- Choose Annual reports by year or Implementation Plans

- Highlight Category in Implementation Plan

- Press the **Search**. The system will begin searching and displays the Annual Reports or Implementation Plans that meet the search criteria. The following screen appears.
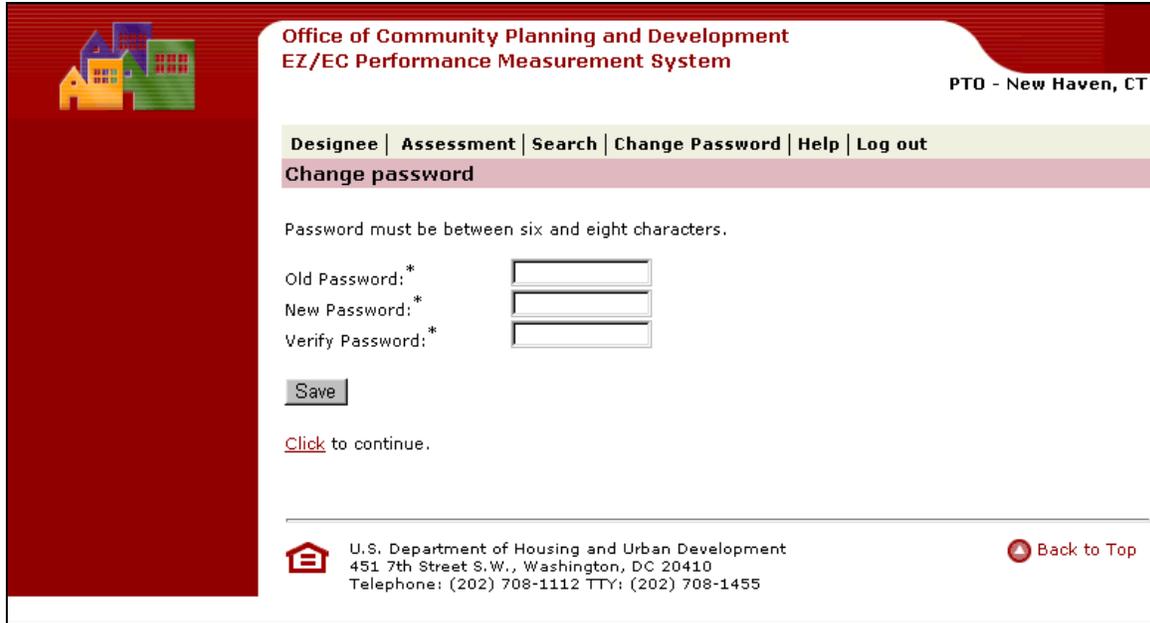

- Press on the link for the Report or Plan you want to Review.

6   Change Password

- Press the Change Password tab. The following screen appears.

- Enter Old Password

- Enter New Password

- Verify New Password.

- Press Save

You have changed your password.