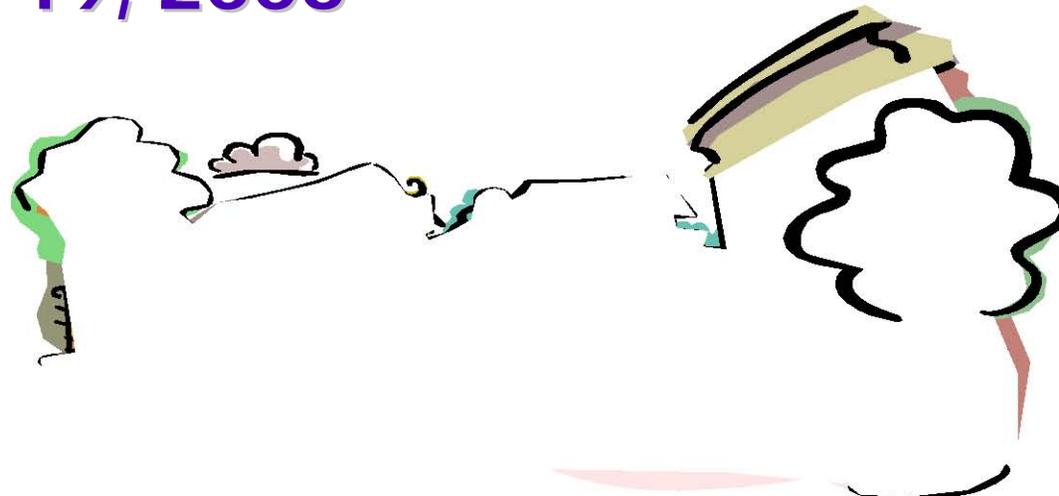# HUD CPD Outcome Measurement System

April 19, 2006

U. S. Department of Housing and Urban Development

Office of Community Planning and Development

Overview

- **Introduction**

- **Overview of Final CPD Outcome Measurement System**

- **Preparing to Use the System**

- **New Performance Measurement Screens in IDIS**

- **Summary and Next Steps**

Section 1: Introduction

Why Performance Measurement?

- **Required for Federal programs**

- **HUD and grantees need the ability to explain how key community development programs help families and communities**

- **To do this, need a common framework and system across all grantees**

  - Data that can be nationally aggregated

  - Need consistency of reporting type, frequency

Some Key Challenges

- **Formula grant programs with broad goals face challenges in measuring outcomes**

  - Many activities

  - Numerous entities involved

  - Needs are long term and varied across communities

- **Keeping the system feasible to implement**

Highlights of CPD System

- **Will help HUD & Grantees "tell the story" about the accomplishments of the four formula grant programs:**

  - Community Development Block Grant Program (CDBG)

  - HOME Investment Partnerships Program (HOME)

  - Housing Opportunities for Persons With AIDS Program (HOPWA)

  - Emergency Shelter Grants Program (ESG)

Highlights of CPD System

- **Goals for the System:**
  - Capture information about program "outcomes"

  - Aggregate results across the broad range of activities funded at the city, county, and state levels by the four programs

  - Clearly link to statutory objectives and key goals in HUD's Strategic Plan for 2006 to 2011

    - Expanding access to affordable housing

    - Fostering suitable living environments

    - Expanding economic opportunities

Highlights of CPD System

- **Developed by a "Working Group"**
  - National organizations
  - Diverse group of grantees
  - HUD
  - OMB

Development of CPD Outcome Measurement System

- **Developed/approved by Working Group**

- **HUD issued Proposed Framework on June 10, 2005**

- **Regional Feedback Sessions in July & early August 2005**

- **Final Notice issued March 7, 2006**

- **Performance measurement screens integrated into IDIS Spring 2006**

- **Full implementation in October 2006**

Federal Register Notice
(March 7, 2006)

- **Announces the final structure of CPD Outcome Performance Measurement System**

- **Sets timeframe for implementation**

- **Key sections:**

  - Background

  - Discussion of Public Comments

  - Description of CPD Outcome Performance Measurement System

Resources

- **HUD Notice**

- **HUD CPD Performance Measurement website:**

  www.hud.gov/offices/cpd/about/performance.index.cfm

- **FAQs and Sample IDIS screens**

- **HUD Training – Late Spring and Summer**

Implications for Grantees

- **Basic structure is now final**

- **Make plans to attend the HUD training on how to use the system**

- **Grantees encouraged to begin entering data into updated version of IDIS once its released in Spring 2006**

