FY2023 Municipal Planning Grant

Program Description

Rutland Regional Asset Mapping Project
MPG-funded project - https://rutlandramp.com/

Community Planning + Revitalization
Vermont Department of Housing and Community Development
September 2022

VERMONT
AGENCY OF COMMERCE & COMMUNITY DEVELOPMENT
DEPARTMENT OF HOUSING & COMMUNITY DEVELOPMENT

FY23 Municipal Planning Grant Guidance Manual

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Completing Your Grant Agreement

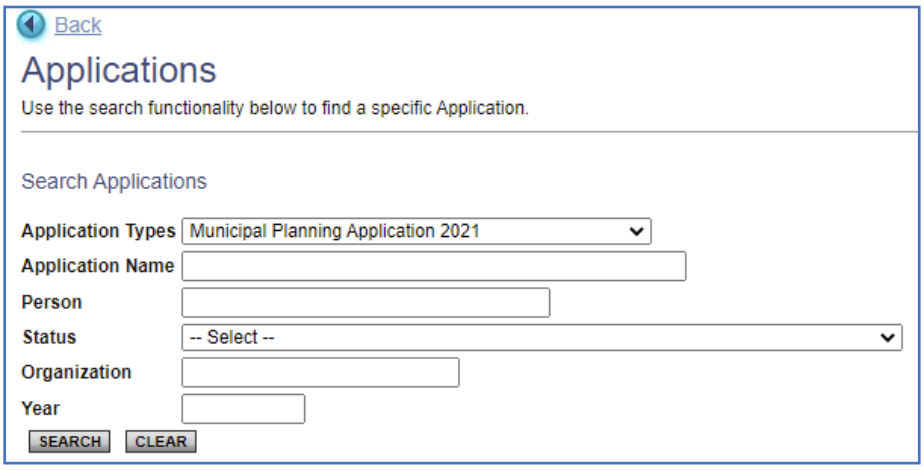
Log on to the GEARS online grants management system using your assigned username and password at https://egrants.vermont.gov

If you've forgotten your username or password, please use the below links or contact DHCD staff at jennifer.lavoie@vermont.gov or 802-828-1948 for assistance.

- Forgot your username?
- Forgot your password?

Navigate to your Application in GEARS

- Open your Municipal Planning Grant by clicking the **Applications** tab at the top of the screen.
- From the first drop-down menu set the Type as "Municipal Planning Application 20XX". Leave all other search fields empty/blank (as shown below) and click the Search button.



Select the name of your grant from the search results. The grant name will begin with 07110, followed by the letters MP, then by the fiscal year, municipality name, and two-digit grant identification number. The current status should be *Grant Agreement Offered* (it will change to *Grant Awarded* once the grant is executed). Clicking on the Name will take you to the **Application Snapshot**.

(Ex: 07110-MP-2021-Danville-04)

Whenever you login to GEARS, you will use this same process to access your grant via the **Application Snapshot**.

Accept the Grant Agreement in GEARS

From the **Application Snapshot**, you can access the Grant Agreement through the **Forms Menu** link at the top of the page.

- On the **Forms Menu**, scroll to *Grant* > *Grant Agreement Documents* to view 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.
- From the **Application Snapshot**, go to the **Status Changes** menu link at the top of the page. Click on *Grant Agreement Accepted* > *Apply Status* (Note that this option will only appear for those with M/AO and Grant Administrator roles).

Sign the Grant Agreement with DocuSign

Once the grant agreement is accepted in GEARS, DHCD staff will send the grant agreement to the Municipal / Authorizing Official (M/AO) for digital signature via DocuSign. Once the M/AO has signed, the agreement will automatically be sent to the Commissioner of DHCD for final signature to execute the grant.

Requisitions for funding cannot be submitted until you receive confirmation that the Grant Agreement is executed. **The Grant Agreement must be signed within 45 days of the grant award notification.** You can view your fully executed Grant Agreement from the **Application Snapshot** by going to the **Forms Menu** > *Application* > *Application Attachments* page.

Grant Administration Roles	Key Dates
Each GEARS user is assigned a Role. **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. *Click here for more information on Grant System Roles*.	**March 1, 2023** – Grant start date – no costs can be incurred before this date. **January 31, 2024** – Mid-project progress report and second requisition due. **January 31, 2025** – Project completion and all funds spent. **February 28, 2025** – Final report, documentation and products, and final requisitions submitted.

