2021 Municipal Planning Grant
GEARS Application Instructions

This document provides essential information about the Municipal Planning Grant (MPG) program and is intended to provide instructions and links to important resources for completing the online application (only applications submitted through the online Grant Electronic Application and Reporting System – GEARS – will be considered). In addition to these instructions, we recommend that you review the Program Description for general information about the grant program and scoring criteria. These instructions also provide step by step pointers on responding to the application questions.

Application Due Date

Applications must be electronically submitted in the online grants management system by **Thursday, October 1, 2020 at 6:00 pm.**

Before You Begin the Online Application

- Discuss with project partners and other town officials as well as with potential consultants. Have the selectboard or city council complete the required Municipal Resolution.
- Draft an outline of your project using the Application Guide as a model. Use word processing software to compose responses to the essay questions. Once edited, reviewed, and perfected in word processing, the responses can easily be copied and pasted into the online application forms.
- Look through all of the application forms before starting to fill them out.

Grant System Roles

Every person associated with an online grant application must first create a new user account and then be assigned a role within the online Grant Electronic Application and Reporting System (GEARS). You only need one account per person in the online system, even if you are associated with multiple municipalities or grant applications.

Municipal/Authorizing Officials are assigned by their Legislative Body (selectboard, city council, alderboard or village trustees), identified in the Municipal Resolution, and their online accounts are validated by Department of Housing and Community Development (DHCD) staff. All other users are assigned by the Municipal/Authorizing Official or Administrator associated with their grant application. To create a new account, complete the online new user registration form and click the save button to submit the registration.

System Role	Assigned to	Designated by	Create Application	View Forms	Edit Forms	Submit Application	Approve Account
Municipal/ Authorizing Official (M/AO)	Selectboard member, Town or City Manager, or Town Administrator	Municipal Resolution	✓	✓	✓	✓	✓
Administrator	Town staff, planning commissioner or RPC staff	Municipal Resolution	✓	✓	✓	✓	
Writer	RPC or town staff, or consultant	Email from M/AO or Administrator		✓	✓		
Viewer	RPC or town staff, or consultant	Email from M/AO or Administrator		✓			

Municipal/Authorizing Official (M/AO)

Must be Chief Executive Officer of the municipality as defined by 10 VSA §683(8) such as a selectboard member, or a Town or City Manager or a Town Administrator. No person who is paid through the grant or handles grant funds, including the Municipal Clerk or Treasurer, may be assigned the Municipal/Authorizing Official role. M/AOs have the following permissions and functions:

- Only role with the authority to electronically submit requisitions (if grant is awarded).
- Assigns the grant Administrator role.
- Assigns Writers or Viewers for the project or may leave that responsibility to the Administrator.
- M/AO title functions as an electronic signature in the system.
- Ability to initiate, write, edit, review and submit applications.
- Ability to administer the grant if awarded. (If no Administrator is assigned to the grant, the M/AO will need to perform the Administrator functions.)

Each municipality should have two persons validated as Municipal/Authorizing Officials in the event one is not available at a critical time. (For example, both a selectboard member and Town Administrator could be authorized.) Before submitting the application, a majority of legislative body must sign a resolution to designate the M/AO(s) to act on behalf of the municipality.

Administrator

Handles all grant-related tasks for the municipality except the first two M/AO functions listed above. The Administrator role may be assigned to a town planner or other staff, a planning commissioner or other board member involved in the grant, or regional planning commission staff if identified as an agent of the municipality for **small towns** or consortia. Administrators have the following permissions and functions:

- Must be validated in the Grants Management System by a Municipal/Authorizing Official or by DHCD staff, with written permission from a Municipal/Authorizing Official.
- Ability to initiate, write, review, edit and submit applications.
- Ability to initiate, write, review and edit requisitions.
- Validates/assigns Writers or Viewers to the grant applications.
- Ability to administer the grant if awarded.

The Administrator role, when authorized by the M/AO, can create applications on behalf of the municipality. The Administrator is added to a specific grant Application by the M/AO or DHCD staff, with written permission from the M/AO.

