

CON PLAN QUICK GUIDE



# Housing Trust Fund & eCon Planning Suite

*For ALL Grantees*





# WHAT ARE CON PLAN QUICK GUIDES?

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The Con Plan Quick Guides provides a summary of the steps required to set up and complete certain elements of the Consolidated Plan, Annual Action Plan and CAPER. For complete guidance and screen by screen instruction, review the [Con Plan in IDIS Desk Guide](#).

# HOUSING TRUST FUND & ECON PLANNING SUITE

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## *For all Grantees*

These instructions are for state grantees receiving Housing Trust Fund (HTF) and for entitlement grantees that are Housing Trust Fund subgrantees.

This quick guide provides guidance on the following topics:

1. How state grantees should include the HTF in the Consolidated Plan
2. How state grantees should include the HTF in Action Plans
3. How entitlement grantees who are HTF subgrantees should include the HTF in the Action Plan

## I. INCLUDING THE HTF IN THE CONSOLIDATED PLAN FOR STATE GRANTEES

Starting in Program Year 2018, HTF will automatically be included as a program when state grantees create a new Consolidated Plan, whether by copying the prior Consolidated Plan or by creating a new, blank Consolidated Plan template.

### **1. Copying Consolidated Plan**

To copy a Consolidated Plan, follow the instructions in the [“Creating a Consolidated Plan for State and Entitlement Grantees”](#) Quick Guide.

When the plan is copied, IDIS will automatically insert HTF in the “Programs Included” box.

## HOUSING TRUST FUND & ECON PLANNING SUITE

Strategic Plan Beginning Year:\* 2018

Ending Year:\* 2022

Title:\* 2018-2022 CP

Plan Version:\* V1

If Amendment: N/A

Programs included:\*

- CDBG
- HOME
- ESG
- HOPWA
- HTF



### 2. Creating New Consolidated Plan

To create a new, blank Consolidated Plan, follow the instructions in the [“Creating a Consolidated Plan for State and Entitlement Grantees”](#) Quick Guide.

HTF is automatically checked in the “Programs Included” box.

Strategic Plan Beginning Year:\* 2018

Ending Year:\* 2022

Title:\* Con Plan

Plan Version:\* v2

If Amendment: N/A

Programs included:\*

- CDBG
- HOME
- ESG
- HOPWA
- HTF



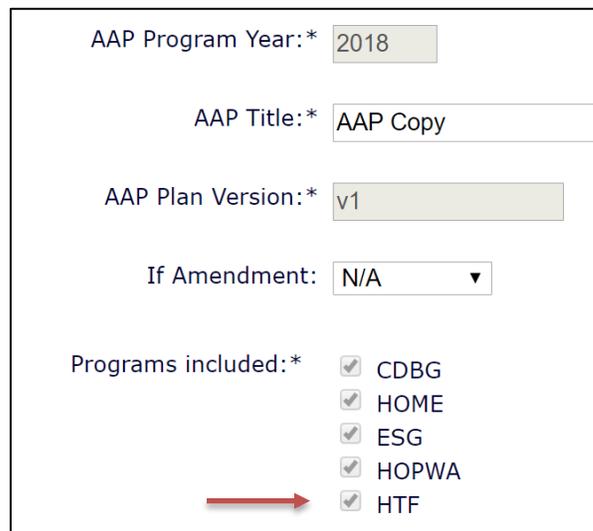
## II. INCLUDING THE HTF IN THE ACTION PLAN FOR STATE GRANTEES

For state grantees completing a year 2-5 Action Plan (whether by copying the prior Action Plan or by creating a new, blank one) prior to creating a Consolidated Plan in or after 2018, the Action Plan will automatically include HTF.

### 1. Copying Action Plan

To copy an Action Plan, follow the instructions in the [“Creating a Year 2-5 Action Plan for State and Entitlement Grantees”](#) Quick Guide.