Grant Start-Up

Grant Expense Tracking

Please inform your Municipal Clerk/Treasurer of the grant award and:

- 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.)
- 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 March 1, 2023 and through January 31, 2025, may be applied to the grant.
- Once you complete each requisition form in GEARS, provide the Clerk a copy (from the **Budget Status Requisition Form** > Print Version button near the top of your screen)
- 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;

Amendments

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 to find out if an amendment is needed before beginning the amendment process.

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

Press Releases

A sample press release will be made available on our Grantee Guidance page. 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.) *Example: This project was funded in part by a Municipal Planning Grant administered by the Vermont Department of Housing and Community Development.*

Consultant Selection

If intending to work with a consultant, review the Procurement Procedures, the Quick Tips on Consultant Selection and see the Sample Request for Proposal (RFP) and Request for Qualifications (RFQ) available on our Grantee Guidance page, as well as a sample contract and directory of consultants.

How to Request Grant Funds

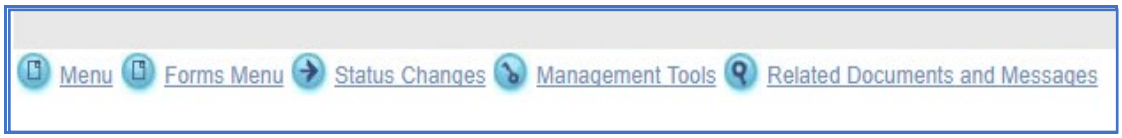
Timeline

The Municipal Planning Grant (MPG) program allows grantees to requisition (request) funds at three separate times throughout the grant period:

First Requisition	**40% Advance**	Request advance payment of **40%** with your first requisition **once the grant agreement is executed** and the grant is in Grant Awarded status. *You will receive an email notifying you of this status.*
Second Requisition	**30% Advance**	Request **30%** of your grant award **when you submit your Progress Report**, which is due by **January 31, 2024.**
Final Requisition	**30% Reimbursement**	Request a final requisition **when the project and its deliverables are complete** and closeout documentation has been submitted. **The last payment is made on a reimbursement basis.** The closeout documentation needs to show that all project costs have been billed no later than **January 31, 2025**, and have been paid. Unused funds or funds used for ineligible or undocumented costs must be returned, or the grant award will be proportionally reduced.

Create a Requisition in GEARS

- Log in to GEARS and go to your **Application Snapshot** by searching for your application, as when you accepted the grant agreement.
- At the top of the **Application Snapshot** page, go to **Related Documents and Messages** > *Initiate a New MPG Requisition 20XX*.



- Click on *I agree* after reading the statement. You should see the **Requisition Snapshot** page.

At the top of the **Requisition Snapshot** page, go to the **Forms Menu** > *Requisition* > *Budget Status Requisition.*

- Select the checkbox for the appropriate requisition. You may select more than one.
- Fill in the Current Requisition Amount (numbers only – no dollar symbol or comma) using the amounts listed as reference.
- **If this is your second requisition**, **complete the Progress Report** questions at the bottom of the form.
- Be sure to click **SAVE** at the top of the page once complete.

The third requisition should be submitted in conjunction with your closeout materials.

Submit a Requisition

Both the **Administrator** and **Municipal/Authorizing Official** roles can create a new requisition and complete the required fields. **ONLY the M/AO role can submit the requisition**.

- At the top of the **Requisition Snapshot**, go to the **Status Changes** menu link at the top of the page. Click on *Requisition Submitted* > *Apply Status.*
- Read the agreement message and click on I Agree in order to submit the requisition.

  The system will then redirect you back to the **Requisition Snapshot** page. *You will receive an email notifying you that your requisition has been successfully submitted*.

Payment of Grant Funds
Payments will be transferred ***electronically*** from the State Treasurer into the same Municipal bank account established to receive VTrans funds. In the event a Requisition was submitted to the Department, but funds have not been received, please contact DHCD staff at jennifer.lavoie@vermont.gov or 802-828-1948 to determine the status of your submitted Requisition. Please allow 2-3 weeks for requisitioned funds to be processed after electronic submittal.

Closing out your Grant

Once you have completed your project and paid all expenses, you must **submit the final requisition** and **submit your final report and supporting documentation**. *Only the M/OA can submit the requisition; either the M/OA or Grant Administrator can submit closeout materials.*

Completing the Final Project Report Form

From the **Application Snapshot** page, go to the **Forms Menu** > scroll to *Closeout* > *Final Project Report*.