Writer

Can write, edit and review applications. The Writer is added to a specific grant Application by the M/AO or by DHCD staff, with written permission from the M/AO or Administrator.

Viewer

Can review the grant application and if the grant is awarded can view grant-related documentation in the system. The Viewer is added to a specific grant Application by the M/AO or by DHCD staff, with written permission from the M/AO or Administrator.

Page by Page MPG Application Instructions – FY21

Keep these instructions available to reference while you work on the online application. Page-specific instructions can also be found on each form when you click on the SHOW HELP button in the upper right-hand corner.

Save Often

The system will automatically time out after 45 minutes on a single page even if you are continuously adding data. We recommend writing all of your responses in a word processing program first, using the Application Guide as a model. In addition, we strongly encourage you to save your work in the system at regular intervals to prevent loss. If you are timed out, **do not** use your browser's back button to return to the page you were on as all data entered after this will be lost. Always *SAVE before moving to another page!*

Formatting

The online grants management system does not recognize special formatting such as Bold, Italics or Bullets – this is important to keep in mind as you draft your application. We recommend that you compose your responses in a word processing program (such as Microsoft Office Word) first and avoid using any special formatting. *Note that character limits include spaces and punctuation.*

Required Fields *

Throughout the application you will see fields that have a red asterisk * beside them. This indicates a required field. If no data is entered into a required field, you will receive an error message when you save the page. A blank required field will also prevent the application from being submitted successfully. If attempting to submit the application with blank required fields the system will redirect you to the incomplete page for correction.

System Emails

Once an application is successfully submitted you will receive system messages informing you of the status of your application. If you use spam blockers, be sure to add **SOV-EGrantsNoReply@vermont.gov** to your "safe list" so that you can receive important messages from the system**.**

Accessing the Online System

Every person needing access to the online Grant Electronic Application and Reporting System (GEARS) must first create a new user account (only one), however creating an account will not give you access to an application. The Municipal/Authorizing Official (M/AO) **MUST** first be validated by MPG staff (Jenni Lavoie).

The M/AO can assign users already in the system to their organization's account and the application. The M/AO needs to notify MPG staff of all new users needing access along with their respective roles to the organization's account and application, and MPG staff will validate their accounts.

If you do not have an existing account in the online system, you'll need to register for a new account by completing the online registration form. If you are an M/AO needing to assign an administrator, write, or reader roles to people who are new to your organization's account for the MPG application, please send an email to MPG staff indicating the names and roles.

If you do have an existing account but have 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.

- Forgotten your password?
- Forgotten your username?

Home

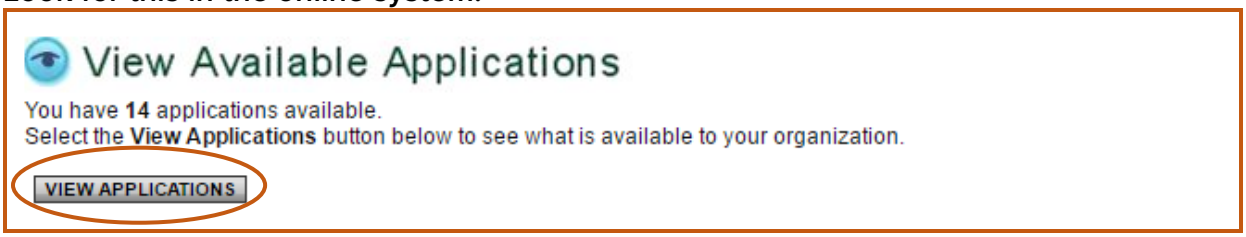
Log in to the GEARS using your assigned username and password here: https://egrants.vermont.gov
The Home Page is the first page that appears after logging in to the system. Also identified by the blue highlighted "Home" tab it provides access to the available ACCD online grant applications.

Look for this in the online system:

Create an Application

Click on the "View Applications" button in the "View Available Applications" section at the top of the page (see image on following page). Select the Municipal Planning Application 2021 at the top of the page by clicking the associated "Apply Now" button. (Note that **both** the Municipal/Authorizing Official (M/AO) and Administrator roles can initiate a new MPG application. See MPG Roles for more information.)

