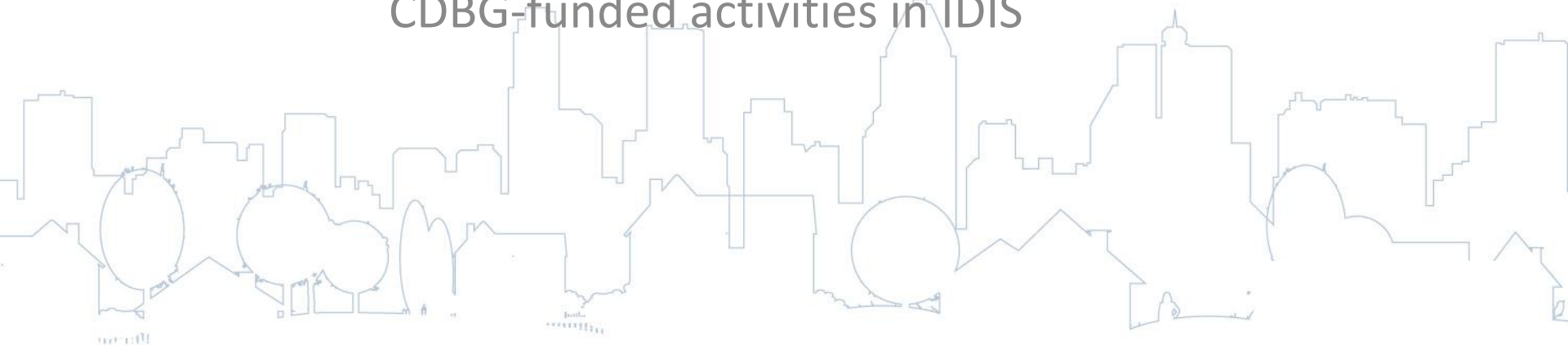# IDIS in 90 Minutes:
Public Facilities, Public Services, and Economic Development

A review of how to correctly set up and report on CDBG-funded activities in IDIS

Participating in the Webinar

- Call will last approximately 90 minutes.

- All callers are muted due to the high number of participants.

- Webinar will be recorded for future use and made available for viewing/ downloading.

Participating in the Webinar

- If you are having audio difficulties, you may want to use your telephone instead of your computer.

- If you have questions, you are welcome to submit them throughout the presentation using the "Questions" function on the GoToWebinar toolbar. Submit your questions by keying them in the text box under the Questions pane on the toolbar.

- Presenter will answer some questions during the webinar; others will be answered in a new FAQ document posted to website: http://www.comcon.org/programs/idis.html

COMMUNITY PLANNING & DEVELOPMENT

IDIS Data Entry for Public Facilities, Public Services, and Economic Development Activities

Goal: Ensure grantees understand the correct way to set up and report accomplishments on CDBG-funded activities in IDIS.

Agenda

- What's New

- Concepts

- IDIS for Facilities (LMA)

- IDIS for Services (LMC)

- IDIS for Economic Development (LMJ)

- Question and Answer

What's New: Resources

- Web-based IDIS Instruction
  - Detailed video walkthroughs of all slide material and exercises
  - ComCon Website: http://www.comcon.org/programs/idis.html
- Three other webinars in the *IDIS in 90 Minutes* Series:
  - Housing
  - Common Mistakes Grantees Make in Reporting CDBG Data
  - Generating CDBG Reports in IDIS

What's New in the System

- Code Enforcement Screen

- Inclusion of Con Plan & Action Plan

  - Scheduled for release in April 2012???

  - Connect Con Plan Goals to activities and outcomes

  - More details in July Con Plan webinar available at www.comcon.org

Concepts: What is IDIS?

- Real-time Online Database

- Supports CDBG, CDBG-R, HOME, ESG, and HOPWA

- Key Purposes of IDIS:

  - Disburse funds

  - Collect accomplishment and compliance data

Concepts: What Is an IDIS Activity?

- Basic Building Block of IDIS

- Collects Data Regarding:

  - Beneficiary Data and Compliance

  - Expenses (drawdowns)

- For Public Facilities: One Facility

- For Public Services: One Program

- For Economic Development: One Loan

Activity Setup Focus

- Defining Scope of the Activity
- Matrix Codes
  - Describes Eligibility of Activity
  - Use Most Specific
  - Use Appendix of Training Manual
- National Objectives (N.O.)
  - Must document N.O. compliance for all non-admin/planning activities

Public Facilities and Infrastructure Activities

Data entry for

activities that meet the

Low/Mod Area (LMA) national objective

Public Facilities & Infrastructure Matrix Codes

03A   Senior Centers

03B   Handicapped Centers

03C   Homeless Facilities (not operating costs)