Complete the Final Project Report Form, responding to all required questions marked with a *, and be sure to click the **SAVE** button at the top of the page before moving on.

We recommend using the **Final Project Report Questions** at the end of this document to prepare your answers before pasting them into the form in GEARS.

Uploading Supporting Documentation

Required documentation—including the final product(s) and financial documents—can be uploaded in GEARS or emailed to Department staff. Documents should be in pdf format unless otherwise specified. GIS Information should be submitted separately by your consultant via the GIS Data Submission Online Intake Form.

From the **Application Snapshot** page, go to the **Forms Menu** > scroll to *Closeout* > *Closeout Documentation*.

Using the Grantee Attachments column, give each document a name and then use the Choose File button to browse your computer and select the file you would like to upload. As with all forms, be sure to click the **SAVE** button at the top of the page when you are done.

Use the Closeout Checklist to make sure you have submitted everything:

Closeout Checklist

- ☐ **Final Project Report Form** (the narrative portion of the final report), completed in GEARS.
- ☐ **Final Product** (submitted through GEARS or by email)
  Copies of all final products. **Note that all final products should include an acknowledgement of funding**, such as *This project was funded in part by a Municipal Planning Grant administered by the Vermont Department of Housing and Community Development.*

Financial Documentation (submitted through GEARS or by email)

- ☐ **Summary ledger** Please use the summary ledger template or a similar model to provide an overview of all project related financial transactions.
- ☐ **Copies of all invoices and receipts** for project expenditures. Invoices and receipts must demonstrate that all grant work was completed within the grant period; **invoices must be dated within the grant period**, though they may be paid later.
- ☐ **Copies of all canceled checks** (not check stubs) – OR – submit a detailed transactions report including date, recipient, check numbers and amount. Report must be signed and certified by the Treasurer as true and accurate. The canceled checks or detailed transactions report must demonstrate that all invoices have been paid by the municipality.
- ☐ **If GIS work was done with grant funds,** complete the GIS section of the Final Project Report Form in GEARS. If new data layers were created, please confer with your consultant and have them complete the GIS Data Submission Online Intake Form and submit new data layers.

Submitting Your Grant Closeout

- From the **Application Snapshot** page, **Final Project Report**, or **Closeout Documentation**, go to **Status Changes** menu link at the top of the page. Click on *Closeout Documentation Submitted* > *Apply Status*.
- Read the agreement message and click on I Agree in order to submit the closeout.

  The system will then redirect you back to the **Application Snapshot** page. *You will receive an email notifying you that your requisition has been successfully submitted.*

  CAUTION: *Once the status has been changed, you will no longer be able to save new information on the forms.*

Troubleshooting
If you didn't receive a status change email, but the online grant system reflects that your grant or requisition has changed status, please check your personal contact information to update your email address or contact Department staff at jennifer.lavoie@vermont.gov or 802-828-1948 to check on the status of your requisition and/or Closeout submission.

Final Project Report Questions

For Use Before Preparing the Final Project Report and Grant Closeout

Use this document to review the Final Project Report questions and to prepare your responses. **We highly recommend preparing your responses in advance and pasting them into the GEARS system**. Note that character limits include spaces. You must submit the Final Project Report through GEARS.

Section 1: PROJECT DETAILS

1.1 Project Title: *[automatically populated with the response from your application]*

1.2 Project Description: *[automatically populated with the response from your application]*

Section 2: FINANCIAL REPORT

2.1 Project Finances:
Please compile and attach financial documentation using the Closeout Documentation form. (See the Closeout Checklist on page 6 for a complete list of required financial documentation.) Only those expenses directly related to your workplan activities (Attachment A of your grant agreement) are eligible.

Total Project Cost: _____
Enter the amount of your total funds spent, not to exceed the Total Project Cost in Attachment A of the Grant Agreement.

State Grant Funds: *[automatically calculated based on the Total Project Cost]*

Minimum Match Funds: *[automatically calculated based on the Total Project Cost]*

Additional Match Funds: *[automatically calculated based on the Total Project Cost]*

2.2 Please describe the source of the match funds:
Contributions from municipal staff or volunteers' time will not be accepted as the match. (Unrequired contributions may be documented here as well.) *(500 character limit)*

2.3 Additional Project Cost: _____ If the final project cost exceeded the Total Project Cost in Attachment A of the Grant Agreement, what was the **additional** project cost (the amount spent above and beyond what was identified as the total cost in the application)?