When the plan is copied, it will automatically include HTF in the “Programs Included” box.



The screenshot shows a form with the following fields and values:

- AAP Program Year: \* 2018
- AAP Title: \* AAP Copy
- AAP Plan Version: \* v1
- If Amendment: N/A
- Programs included: \*
  - CDBG
  - HOME
  - ESG
  - HOPWA
  - HTF

A red arrow points to the HTF checkbox.

### 2. Creating New Action Plan

To create a new, blank Action Plan, follow the instructions in the [“Creating a Year 2-5 Action Plan for State and Entitlement Grantees”](#) Quick Guide.

The new plan will automatically include HTF in the “Programs Included” box.

HOUSING TRUST FUND & ECON PLANNING SUITE

AAP Program Year:\* 2018

AAP Title:\* 2018 AAP

AAP Plan Version:\* v1

If Amendment: N/A

Programs included:\*

- CDBG
- HOME
- ESG
- HOPWA
- HTF



### III. COMPLETING HTF ELEMENTS IN STATE CONSOLIDATED PLAN AND ACTION PLAN

Once the HTF is included in the state grantee’s Consolidated Plan and/or Action Plan, the grantee is responsible for incorporating HTF elements into multiple sections of the eCon Planning Suite.

**1. The following Consolidated Plan sections should be updated to include HTF:**

Screen Name	HTF Element
PR-05 Lead & Responsible Agencies	Enter organization and department/agency responsible for administering HTF
SP-35 Anticipated Resources	Include HTF as a funding amounts in table. HTF is included as default program in Resource Table and no longer needs to be added as an additional resource.
SP-40 Institutional Delivery Structure	Include how HTF activities will be carried out
SP-45 Goals	Add goals funded with HTF resources

**2. The following Action Plan sections should be updated to include HTF:**

Screen Name	HTF Element
PR-05 Lead & Responsible Agencies*	Enter organization and department/agency responsible for administering HTF
AP-15 Expected Resources	Include HTF as a funding amounts in table. HTF is included as default program in Resource Table and no longer needs to be added as an additional resource.
AP-20 Annual Goals and Objectives	Add goals funded with HTF resources
AP-25 Allocation Priorities	Complete funding allocation priorities table to include HTF
AP-30 Method of Distribution	Include distribution methods for HTF resources
AP-35 Projects**	Add projects funded with HTF resources
AP-90 Program Specific Requirements	(See screenshot below)

\* For Year 1 Action Plans, completed as part of Consolidated Plan

\*\* Project screen is not required for state grantees, but recommended to complete during program year to ensure project data automatically populates the CAPER template



## HOUSING TRUST FUND & ECON PLANNING SUITE

### Annual Action Plan

- AP-15 Expected Resources
- AP-20 Annual Goals and Objectives
- AP-25 Allocation Priorities
- AP-30 Method of Distribution
- AP-35 Projects
- AP-40 Section 108 Loan Guarantee
- AP-45 Community Revitalization Strategies
- AP-50 Geographic Distribution
- AP-55 Affordable Housing
- AP-60 Public Housing
- AP-65 Homeless and Other Special Needs Activities
- AP-70 HOPWA goals
- AP-75 Barriers to affordable housing
- AP-85 Other Actions
- AP-90 Program Specific Requirements
- AP-91 Program Specific Information for State Agency Subgrantees

**AP-91 Housing Trust Fund (HTF) -Reference 24 CFR 91.320(k)(5)**

Save | Save and Return | Cancel

**Housing Trust Fund (HTF)**  
**Reference 24 CFR 91.320(k)(5)**

State agency subgrantee name:

**1. Distribution of Funds**

**a. Describe the eligibility requirements for recipients of HTF funds (as defined in 24 CFR § 93.2).**

**B I U** | | | | | | | | | | HTF

**b. Describe the State Agency's application requirements for eligible recipients to apply for HTF funds.**

**B I U** | | | | | | | | | | HTF

## IV. ADDING HTF TO ENTITLEMENT CONSOLIDATED PLANS

Entitlement grantees who receive HTF as a subgrantee should include HTF in their Consolidated Plan. Consolidated Plans created in 2018 and after can indicate that the grantee is a Housing Trust Fund Subgrantee.