Look for this in the online system:



"I Agree"

Before you can "create" an application or submit one, a confirmation page will ensure that you are aware of critical program requirements. Read the statement carefully and click the "I Agree" button to continue.

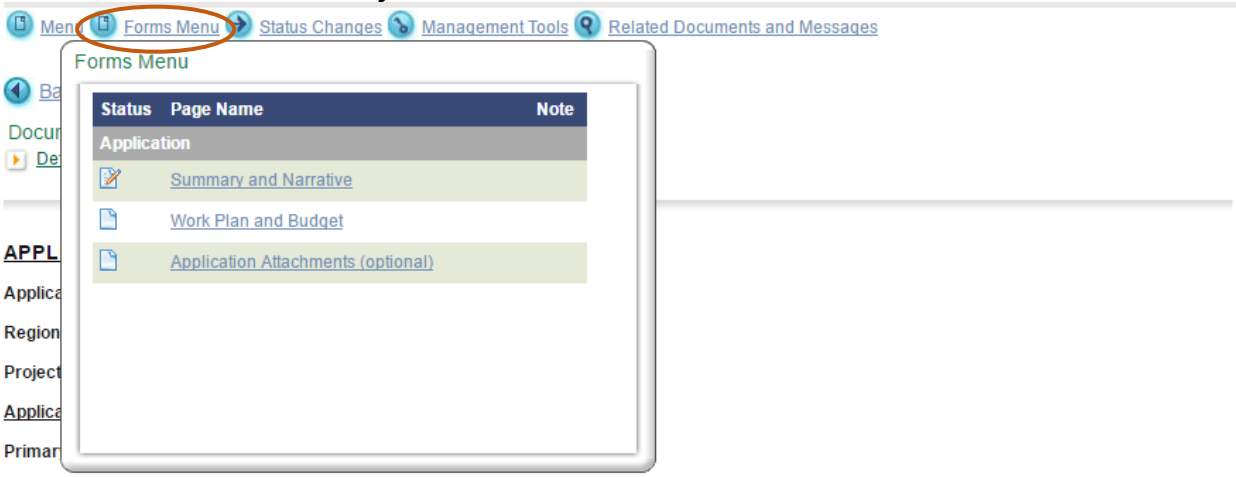
Application Snapshot

You will now be on the application snapshot and application menu home. The snapshot provides basic information about the application and will update as the application forms are completed. The snapshot includes information about the responsible individuals and the budget. You can return to the snapshot from any of the forms by clicking the Menu link at the top of the page.

Navigation Tips

To access the application forms – use the Forms Menu link at the top of the page.

Look for this in the online system:



Summary and Narrative Form

Application Summary

Rural Towns. If you are a "rural town" with a population of less than 2,500 and the grant administrator is the Regional Planning Commission, select YES. If a rural town is administering its application and grant without RPC assistance, then select NO. Non rural towns select N/A.

Town Plan Adoption Date. Provide the latest adoption date of your municipal plan. If your municipality has never had a plan, select N/A.

State Designations. This question applies only to *state* designated centers. If you are unsure if your municipality has a state designated center, refer to the DHCD Planning Atlas for a map of municipalities with state designated centers.

Municipal Confirmation. If you are not certain of your municipality's confirmation status, which requires an adopted town plan that has been approved by a regional planning commission (RPC), as well as a confirmed planning process, please contact your regional planning commission. All applying municipalities, including those within a consortium, must be confirmed by September 30, 2020.

Municipalities without a confirmed local planning process may apply for funding but only to create a municipal plan approvable by the RPC. They must also have voted to provide local funds for municipal and regional planning purposes. Grant proposals from municipalities that have received RPC recommendations to bring their plan into compliance with statewide requirements must address the changes identified by the RPC and the application must include a copy of the latest RPC consultation report.

Consortium Project. A consortium is formed when two or more municipalities submit a joint application with one municipality agreeing to serve as the lead municipality. All participating municipalities need to be confirmed by the confirmation due date, September 30, 2020 (applications are due October 1, 2020 by 6:00 pm). If applying as a multi-municipal consortium, select "Yes" and then select each "Participating Municipality" from the resulting list. Municipalities are listed alphabetically by City, Town and Village in the drop-down. Indicate if the RPC is serving as an agent for the consortium (see page 8 of the MPG Program Description).

