



Crosswalk: Linking the eCon Plan Template to the Maximizing Investments Toolkit



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1. Introduction

The Crosswalk is designed to illustrate how the products included in the Maximizing Investments Toolkit (Toolkit) link to the eCon Plan Template in IDIS and how they support the critical components of the consolidated planning process. As several of the Toolkit products support more than one component of the consolidated planning process, many products appear more than once in the tables below.

The Toolkit includes three products in addition to the Crosswalk to orient users to the concept of maximizing investments and how the Toolkit products can support their efforts to do so. These products, not included in the tables below, include: the Webinar: Using the Consolidated Plan to Maximize Investments; the Guidebook: Maximizing Investments Toolkit; and the Case Study: Neighborhood Planning in Rye, Indiana.

Two versions of the Crosswalk are presented below. The first is organized by the relevant component of the consolidated planning process, the second is organized by section in the eCon Plan Template. This allows grantees to either use the component of the planning process or the section of the template as a beginning point of reference.

2. Crosswalk Organized by Components of the Planning Process

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| CONSULTING WITH STAKEHOLDERS | | | |
|---|--|--|--|
| Description of Planning Process Component | Addressing the Component in the Consolidated Plan | eCon Plan Template Screen(s) | Maximizing Investments Toolkit Products |
| Community stakeholders are critical at every step of the grants management cycle and the consolidated planning process. Stakeholders provide the grantee with an understanding of community needs as they see them “on the ground”, their input can help the grantee design programs that work effectively to meet priority needs, and they can help grantees implement programs. | In the eCon Plan Template PR-10 Consultation, the grantee will include a summary of the consultation process, including identification of the agencies that participated in the process. | Consultation: PR-10 | Using Stakeholder Input in Consolidated Planning |
| | In SP-40 Institutional Delivery Structure, the grantee must conduct a brief assessment of the strengths and gaps of the institutional structure to carry out the Strategic Plan and any actions to overcome weaknesses in the institutional structure. | Institutional Delivery Structure (Strategic Plan): SP-40 | Evaluating Subrecipients to Optimize Performance Thinking About Implementation When Planning Assessing Capacity with SWOT Analysis Improving Performance with Process Mapping |

| EVALUATING PERFORMANCE | | | |
|---|---|------------------------------|--|
| Description of Planning Process Component | Addressing the Component in the Consolidated Plan | eCon Plan Template Screen(s) | Maximizing Investments Toolkit Products |
| <p>This step in the grants management cycle provides grantees an opportunity to evaluate the effectiveness of their programs. The evaluation should identify programs and projects that performed well and those that experienced issues, yielding valuable insights and lessons learned that can be used in the next cycle to improve program performance. A dynamic and ongoing evaluation process that tracks progress throughout the program year can help grantees identify and address issues that if otherwise left alone could lead to difficulty satisfying commitment and expenditure requirements.</p> | <p>Due within 90 days of the program year, a grantee must submit a Consolidated Annual Performance and Evaluation Report (CAPER) to report on the accomplishments of funded activities within the program year and to evaluate the grantee's progress in meeting one-year goals described in the Annual Action Plan and long-term goals described in the Consolidated Plan.</p> <p>Additionally, grantees can use the Reports feature of IDIS Online to monitor and assess the number of accomplishments reported during the program year to determine if each funded activity is producing the expected results.</p> | <p>CAPER: CR-00 to CR-75</p> | <p>Weighing the Value of Projects and Activities</p> <p>Evaluating Subrecipients to Optimize Performance</p> <p>Using Reports to Assess Progress and Inform Planning</p> <p>Improving Performance with Process Mapping</p> |

| DETERMINING NEEDS | | | |
|---|---|----------------------------------|---|
| Description of Planning Process Component | Addressing the Component in the Consolidated Plan | eCon Plan Template Screen(s) | Maximizing Investments Toolkit Products |
| A comprehensive understanding of the pressing needs in the grantee community forms the basis for developing strategies for investing CPD funds. The grantee's priority needs are informed by findings from its needs assessment and market analysis research. | The Needs Assessment provides a detailed outline of a jurisdiction's needs related to affordable housing, community development, and homelessness. An understanding of community needs helps target resources towards community priorities. | Needs Assessment: NA-10 to NA-50 | Using Data for Consolidated Planning Matching Priority Needs with Activities |
| | In the Market Analysis, the grantee forms a profile of the community's housing inventory that includes market-rate and affordable housing, including public housing. Through this process, the grantee identifies its housing assets and challenges, gains an understanding of private market dynamics and determines where to focus public investment. | Market Analysis: MA-10 to MA-50 | |

