

# FY21 Municipal Planning Grant Grant Administration Guide

## Completing Your Grant Agreement

Accepting the offered grant and completing the Grant Agreement involves two separate steps:

**\*\*\*PLEASE NOTE:** New Grant Acceptance Procedures Due to the COVID-19 Pandemic\*\*\*

1. Electronically “accept” the agreement by changing the status of the application to “Grant Agreement Accepted” in the online Grants Management System. Both the M/AO or the Administrator can complete this step.
2. An electronic copy of the Grant Agreement will be uploaded to an online digital signing service, OneSpan eSignLive, and will be emailed by DHCD staff for signature by the Municipal/Authorizing Official (M/AO), and the Commissioner of the Department of Housing and Community Development (DHCD)

To complete both of these requirements, please follow the instructions provided below.

1. **Log on** to the online grants management system using your assigned username and password <https://egrants.vermont.gov>

If you’ve forgotten your username or password, please use the below links or contact DHCD staff at [Jennifer.Lavoie@vermont.gov](mailto:Jennifer.Lavoie@vermont.gov) or 802.828.1948 for assistance.

- [Forgot your username?](#)
- [Forgot your password?](#)

### 2. Electronically Accepting:

- Navigate to the “Municipal Planning Application FY21 Menu” by using the search instructions described above in the “Generate Your Grant Agreement” section. Once you are on the “Application Snapshot” page, select the “Status Changes” menu at the top of the page.
- Click the “Apply Status” button next to the “Grant Agreement Accepted” status option. (Remember that this status option will only appear for those roles that have permission to accept, that includes the M/AO and the Grant Administrator.)

## Grant Administration Roles

**Grant Administrators** may perform all the functions described in this document, EXCEPT signing the Grant Agreement and electronically submitting requisitions.

**Municipal/Authorizing Official (M/AO)** is the only role that can sign the Grant Agreement and electronically submit requisitions online. M/AOs may also perform all other grant administration functions.

More information on system roles and permissions is available [HERE](#).

## Key Dates

**August 31, 2021** – Mid-project progress report and second requisition due.

**May 31, 2022** – Project completion and all funds spent.

**June 30, 2022** – Final report, documentation and products, and final requisitions submitted.

### 3. Access your Grant Agreement

- Navigate to your application using the “Applications” tab at the top of the page.
- Search using the top drop-down menu for “Application Types”. Select the “Municipal Planning Application 2021” option and leave all other search field empty or on the default (“select”) before clicking the “Search” button.
- From the search results, click on the blue hyperlink for the name of your application (ex: 07110-MP-2021-Montpelier-29). (Be careful not to click the similar looking blue hyperlink with the name of your municipality.)
- From the application snapshot, you can access the Grant Agreement by clicking on the “Forms Menu” link at the top of the page.
- Click on the “Grant Agreement Documents” form to generate and view the Grant Agreement.

### 4. Review the Grant Agreement

Prior to signing, make sure the information about your grant is correct and that you understand the terms of the Grant Agreement.

### 5. Digitally Sign to Accept the Grant Agreement

DHCD staff will send the grant agreement via email to the M/AO for digital signature.

- The email will come from sender, “ADS-E-Signature”, and may go to junk or spam.
- There will be a hyperlink within the email address, once you click on the hyperlink, it will bring the M/AO to the document, the system will prompt you through a series of two mouse clicks to complete the digital signature.
- Once the M/AO has signed, the agreement will automatically be sent to the Commissioner of DHCD for final signature to execute the grant.
- The Grant Agreement must be signed within 45 days of the grant award notification.

### 6. Once the Agreement is Electronically Accepted and the Signed Signature Page is Received by DHCD, you will then:

- Receive an email notification of the “Grant Awarded” status of your grant.

**NOTE** – requisitions cannot be started or submitted until the grant is fully awarded;

## Requisitions

Use the online Grants Management System to request funds. Use the step-by-step [Requisition Instructions](#) to guide you through the process.

**ONLY the MUNICIPAL/AUTHORIZING OFFICIAL (M/AO) can “Electronically Submit” the requisition.**

Click the “Related Documents and Messages” link on your “Application Snapshot”. Select the option and the top to “Initiate a new MPG requisition” and click I agree to continue. Once initiated (i.e. created) you will be able to revisit the requisition using the “Requisitions/Claims/Invoices” tab and searching for the “MPG Requisition 2021: 2021” type.