Municipal Resolution

The Resolution authorizes the Municipal/Authorizing Official (and Alternate) to act on behalf of the municipality on all matters related to the grant and officially recognizes the Grant Administrator. The signature of the Planning Commission Chair is required to document planning commission support for the application. The Resolution confirms that the municipality will maintain its efforts to provide local funds for municipal and regional planning or has voted at an annual or special meeting to provide local funds for municipal and regional planning purposes. The resolution also commits the municipality to allocating the necessary match funds.

For all applications, a primary Municipal/Authorizing Official (M/AO) must be designated on the Resolution. We **strongly recommend** that municipalities designate a second, alternate M/AO in case the primary M/AO is not available at critical times. Electing another individual to the M/AO role later in the process requires an amendment to the resolution and signatures from the legislative body. The M/AO(s) will need an account in the GEARS and must complete the New User Registration form.

For consortium applications, each municipality must submit a separate, signed Resolution. Each municipality must designate the **same** Municipal/Authorizing Official(s) and Administrator.

After signatures are gathered, upload the signed Resolution(s) or email to jennifer.lavoie@vermont.gov with the name of the municipality and MPG 2021 in the subject line. If scanning is not possible, select the "mailed to DHCD" option and mail the signed Resolution, postmarked by the application due date (Thursday, October 1, 2020), to DHCD. All mailed Resolutions will be uploaded to the Application Attachments form once we receive them. (The mailing address is listed on the final page of these instructions and on the Resolution form.)

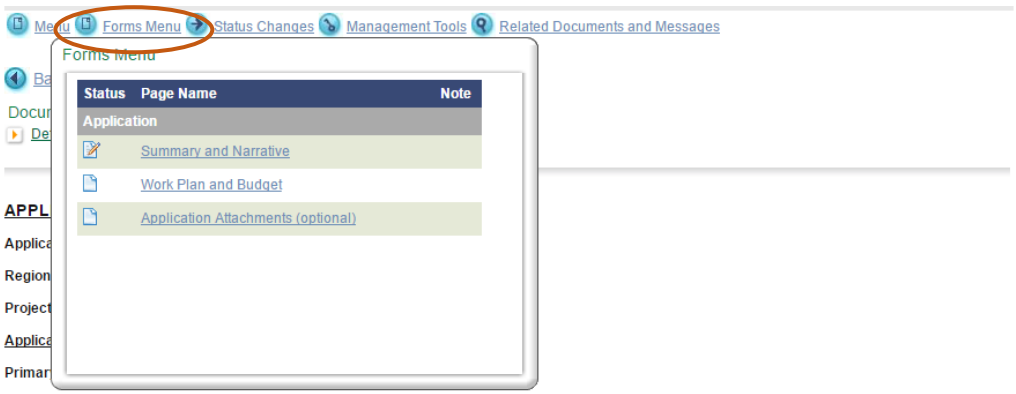
Municipal/Authorizing Official. Identify the person from the dropdown list who is the primary Municipal/Authorizing Official (M/AO). See MPG Roles for more information about who can be assigned the M/AO role and what their responsibilities are. In the case of a consortium, enter the lead municipality's Municipal/Authorizing Official. Only the lead municipality prepares an application.

Grant Administrator. This designated person handles all grant-related business including contact with DHCD about the application. If no Administrator role has been assigned, the M/AO may serve in this role as well. Municipalities may wait until a grant is awarded to identify an Administrator and may change Administrators once the grant is awarded.

Note that only the names of individuals who have registered for and received an account in GEARS will appear in the drop-down menus. Contact Jenni Lavoie – jennifer.lavoie@vermont.gov or 802.828.1948 if you do not see the name of an individual listed in the drop-down menu options.

Be sure to SAVE your work before moving on to another form. Move on to the Work Plan and Budget Form by using the Forms Menu at the top of the page.