Section 3: OUTCOMES

Project Summary and Accomplishments:

3.1 What were the issues your community was trying to address? *[automatically populated with the response from your application]*

3.2 How were the issues identified in your application addressed?

If applicable, explain any discrepancies between what was originally proposed and what was accomplished, referring to the Work Plan and Budget Summary (Attachment A of the Grant Agreement). (*4,000 character limit)*

3.3 What did the project produce (outputs)? List the materials produced, events completed, process in place, etc. Relate these to the Work Plan and Budget (Attachment A of the Grant Agreement), accounting for all items listed in the scope of work. Upload or mail (using the Closeout Documentation form) copies of all materials (reports, plans, bylaws, etc.) created through this grant project. *(4,000 character limit)*

3.4 Did any challenges, unexpected opportunities or obstacles arise from this project? Please describe them. *(4,000 character limit)*

Public Involvement:

3.5 Describe the ways the project engaged the public and sought broad community participation and input? Similarly, how did the project benefit from community input? *(2,000 character limit)*

3.6 Approximately how many people did you engage in the project? Add up the number of board/commission/committee members who were involved, public meeting attendees, letters/emails received, volunteer helpers at events, participating members of partner organizations, survey respondents, etc.

3.7 List the local, regional organizations, and partners you coordinated with, including other municipal boards and commissions, and describe the types of community support you received for the project. *(500 character limit)*

Community Benefits:

3.8 How did the project benefit the community? *(2,000 character limit)*

Examples:

- *Discussions leading up to the Town Plan re-write brought townspeople together to address the following critical issues ...*
- *The economic development study helped stimulate new business in the village, specifically...*

Adoption Follow-Up:

3.9 Did you grant include the adoption/amendment of a plan, bylaw, or other document requiring adoption? (The following questions only appear depending on the answer to this question)

- ☐ Yes
- ☐ No

3.10 Was a vote to adopt the proposed document held within the grant period?

☐ Yes

☐ No

3.11 If not, please predict a potential adoption date from the list below:
<Dropdown options>

☐ Within the next 6 months

☐ Within the next year

☐ Within the next 2 years

☐ The town voted on adoption and it was not approved

☐ Other

3.12 If the Town voted on adoption but it was not approved, why did it fail? *(1,000 character limit)*

Implementation Actions:

3.13 What will your next steps as a result of this grant project be? List next steps. *(2,000 character limit)*

Examples:

- *Apply for funding to conduct the feasibility study recommended in the Town Plan*
- *Amend the bylaws to conform to the newly adopted Town Plan*

3.14 Additional Comments: (optional) *(2,000 character limit)*

Section 4: GIS DATA (Mapping)

Please talk to your GIS data creator (mapping consultant or RPC) before responding to the questions below. Please note that it is not necessary to provide information for layers that are simply subsets of existing layers (e.g. if you "clip" a VGIS roads layer to the boundaries of the town).

If digital parcel data has been created or updated as part of this project, please refer to and follow the Vermont GIS Parcel Data Standard, located at the Vermont Center for Geographic Information (VCGI) web site. Vermont law requires that geospatial data creation funded with public money adhere to existing data standards.

Were new data layers created as part of this grant project?

☐ No new data layers were created as part of the grant project. This means that GIS data used in the project is available in the VCGI data warehouse.

☐ New data layers were created as part of the grant project. If new data layers were created, please have your consultant complete the GIS Data Submission Online Intake Form for the data layer created.

Please contact the Vermont Center for Geographic Information at 802-585-0820 if you have questions.

Section 5: PROGRAM FEEDBACK

Please answer the following questions to help improve the MPG Program. Choose N/A if you don't know or the question doesn't apply.

Was information about the MPG program clear?
Information was: ☐ Excellent ☐ Good ☐ Average ☐ Poor ☐ N/A

Was information readily available?
Availability was: ☐ Excellent ☐ Good ☐ Average ☐ Poor ☐ N/A

Was MPG program staff helpful?
Staff support was: ☐ Excellent ☐ Good ☐ Average ☐ Poor ☐ N/A

Were you satisfied with the consultant hired for the grant project?
If you are the consultant please leave blank
The consultant was: ☐ Excellent ☐ Good ☐ Average ☐ Poor ☐ N/A

Please identify the primary consultant hired for the grant project: _____

Please offer any additional feedback: (Optional) *(1,000 character limit)*

Please contact DHCD staff at jennifer.lavoie@vermont.gov or 802-828-1948 if you have any questions.