

# Grant Administration Guide

## FY10 Municipal Planning Grants (MPGs)

Revised 9/2011 DEHCD

### COMPLETE GRANT AGREEMENT

1. Log on: <https://development.grants.vermont.gov/>.
2. Generate your grant agreement
  - a. Select your application from the Municipal Planning Application 2010 folder. (If your application is not visible, select All My Documents from the drop down menu and click GO.)
  - b. On the FORMS tree, click on "Agreement Document."
  - c. Click on the link to "Generate the Contract," then "View PDF," then "Open".
3. Review the Grant Agreement

Make sure the information about your grant is correct and that you understand the terms of the grant agreement.
4. Accept Grant Agreement
  - a. Return to "MPG Proposal Menu."
  - b. Select "MPG Grant Agreement Accepted" under STATUS MANAGEMENT, then CHANGE STATUS.
5. Print, Sign and Mail Signature Page
  - a. Generate grant agreement and print first page. The Municipal CEO whose name appears on it then signs it.
  - b. Mail signature page only to DEHCD:

**Municipal Planning Grant Program**  
Vermont Dept. of Economic, Housing & Community Development  
One National Life Drive, 6th Floor  
Montpelier, VT 05620-0501
6. After we receive the signed signature page, you will:
  - a. Receive electronic notification of the "Grant Awarded" status of your grant;
  - b. View your executed grant agreement online (uploaded onto "DEHCD Staff Attachments" page; and
  - c. Be able to submit your first requisition (see "Requisitions" box below.

### GRANT START-UP

1. Please notify your Municipal Clerk/Treasurer of the grant award and provide them a copy of the grant agreement signature page and requisition (when submitted). Request that a dedicated accounting number be established for the grant and determine the best way to document grant income and expenses (see Closeout Documentation below). A separate bank account is not necessary for this program.

### Grant Administrator

#### ROLES

**Grant Administrators** may perform all the functions described here, EXCEPT signing the grant agreement and "submitting" requisitions.

#### Municipal Authorizing Official

(MAO) role signs the grant agreement and "submits" requisitions online. MAOs may perform all the grant administration functions and may authorize a new grant administrator at any time.

More information on ROLES:

[http://www.dhca.state.vt.us/Planning/GMS/MPG\\_Roles.pdf](http://www.dhca.state.vt.us/Planning/GMS/MPG_Roles.pdf)

#### Key Dates:

Mid-project report due:

**Feb. 28th 2011**

Project completion and all funds spent: **November 8, 2011**

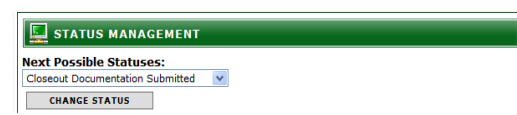
Final report documentation and products submitted:

**December 13<sup>th</sup>, 2011**

Extensions by Request due to impact of Tropical Storm Irene are being offered if [requested](#) on or before October 14, 2011.

### Status Changes

Any time the STATUS MANAGEMENT box appears on the left side of the Proposal Menu, you are able to submit, cancel or take other actions noting the "next possible statuses" in the drop down window and clicking on the "Change Status" button.



2. 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 May 20, 2010 and through November 8, 2011, may be applied to the grant.
3. A [Log of Hours](#) is required if a municipal employee is to be paid with grant funds.
4. A [sample press release](#) is available. Note that all press releases, public communications or products related to your grant project must reference the support from a Municipal Planning Grant awarded by the Department of Economic, Housing & Community Development. (This helps ensure funding is available in the future.)
5. To access your grant, select and open your grant from the "Municipal Planning Grant" folder in the MY DOCUMENTS section of the "Main Menu." Once your grant is in "Awarded" status, you can access Requisition forms (RELATED ITEMS BOX, left bottom), Amend Your Resolution, Amend your Work Plan & Budget as well as Closeout forms (FORMS tree on the right).

## CLOSEOUT DOCUMENTATION

1. After November 8, 2011 (or anytime before that date if the grant project has been completed) make sure all outstanding grant expenses have been paid. Compile a copy of all studies or other products developed with grant funds making sure all the grant agreement requirements are met.
2. Compile and submit the following financial documentation:
  - [Summary Ledger](#) or similar document: Grant Administrators must maintain financial records throughout the progress of the grant project to provide an overview of all your grant-related financial transactions.
  - **All receipts and invoices for grant expenditures** showing grant work was completed within the grant period, including any work covered by match funds;
  - **Copies of cancelled checks OR a detailed transactions report** including date/recipient/check # and amount showing that payments were made for all grant expenses (include evidence of match payments, if applicable);
  - **Log of Hours:** if municipal employee hours are included as an expense in your budget (to be reimbursed by the grant) you must document these hours using the form provided or another type of log that provides at a minimum, the same data tracking municipal employee tasks and hours on the grant project. (Staff time cannot be used for match funds.)
3. Complete and submit a final Requisition for reimbursement of the last 30% of the grant amount along with the Final Project Summary form. Upload (or mail) the final product(s) as well as other related documents. Use the STATUS CHANGE buttons to "submit closeout documentation" and to "submit requisition" by December 13, 2011. [MORE ON CLOSING OUT...](#)

## Requisitions

Use the online Grants Management system to request funds. Please find step-by-step instructions on the Forms Tree of your grant online.

**ONLY the MUNICIPAL AUTHORIZING OFFICIAL can electronically "Submit" the requisition.**

Go to the RELATED ITEMS box and click on "Create New" under MPG Requisition folder. You may request funds three times per grant period:

**First** – request advance payment of 40% any time after grant agreement is "awarded".

**Second** – Submit mid-project payment request of 30% along with a completed "Progress Report" by February 28<sup>th</sup>, 2011. An e-mail reminder and instructions will be sent to you.

**Final** – Last payment is made on a reimbursement basis when the project and its deliverables are completed and submitted. Submitted invoices must show that you have spent or obligated all grant funds (including match funds) no later than November 8, 2011. Unused, ineligible or undocumented costs must be returned.

## **Amendments - Changes to Work Plan and Budget-**

DEHCD approval is required to change a task or sub-product in your Work Plan and Budget (Attachment A of your grant agreement). To request Department approval: 1) Change Status to "Amendment Request in Progress" 2) Use the "Amendment Request" form, in the FORMS tree, & SAVE. 3) Change Status to "Amendment Request Submitted." **Major changes to the final product or grant extensions are not allowed.**

## **MATCH FUNDS**

For grants over \$8,000, with a match requirement, closeout documentation must include evidence of expenses and payment for the total project amount (state + match funds). If a project is completed with less expended than the total project amount, the match funds will be reduced proportionately.

## **QUESTIONS?**

Please contact Vermont DEHCD Staff:  
(802)828-5249 or email [Wendy.Tudor@state.vt.us](mailto:Wendy.Tudor@state.vt.us)