Look for this in the online system:



Work Plan and Budget Form

Fill in the relevant fields on the Work Plan and Budget form for each project task. We recommend that you write up your entire work plan in a word processing program using the form on page 17 of the Application Guide and obtain cost estimates for the work before starting on these pages in the online system.

Start by providing a task name and a short description of what that item entails. If more than five tasks lines are needed, complete the first five rows and save the page. Additional rows will appear once the page is saved.

> ***Example Task Name:*** Inventory of on-site sewage treatment systems in the village.
>
> ***Example Task Description:*** Go through records to identify and map all in-ground septic systems serving buildings in the village that are not on the municipal sewage treatment system and categorize them.

Paid Personnel. Select the closest option for who is responsible for the task from the Paid Personnel drop-down list. If no one is being paid through the grant for this task, leave blank.

When paid personnel are involved in a task, give the estimated number of hours and the billing rate. These should be based on cost estimates or other information from a qualified consultant, the Regional Planning Commission or other knowledgeable source. Total personnel cost will be automatically calculated when you save the page.

If other material costs such as copying, mailing, or equipment rental fees are involved in the task, note them in the "Materials Description" box. Provide the total non-personnel expenses for each task in the "Materials Cost" box. Itemize those costs in a separate document uploaded to the Attachments form.

Total Project Cost. The total project cost for each task will automatically calculate when you click **Save**. You must **SAVE** this page **any time** subsequent revisions are made to your work plan. The total cost of each task will be summarized on the Work Plan and Budget Table.

All grants require a local cash match of 10% of the state fund/grant request. The maximum amount of grant funds available for a single municipality is $22,000. Grant applications that offer additional match funds beyond the required amount will be more competitive than those with only the 10% match.

The Work Plan and Budget form in GEARS requires you to manually identify the *amount of funding requested from the state grant*. Fill in the State Grant Amount requested and save

the form at the top of the page. The 10% minimum required grant amount will be calculated **automatically** based on the state grant request. Any additional match amount will calculate **automatically** based on the difference between the Total Project Cost (sum of each task and budget item) and the state funds requested + 10% minimum match.

> ***Example:*** If the budget for the tasks result in a Total Project Cost (Work Plan and Budget Total) of $28,000, and the applicant fills in the State Grant Funds Requested at the maximum grant amount of $22,000. The 10% minimum match will equal $2,200 so the remaining $3,800 needs to be filled with an additional match, for a total match of $6,000. The municipality will be responsible for documenting the payment of those $6,000 in project costs when the grant is closed out, in addition to the $22,000 that will be reimbursed by the MPG. To lower the match amount, adjust the tasks and budget to reduce the total project cost.

For consortia applications, the minimum match is 10% of the grant request. The maximum amount of grant funds available for consortia applications is $35,000 and with the minimum match the total project cost for a maximum grant will be $38,500. Additional match amounts may be proposed for a more competitive application.

Budget Documentation

Describe Source(s) of Match Funds. 10% cash match is required for all grants and will be automatically calculated on the Work Plan and Budget form in GEARS after the requested grant amount is entered. Projects that include more than a 10% cash match will more competitive than those that are budgeted with the minimum match.

Any source of cash match funds may be used -- federal, other state grants, municipal, private or non-profit. Contribution of staff or others' time **cannot** be offered as a match.

Upload your documentation or any uploads beyond what is included in the Budget Documentation box, please use the Application Attachments form (see instructions below).

If you mail the budget documentation, check "Mailed to DHCD." (See mailing address on final page of this document.)

