Municipal Planning Grant Program
Closeout Instructions

Please use these instructions to review all grant closeout requirements and as you prepare your responses to the final report questions. The process of closing out your Municipal Planning Grant (MPG) will require two submissions in the online grants management system (https://egrants.vermont.gov/):

1. **Electronically submitting the final report and supporting documentation** (the Municipal/ Authorizing Official and/or Grant Administrator role may complete the required forms and electronically submit by changing the status).
2. **Electronically submitting the requisition/reimbursement request** (the Grant Administrator role can create and fill out the requisition/request for reimbursement but only the Municipal/Authorizing Official role may electronically submit by changing the status).

The Closeout Instructions include the following resources:

Closeout Checklist

Please review the grant closeout requirements summarized in the checklist below. Your grant closeout will not be considered complete until all of the required items have been submitted and approved by program staff.

Final Project Narrative (must be submitted through the online system)
☐ Complete the Final Project Report Form (the narrative portion of the final report) in the online grants management system. (Use the Final Report Questions to draft responses to questions offline first before completing the form in the online system.)

Final Product (can be submitted through the online system, by mail, or email)
☐ Submit copies of all final products.
☐ Final products should include evidence that the Municipal Planning Grant program, administered by the Department of Housing and Community Development, is credited for funding on the product itself.

Financial Documentation (can be submitted through the online system, by mail, or email)
☐ Submit summary ledger. Please use the summary ledger template or a similar model to provide an overview of all project related financial transactions.
☐ Submit copies of all invoices and receipts for project expenditures. Invoices and receipts must demonstrate that all grant work was completed within the grant period.
☐ Submit copies of all canceled checks – 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 the online system.
☐ 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.

Final Project Report Questions

The Final Project Report must be submitted through the online grants management system. Review the Final Project Report questions and use this document to prepare your responses offline first (you can then copy and paste your drafted responses into the online system).

The Final Project Report questions ask you about the status of your project for the grant close-out; the outcomes of your grant project to help policy makers see the value of municipal planning in Vermont; and your experience of the MPG program to help us continue to improve it.

Government programs are increasingly required to demonstration that public funds are well-spent. The effectiveness of a plan, bylaw or other planning project may take decades to see. However, we can report on shorter term outcomes – especially for the projects with immediate benefits to the community. The descriptions you provide of how the MPG has benefited your community help to build and retain support for community planning in Vermont.

SECTION 1: ADMINISTRATIVE REPORT

PROJECT FINANCES:

- **Total Funds Spent: _____**
  Enter the amount of your total funds spent, not to exceed the Total Project Cost in Attachment A of the Grant Agreement.
- **State Funds Spent: _____** *(automatically calculated by system based on the total funds spent entered above)*
- **Match Funds Spent: _____** *(automatically calculated by system based on the total funds spent entered above)*
- **Source Match Funds:**
  Contributions from municipal staff or volunteer's time will not be accepted as the match. (Unrequired contributions may be documented here as well.) *(500 character limit)*

PROJECT SUMMARY:

- Briefly describe the progress of your project from start to finish including any unexpected opportunities and obstacles. If applicable, explain any discrepancies between what was proposed and accomplished, referring to the Work Plan and Budget Summary (Attachment A of the Grant Agreement). *(4,000 character limit)*

ACCOMPLISHMENTS:

- List the materials produced, events completed, processes in place, etc. Relate these to the Work Plan (Attachment A of Grant Agreement), accounting for all items listed in the work plan. Upload or mail (using the online Closeout Documentation form) copies of all materials (reports, plans, bylaws, etc.) created by this grant project. *(4,000 character limit)*

SECTION 2: GIS DATA

Please talk to your GIS data creator (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 VCGI web site. Vermont law requires that geospatial data creation funded with public money adhere to existing data standards.

Please contact the Vermont Center for Geographic Information at 802.828.3000 if you have any GIS specific questions.

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 this project did not include a GIS component or that GIS data used in the project is already available in the VCGI data warehouse.

☐ **Yes, 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

SECTION 3: OUTCOMES

PUBLIC INVOLVEMENT:

- **Describe the ways people participated in the grant project.** *(2,000 character limit)*

- **Approximate number of people involved in the project:** _____

Provide an estimate of the number of people engaged. 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, etc. (Rough estimates are sufficient because this number will be aggregated with all other MPG projects as a statewide measure of the MPG performance in meeting public participation goals. The number will not be used to evaluate the performance of your project.)

COMMUNITY BENEFITS:

- **How did the grant affect your municipality?**
  Please list the benefits to the community, if any. *(2,000 character limit)*

  Examples:
  - Discussions leading up to the Town Plan re-write brought townspeople together to address the following critical issues …
  - The flood resilience planning resulted in a more comprehensive Hazard Mitigation Plan for the town that raised awareness about safety and damage-prevention efforts for all residents and businesses.
  - Regular, well-publicized meetings between the planning commission and Selectboard on the draft bylaws helped educate town leaders and the public, leading to speedy adoption of the bylaw.
  - The sewer and water feasibility study educated everyone on the available options for infrastructure and enabled the town to apply for and receive funding for design and construction.

