

October 21, 2025



Grant Basics Series

Grant Management

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Vermont League of Cities and Towns

Grant Basics Series



Session I - Before the Grant

- ✓ Picking the right project
- ✓ Understanding roles
- ✓ Working as a team
- ✓ Assessing capacity
- ✓ Understanding grant readiness

Session II - Developing and Funding the Project

- ✓ Project development lifecycle
- ✓ Building a funding stack
- ✓ Project budgets
- ✓ Grants and how they work
- ✓ What funders want (and don't want) to see in application
- ✓ Understanding local match
- ✓ Accessing capacity and filling gaps

Session III - The Application

- ✓ Grant guidance
- ✓ The application narrative
- ✓ The application budget
- ✓ Understanding and finding local match
- ✓ Accessing capacity and filling gaps

Session IV - Grant Management

- ✓ Intro to grant management
- ✓ The grant agreement
- ✓ Grant implementation and management
- ✓ Monitoring and reporting
- ✓ Evaluation
- ✓ Grant closeout
- ✓ Best practices



are
you
ready?

Today's Topics

- Intro to Grant Management
- The Grant Agreement
- Grant Implementation and Management
- Monitoring and Reporting
- Evaluation
- Grant Closeout
- Best Practices

The recorded training will be posted in the VLCT Resource Library at <https://www.vlct.org/resource-library>



Grant Management vs Project Management

What's the difference?

Grant Management

Focuses on use of grant funds

- Understands how grant funds can be used
- Plans and tracks grant goals and timelines
- Manages funder and partner relationships
- Makes sure grant rules are followed
- Writes and sends progress and final reports

Project Management

Focuses on project success

- Plans and tracks project scope
- Plans and tracks project goals and timelines
- Manages the project team so the project is completed on time and within budget

Together, they align resources so that both the grant and the project are successful!

Grant Management

Why is it important?

Effectively managing your grants, satisfying funder requirements, and timely and accurate reporting:

- ensure your organization can keep and use awarded funds.
- keep your own internal tracking and accounting processes running smoothly.
- help you develop a proven track record, which helps significantly with future grant seeking.
- foster stronger relationships with your funders over time.

Funders look for more than a good project.

They want successful grant managers.

Grant Management

Why is it important?

Poor grant management results in:

- Lost awards (failure to meet conditions)
- Poor audit results
- Damage to reputation
- Missed reimbursement opportunity or return of funds
- Difficulty securing future grant awards

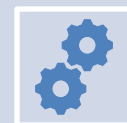
Poor grant management impacts the funder, since they are audited too.

Grant Management

Typical challenges



Tools



Processes



Time



Staffing



Knowledge



Experience

Grant Management

Where to start?

Pillars of Effective Management

- Written policies and procedures that follow the grantor's rules
- Financial management system with grant management capacity ...
 - to keep grant funds separate
 - to produce accurate and timely budget vs. actual reports
- Experienced people managing the grant

Policies and Procedures

Minimum requirements



Federal

(2 CFR Part 200 and federal laws)

- Personnel and Benefits
- Procurement (purchasing)
- Travel
- Drug Free Workplace
- Conflict of interest (differs from State)
- Internal controls (include cybersecurity)
- Equipment and property management
- Subrecipient monitoring and management (granting funds to partners)
- Cost Allocation (charging overhead)



State

(AoA Bulletin 5 and state laws)

- Conflict of interest (differs from Federal)
- Internal controls
- Plus required federal policies when federal funds included



Local

- Adopted policies and procedures

TIP!

Reference - don't repeat - policy language in other policies!

Examples:

- ...as described in the Town's personnel policy...
- ...per the Town's Code of Conduct and Conflict of Interest Policy...

Financial Management

Essential principals

The meticulous handling of grant funds ensures that every dollar used furthers your project's goals and impact.

- Financial software is your best friend
- Know your grant terms and conditions
- Establish financial policies and controls together
- Track expenditures by grant and verify cost eligibility
- Regularly compare your budget to what's been spent
- Accurate and on-time reporting is essential
- Review reports with your project management team
- Keep backup documentation
- Prepare for financial audits

TIP!

Build the grant application budget with your finance staff or Treasurer.

They need to know what will be required *before* the grant agreement is signed.

Build Team Experience

Accessing capacity and filling gaps

Grants require having capacity not only to write and manage them, but also to complete the project and maintain it over time.

You can add capacity by:

- Enlisting experienced volunteers to help.
- Hiring staff or sharing a position with another municipality
- Working with a service provider (RPC, RDC, etc.)
- Retaining a consultant

Build Team Experience

Invest in your own capacity!

Learn More about Grant Management

- The internet is your friend*
- Use State and Federal online coaching
- Seek advice from your neighbors, [RPC](#), and [VLCT](#)

Start Internal Conversations

- Brainstorm what's working, what could be strengthened, and what needs to be crafted

Invest in Continuous Improvement Culture

- Streamline your processes
- Understand your tools, their limits, and their potential

***Buyer Beware!**

Municipalities have different Federal rules than other entities. The internet can help you find information, but you still need to know how to use it based on your local government's needs.

Sources of Grant Money

Public

(more restrictive = more “strings”)

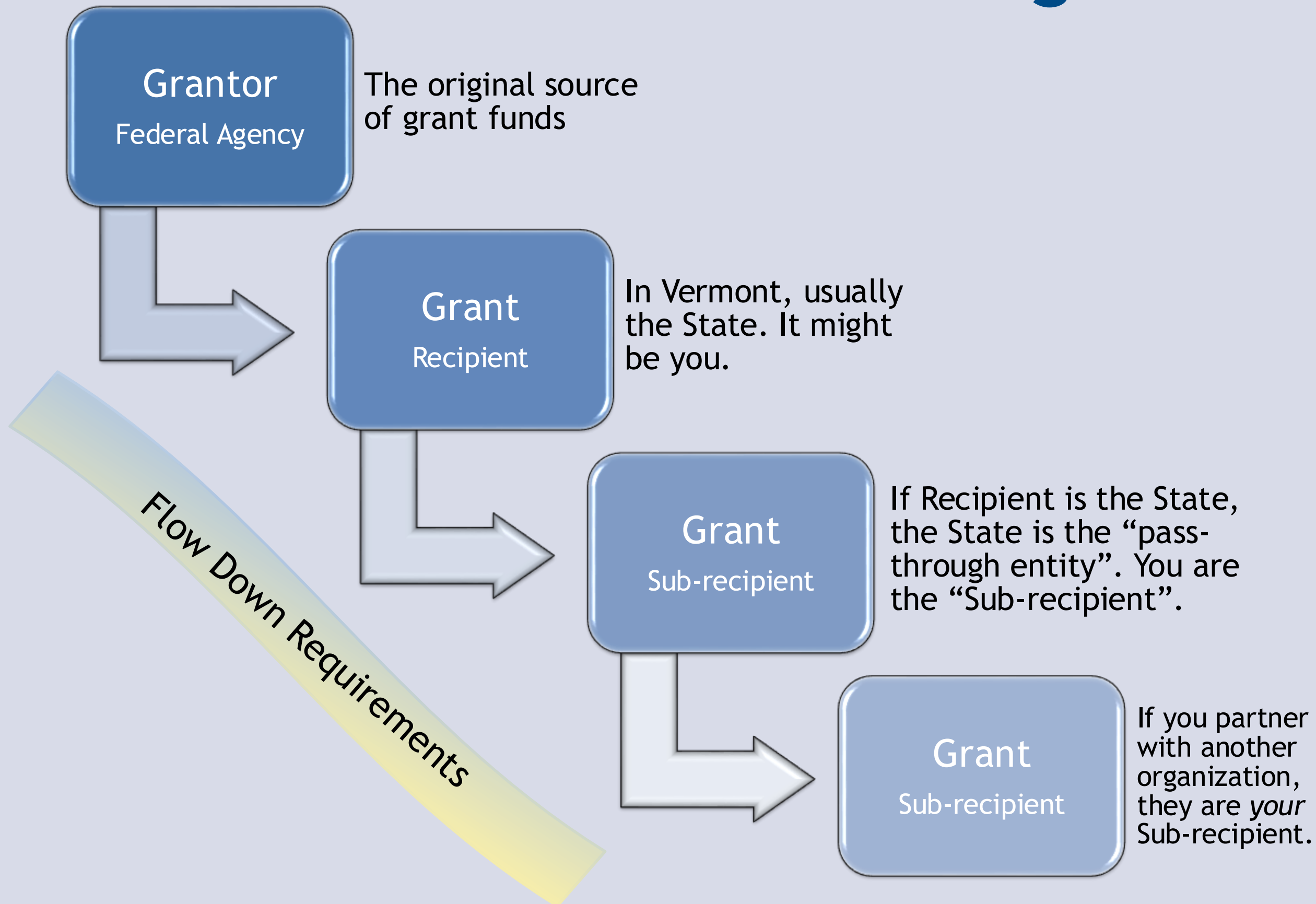
- **Federal Grants** - grant source IS the federal government
- **State Grants** - grant source is NOT the federal government