### 1. Copying Consolidated Plan

To copy a Consolidated Plan, follow the instructions in the [“Creating a Consolidated Plan for State and Entitlement Grantees”](#) Quick Guide.

If the entitlement grantee is copying a prior Consolidated Plan, it should use the dropdown menu on the Copy screen to indicate that it is an HTF subgrantee.

Source Consolidated Plan's Start Year:\* 2014  
Source Consolidated Plan's Version:\* v1  
New Consolidated Plan's Start Year:\* 2018  
New Consolidated Plan's End Year:\* 2022  
New Consolidated Plan's Version:\* v1  
If Amendment: \* N/A  
Housing Trust Fund Subgrantee: Yes

### 2. Creating New Consolidated Plan

To create a new, blank Consolidated Plan, follow the instructions in the [“Creating a Consolidated Plan for State and Entitlement Grantees”](#) Quick Guide.

If creating a new, blank Consolidated Plan template, the entitlement grantee is should use the dropdown menu to indicate that it is an HTF subgrantee:

Strategic Plan Beginning Year:\* 2018  
Ending Year:\* 2022  
Title:\* v1  
Plan Version:\* v1  
If Amendment: N/A  
Programs included:\*  
 CDBG  
 HOME  
 ESG  
 HOPWA  
Housing Trust Fund Subgrantee: Yes  
Consolidated Plan is for\*: Grantee

## V. ADDING HTF TO ENTITLEMENT GRANTEE ACTION PLANS

Entitlement grantees who receive HTF as a subgrantee should include HTF in their Annual Action Plan. If the grantee does not receive HTF in subsequent years, see Section VII of this guide for additional guidance.

### 1. Copying Action Plan

To copy an Action Plan, follow the instructions in the [“Creating a Year 2-5 Action Plan for State and Entitlement Grantees”](#) Quick Guide.

If the entitlement grantee is copying a prior year Annual Action Plan, it should use the dropdown menu on the Copy screen to indicate that it is an HTF subgrantee.

Source AAP Program Year:\* 2017  
Source AAP Plan Version:\* v1  
New AAP Program Year:\* 2018  
New AAP Plan Version:\* v1  
If Amendment: \* N/A  
Housing Trust Fund Subgrantee: Yes

### 2. Creating New Action Plan

To create a new, blank Action Plan, follow the instructions in the [“Creating a Year 2-5 Action Plan for State and Entitlement Grantees”](#) Quick Guide.

If creating a new, blank Action Plan template, the grantee should use the dropdown menu to indicate that it is an HTF subgrantee:

AAP Program Year:\* 2018  
AAP Title:\* 2018 AAP  
AAP Plan Version:\* v1  
If Amendment: N/A  
Programs included:\*  
 CDBG  
 HOME  
 ESG  
 HOPWA  
Housing Trust Fund Subgrantee: Yes

## VI. COMPLETING HTF ELEMENTS IN ENTITLEMENT CONSOLIDATED PLAN AND ACTION PLAN

Once HTF is included in its Consolidated Plan and/or Action Plan, the entitlement grantee is responsible for incorporating HTF elements into multiple sections of the eCon Planning Suite.