ADOPTION FOLLOW-UP: skip to Implementation Actions if not a plan or bylaw project.

- **Did your grant include the adoption/amendment of a plan, bylaw, or other document requiring adoption?**
  ☐ Yes
  ☐ No
- **If yes, was a final vote held within the grant period that led to adoption of the proposed document?**
  ☐ Yes
  ☐ No
- **If no vote was held within the grant period, please predict a potential adoption date from the list below:**
  ☐ 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

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

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IMPLEMENTATION ACTIONS:

- **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.
  - Conduct a series of individual and neighborhood meetings to obtain input and address concerns that arose in the process of amending the bylaws.

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ADDITIONAL COMMENTS: (Optional) *(2,000 character limit)*

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SECTION 4: 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 do not answer this question
  The consultant was: ☐ Excellent ☐ Good ☐ Average ☐ Poor ☐ N/A

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

How to Complete and Submit the Grant Closeout

Navigating to Your Grant

1. Log on to the online grants management system https://egrants.vermont.gov/

2. Open your Municipal Planning Grant by clicking the "Applications" tab at the top of the screen.

3. Select "Municipal Planning Application 20XX" as the type from the top drop down menu, leave all other search fields empty/blank, and click the search button.

   Look for this in the online system:

4. Select the name of your grant from the search results. (The grant name will begin with the letters MP followed by the fiscal year, municipality name, and five-digit grant identification number. The current status should be "Grant Awarded." Ex: MP-2016-Waterford-00007.)

   Look for this in the online system:

Completing the Final Project Report Form

1. At the top of the "Application Snapshot" page, look for and click on the "Forms Menu" section.

Look for this in the online system:

2. Scroll to the bottom of the Forms list, to the Closeout Section, and select the Final Project Report form.

   Look for this in the online system:
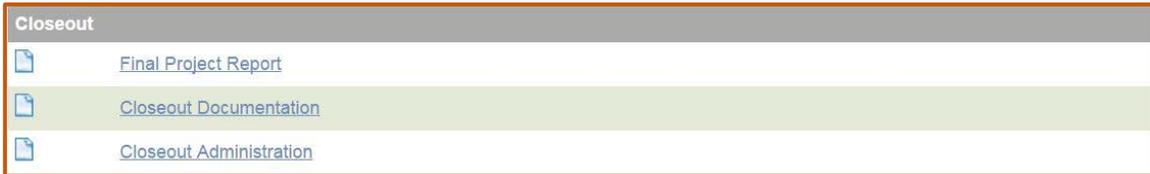
3. Complete the Final Project Report Form, responding to all required questions marked with a red asterisk, and be sure to click the SAVE button at the top of the page before moving on.

Upload Supporting Documentation to the Online System

Required documentation, including financial materials, the final product, and GIS forms and files can be uploaded in the online system, mailed or emailed to Department staff.

To upload the supporting documentation to the online system:

1. Use the steps described above to navigate to your grant and to the Forms list. Select the Closeout Documentation form from the form list.

   Look for this in the online system:
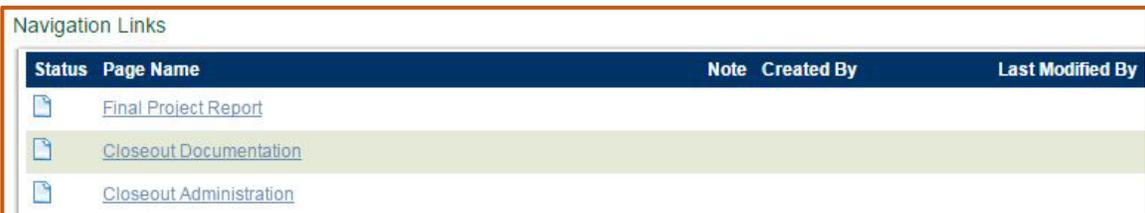
2. The Closeout Documentation form will allow you to upload documents to submit along with the Final Project Report. Using the "Grantee Attachments" column, give each file a name and then use the "Choose File" button to browse your computer and select the file you would like to upload. As with all forms, be sure to click the SAVE button at the top of the page when you are done.

   Please keep in mind that, per your grant agreement, *all* products of the grant will credit the "Municipal Planning Grant Program, as administered by the Department of Housing and Community Development," for funding.

Electronically Submit Your Grant Close Out

Both the Municipal/Authorizing Official and Grant Administrator roles can electronically submit the grant closeout in the online system.

1. Use the steps above to navigate to your Municipal Planning Grant in the online system. If you are on the Final Project Report form or Closeout Documentation form, use the "Document Information" link or "Municipal Planning Application FYXX Menu" link at the top of the form page to navigate to the main menu.

Look for this in the online system:

Document Information: MP-2016-Bennington-00036
▶ Details
You are here: > Municipal Planning Application FY16 Menu > Forms Menu

2. At the top of the "Application Snapshot" page click on the "Status Changes" option.

Look for this in the online system:

🗋 Menu 🗋 Forms Menu → Status Changes ↻ Management Tools 🔍 Related Documents and Messages

3. Click the "Apply Status" button beneath the "Closeout Documentation Submitted" option, then click "I agree" to submit. You will receive a system email notifying you that the closeout was successfully submitted.