03D   Youth Centers

03E   Neighborhood Facilities

03F   Parks, Recreational Facilities

03G   Parking Facilities

03H   Solid Waste Disposal Improvements

03I   Flood Drainage Improvements

03J   Water/Sewer Improvements

Public Facilities & Infrastructure Matrix Codes

03K   Street Improvements

03L   Sidewalks

03M   Child Care Centers

03N   Tree Planting

03O   Fire Stations/Equipment

03P   Health Facilities

03Q   Facilities for Abused and Neglected Children

03R   Asbestos Removal

03S   Facilities for AIDS Patients (not operating costs)

03   Other Public Facilities/Improvements

Public Facilities & Infrastructure National Objectives

- Infrastructure improvements will typically qualify under Low/Mod Area Benefit (LMA)
  - Area must be primarily residential
  - Activity must benefit all residents of the area
- Facilities for persons with special needs may qualify under Low/Mod Limited Clientele (LMC)
- Some improvements may fit SBA, LMJ national objectives

Public Facilities & Infrastructure Key Points

- Use most specific "03" matrix code to accurately describe use of funds
- Avoid combining different public facilities under one activity
- Report performance measures when activity completed/benefits realized
- Strive to report unduplicated persons served
- When reporting persons for LMA, use Total Population (Low/Mod "Universe")

Data Entry Exercise

- Street Improvement Project
  - Two target area neighborhoods: Maywood and 3rd Street
  - It is expected that all bidding and pre-construction work will finish in first year, construction to occur in the second year.
- Architectural Barrier Removal
  - Two locations: City Hall and Westside Community Center

Public Service Activities

Data entry for

activities that meet the Low/Mod

Limited Clientele (LMC) national objective

Public Service Matrix Codes

03T   Operating Costs of Homeless/AIDS Patients Programs

05A   Senior Services

05B   Handicapped Services

05C   Legal Services

05D   Youth Services

05E   Transportation Services

05F   Substance Abuse Services

05G   Services for Battered and Abused Spouses

05H   Employment Training

05I   Crime Awareness/Prevention

05J   Fair Housing Activities (subject to Public Services cap)

05K   Tenant/Landlord Counseling

Public Service Matrix Codes

05L   Child Care Services

05M   Health Services

05N   Services for Abused and Neglected Children

05O   Mental Health Services

05P   Screening for Lead Poisoning

05Q   Subsistence Payments

05R   Homeownership Assistance (not direct)

05S   Rental Housing Subsidies

05T   Security Deposits

05U   Housing Counseling

05   Other Public Services

Public Service National Objectives

- Low/Mod Limited Clientele (LMC)
  - Particular group of low/mod residents
  - Presumed benefit
  - Examples: youth services, homeless services
- Low/Mod Area (LMA)
  - Service must be available to all residents in an area
  - Examples: crime prevention, graffiti removal
- Others
  - Urgent Need
  - Slum/Blight Area

Presumed Benefit Categories

Abused children	Extremely low income
Battered spouses	Low income
Severely disabled adults	Low income
Homeless persons	Extremely low income
Illiterate adults	Low income
Persons with AIDS	Low income
Migrant farm workers	Low income
Elderly	Senior center – Mod Income Not center based – Low income

Public Services Key Points

- Use most specific "05" matrix code to accurately describe use of funds

- Break out beneficiaries by income categories (not just moderate income!)
  - Misrepresents CDBG beneficiaries
  - Distorts summary report to HUD, Congress, etc.

- Insert a new program year for multiyear activities

- Strive to report unduplicated persons served

Data Entry Exercise

- Meals on Wheels

  - Program will serve 50 homebound seniors and persons with disabilities.

  - Program serves all areas of the community

  - At the end of the year, the program has a small balance of funds remaining. If agreement is extended, how will this be handled in IDIS?

Economic Development Activities

Data entry for

activities that meet the

Low/Mod Job (LMJ) national objective

Economic Development Matrix Codes

14E   Rehab: Publicly or Privately Owned Commercial/Industrial (CI)

17A   CI: Acquisition/Disposition

17B   CI: Infrastructure Development

17C   CI: Building Acquisition, Construction, Rehab

17D   CI: Other Improvements

18A   ED: Direct Financial Assistance to For-Profits

18B   ED: Technical Assistance

18C   ED: Microenterprise Assistance

Economic Development National Objectives

- Low/Mod Jobs (LMJ) – most common
  - Create or retain jobs
  - At least 51 % of Full-Time Equivalents must be Low/Mod income
- Others
  - Limited clientele – Microenterprise
  - Area benefit – service type businesses
  - Slum Blight Area/Spot

