



Why We Count and What To Count

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Why We Count

Presented by: Traci Munyan

HUD's Integrated Disbursement Information System (IDIS)

HUD's system which we are required to use to draw funds and report to HUD/Congress.

-Activity based rather than **project based**

HUD's Integrated Disbursement Information System (IDIS)



At the end of the day

**HUD wants to know two things about each
CDBG funded activity.....**

HUD's Integrated Disbursement Information System (IDIS)

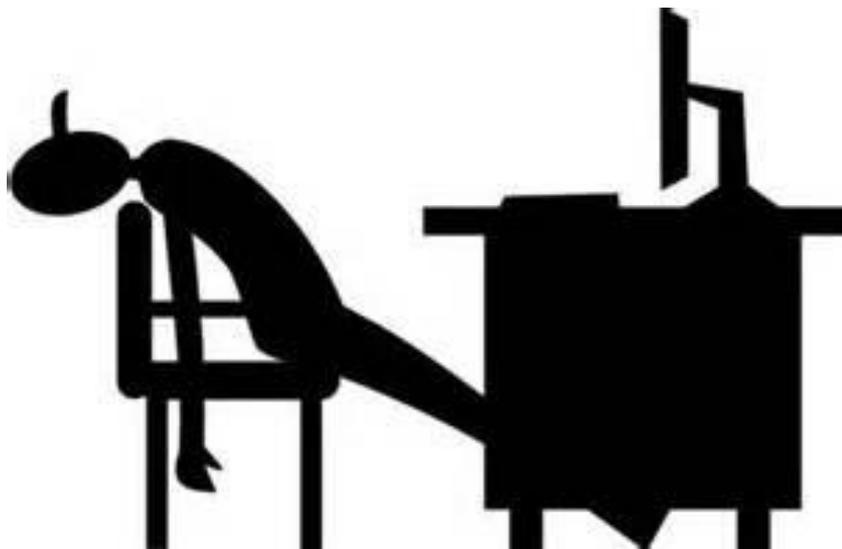
1- National Objective Met

- Low and Moderate Income
- Slums and Blight
- Urgent Need

2 - Benefits have been achieved

When to Report

- Annual Activity Reports
After June 30th each year
- Remediation Dashboard
On Demand
- Final Closeout Reports
At Project Completion



Tracking/Reporting

ACTIVITIES that we Track and Report

- ★ ADMINISTRATIVE – No Benefits
- ★ INTERIM ASSISTANCE – Area Benefit
- ★ PERMANENT RELOCATION - Households
- ★ ACQUISITION – Households/People
- ★ CLEARANCE and DEMOLITION – Area Benefit
- ★ OWNER OCCUPIED HOUSING REHAB – Housing Units/People
- ★ TENANT OWNED HOUSING REHAB – Housing Units/People
- ★ SUBSTANTIAL RECONSTRUCTION – Housing Units/People
- ★ HOMEOWNERSHIP CREATION – Households

ACTIVITIES that we Track and Report Continued

- ★ SEWER IMPROVEMENTS – People and Households Connected
- ★ WATER IMPROVEMENTS – People and Households Connected
- ★ STREET IMPROVEMENTS – People
- ★ COMMUNITY SERVICE FACILITY – People
- ★ FLOOD DRAINAGE FACILITIES – People
- ★ MICROENTERPRISE ASSISTANCE- Jobs
- ★ BUSINESS DISTRICT REVITALIZATION – Area Benefit
- ★ UPPERSTORY HOUSING – Housing Units
- ★ ECONOMIC DEVELOPMENT INFRASTRUCTURE - Jobs
- ★ TELECOMMUNICATIONS – Jobs/People
- ★ **OTHER** (be careful here!)

CAMS / IDIS

Compatibility

What To Count

Presented by: Star Canada

WHAT TO COUNT

Begin counting YESTERDAY!!

– You are responsible to find out at the beginning of your project **WHAT** you are required to count for your project type so that you can track and report the information to DHCD as required.