| SETTING PRIORITIES | | | |
|---|---|--|--|
| Description of Planning Process Component | Addressing the Component in the Consolidated Plan | eCon Plan Template Screen(s) | Maximizing Investments Toolkit Products |
| The level of need in a community will always be greater than the limited resources available to meet the need. Priority needs are the needs that will be addressed by the goals outlined in the Strategic Plan. This section should make clear the rationale for establishing the allocation priorities. The rationale should flow logically from the analysis in the Needs Assessment and Market Analysis. | Determining Priority Needs: Once needs are established using need and market data, the grantee establishes priorities for addressing the greatest needs. The grantee should consider the unique conditions in its community and is encouraged to focus on areas where need and opportunity coexist. | Priority Needs (Strategic Plan): SP-25 Influence of Market Condition (Strategic Plan): SP-30 | Matching Priority Needs with Activities Developing Goals and Strategies for Target Areas Deciding Which Activities to Fund |
| | Establishing Geographic Priorities: Targeting resources towards a defined geographic area can help maximize the impact of the combined resources. By targeting funds, the grantee can increase its impact in an area to achieve its goals. | Geographic Priorities (Strategic Plan): SP-10 Influence of Market Condition (Strategic Plan): SP-30 | |

| DETERMINING RESOURCES | | | |
|---|---|---|---|
| Description of Planning Process Component | Addressing the Component in the Consolidated Plan | eCon Plan Template Screen(s) | Maximizing Investments Toolkit Products |
| <p>This step in the grants management cycle is used to identify the financial and organizational resources available to address priority needs. The level of resources available will play a key role in determining strategies and goals. Grantees should consider all resources within the jurisdiction's control that can be reasonably expected to be available, including federal, state, and local resources.</p> | <p>Matching Resources to Needs: Aligning funding sources enables grantees to extend the reach of their investments and advance multi-dimensional projects that meet multiple goals. Capable community stakeholders can assist with this by bringing resources to the table. Leveraging non-CPD funds is an important component of this strategy and the grantee should make every effort to bring as many resources to the table.</p> | <p>Anticipated Resources (Strategic Plan): SP-45</p> <p>Expected Resources (Action Plan): AP-15</p> | <p>Developing Goals and Strategies for Target Areas</p> <p>Thinking About Implementation When Planning</p> <p>Assessing Capacity with SWOT Analysis</p> <p>Improving Performance with Process Mapping</p> |
| | <p>Building on existing assets and identifying opportunities: Grantees should aim to integrate their plans and projects with other revitalization activities, look for commonality with projects and align theirs with others to maximize impact, and build upon other projects or activities that open the door for further investment.</p> | <p>Institutional Delivery Structure (Strategic Plan): SP-40</p> | |

| SETTING GOALS | | | |
|--|---|--|--|
| Description of Planning Process Component | Addressing the Component in the Consolidated Plan | eCon Plan Template Screen(s) | Maximizing Investments Toolkit Products |
| Once priorities have been established, grantees must develop a set of goals based on the availability of resources, and local organizational capacity. The goals should specifically address the priority needs outlined on the Priority Needs screen. The goals will serve as a management tool to help the grantee track and monitor performance throughout the term of the Consolidated Plan. | <p>The grantee must summarize the specific goals it intends to initiate and/or complete within the term of the Strategic Plan, using one or more Goal Outcome Indicators to describe in quantitative terms what the jurisdiction expects to achieve. Goals listed in the Strategic Plan and those in the Action Plan will be tightly linked. In order to be included in the Action Plan, a goal must also appear in the Strategic Plan.</p> <p>Under this section, the grantee will also create strategies for addressing:</p> <ul style="list-style-type: none"> • Public Housing • Barriers to Affordable Housing • Homelessness • Lead-based Paint Hazards • Anti-Poverty • Colonias (for States bordering Mexico) and • Monitoring | <p>Goals and strategies (Strategic Plan): SP-45 to SP-80</p> <p>Annual Goals and Objectives and strategies (Action Plan): AP-20 to AP-90</p> | <p>Writing Measurable Goals</p> <p>Developing Goals and Strategies for Target Areas</p> <p>Deciding Which Activities to Fund</p> |