Private

(less restrictive = less “strings”)

- **For-profit or Non-profit** - grant source is a private entity (example: AARP [Community Challenge Grants](#) and local banks)
- **Foundation** - grant source is a philanthropic organization (example: [VT Community Foundation](#))

When is a State grant not a State grant?



All Sub-recipients must comply with “Guidance for Federal Financial Assistance”.

2 CFR Part 200, the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards, is a federal framework for grants management.

Sub-recipient examples:

- HUD CDBG → VT Agency of Commerce → You
- FEMA Public Assistance → VT Emergency Management → You
- EPA Clean Water State Revolving Fund → VT DEC Wastewater Loans → You
- FHWA Transportation Alternatives → VTrans → You

Your contractors are not your sub-recipients.

The Grant Agreement

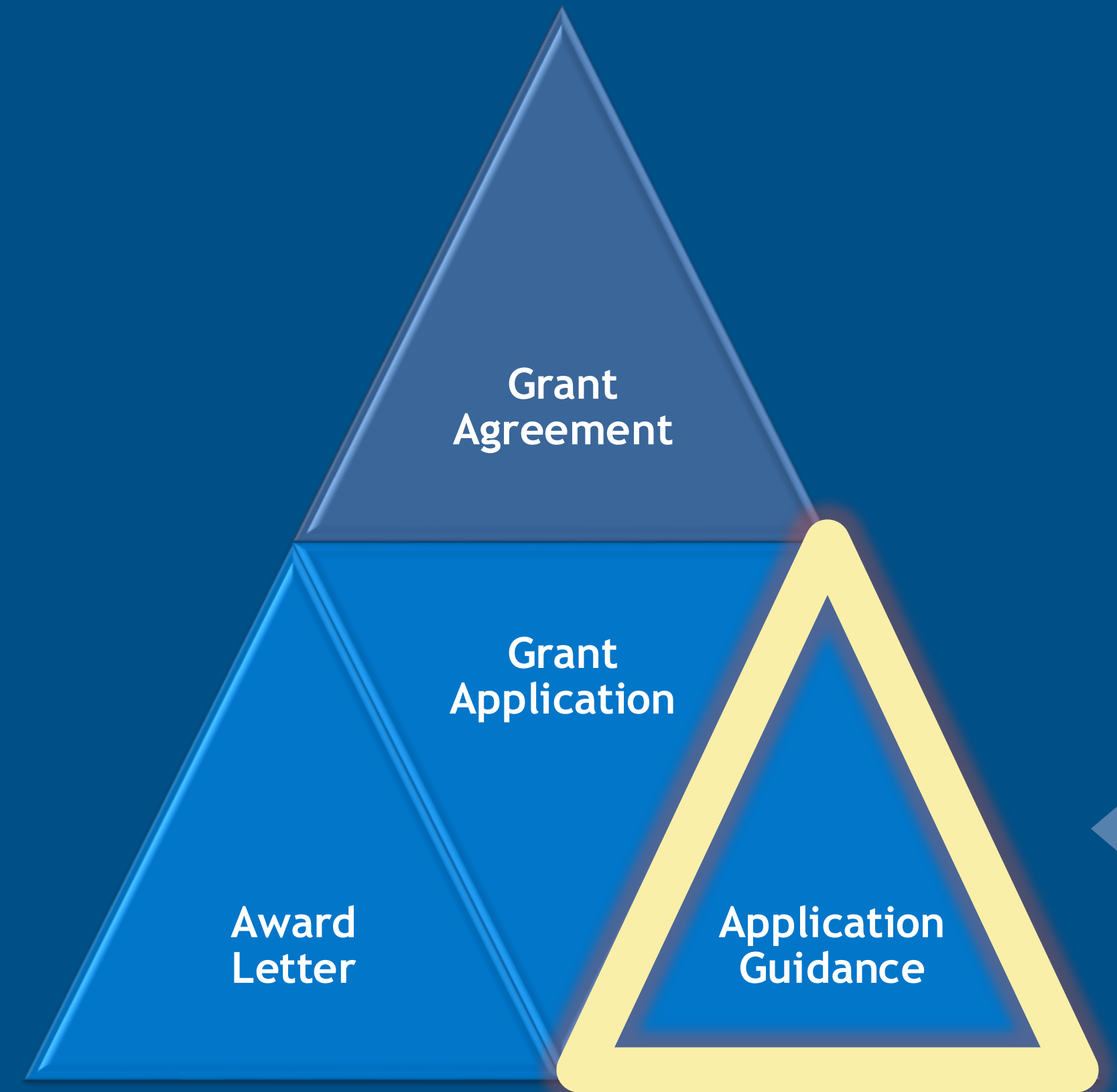
Building success

Application Guidance

The funder's aspirations, goals, and rules for the grant.

Grant program guidance and application materials tell you about most requirements.

TIP: Read guidance thoroughly!