Look for this in the online system:

Possible Statuses
CLOSEOUT DOCUMENTATION SUBMITTED
APPLY STATUS

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.

All required documentation may be uploaded in the Grants Management System, mailed to DHCD or emailed to jennifer.lavoie@vermont.gov.

How to Complete and Submit the Final Requisition

Please note that both the Administrator and Municipal/Authorizing Official roles can create a new requisition and complete the required field. **ONLY the M/AO role can electronically "submit" the requisition.**

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 you have spent or obligated all grant funds no later than the "grant period end date" (Find Period of Performance dates in Attachment B of your grant agreement). Unused funds or funds used for ineligible or undocumented costs must be returned.

Create a new requisition

1. Log on to the online grants management system https://egrants.vermont.gov/
2. Open your Municipal Planning Grant by clicking the "Applications" tab at the top of the screen.
3. Select "Municipal Planning Application 20XX" Type from the top drop down menu, leave all other search fields empty/blank, and click the search button.

Look for this in the online system:

4. Select the name of your grant from the search results. (The grant name will begin with the letters MP followed by the fiscal year, municipality name, and five-digit grant identification number. The current status should be "Grant Awarded." Ex: MP-2016-Waterford-00007.)

Look for this in the online system:

5. At the top of the "Application Snapshot" page click on the "Related Documents and Messages" option.

Look for this in the online system:

6. Click on the "Initiate a/an MPG Requisition 20XX" hyperlink in the first row, and Name column, of the document list.

Look for this in the online system:

7. Click on "I agree" after reading the statement.

Complete the requisition

1. At the top of the "Requisition Snapshot" page click on the "Forms Menu" option.
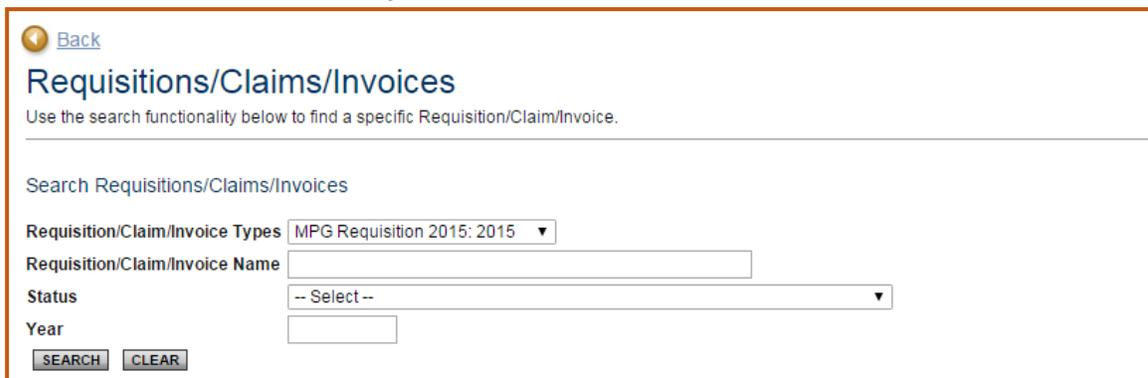
   Look for this in the online system:

2. Click on the "Budget Status Requisition" Form.

3. Complete the requisition request and be sure to click **SAVE** at the top of the page before moving on.

   - Check appropriate requisition checkbox(s);
   - Fill in the "Current Requisition Amount" (numbers only – no dollar symbol or comma); and SAVE.
   - **Reminder:** The third requisition is a reimbursement and should be submitted in conjunction with your closeout materials, listed in the checklist on page 1.

Electronically submit the requisition

Only the Municipal/Authorizing Official (M/AO) role is enabled to electronically "submit" the requisition.

1. If requisition has already been created and filled out, just log in. The requisition can be found under the "Requisitions/Claims/Invoices" tab at the top of the login page. From the first drop down menu set the Type as "MPG Requisition 201X: 201X". Leave all other search fields blank/empty and click the search button.

   Look for this in the online system:

2. From the search results select the requisition. The current status should be "Requisition in Progress". Be sure to click on the name of the requisition rather than the name of the organization. (The requisition will begin with the letters REQ followed by the fiscal year, municipality name, and five-digit grant identification number. Ex: REQ-2016-Bennington-00056.)

3. At the top of the "Requisition Snapshot" select the "Status Changes" section.

   Look for this in the online system:

4. Click the "Apply Status" button beneath the "Requisition Submitted" option. (If "Requisition Submitted" does not appear as an available option the requisition may already have been submitted, cancelled or you do not have the authority/role is the system to submit the request for funds.)

Look for this in the online system:

5. Read the agreement message, and click on "I agree" in order to submit the requisition.
6. The system will then redirect you to the "(MPG) Municipal Planning Grant Requisition Menu". You will be notified by a system email that your requisition has been successfully submitted.

Payment of Grant Funds

The payment will be transferred **electronically** from the State Treasurer into the 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 828-1948 to determine the status of your submitted Requisition. Please allow 2-3 weeks for requisitioned funds to be processed after electronic submittal.