3. Crosswalk Organized by the eCon Plan Template Sections

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| CONSULTATION | | | | |
|--|--|-------------------------------------|---|--|
| eCon Plan Template Screen(s) | Description of eCon Plan Template Screen | Planning Process | Addressing Component of Planning Process in the Consolidated Plan | Maximizing Investments Toolkit Products |
| Consultation: PR-10 | Matching Resources to Needs: Aligning funding sources enables grantees to extend the reach of their investments and advance multi-dimensional projects that meet multiple goals. Capable community stakeholders can assist with this by bringing resources to the table. Leveraging non-CPD funds is an important component of this strategy and the grantee should make every effort to bring as many resources to the table. | Consulting with Stakeholders | Community stakeholders are critical at every step of the grants management cycle and the consolidated planning process. Stakeholders provide the grantee with an understanding of community needs as they see them “on the ground”, their input can help the grantee design programs that work effectively to meet priority needs, and they can help grantees implement programs. | Using Stakeholder Input in Consolidated Planning |
| Institutional Delivery Structure: SP-40 | Building on existing assets and identifying opportunities: Grantees should aim to integrate their plans and projects with other revitalization activities, look for commonality with projects and align theirs with others to maximize impact, and build upon other projects or activities that open the door for further investment. | | | Evaluating Subrecipients to Optimize Performance Thinking About Implementation When Planning Assessing Capacity with SWOT Analysis Improving Performance with Process Mapping |

| NEEDS ASSESSMENT AND MARKET ANALYSIS | | | | |
|---|---|--------------------------|---|---|
| eCon Plan Template Screen(s) | Description of eCon Plan Template Screen | Planning Process | Addressing Component of Planning Process in the Consolidated Plan | Maximizing Investments Toolkit Products |
| Needs Assessment: NA-10 to NA-50 | The Needs Assessment provides a detailed outline of a jurisdiction's needs related to affordable housing, community development, and homelessness. An understanding of community needs helps target resources towards community priorities. | Determining Needs | A comprehensive understanding of the pressing needs in the grantee community forms the basis for developing strategies for investing CPD funds. The grantee's priority needs are informed by findings from its needs assessment and market analysis research. | Using Data for Consolidated Planning Matching Priority Needs with Activities |
| Market Analysis: MA-10 to MA-50 | In the Market Analysis, the grantee forms a profile of the community's housing inventory that includes market-rate and affordable housing, including public housing. Through this process, the grantee identifies its housing assets and challenges, gains an understanding of private market dynamics and determines where to focus public investment. | | | |

| STRATEGIC PLAN | | | | |
|---|--|---------------------------|---|--|
| eCon Plan Template Screen(s) | Description of eCon Plan Template Screen | Planning Process | Addressing Component of Planning Process in the Consolidated Plan | Maximizing Investments Toolkit Products |
| Geographic Priorities: SP-10 | Establishing Geographic Priorities: Targeting resources towards a defined geographic area can help maximize the impact of the combined resources. By targeting funds, the grantee can increase its impact in an area to achieve its goals. | Setting Priorities | The level of need in a community will always be greater than the limited resources available to meet the need. Priority needs are the needs that will be addressed by the goals outlined in the Strategic Plan. This section should make clear the rationale for establishing the allocation priorities. The rationale should flow logically from the analysis in the Needs Assessment and Market Analysis. | Matching Priority Needs with Activities Developing Goals and Strategies for Target Areas Deciding Which Activities to Fund |
| Priority Needs: SP-25 | Determining Priority Needs: Once needs are established using need and market data, the grantee establishes priorities for addressing the greatest needs. The grantee should consider the unique conditions in its community and is encouraged to focus on areas where need and opportunity coexist. | | | |
| Influence of Market Condition: SP-30 | The plan must describe how the characteristics of the housing market influenced the jurisdiction's decisions regarding allocation priorities among the types of housing assistance. The allocation priorities must also factor in the severity of housing problems and needs of renters and owners by income level, persons at risk of homelessness, and homeless persons. | | | |