- **Grantees need to be ready to begin reporting information no later than October 1, 2006**

Section 2: Overview of Final CPD Performance Measurement System

Outcome Measurement System: Key Elements

Three Main Components:

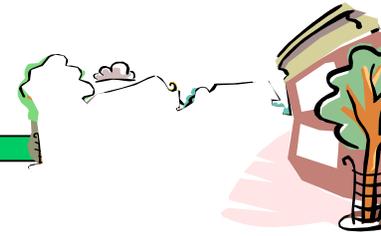- Objectives

- Outcomes

- Indicators

Using the Outcome Measurement System

■ **Role of Grantees:**

1. Determine <u>objective</u> and <u>outcome</u> of activities based on local intent

2. Indicate objectives and anticipated outcomes in next Annual Action Plan

3. Indicate objective and outcome in IDIS when setting up an activity

4. Report on applicable indicators in IDIS/CAPER/PER

Using the Outcome Measurement System
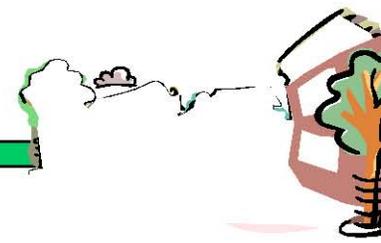
- **HUD's Role:**
  - Aggregate data and report on outcomes at a national level

  - Report outcomes to public, Congress, & OMB
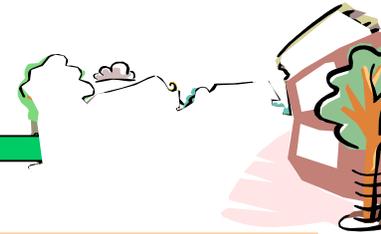
Objectives

- **Suitable Living Environment**

- **Decent Housing**

- **Creating Economic Opportunity**

Outcomes

- **Availability/Accessibility**

- **Affordability**

- **Sustainability**

Outcome Statements

	Outcome 1: Availability/Accessibility	Outcome 2: Affordability	Outcome 3: Sustainability
Objective #1 Suitable Living Environment	**Accessibility** for the purpose of creating **Suitable Living Environments**	**Affordability** for the purpose of creating **Suitable Living Environments**	**Sustainability** for the purpose of creating **Suitable Living Environments**
Objective #2 Decent Housing	**Accessibility** for the purpose of providing **Decent Affordable Housing**	**Affordability** for the purpose of providing **Decent Affordable Housing**	**Sustainability** for the purpose of providing **Decent Affordable Housing**
Objective #3 Economic Opportunity	**Accessibility** for the purpose of creating **Economic Opportunities**	**Affordability** for the purpose of creating **Economic Opportunities**	**Sustainability** for the purpose of creating **Economic Opportunities**

Outcome Statements

Common Indicators

- **Common indicators – apply to most activities:**

  - Funds leveraged

  - Number of persons, households, units

  - Income levels of persons or households by 30%, 50%, 60% or 80% of an area median income

  - Current race, ethnicity, and disability categories

- **No new reporting requirements will be imposed for those programs not already collecting data**

Specific Outcome Indicators

- **18 Specific Outcome Indicators**

  - Many indicators have several data elements

- **Some Key Changes from Proposed System:**

  - One common indicator dropped

  - Public services is now a separate indicator

  - Homeless indicators expanded & include prevention

  - Business assistance & jobs indicators clarified

Section 3: Preparing to Use the System

Process for Implementation

- **Federal Register Notice – March 7, 2006**

- **Updated version of IDIS available – Spring 2006**

- **HUD offers training on the system – Late spring and Summer 2006**

- **Phase I of IDIS system changes come on line - Fall 2006**

- **Grantees required to begin reporting performance data – October 1, 2006**

Preparing for Implementation

- **Evaluate your program and planning**

  - Review your Con Plan and Action Plans and assess how the objectives and outcomes may be applied

  - Determine the relevant objectives and outcomes for the activities you fund

Preparing for Implementation

- **Identify changes to procedures and systems**

    - Review procedures for IDIS data entry and any linked local data systems

    - Determine which procedures need to be updated

    - Review sample IDIS screens and practice using the updated version of IDIS

    - Ensure that subrecipients understand that data for all relevant indicators needed for activities completed after October 1, 2006

Preparing for Implementation

- **Determine updates needed to key data collection tools**
  - Subrecipient or developer application forms

  - Periodic subrecipient or developer reports

  - Close-out subrecipient or developer reports

  - Data collection forms for nonprofits, developers, businesses, households (*e.g., jobs or income documentation forms*)