You may request funds three times per grant period:

- **First** – Electronically request advance payment of 40% any time after Grant Agreement is in “awarded” status.
- **Second** – Submit mid-project payment request of 30% along with a completed “Progress Report” by August 31, 2021.
- **Final** – Last payment is made on a reimbursement basis when the project and its deliverables are completed, submitted and approved.

Submitted invoices must show that you have spent or obligated all grant funds (including any match funds) no later than May 31, 2022. Unused, ineligible, or undocumented costs must be returned.

- Can view your fully executed Grant Agreement online on the “Application Attachments” page (in the Staff Attachments column on the right side of the page); and
- Be enabled to initiate, complete, and submit your first requisition for 40% of awarded grant funds (see [Requisitions Instructions](#) for details).

## Amendments

Please [contact us](#) first to find out if an amendment is needed for any changes to your work plan or budget.

DHCD approval is required to change a task or sub-product in your work plan and budget (Attachment A of your Grant Agreement). Please contact DHCD staff and review the [Amendment Instructions](#) before beginning the amendment process.

Major changes to the final product or grant due date extensions are not allowed.

## Grant Start-Up

- 1. Tracking Grant Expenses:** Please inform your Municipal Clerk/Treasurer of the grant award and:
  - a. Provide the Clerk a copy of the requisition form once completed (you can use the “Print” button in the upper right corner of the “Budget Status Requisition Form” to generate a copy;
  - b. Explain that the final 30% payment is a reimbursement and the town will need to document all project payments before the **final** 30% of grant funds can be issued;
  - c. Recommend that the town dedicate an accounting number for the grant and determine the best way to document grant income and expenses (see Closeout Documentation info below. A separate bank account is not necessary for this program. These are State, *not* Federal funds.)
  - d. Set up a [Summary Ledger](#) to keep track of grant expenditures. Grant administrators must maintain financial records throughout the progress of the grant project. Expenses related to your work plan and budget, as of December 1, 2020 and through May 31, 2022, may be applied to the grant.
- 2. Press Releases:** A sample press release will be made available on our [Grant Administrators webpage](#). Note that all press releases, public communications or products related to your grant project must reference funding support from a Municipal Planning Grant awarded by the Vermont Department of Housing & Community Development. (This helps promote the program and ensure funding is available in the future.)
- 3. Consultant Selection:** If intending to work with a consultant, review the [FY21 Procurement Procedures](#), the [Quick Tip on Consultant Selection](#) and see the Sample Request for Proposal (RFP) and Request for Qualifications (RFQ) available on our [Grant Administrators webpage](#), as well as a sample contract and directory of consultants.
- 4.** Once your grant is in “Awarded” status, you can initiate Requisition forms (“Related Documents and Messages” section of the menu accessed from the “Application Snapshot”), amend your resolution, amend your work plan & budget as well as close out the grant.

## Closeout Documentation

1. **Make certain all outstanding grant expenses have been incurred by May 31, 2022.** Provide a copy of all studies or other products developed with grant funds making sure that all of the Grant Agreement requirements have been met.
2. **Compile and submit the following financial documentation:**
  - a. [Summary Ledger](#) or similar document: Grant Administrators must maintain financial records throughout the progress of the grant project providing an overview of all your grant-related financial transactions.
  - b. **All receipts and invoices for grant expenditures** showing grant work was completed within the grant period, including any work covered by match funds;
  - c. **Copies of cancelled checks OR a detailed transactions report**, certified by the Treasurer, including date/recipient/check number and amount showing that payments were made for all project expenses (including evidence of match payments, if applicable).

## Match Funds

Closeout documentation must provide evidence of expenses and payments for the total project amount (state + all match funds). If a project is completed with less than the projected total project amount expended, the grant funds and match funds will be automatically re-calculated proportionately for you on the Final Project Report form.

Detailed instructions for submitting the final closeout documentation and requisition can be found in the [Closeout Instructions and Checklist](#).

## Questions?

Please contact DHCD Staff:

- For questions about program requirements, please contact Jacob Hemmerick, Planning & Policy Manager, at [jacob.hemmerick@vermont.gov](mailto:jacob.hemmerick@vermont.gov) or 802.828.5249.
- For questions about the online grants management system, please contact Jenni Lavoie, at [Jennifer.Lavoie@vermont.gov](mailto:Jennifer.Lavoie@vermont.gov) or 802.828.1948.