Persons Assisted vs. Full-Time Equivalents (FTE)

- When part-time jobs involved, persons assisted will always be more than the FTE
- EXAMPLE:
  - Activity creates one full-time and two part-time jobs (20 hours/week)
  - 3 persons assisted > 2 FTEs

Persons Assisted	Positions Created
Alice Anderson	1.0 Full-Time Manager
Bill Brown	0.5 Part-Time Clerk
Cindy Snow	0.5 Part-Time Sales
3 Persons Assisted >	2.0 Full-Time Equivalents

Low/Mod Job National Objective

- Job Creation Documentation:
    - How jobs made available to or held by LMI
    - Only count first "hire" for each job
    - Track jobs as long as jobs are still being created/hiring for new positions is still occurring (not defined in regulations)

- Job Retention Documentation:
    - Document how jobs will be lost without CDBG

Economic Development Key Points

- Direct Financial Assistance to For-Profits
  - Separate activity for each business assisted
  - Do not aggregate
- Report jobs in correct program year
- Report jobs only once each program year (i.e., separate program delivery activity)
- Report only the number of jobs created/retained; do not report on LMI population or the total population of a jurisdiction
- CDBG-R jobs calculation is different

Data Entry Exercise

- Economic Development Loan Program
  - 1 new loan underwritten in first quarter
    - Thompson Automotive receives $20,000:
      - Promises to create 1 new job: Assistant Technician
  - 1 existing loan reported accomplishments
    - TRJ Manufacturing created three new jobs:
      - Supervisor (full-time, non low/mod)
      - Part-time clerk (20 hours per week, low/mod)
      - Part-time warehouse (20 hours per week, low/mod)
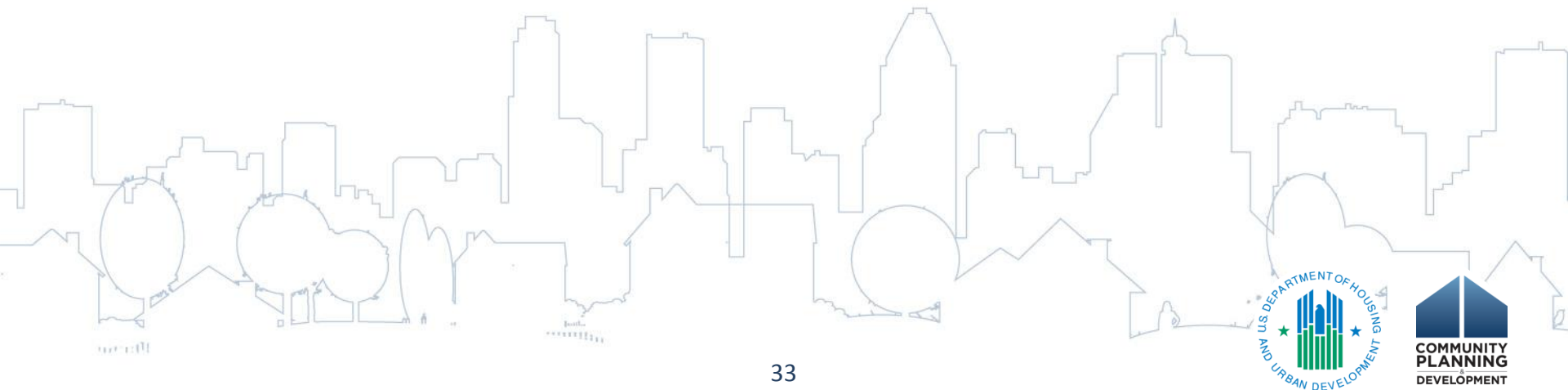
Summary

- Activity Setup
  - Define scope
  - Choose most appropriate Matrix Code and National Objective

- Activity Accomplishments
  - Report annually at a minimum
  - Report by Program Year
  - Maintain adequate documentation to report on all fields

Resources

- IDIS Training Materials
  - http://www.comcon.org/programs/idis.html
- Consolidated Plan Mapping Tool Webinars
  - http://www.comcon.org/programs/consolidated%20planning.html#training
- This Series of IDIS Training Webinars
  - http://www.comcon.org/programs/idis.html

Question and Answer

- ## What questions do you have?
  (Submit questions using the "Questions" function on the lower portion of your webinar control panel.)

Thank you

- Upcoming IDIS webinars

- An online evaluation will be sent automatically to all attendees in approximately 1 hour. Please take a few moments to complete the evaluation. HUD values your feedback.

- Thank you for attending today's webinar.