The Grant Agreement

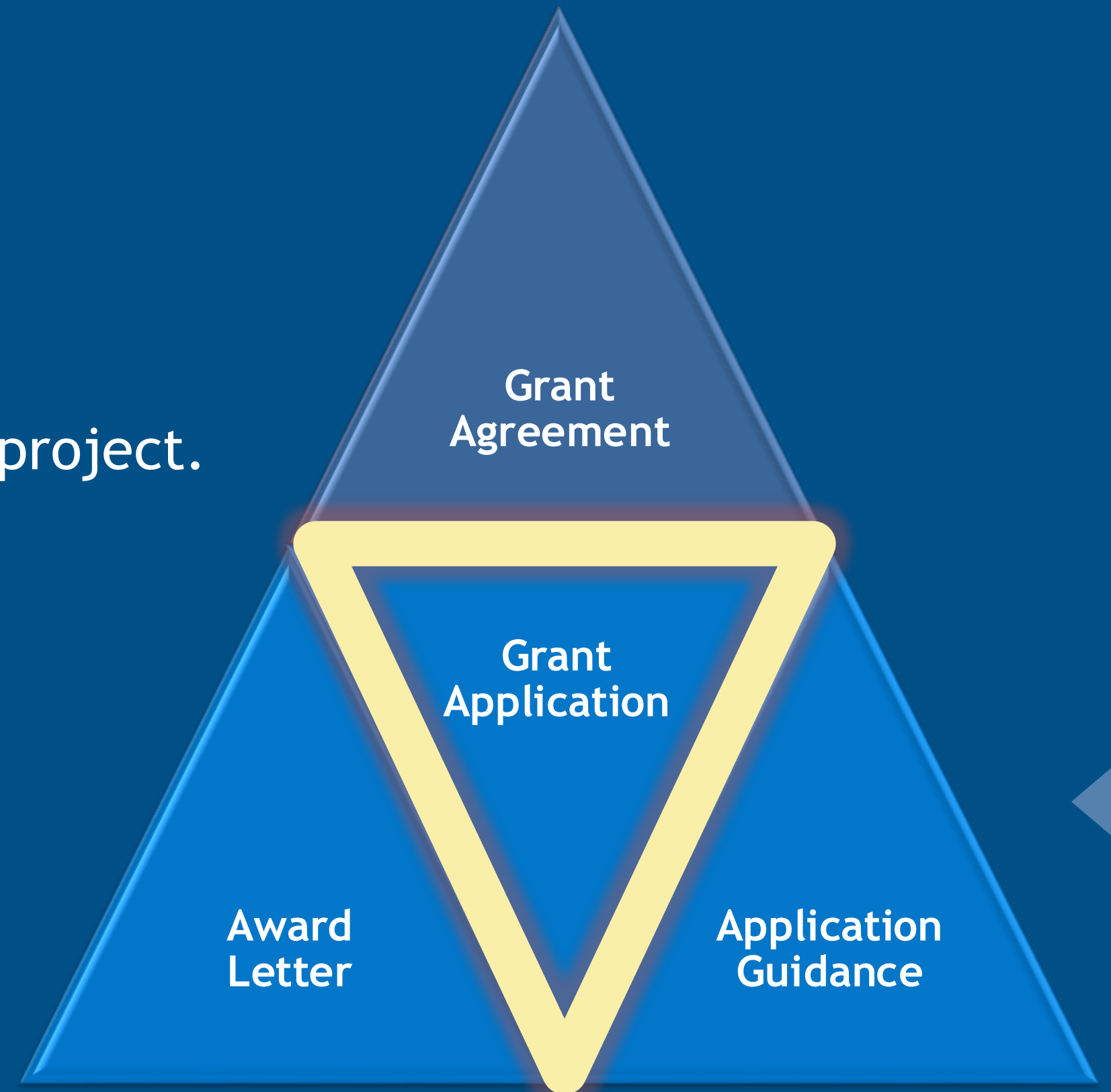
Building success

Grant Application

Your hopes, dreams, and commitments for a project.

You commit to...

- ✓ Meet match (local share) requirements
- ✓ Follow the grant program's schedule
- ✓ Perform eligible activities
- ✓ Submit required reports
- ✓ Met compliance requirements
- ✓ Pay for activities prior to reimbursement
- ✓ Do what you say you are going to do!



The Grant Agreement

Building success

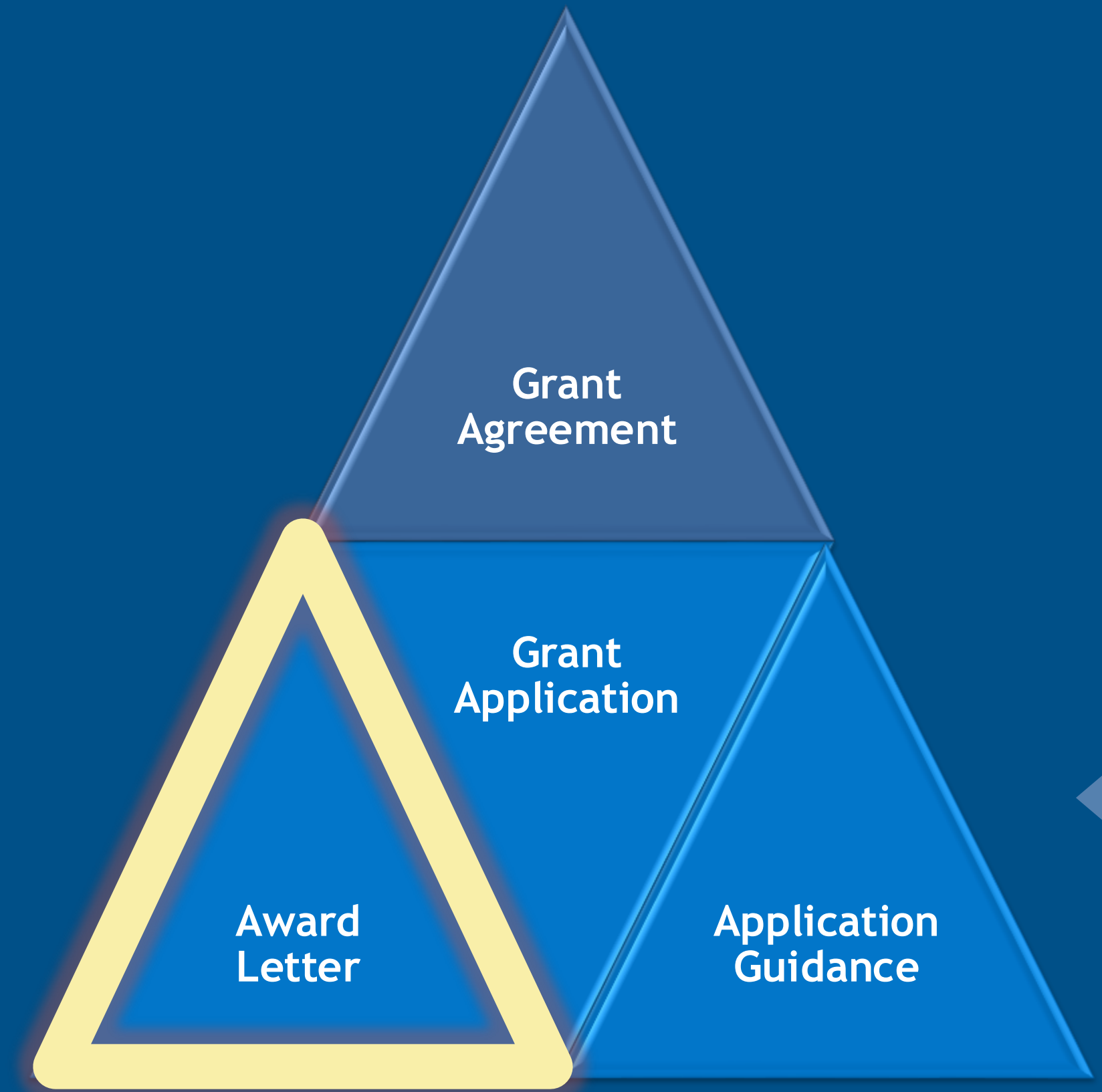
Award Letter

Notification of an award.

