

Performance Measurement, IDIS and CDBG Annual Performance Plan Goals



U.S. Department of Housing and Urban Development



Performance Measurement Initiative: History and Background

■ History

- HCDA Section 104(e)
- GPRA of 1993
- Consolidated Plan Regulations

■ PART

■ Formula Study

■ SACI





Performance Measurement System

- **Goal is to provide CPD grantees with a standardized methodology and system to measure *outcomes* of CDBG and other grant programs**
- **System was designed through a collaborative effort**





Performance Measurement System

- **Provides clear evidence of program results/outcomes at the national level**
- **Provides grantees with performance information to inform local officials/public**
- **Informs grantee decisions about program design/implementation**





Performance Measurement System

- Three *objectives* each with three possible *outcomes*= 9 possible groups of outcomes to represent the activities of the formula grant programs
- Also 17 output indicators (categories) that typify most activities





First Year Performance Measurement Results

- **Time period 10/1/2006-9/30/2007**
- **Results solid but not outstanding**
- **Grantee Data Entry issues—to be discussed further**





Fiscal Year 2007 Performance Measurement Results

- **Over 91% entered at least some performance measurement data**
- **Three outcome/objective statements account for the majority of activities**
- **Outcome statements provide for richer data**





Results for Performance Measurement –Data Limitations

- **First run of data incompatible with Annual Performance Plan (APP) Numbers**
- **Data provided w/o accompanying detail**
- **Learning curve for grantees**





What is HQ doing with the PM data anyway?

- **Reporting back to OMB, Congress and others, as requested.**
- **Using the data for creation of outcome statements**





The Specifics: A Review of 2007 Outcome Statements w/ examples

Economic Development

- X % of jobs had health insurance benefits

Housing

- x % of homeowner rehab was occupied by the elderly

Public Facilities/Public Services

- x % of public facilities provided improved access instead of new access





Sample Outcome Statement

In Fiscal Year 2007, CDBG funds created 32,180 jobs, nearly 33% (10,426) of these were offered with employer sponsored health benefits. 14% of the jobs created were given to persons formerly unemployed.





CDBG's Efforts to Reinforce Importance of the Performance Measurement System

- **Industry Group Meetings/Conferences**
- **Program Updates**
- **Conference Call with CPD Directors**





Integrated Disbursement and Information System (IDIS)

- **COBOL based System**
- **Re-engineering plans-web based system**
- **State specific IDIS changes**
- **No training funds are available**
- **Rollout to begin in late October**





CDBG Annual Performance Plan Goals

- **What are the CDBG APP Goals and how are they set?**
- **How did CDBG fare in 2007?**
- **How can we work together to improve data?**





What are the CDBG APP Goals?

- **Owner Occupied Housing Rehabilitation**
- **Homeownership Assistance**
- **Renter Occupied Housing Rehabilitation**
- **Jobs Created and Retained**

Also:

- % of State and Entitlement funds benefiting low and moderate income persons
- % of completed activities reporting accomplishments





So...how did the CDBG Program Fare in 2007...

????????????????





<u>Indicator</u> <u>(CDBG Wide)</u>	<u>Goal</u>	<u>Actual</u>
Owner Occupied rehab	127,583	117,830
HO Assistance	7,400	6,919
Renter Occupied rehab	37,032	26,358
Jobs (creat/ret)	54,287	39,123





Bottom Line on FY 2007 Results

- **Grantees not reporting data (accurately, timely, no accomplishments being entered, screens being skipped, incorrect PY, etc.)**
- **Goals possibly too high due to inflation in construction costs over the prior 5 years**





CDBG Goals for FY 2008

SF Rehab **114,228**

Homeowner Assistance **6,708**

Rental Rehabilitation **25,552**

Jobs—created/ret. **37,927**





Progress as of the end of the Third Quarter 2008

Indicator	As of 3rd Quarter (6/30)	2008 goal	Progress to date (6/30)
Own Occ rehab + home. own assistance	69,825	120,936	58%
Rental Rehab	12,525	25,552	49%
Jobs created / retained	20,996	37,927	55%





Improving Data: Where do I find Grantee Data?

CDBG Website

- CDBG Accomplishments
- Data cleanup
- Performance profiles

IDIS reports

- PR83

Talk to Grantees





Request for Field Offices

- **Review data cleanup worksheets and encourage grantees to clean-up data**
- **Run a PR83 (CDBG Performance Measurement Report) for each grantee**
- **Remind grantees to enter data, preferably quarterly**





Summary

- **APP Goals and Performance Measurement Indicators are reviewed by HQ, Congress, OMB and others**
- **The CDBG Program Missed its APP Goals in 2007 and as of June 2008 we are not yet on target to meet the goals this year**
- **We believe missing and/or inaccurate data entry is part of the problem**