- Annual Reporting
- On Demand Reporting
- Closeout Reporting

PROJECT TYPES:

Housing

Community Facilities

Community Service Facility

Business District Revitalization

Economic Development

Housing Projects – Rehab, Comprehensive, Production



Track the number of **households** and Report the **characteristics** of the household :

Female-Headed Household

**Housing
Projects –
Rehab,
Comprehensive,
Production**

Track the number of **people** and Report the **demographics** of the household :

Hispanic or Latino



SAMPLE TRACKING FORM

BENEFITS TRACKING
Insert Grantee's Name and Contract #

PREPARED BY: _____ DATE: _____

PROPERTY INFORMATION							LPB (Insert 1 or 0)			
Map #	PROPERTY ADDRESS	PROPERTY OWNER'S NAME	TENANT'S NAME	TYPE OF OWNERSHIP (Owner, Renter, Heir, etc)	TYPE OF WORK (Rehab, Substantial, Mobile, Production, Demo, etc)	Housing # of Units	Constructed before 1978?	Exempt+	LWSP Observed?	Interim Controls Observed?
1	123 ABC									
2										
3										
4										
5										
6										
7										
8										
9										
10										

Page: 1 of 1 Words: 180 Track Changes: Off 100%

SAMPLE TRACKING FORM CONTINUED

CDBG SPREADSHEETS TRACKING-FINANC...

Home Insert Page Layout Formulas Data Review View

Clipboard Font Alignment Number Styles Cells Editing

H7 LMI STATUS

	LMI STATUS				MUST EQUAL TOTAL PERSONS									HOUSEHOLD DATA								
	0-30% Extremely Low-Income Persons	31-50% Very Low-Income Persons	51-80% Low-Income (LMI) Persons	Non-LMI Persons	American Indian or Alaska Native	Asian	Black or African American	Native Hawaiian or Other Pacific Islander	White	American Indian or Alaska Native AND White	Asian AND White	Black or African American AND White	American Indian or Alaska Native AND Black or African American	American	Balance of Persons Rptg More than One Race	Total Persons in Household (HH)	# in HH Hispanic or Latino	# in HH If LMI	Female-headed HH? If yes, insert 1*	Elderly HH? If yes, insert 1**	Disabled HH? If yes, insert 1 ***	
7																						
8																						
9																						
10																						
11																						
12																						
13																						
14																						
15																						
16	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17																						

Income Surveys Beneficiary Tracking

Select destination and press ENTER or choose Paste 100%



Who can tell me
the three
characteristics
reported for a
household?