A cause for celebration!

👉 But don't start grant-funded work yet.

The letter may contain pre-award conditions (actions) you need to accomplish before you receive a grant agreement offer and can start grant-funded activities.

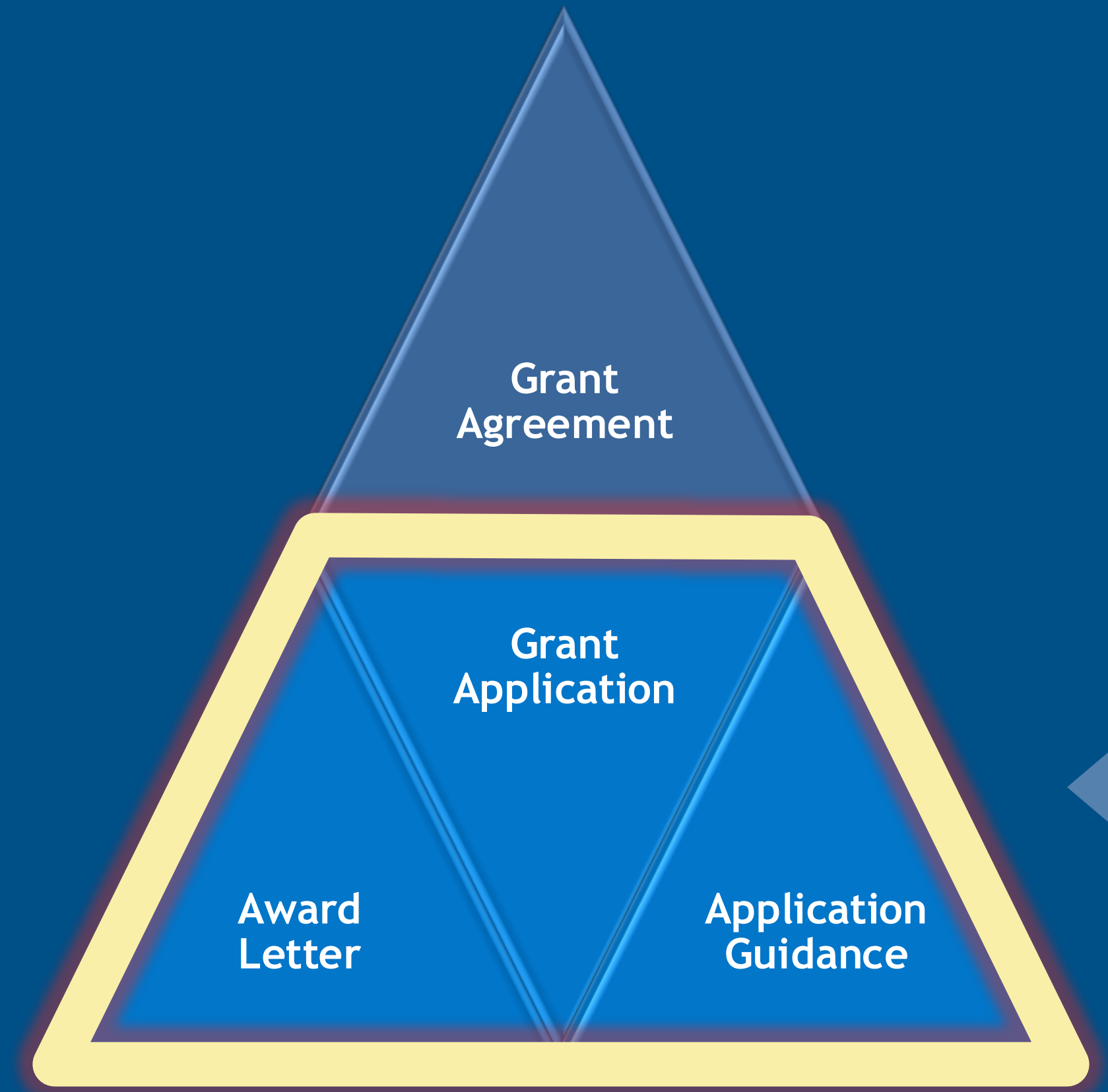


The Grant Agreement

Building success

To build a strong base for your grant agreement...

- ✓ Know what the grant requires and allows
- ✓ Don't make commitments you can't honor
- ✓ Read and follow through on Award Letter requirements



The Standard Grant Agreement Contents*

- Cover page (if applicable)
- Standard Agreement
- Scope of Work
- Payment Provisions
- Customary Provisions
- Other Provisions (if applicable)
- Special Conditions (if applicable)

* For a grant from/through the State of Vermont

VERMONT
STATE OF VERMONT
STANDARD SUBRECIPIENT AGREEMENT
(Federal Fund Source to Non-State Subrecipient)
VERMONT DEPARTMENT OF PUBLIC SAFETY
FEDERAL PROGRAM TITLE
FEMA Public Assistance
AGREEMENT WITH
Agreement #02140-
Award Amount: \$

DPS Financial Office Use Only

☐ Unique Entity ID# Checked on SAM.gov	Date: _____	Initials: _____
☐ Suspension and Debarment Exclusions Checked on SAM.gov	Date: _____	Initials: _____
☐ DPS Restricted Parties List Checked	Date: _____	Initials: _____
☐ Risk Assessment Completed	Date: _____	Initials: _____
☐ Subrecipient vs. Contractor Determination Form Completed	Date: _____	Initials: _____
☐ Single Audit Check & Delinquent SAR (VT Bulletin 5_Eligibility Query in VISION)	Date: _____	Initials: _____
☐ BGS Office of Purchasing & Contracting Debarment List Checked https://bgs.vermont.gov/purchasing-contracting/debarment	Date: _____	Initials: _____
☐ Certificate of Insurance	Date: _____	Initials: _____
☐ Executive Compensation Data Collected (if subaward \$30K or over)	Date: _____	Initials: _____
☐ VT Grant Tracking (VISION)	Date: _____	Initials: _____
☐ FFATA (if \$30K or over)	Date: _____	Initials: _____
☐ FFATA Executive Compensation Amount (if required)	Date: _____	Initials: _____

Entered In: _____

Federal Fund Standard Format to Non-State Subrecipients Only



Read the Entire Grant Agreement!

Read the WHOLE thing, not just the cover page!

- It is a legal instrument of financial assistance between you and the funder.
- Acceptance of the agreement content is assumed unless objections are raised before signing.
- Once executed (fully signed), it is a binding agreement.

And read the cover letter/email too!