### 1. Complete HTF Elements in Consolidated Plan Template

The following Consolidated Plan and Action Plan sections should be updated to include the HTF:

Screen Name	HTF Element
PR-05 Lead & Responsible Agencies*	Enter organization and department/agency responsible for administering HTF
SP-35 Anticipated Resources	Add HTF as a resource (using the “Add” button to include it as an additional Source of Funds – see below for additional guidance)
SP-40 Institutional Delivery Structure	Include how HTF activities will be carried out
SP-45 Goals	Add goals funded with HTF resources

### 2. Complete HTF Elements in Action Plan Template

Screen Name	HTF Element
PR-05 Lead & Responsible Agencies*	Enter organization and department/agency responsible for administering HTF
AP-15 Expected Resources	Add HTF as a resource (using the “Add” button to include it as an additional Source of Funds – see below for additional guidance)
AP-20 Annual Goals and Objectives	Add goals funded with HTF resources
AP-35 Projects	Add projects funded with HTF resources
AP-90 Program Specific Requirements	Complete HTF narrative and radio button questions (see below for additional guidance)

### 3. Adding HTF as Resource on SP-35 and AP-15 Screens

Click “Add” on AP-15 resource priority table.

## HOUSING TRUST FUND & ECON PLANNING SUITE

Priority Table							
Source of Funds	Source	Uses of Funds	Expected Amount Available		Expected Amount Available Remainder of Con Plan	Narrative Description	Action
CDBG	public - federal	Acquisition Admin and Planning Economic Development Housing Public Improvements Public Services	Annual Allocation: \$	7076798	\$ 14153596		
			Program Income: \$	1200000			
			Prior Year Resources: \$				
			Total: \$	8276798			
HOME	public - federal	Acquisition Homebuyer assistance Homeowner rehab Multifamily rental new construction Multifamily rental rehab New construction for ownership TBRA	Annual Allocation: \$	2159809	\$ 4319618		
			Program Income: \$				
			Prior Year Resources: \$				
			Total: \$	2159809			
HOPWA	public - federal	Permanent housing in facilities Permanent housing placement STRMU Short term or transitional housing facilities Supportive services TBRA	Annual Allocation: \$	2196785	\$ 4393570		
			Program Income: \$				
			Prior Year Resources: \$				
			Total: \$	2196785			
ESG	public - federal	Conversion and rehab for transitional housing Financial Assistance Overnight shelter Rapid re-housing (rental assistance) Rental Assistance Services Transitional housing	Annual Allocation: \$	640040	\$ 1280080		<input type="button" value="Add"/>
			Program Income: \$				
			Prior Year Resources: \$				
			Total: \$	640040			

Select Housing Trust Fund in dropdown list and complete all fields providing more detail on the HTF.

**2101 Add Expected Resource - 24 CFR 91.420(b)**

Save | Save and Return | Cancel

Anticipated Resource: →

Other Funding Source:

Expected Amount Available: \$

Amount Expected for the remainder of the Consolidated Plan: \$

Narrative Description:

Source:  public - federal  public - state  public - local  private

### 4. Completing AP-90 Program Specific Requirements

If the grantee is an entitlement subgrantee for the HTF, it must complete the relevant HTF fields in the AP-90 screen. Where relevant, grantees can use the “Browse to Attach” buttons to upload additional or supporting content.

# HOUSING TRUST FUND & ECON PLANNING SUITE

**Housing Trust Fund (HTF)**  
Reference 24 CFR 91.220(l)(5)

**1. Distribution of Funds**

**a. Describe the eligibility requirements for recipients of HTF funds (as defined in 24 CFR § 93.2).**

**B** *I* U |           HTML

**b. Describe the jurisdiction's application requirements for eligible recipients to apply for HTF funds.**

**B** *I* U |           HTML

**c. Describe the selection criteria that the jurisdiction will use to select applications submitted by eligible recipients.**

**B** *I* U |           HTML

## VII. ONGOING ACTION PLANS FOR ENTITLEMENT GRANTEES

Once HTF is added to an entitlement grantee's Annual Action Plan, it will automatically be included in subsequent Action Plans, regardless if the grantee is a subgrantee that program year. If the grantee is not an HTF subgrantee in subsequent years, it can ignore HTF questions in that corresponding Action Plan.