Female-Headed Household

Elderly

Disabled



Community Facilities

- Usually public infrastructure Projects

Households



People



Community Facilities

51% of Households MUST be LMI

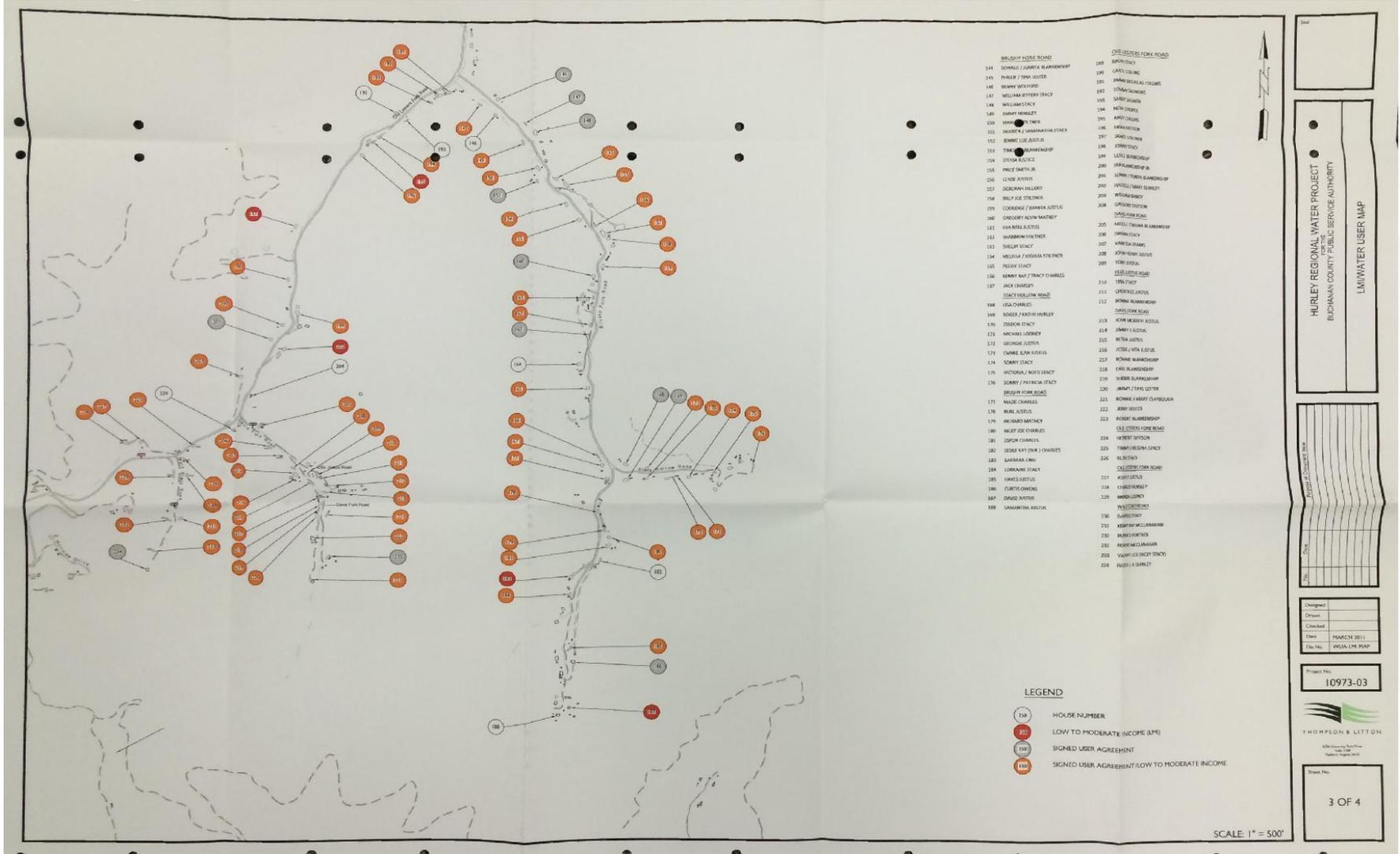


Documentation Required for Closeout Reporting includes:

- ★ A customer list from the Public Service Authority (PSA) or owner;
- ★ An updated map showing actual water/sewer lines installed; identify LMI and non-LMI households and connections;
- ★ A spreadsheet prepared by GM that list names/addresses of actual households served.

Minimum Requirements!!

Map



HURLEY REGIONAL WATER PROJECT
 BUCHANAN COUNTY PUBLIC SERVICE AUTHORITY
 LM WATER USER MAP

10973-03

THOMPSON & LITTON

3 OF 4

Community Service Facility

- **Types of centers**
 - Medical Center
 - Dental Clinic
 - Senior Facility
 - Child Care Center
 - Work Force Development Center
- **Data to collect**
 - People – Initial Visit Only
 - People – Enrolled
 - People – Completed GED or Training
- **Data collection period**

Generally you have 2 years *after* administrative closeout of a project to achieve benefits



Community Service Facility

Benefits are usually achieved prior to the two year period. The project can be closed out once benefits are achieved.

Work closely with your CDS at the beginning of the project to determine your tracking and reporting periods.



Who can tell me
the demographics
reported for a
person?

LMI Status

Race

Hispanic or Latino



Business District Revitalization

Projects that primarily improve the economic environment by eliminating slums and blight or providing direct benefit to LMI persons.

- Revolving Loan Fund
- Facades
- Streetscapes
- Upper-story Housing

Data collected is project specific and differs, pending the project type.



Economic Development

- Project creates job and business opportunity for LMI persons.

- People
- Households
- # Businesses assisted
- # Businesses created
- # of loans
- # of jobs with healthcare
- # unemployed prior to taking jobs created



Economic Development

Job Type created:

- Officials/Managers
- Professionals
- Technicians
- Sales
- Office/Clerical
- Skilled Craft Workers
- Skilled Operatives
- Unskilled Laborers
- Service Workers
- And track the numbers



- **Track and Record:**
- Name of Business assisted and the DUNS #

Questions/Comments

Always work with the CDS in the early stages of a project to determine what you will be required to track and report for your project type.

Refer to the thumb drive for samples of tracking and reporting forms.

Thank you.