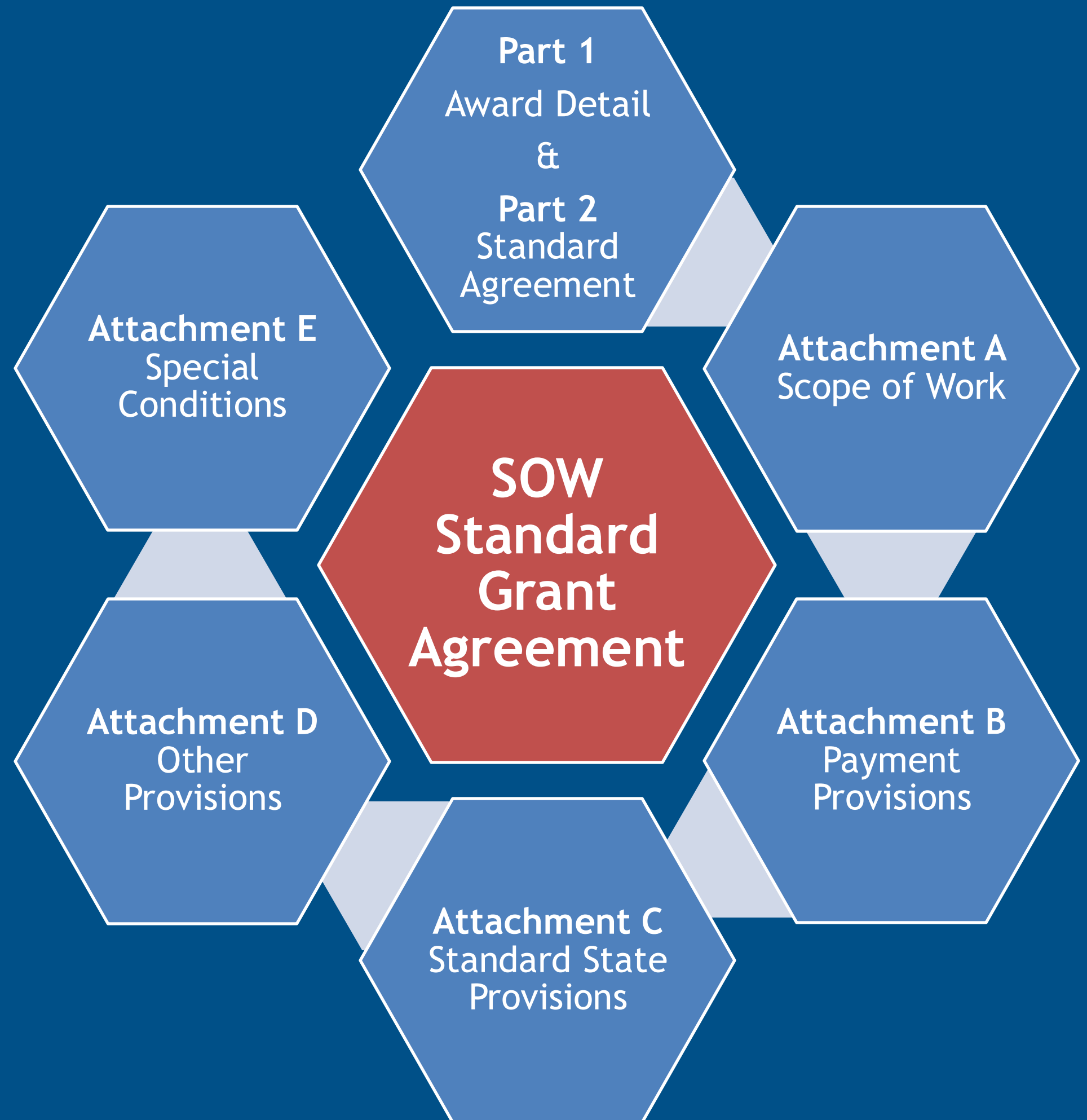
- Don't miss response and acceptance deadlines and lose your grant.

TIPS!

Print your grant award documents and highlight important details.

Take notes as you read then read them at least quarterly.

Regardless of the source of funds (federal or state), all State of Vermont grant agreements should have a similar format.



SOV Standard Grant Agreement

Part 1 - Grant Award Detail

Four Sections:

- Section I - General Grant Information
- Section II - Subrecipient Award Information
- Section III - Funding Allocation
- Section IV - Contact Information

STATE OF VERMONT GRANT AGREEMENT				Part 1-Grant Award Detail	
SECTION I - GENERAL GRANT INFORMATION					
1 Grant #: _____		2 Original ☐ Amendment # ☐			
3 Grant Title: _____		4 Amount Awarded This Action: \$0.00		5 Total Award Amount: \$0.00	
6 Amount Previously Awarded: \$0.00		7 Award End Date: _____		8 Subrecipient Award: YES ☐ NO ☐	
9 Award Start Date: _____		10 Grantee Name: _____		11 Zip Code: _____	
12 Supplier #: _____		13 State: _____		14 Business Unit: _____	
15 Grantee Address: _____		16 City: _____			
17 State Granting Agency: _____		18 Description: _____			
19 Performance Measures: YES ☐ NO ☐		20 Match/In-Kind: _____		21 Scope of Work: ☐ Other: ☐	
22 If this action is an amendment, the following is amended: _____					
23 Amount: _____		24 Funding Allocation: ☐		25 Performance Period: _____	
SECTION II - SUBRECIPIENT AWARD INFORMATION					
26 Indirect Rate: _____ %		27 #FYA: YES ☐ NO ☐		28 #A&D: YES ☐ NO ☐	
29 Grant Identifier (UII) #: _____		30 Indirect Rate: _____ % (Approved rate or current federal de minimis)			
31 Grantee Fiscal Year End Month (date format): _____					
32 UEI Registered Name (if different than USGSM Supplier Name in Box 23): _____					
SECTION III - FUNDING ALLOCATION					
STATE FUNDS					
Fund Type	33 Awarded Previously	34 Award This Action	35 Cumulative Award	36 Special & Other Fund Descriptions	
General Fund			\$0.00		
Special Fund			\$0.00		
Global Commitment (non-renewable funds)			\$0.00		
Other State Funds			\$0.00		
FEDERAL FUNDS (Includes subrecipient Global Commitment funds)				Required Federal Award Information	
37 ALN#	38 Program Title	39 Awarded Previously	40 Award This Action	41 Cumulative Award	42 Total Federal Award
43 Federal Awarding Agency: _____					
44 Federal Award Project Description: _____					
45 Federal Awarding Agency: _____					
46 Federal Award Project Description: _____					
47 Federal Awarding Agency: _____					
48 Federal Award Project Description: _____					
49 Federal Awarding Agency: _____					
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51 Federal Awarding Agency: _____					
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111 Federal Awarding Agency: _____					
112 Federal Award Project Description: _____					
113 Federal Awarding Agency: _____					
114 Federal Award Project Description: _____					

The Standard Grant Agreement

Part 1 - Grant Award Detail

SECTION I - GENERAL GRANT INFORMATION

STATE OF VERMONT GRANT AGREEMENT		Part 1-Grant Award Detail	
SECTION I - GENERAL GRANT INFORMATION			
¹ Grant #:		² Original ☐	Amendment # ☐
³ Grant Title:			
⁴ Amount Previously Awarded: \$0.00	⁵ Amount Awarded This Action: \$0.00	⁶ Total Award Amount: \$0.00	
⁷ Award Start Date:	⁸ Award End Date:	⁹ Subrecipient Award: YES ☐ NO ☐	
¹⁰ Supplier #:	¹¹ Grantee Name:		
¹² Grantee Address:			
¹³ City:		¹⁴ State:	¹⁵ Zip Code:
¹⁶ State Granting Agency:			¹⁷ Business Unit:
¹⁸ Performance Measures: YES ☐ NO ☐	¹⁹ Match/In-Kind: Description:		
²⁰ If this action is an amendment, the following is amended: Amount: ☐ Funding Allocation: ☐ Performance Period: ☐ Scope of Work: ☐ Other: ☐			

The Standard Grant Agreement

Part 1 - Grant Award Detail

SECTION II - SUBRECIPIENT AWARD INFORMATION		
²¹ Grantee Identifier [UEI] #:	²² Indirect Rate: % (Approved rate or current Federal de minimis)	²³ FFATA: YES ☐ NO ☐
²⁴ Grantee Fiscal Year End Month (MM format):		²⁵ R&D: YES ☐ NO ☐
²⁶ UEI Registered Name (if different than VISION Supplier Name in Box 11):		

SECTION II - SUBRECIPIENT AWARD INFORMATION

A “subrecipient” relationships exists when the grant source is federal money. But, some State agencies use this section even if the grant source is only state money.