| eCon Plan Template Screen(s) | Description of eCon Plan Template Screen | Planning Process | Addressing Component of Planning Process in the Consolidated Plan | Maximizing Investments Toolkit Products |
|--|---|------------------------------|--|---|
| Anticipated Resources: SP-35 | Matching Resources to Needs: Aligning funding sources enables grantees to extend the reach of their investments and advance multi-dimensional projects that meet multiple goals. Capable community stakeholders can assist with this by bringing resources to the table. Leveraging non-CPD funds is an important component of this strategy and the grantee should make every effort to bring as many resources to the table | Determining Resources | This step in the grants management cycle is used to identify the financial and organizational resources available to address priority needs. The level of resources available will play a key role in determining strategies and goals. Grantees should consider all resources within the jurisdiction's control that can be reasonably expected to be available, including federal, state, and local resources. | Thinking About Implementation When Planning |
| Institutional Delivery Structure: SP-40 | In SP-40 Institutional Delivery Structure, the grantee must conduct a brief assessment of the strengths and gaps of the institutional structure to carry out the Strategic Plan and any actions to overcome weaknesses in the institutional structure | | | Assessing Capacity with SWOT Analysis Improving Performance with Process Mapping |

| eCon Plan Template Screen(s) | Description of eCon Plan Template Screen | Planning Process | Addressing Component of Planning Process in the Consolidated Plan | Maximizing Investments Toolkit Products |
|--|---|----------------------|---|--|
| Goals: SP-45 Strategies: SP-50 to SP-80 | <p>The grantee must summarize the specific goals it intends to initiate and/or complete within the term of the Strategic Plan, using one or more Goal Outcome Indicators to describe in quantitative terms what the jurisdiction expects to achieve. Goals listed in the Strategic Plan and those in the Action Plan will be tightly linked. In order to be included in the Action Plan, a goal must also appear in the Strategic Plan.</p> <p>Under this section, the grantee will also create strategies for addressing:</p> <ul style="list-style-type: none"> • Public Housing • Barriers to Affordable Housing • Homelessness • Lead-based Paint Hazards • Anti-Poverty • Colonias (for States bordering Mexico) and • Monitoring | Setting Goals | <p>Once priorities have been established, grantees must develop a set of goals based on the availability of resources, and local organizational capacity. The goals should specifically address the priority needs outlined on the Priority Needs screen. The goals will serve as a management tool to help the grantee track and monitor performance throughout the term of the Consolidated Plan.</p> | <p>Writing Measurable Goals</p> <p>Developing Goals and Strategies for Target Areas</p> <p>Deciding Which Activities to Fund</p> |

| ANNUAL ACTION PLAN | | | | |
|----------------------------------|--|------------------------------|---|---|
| eCon Plan Template Screen(s) | Description of eCon Plan Template Screen | Planning Process | Addressing Component of Planning Process in the Consolidated Plan | Maximizing Investments Toolkit Products |
| Expected Resources: AP-15 | <p>The plan must provide a concise summary of the federal resources expected to be available. These resources include grant funds, anticipated program income, and other resources such as private and non-federal public sources that are reasonably expected to be available to the jurisdiction to carry out its Strategic Plan over the course of the program year.</p> <p>The plan must explain how federal funds will leverage these additional resources, including a description of how matching requirements of the HUD programs will be satisfied.</p> | Determining Resources | <p>This step in the grants management cycle is used to identify the financial and organizational resources available to address priority needs. The level of resources available will play a key role in determining strategies and goals. Grantees should consider all resources within the jurisdiction's control that can be reasonably expected to be available, including federal, state, and local resources.</p> | |

| eCon Plan Template Screen(s) | Description of eCon Plan Template Screen | Planning Process | Addressing Component of Planning Process in the Consolidated Plan | Maximizing Investments Toolkit Products |
|---|---|----------------------|--|---|
| Annual Goals and Objectives: AP-20 Projects and Strategies: AP-35 to AP-80 | <p>The plan must summarize the specific goals it intends to initiate and/or complete within the term of the program year. Each goal must use one or more of the Goal Outcome Indicators to describe in quantitative terms what the jurisdiction hopes to achieve.</p> <p>Under this section, the grantee will also create strategies for addressing:</p> <ul style="list-style-type: none"> • Public Housing • Barriers to Affordable Housing • Homelessness • Lead-based Paint Hazards • Anti-Poverty • Colonias (for States bordering Mexico) and • Monitoring | Setting Goals | Once priorities have been established, grantees must develop a set of goals based on the availability of resources, and local organizational capacity. The goals should specifically address the priority needs outlined on the Priority Needs screen. The goals will serve as a management tool to help the grantee track and monitor performance throughout the term of the Consolidated Plan. | <p>Writing Measurable Goals</p> <p>Deciding Which Activities to Fund</p> <p>Thinking About Implementation When Planning</p> <p>Developing Goals and Strategies for Target Areas</p> |

