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
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

Elderly

Disabled
Housing Projects – Rehab, Comprehensive, Production

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

LMI Status
Race
Hispanic or Latino
### Sample Tracking Form

**Prepared By:**

**Date:**

**Property Information**

<table>
<thead>
<tr>
<th>Map #</th>
<th>Property Address</th>
<th>Property Owner's Name</th>
<th>Tenant's Name</th>
<th>Type of Ownership (Owner, Renter, Other, etc.)</th>
<th>Type of Work (Rehab, Substantial, Mobile, Production, Demo, etc.)</th>
<th>Housing of Units Before 1980</th>
<th>Exempt?</th>
<th>LNSP? Observed?</th>
<th>Interim Controls Observed?</th>
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</thead>
<tbody>
<tr>
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<tr>
<td>LMI STATUS</td>
<td>MUST EQUAL TOTAL PERSONS</td>
<td>HOUSEHOLD DATA</td>
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<tr>
<td>0-30% Extremely Low-Income Persons</td>
<td>31-50% Very Low-Income Persons</td>
<td>51-80% Low-Income (LMI) Persons</td>
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<td>Non-LMI Persons</td>
<td>American Indian or Alaska Native</td>
<td>Black or African American</td>
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<td>Native Hawaiian or Other Pacific Islander</td>
<td>White</td>
<td>American Indian or Alaska Native AND White</td>
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<tr>
<td>Asian AND White</td>
<td>Black or African American AND Black or African American AND More than One Race</td>
<td>Balance of Persons in Household (HH)</td>
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<tr>
<td>Total Persons in Household (HH)</td>
<td># in HH Hispanic or Latino</td>
<td># in HH LMI</td>
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<tr>
<td>Female-headed HH?</td>
<td>Yes, insert 1</td>
<td>Elderly (65+)?</td>
<td>Yes, insert 2</td>
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<td>Disabled?</td>
<td>Yes, insert 3</td>
<td>A **</td>
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</tbody>
</table>
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 namesAddresses of actual households served.

Minimum Requirements!!
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.
- # Businesses assisted
- # Businesses created
- # of loans
- # of jobs with healthcare
- # unemployed prior to taking jobs created

- People
- Households
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.