- (21) **Grant Identifier [UEI] #** - your 12-character alphanumeric Unique Entity Identifier assigned, managed and owned by the federal government through [SAM.gov](https://sam.gov). It validates your legal business name and address.
- (22) **Indirect Rate** - Indirect costs are overhead costs....and there’s a special federal process if you want to recoup them. You can charge nothing, 10% or submit a full proposals that determines actual costs. Know the rules before charging indirect costs.
- (23) **FFATA** - Federal Funding Accountability and Transparency Act. You may have reporting requirements if you receive a grant directly from the federal government or are a state grantee.

The Standard Grant Agreement

Part 1 - Grant Award Detail

SECTION III - FUNDING ALLOCATION

Does your award include federal funds?

Subrecipient Annual Reports are due annually within 45 days after your fiscal year end date. If you file late, new grant awards are held until you file this report.

TIP!

Keep a master record about all grant agreements. It makes filing your Subrecipient Annual Report easier.

SECTION III - FUNDING ALLOCATION							
STATE FUNDS							
Fund Type		²⁷ Awarded Previously	²⁸ Award This Action	²⁹ Cumulative Award	³⁰ Special & Other Fund Descriptions		
General Fund				\$0.00			
Special Fund				\$0.00			
Global Commitment (non-subrecipient funds)				\$0.00			
Other State Funds				\$0.00			
FEDERAL FUNDS (includes subrecipient Global Commitment funds)					Required Federal Award Information		
³¹ ALN#	³² Program Title	³³ Awarded Previously	³⁴ Award This Action	³⁵ Cumulative Award	³⁶ FAIN	³⁷ Fed Award Date	³⁸ Total Federal Award
				\$0.00			
³⁹ Federal Awarding Agency:			⁴⁰ Federal Award Project Descr:				
				\$0.00			
Federal Awarding Agency:			Federal Award Project Descr:				
				\$0.00			
Federal Awarding Agency:			Federal Award Project Descr:				
				\$0.00			
Federal Awarding Agency:			Federal Award Project Descr:				
				\$0.00			
Federal Awarding Agency:			Federal Award Project Descr:				
Total Awarded - All Funds		\$0.00	\$0.00	\$0.00			

The Standard Grant Agreement

Part 1 - Grant Award Detail

SECTION IV - CONTACT INFORMATION	
⁴¹ STATE GRANTING AGENCY	⁴² GRANTEE
NAME:	NAME:
TITLE:	TITLE:
PHONE:	PHONE:
EMAIL:	EMAIL:

SECTION IV - CONTACT INFORMATION

- **State Granting Agency** - The program staff person who will administer the grant for SOV. This is the person you talk to about questions, clarifications, grant agreement conditions, amendments, etc.
- **Grantee** - Who should be your municipality's designated point of contact for grants? A person knowledgeable about the grant and the project as well as your municipality's policies, procedures, systems, and processes.

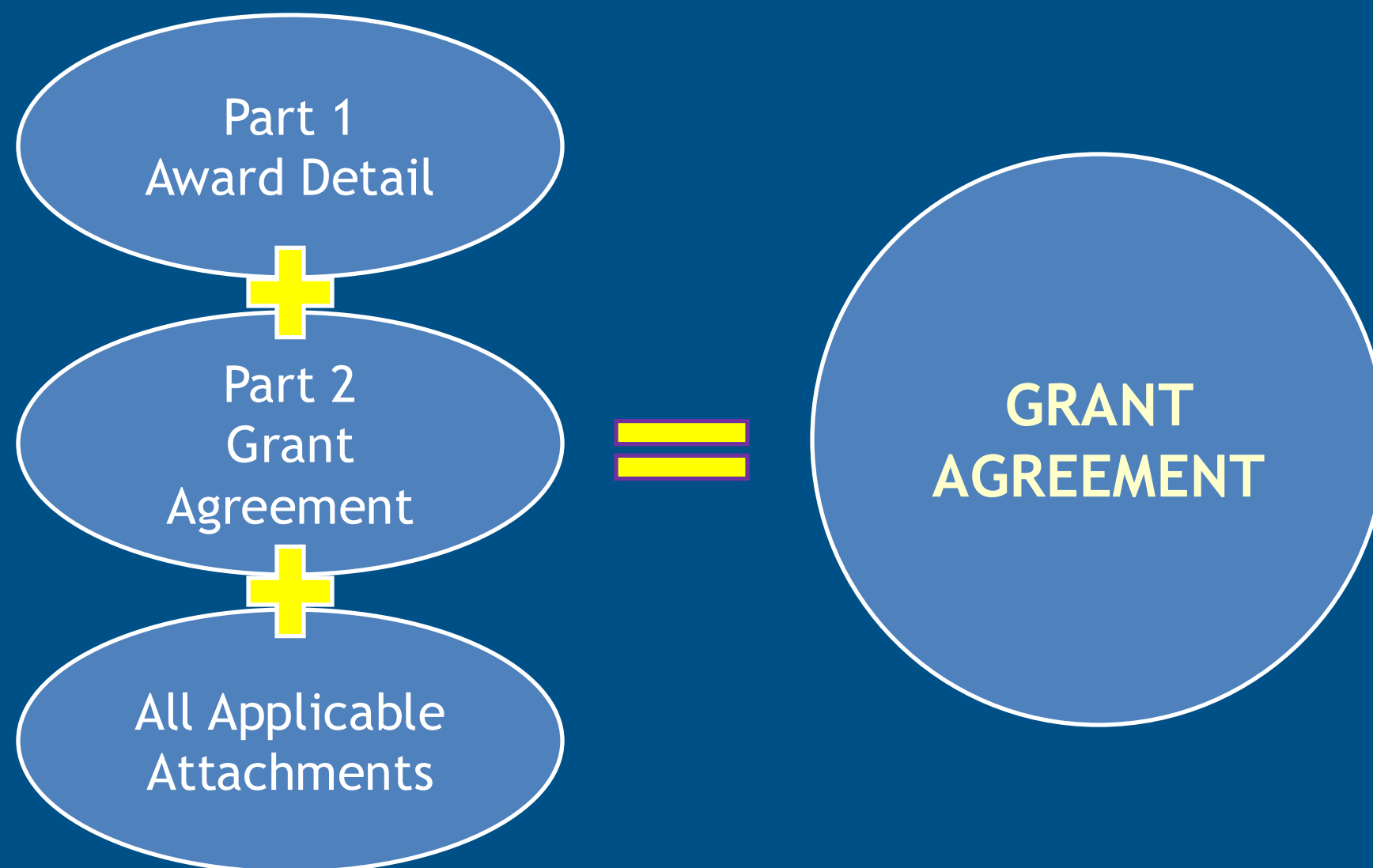
TIPS!

