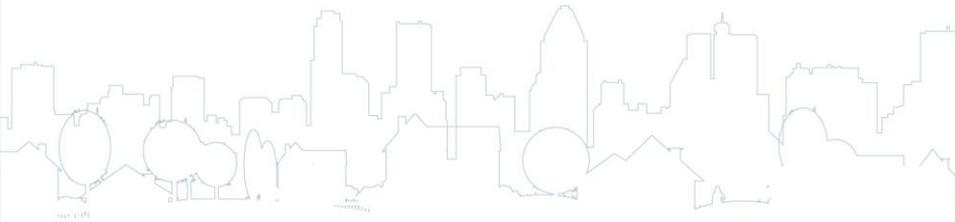




IDIS in 90 Minutes: Common Mistakes Grantees Make in Reporting CDBG Data



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, try using your telephone for audio instead of your computer speakers.
- 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>.

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Agenda

- Activity Setup
 - Matrix Codes
 - Location/Address Information
- Accomplishment Reporting
 - Reporting under the incorrect year
 - Reporting multiple times
 - Incomplete reporting
- Program Income
- Question and Answer

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Why IDIS Data Are Important

- Demonstrate Compliance
- Provide Transparency and Accountability
- Incorporate in government-wide and department-wide reports. Respond to frequent requests from:

The White House

OMB

Congress

GAO

OIG

HUD Secretary

- Demonstrate the contributions each of our grantees are making toward meeting the needs of LMI citizens

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Setup: Matrix Codes

- Describes Eligibility of Activity
- Use Most Specific
 - Avoid 03 and 05
- Use Appendix A of Training Manual at <http://www.comcon.org/programs/idis.html>

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Choosing the Right Matrix Code: Housing Counseling

- Misuse of matrix codes 13 and 05R for activities that solely provide housing counseling is one of most common user errors in IDIS.
- For activities that ONLY provide counseling:
 - Use 05U
 - Report number of persons receiving counseling
- For activities that provide financial assistance:
 - Use 13 or 05R
 - Report the number of households receiving financial assistance
 - Do NOT report the number receiving housing counseling, except under the Performance Measurement screen where it specifically asks for this number.

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Choosing the Right Matrix Code: Housing Acquisition Activities

- Matrix codes 01 and 14G
- When new construction or rehabilitation is not funded with CDBG
- Only after the units are occupied
- Must keep activity open until all the units are occupied

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Setup: Location/Address Information

- HUD encourages the use of multiple activities to report on multiple sites
- For infrastructure activities, use a street address range
- Do not use
 - the address of administrative office
 - No P.O. Boxes
- Address Verification
- New Multiple Address Feature

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Setup: Enter Leveraging Data

- High degree of interest among stakeholders
- Demonstrates that CDBG funds generate additional investment in communities
- Accurate – Grantees in California, Michigan, and Montana do not receive ARC funds

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Reporting Accomplishments

- When to Report
 - Quarterly recommended
 - Annual required
- What to Report
 - Benefits realized during PROGRAM YEAR
 - Report on every screen (completeness)
 - National Objective compliance
 - Accomplishment & Performance measurements
 - Understand data needs upfront

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Reporting Accomplishments: Incorrect Program Year

- IDIS Activities can report accomplishments under several program years
- Report benefit in the year that it is realized
- HUD looks for cases where funds were spent but no units reported
- Reporting under incorrect year may miss aggregation "window"

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Reporting Accomplishments: Multiple Times

- Reporting same unit in more than one program year
 - Do not duplicate housing units, facilities, jobs
 - People – okay to duplicate
- Reporting same unit in more than one activity
 - Program Delivery Activities
 - Use “Reported Under Another Activity” field

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Reporting Accomplishments: Housing Admin & Services

- Housing Rehabilitation Administration 14H
- Housing Services 14J

Activity	Project Costs paid with...	Report Accomplishments in IDIS?
Housing Rehab Admin (14H)	CDBG	Reported Under Other Activities
Housing Rehab Admin (14H)	Non-CDBG	YES
Housing Services (14J)	HOME	YES

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Reporting Accomplishments: Incomplete/Inaccurate Reporting

- Performance Measures are required when applicable
- System cannot require data entry
 - Example: Leveraging
- Tells better, more complete story of how the funds benefit your community

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Certified Energy Star Units

- High-Priority Performance Goal
- In FY 2010, reported 1,800 Energy Star units; actual units after verification was 369
- Gut rehabilitation or new construction; not replacement windows, insulation, appliances
- Must be certified by an Energy Star inspector
- Energy Star Performance Standards for Buildings at <http://www.comcon.org/programs/idis.html>

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Underreporting Low Income for Presumed Benefit

- CDBG Statute requires that moderate-income persons are not benefited to the exclusion of low-income persons
- Do not report all beneficiaries as moderate income

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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

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Program Income

- HUD suspects significant underreporting when:
 - Subrecipients allowed to retain program income to undertake additional eligible activities
 - New loans from revolving loan fund

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In Summary

- Grantees need to monitor IDIS Data Quality
- Poor quality, incomplete data underreport or misrepresent program results
 - Public, HUD, and Congress can see program results via HUD Web reports generated from data entered into IDIS
 - Grantees can use IDIS data to assess their CDBG program performance

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Question and Answer

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

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Additional 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
 - Public Facilities, Public Services, and Economic Development
 - Generating CDBG Reports in IDIS (start time tomorrow is 12:30 EDT)

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Thank you

- An online survey will be sent automatically to all attendees in approximately 1 hour. Please take a few moments to complete the survey. HUD values your feedback.
- Thank you for attending today's webinar.