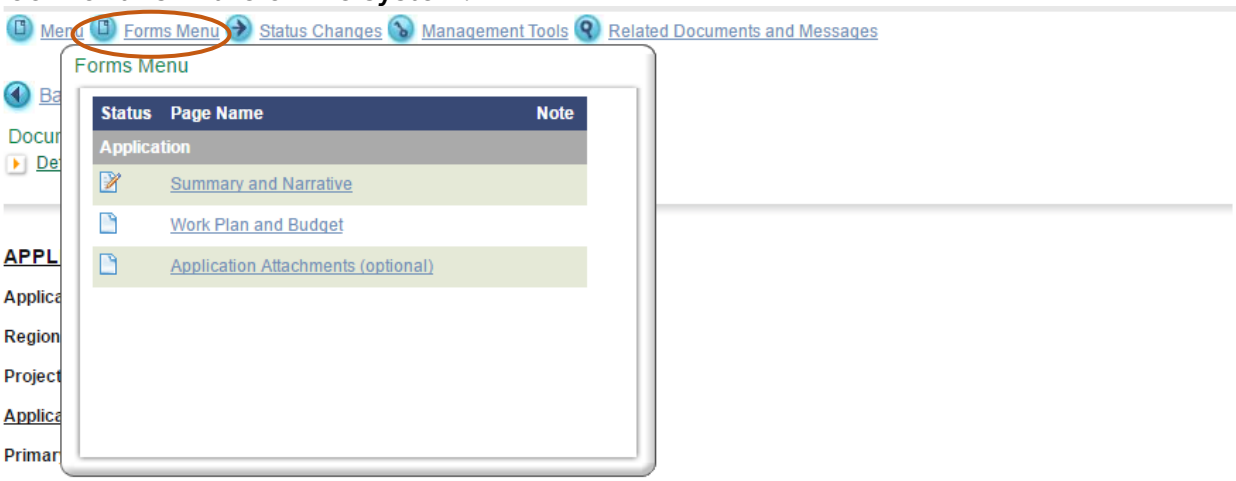
Accounting

Responses to these questions are used for administrative purposes only, as part of a required risk assessment, and will not impact the competitiveness of your application.

Be sure to SAVE your work before moving on to another form.

Move on to the Work Plan and Budget Form by using the Forms Menu at the top of the page.

Look for this in the online system:



Application Attachments Form

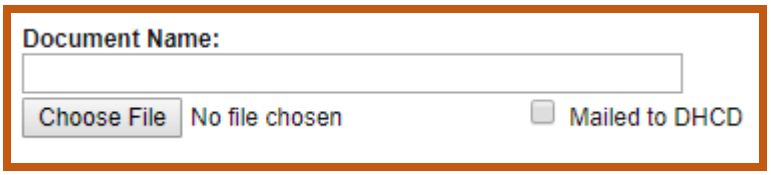
For additional supporting documents, use the "Application Attachments" form. *(30 MB upload limit)*

Types of documents that might be uploaded on this page include answers to questions on the Summary and Narrative page that require more than 2,500 characters (especially for consortium applications), letters of support, and cost estimates or explanations of expenses.

Please do not upload large documents such as an entire town plan or reports containing extensive data. If submitting maps or other graphics to illustrate information pertinent to the grant application, please use a commonly available format like PDF or JPG and compress the file, if possible.

There are five document uploads (or mailings) available on this form. If you require more upload fields, enter the first five and then save. The system will then add an additional five rows. If mailing documents, name them in the Document Name box provided and select "mailed to DHCD" and SAVE.

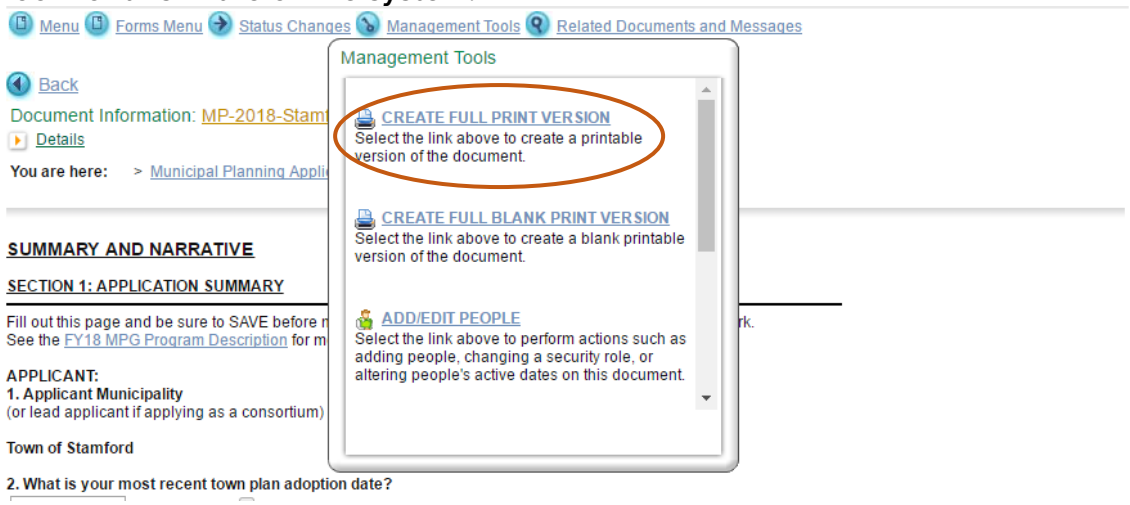
Look for this in the online system:



Completing and Submitting Your Application

Viewing Your Completed Application. Once you have completed your application, you have the option to view it as a PDF. Use the Management Tools link in the menu to "Create Full Blank Print Version". Your PDF will contain completed and SAVED application pages only. Uploaded attachments will show as the "Document Name" only.

Look for this in the online system:



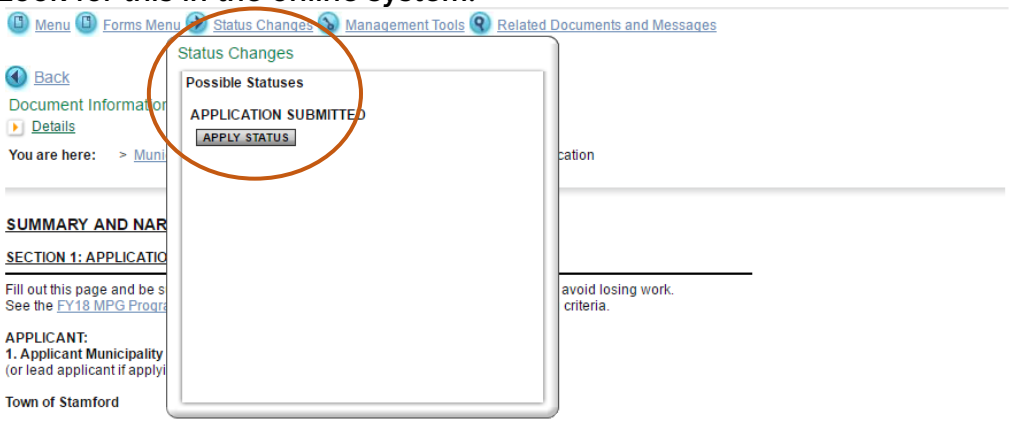
Checking for Errors. You may check your document for submission errors throughout the writing process (they will also appear at the top of each individual form page when you click save). This option will alert you if there are any required items that are missing from your application. Under the "Management Tools" menu select "Check for Errors." A list of pages with errors will appear. Click the highlighted form to go directly to the page with errors and make corrections. SAVE corrections on each page.

Attention. If there are missing required items, the system will **not** allow you to submit an incomplete application. Error Checking in advance will help minimize the possibility of receiving error messages at the time of submission. If you have questions about any error messages that you are receiving, please contact us.

Electronically Submitting Your Application. Both the Municipal/Authorizing Official for your municipality and the Grant Administrator roles are authorized to electronically submit your application. Submit only when the application is complete, no more changes are required, and all error messages have been addressed.

Submit the application by using the Status Changes section of the menu.
Click the "Apply Status" button beneath the "Application Submitted" option.

Look for this in the online system:



If any errors exist in the application, they will appear at that time and they must be fixed before the application can be submitted. If no errors exist, you will be prompted to confirm the decision to submit by clicking “I agree.”

Please Note: We will not give consideration to mailed applications. However, if you have supporting documentation that you are unable to scan and upload, please document them on the “Application Attachments” form. Name the document and select “Mailed to DHCD,” and mail to the address below:

All mailed documents **must be postmarked by the application due date,** Thursday, October 1, 2020**.**

Municipal Planning Grant Program
Division of Community Planning & Revitalization
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Montpelier, VT 05620-0501