- **Develop a list of the responsibilities and duties of your grant manager**, then make sure they have been communicated to, and understood by, the person filling this role.
- **Assign a town email address to any volunteer that is acting as your grant or project manager.** All their correspondence related to the grant is subject to public records law.

The Standard Grant Agreement

Part 2 - Grant Agreement

- Serves as a cover sheet
- Has signatures and is titled “Grant Agreement,”
HOWEVER, it alone is NOT your grant agreement!



State of Vermont
Standard Grant Agreement

Agreement # _____

Part 2 – Grant Agreement

1. Parties: This is a Grant Agreement between State of Vermont
Department of _____, (hereinafter called “State”)
Division of _____
And _____
with principal place of business at _____
(hereinafter called “Grantee”).

It is the grantee’s responsibility to contact the Vermont Department of Taxes to determine if, by law, the grantee is required to have a Vermont Department of Taxes Business Account Number.

2. Subject Matter: The subject matter of this Grant Agreement is _____.

3. Award Details: Amounts, dates and other award details are as shown in the attached *Grant Agreement Part 1-Grant Award Detail*. A detailed scope of work covered by this award is described in Attachment A

4. Amendment: No changes, modifications, or amendments to the terms and conditions of this Grant Agreement shall be effective unless reduced to writing, numbered, and signed by the duly authorized representative of the State and Subrecipient.

5. Cancellation: This Grant Agreement may be suspended or cancelled by either party by giving written notice at least _____ days in advance.

6. Attachments: This Grant consists of _____ pages including the following attachments that are incorporated herein:
Grant Agreement-Part 1 – Grant Award Detail
Grant Agreement-Part 2 – Grant Agreement
Attachment A – Scope of Work To Be Performed
Attachment B – Payment Provisions
Attachment C – Customary State Grant Provisions
Attachment D – Other Provisions

7. Order of Precedence: Any ambiguity, conflict or inconsistency in the Grant Documents shall be resolved according to the following order of precedence:
1) Grant Agreement Part 1 and Part 2
2) Attachment C
3) Attachment D (if applicable)
4) Attachment A
5) List other attachments in order of precedence
6) Attachment B

The Standard Grant Agreement

Attachment A - Scope of Work

Contents generally should reflect what you submitted in the grant application.

The level of detail included and how the scope is presented will vary by agency.

- May resemble a task list.
- May include performance measures.
- May include progress reporting elements.
- Should list grant deliverables.

Scope examples:

Project Scope of Work: The grantee shall proceed with the project as follows for each pre-identified municipality to be served in the region:

- 3.1 Conduct a review to determine municipal readiness to apply for an NDA by preparing a draft application, maps, and potential boundaries to evaluate compliance with the application requirements; and
- 3.2 If the draft application appears to meet the program requirements, schedule a pre-application meeting with the Department and the municipality; and prepare any necessary revisions requested by the Department; and
- 3.3 If the draft application cannot meet program requirements, identify necessary updates to the municipal planning framework with any necessary and targeted bylaw amendments in markup format and issue a memo to municipal officials; or
- 3.4 If deemed ready to proceed with a final application, prepare a final application for Downtown Board consideration and conduct any needed coordination with municipal officials to finalize the application.

Table 1: Milestones & Deliverables

#	Milestone	Deliverables	Due Date
1.	Quarterly Check-in with Technical Project Manager (TPM)	• Engage in Progress Meeting with TPM • Submit Required Program Quarterly Reporting • Submit Required State Financial Report Form	10/31/2022
2.	Quarterly Check-in with Technical Project Manager (TPM)	• Engage in Progress Meeting with TPM • Submit Required Program Quarterly Reporting • Submit Required State Financial Report Form	01/31/2023

The Standard Grant Agreement

Attachment B - Payment Provisions

- Shows maximum grant amount; may show budget detail (how grant funds will be spent)
- Includes reporting requirements
- Describes payment of funds
 - On what basis payments are made - actual cost, deliverable based, schedule based, percent of project completed
 - Requirements for invoices
- Discusses Closeout requirements
 - Demonstrate scope of work completed
 - All required reporting submitted
 - Verification of all requirements met
 - Final invoice and payment

**ATTACHMENT B
PAYMENT PROVISIONS**

The State agrees to compensate the Subrecipient for services performed, up to the Federal share amount stated below, provided such services are within the scope of the Agreement and are authorized as provided for under the terms and conditions of this Agreement.

Budget Detail:	
Salaries and Benefits	\$
Contractual	\$
Supplies	\$
Travel & Mileage	\$
Equipment *	\$
Other Costs	\$
Indirect Cost **	\$
Total Federal Share	\$
Total Non-Federal Share (Match)	\$

Subrecipient agrees that grant funds awarded will be used to supplement existing funds for program activities and will not supplant (replace) non-Federal funds. Subrecipients must be able to document local funds were not supplanted with funds from this award (for example: personnel expenses must be supported with actual budget allocations which include this funding source).

* Federal equipment threshold is \$5,000.00¹. Please reference Federal equipment compliance requirements.² Subrecipients must follow their own procurement policy unless the Federal and State requirements are more restrictive.

** Current Rate Approval Letter (under 2 CFR 200.332(a)(4)) must be on file with DPS. It is also important to note that indirect rates may be subject to statutory caps of the Federal program which supersede the requirements of the Uniform Guidance. Refer to Bulletin 5 for further guidance.

During the performance of this Agreement, any of the cost categories may be increased or decreased by up to 10% of the total award with prior written approval from the DPS Finance Office. Approval will be given provided:

1. It is within the Total Award Amount in effect at the time of the adjustment.
2. It does not change the Scope of Work in Attachment A.

Modifications outside of what is outlined above will require an official amendment.

PROGRAMMATIC REPORTING REQUIREMENTS:

- Under 2 CFR 200.329 (e) Significant Developments: Events may occur between the scheduled performance reporting dates that have significant impact upon the supported activity. In such cases, the subrecipient must inform DPS as soon as the following types of conditions become known:
 1. Problems, delays, or adverse conditions which will materially impair the ability to meet the objective of the award. This disclosure must include a statement of the action taken, or contemplated, and any assistance needed to resolve the situation.
 2. Favorable developments which enable meeting time schedules and objectives sooner or at less cost than anticipated or producing more or different beneficial results than originally planned.

¹ 2 CFR § 200.313 (d)(1)

The Standard Grant Agreement

Attachment C - Standard State Provisions for Grants

“The Strings” - 32 State requirements

- Acknowledges legal requirements
- Protects State interests
- Includes required insurance coverages
- Addresses cybersecurity responsibilities
- Some requirements pertaining to federal funding
- Requirements pertaining to only State-funded grants

Attachment C is available on the VT Buildings and General Services Purchasing and Contracting [Forms webpage](#).



The Standard Grant Agreement

Attachment D - Other Provisions

Grants are not one size fits all!

“Other provisions” are specific to each grant. They can contain federal requirements such as:

- Certifications regarding lobbying
- Debarment and suspension
- Drug-Free Workplace
- Procurement
- Organizational and financial requirements
- Procedures (written) for payroll, purchasing, contracting, inventory control
- Conflict of Interest
- Confidentiality and security of information
- Reporting templates
- Work product ownership and intellectual property protections

The Grant Agreement

Key takeaways

- ✓ ***Grant program guidance*** - Read it carefully and thoroughly. It contains important details for not only the application process but the entire life of the grant.
- ✓ ***Award letter*** - Read it carefully and thoroughly. It could contain pre-award conditions that must be met before you will receive a grant agreement.
- ✓ ***Grantee Point of Contact*** - List the responsibilities/duties of your grant manager and make sure they have been communicated to, and understood by, the person filling this role.