Preparing for Implementation

■ **Continue Outreach**

– Brief key agency leaders, staff and program partners on the final system. Possible topics include:
- Final structure of system (few changes from last year)
- Timing of implementation
- Likely data needs
- Likely changes in program procedures

– Consider holding workshops with subgrantees

– Gather their input regarding implementation

– HUD developing a brochure to aid in outreach efforts

Preparing for Implementation

■ **Plan to use HUD resources**

   – Training will begin mid-May 2006

      ■ Manual will include detailed information on framework, as well as IDIS changes

      ■ Manual will also include examples of formats for collecting outcome information locally

   – Refer to HUD Performance Measurement website:

      www.hud.gov/offices/cpd/about/performance.index.cfm

   – Send questions to HUD HQ and Field Offices

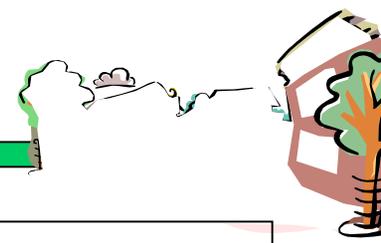# Section 4: New Performance Measurement Screens

New IDIS Screens

- **Examples of the new IDIS Screens can be found on the CPD Performance Measurement website:**

  www.hud.gov/offices/cpd/about/performance.index.cfm

New IDIS Screens

```
 MM/DD/YY  HH:MM                 OBJECTIVE AND OUTCOME                      CDBGXX

Grantee Activity ID xxxxxxxxxxxxxxxxxx            IDIS Activity ID zzzzzzz9
Activity Name        xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx   Natl/Obj xxxxx


     Objective         _

                       1   Create suitable living environment

                       2   Provide decent affordable housing

                       3   Create economic opportunities

     Outcome           _

                       1   Availability/accessibility

                       2   Affordability

                       3   Sustainability


     (This line reserved for messages)
     F1=HELP    F3=VALDT    F4=MAIN MENU    F5=PROJ INFO    F7=PREV    F8=NEXT    F9=SAVE
```

New IDIS Screens

```
MM/DD/YY  HH:MM                   PUBLIC SERVICES                      CDBGXX

 Grantee Activity ID xxxxxxxxxxxxxxxxx        IDIS Activity ID zzzzzzz9
 Activity Name         xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx   Natl/Obj xxxxx



 Total benefiting for program year YYYY: 9,999,9999

 Of the [persons] *assisted, enter the number that:



        Now have new access to this service or benefit:  9,999,999

   Now have improved access to this service or benefit:  9,999,999

     Now receive a service or benefit that is no longer

                                       substandard:  9,999,999

                                          Total:  99,999,999


 (This line reserved for messages)
 F1=HELP    F3=VALDT    F4=MAIN MENU    F5=PROJ INFO    F7=PREV    F8=NEXT    F9=SAVE
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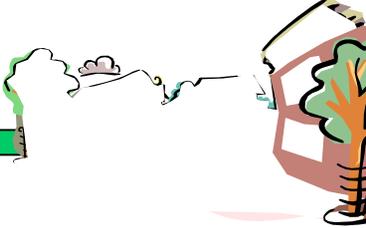
Section 5: Key Next Steps

Key Next Steps for Grantees

- **Review Final HUD Notice**

- **Regularly check CPD Performance Measurement website for updates & resources**

- **Attend HUD training**

- **Begin using updated version of IDIS as soon as feasible**

- **Identify relevant objectives and outcomes for activities and prepare to incorporate in next Annual Action Plan**

- **Prepare to begin reporting for all activities starting in October 1, 2006**

Upcoming Trainings

- **May 15-16: Washington, DC**

- **May 25-26: Denver, CO**

- **June 7-8: Atlanta, GA**

- **June 20-21: Seattle, WA**

- **June 27-28: Phoenix, AZ**

- **July 11-12: Boston, MA**

- **July 19-20: Columbus, OH**

- **July 25-26: San Francisco, CA**

Upcoming Trainings

- **July 25-26: Newark, NJ**

- **August 1-2: Los Angeles, CA**

- **August 7-8: Jacksonville, FL**

- **August 15-16: Dallas/Ft. Worth, TX**

- **August 17-18: Chicago, IL**

- **August 23-24: Pittsburgh, PA**

- **August 30-31: Kansas City, MO**

** State Sessions - Five locations will have a separate track for states. Check the CPD Website in the coming weeks for updates