✓ ***Grant award documents*** -

- ***Read the whole thing and don't skim.*** Read ALL parts of the grant agreement, attachments, and ***the cover letter too!***
- ***Print them*** - use a highlighter to call out important details.
- ***Take notes*** as you read.
- ***Review your notes quarterly.*** Trust us, you won't remember all the details on Day 1, much less on Day 365.
- ***Ask questions.*** Your funder should have the answers.

Grant Implementation and Management

Where to begin?

- Set up a grant project file (ex. Grants: CDBG, DEC; Contracts: SOV)
- Familiarize yourself with grant rules
 - Federal: Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards or 2 CFR Part 200, Updates were made 10/01/24
 - State: Agency of Administration Bulletin 5 and Bulletin 3.5
 - The granting agency's rules (read grant agreement fine print, click through links, look up references, ask questions)
- Know when prior approvals are needed
- Know the rules for contracts and subawards
- Understand payment requests – How, when, and how often?
- Schedule regular meetings between the grant and project manager

Monitoring and Reporting

Monitoring

How do agencies monitor their grantees?

- Telephone or desk reviews and documentation - daily
- On-site audits - occasionally
- Single Audits - when required federally

The most common monitoring findings are:

- Missing policies or procedures
- Lack of documentation to support grant activities
- Missteps when hiring contractors

Having good documentation is essential for a successful monitoring event!

Monitoring and Reporting

Financial reporting

The Treasurer's or Finance Person's Role

- Detailed and timely
- Adequate financial records
- Maintain supporting documents
- Statistical record
- Records retention

All original documents should be kept in the municipality's file at the municipal office!

Monitoring and Reporting

Progress reporting

Tell the funder what *they* want to know

- Workplan progress
 - outputs - plans, products, meetings
 - outcomes - results, effects, impacts
- Lessons learned
- Adherence to schedule
- Budget versus actuals

Submitting complete and on-time progress and financial reports is the #1 measure of a successful project and a grantee.

Evaluation

Helps funder agencies and grant recipients learn what works, for whom, and under what circumstances

If you pursue evaluation:

- Budget for the costs
- Know how you'll measure success
- Ask stakeholders, participants, beneficiaries, and your funder to provide feedback
- Report what you've learned about challenges, achievements and lessons learned

Grant Closeout

Required documentation

State and Federal Grants

- Final financial report
- Cost share/match documentation
- Program income (if earned)
- Final progress report

Additional for Federal Grants

- Property, equipment & other (if applicable)
- Disadvantaged business enterprises affirmative actions
- Lobbying limits
- Single Audit

**Read and file your
grant closeout
letter!**

**It may contain
additional closeout
and documentation
requirements.**



Best Practices

Documenting local match

TIP!

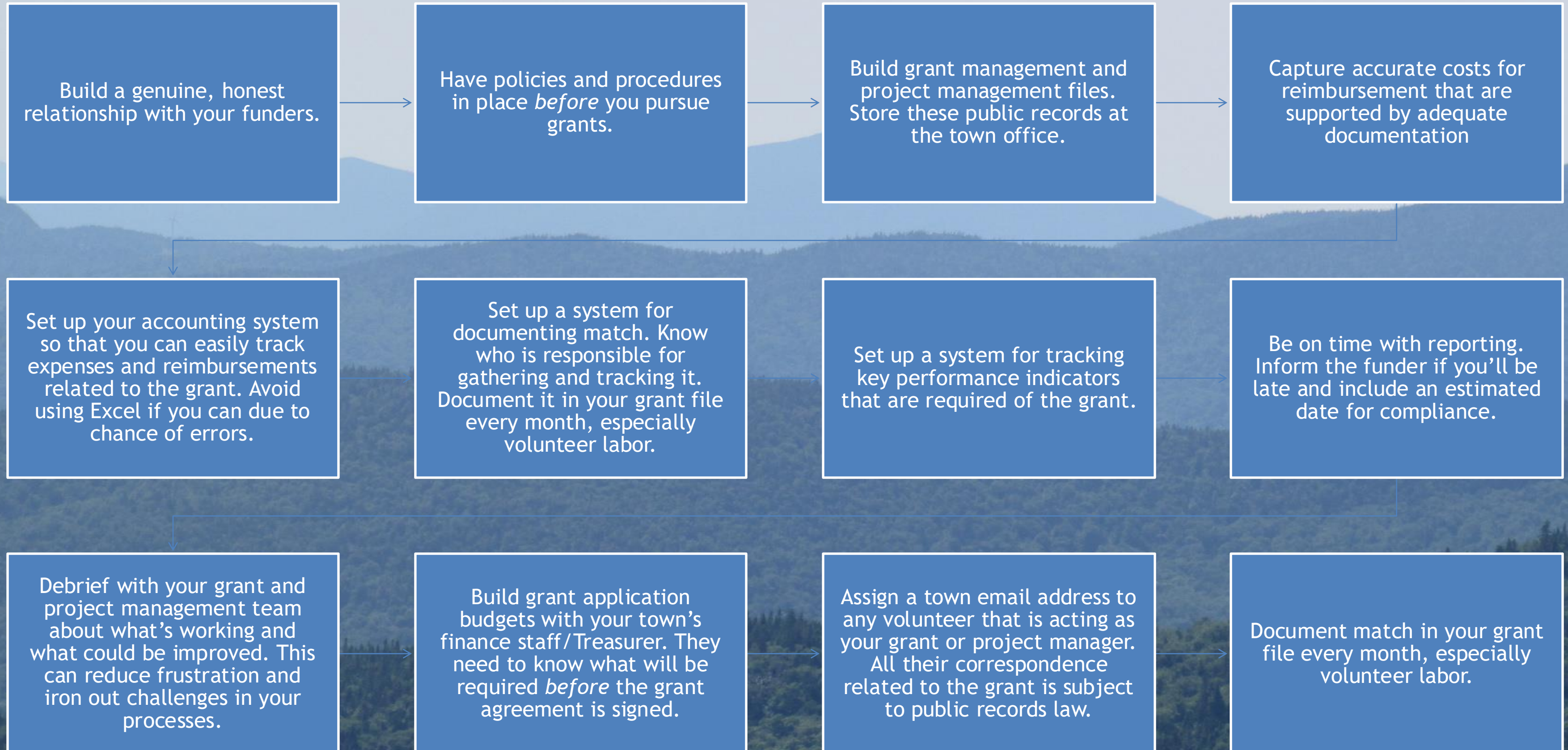
Document match in your grant file every month, especially volunteer labor.

Match is a project cost, so it must be documented like other costs.

- **Personnel/volunteers** = logs with dates, times, activity descriptions, rate (if not specified in grant, use independentsector.org Vermont rate)
- **Mileage** = use current federal rate
- **Donated services*** = use personnel log with rates
- **Donated equipment*** = list equipment used with value (value may differ depending on the grant source's requirements)
- **Land and structures** = value or appraisal

***Caution:** Donated services, equipment, etc. cannot be used as match if the donation was associated with paid services that were discounted.

Best Practices



Final thoughts



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Have questions?

LET US KNOW!



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