

# Montana Land Information Act Grant Management

FY 2018



# Overview

- Defining the Parties within the SOW
- Grants Timeline
- Project Management
- Quarterly Reporting
- Invoicing
- SOW Changes
- Closing Out a Project

# Overview

These slides are meant to be a high level overview of the grant process, please refer to your original SOW first and then contact the State Library for further clarification or technical questions.

# Defining the Parties

“This Statement of Work (SOW) is made and entered by and between the Montana State Library (Agency) and “Organization Name” ([Grantee]).” ...*Standard MLIA Grant SOW language*

1. *MLIA* – Montana Land Information Act
2. *Grantee* – Agency the MLIA grant agreement is with
3. *Agency* – The Montana State Library
4. *Grantee’s Project Manager* – Representative from the Grantee’s agency – defined in each SOW
5. *Agency’s Project Manager* – Erin Fashoway, GIS Coordinator
6. *Invoicing* – Reimbursement for MLIA Granted funds
7. *MLIA Grant Number* – Defined in the SOW, i.e. MLIA\_2018\_xx

# Grants Timeline

- Year long grant – Ending June 29, 2018, unless otherwise negotiated.
  - The grant SOW begins upon July 1, 2017, or if signed after, the completion of signature by both parties.
- Quarterly progress reports:
  - October 10, 2017 – PAST DUE
  - January 10, 2018
  - April 10, 2018
- Monthly invoicing possible
- Extension requests must be submitted by June 15, 2018
- Data due by June 30, 2018.
- Final Report due 45 days after grant close out (August 15, 2018).

# Project Management

“The [Grantee’s] Project Manager responsible for project oversight, submitting quarterly progress reports, financial reports, invoices, final reports, and final data.” ...*Standard MLIA Grant SOW language*

- The MLIA Grant is a SOW between the Montana State Library and the Grantee, therefore all interaction and communication needs to take place between these two parties.
- Reports, invoices, technical support, and final data submissions must all be submitted by the Grantee, specifically the defined Project Manager.

# Quarterly Reporting

“The [Grantee]’s Project Manager shall provide the Agency’s Project Manager quarterly progress reports due on October 10, 2016, January 10, 2017, April 10, 2017 and a final report due by August 15, 2018. The reports shall include a section on each deliverable including any deviations from the timeline and/or budget and any problems encountered. With each quarterly progress report the [Grantee] will submit a quarterly financial report. If the project is completed early a final report will be required 45 days from project close-out and interim quarterly reports will be waived.” \* (Standard MLIA Grant SOW language)

*\*Unless otherwise negotiated*

# Quarterly Reporting

- Quarterly Progress Reports should be submitted on your agency's formal letterhead. Reports may be submitted via the mail or email.
- What should be included in these reports:
  1. Relevant goals/objectives achieved.
  2. Indication of any changes or delays that have arisen in schedule and reasons for these changes.
  3. Indication of how you are achieving your proposed timeline.
  4. Financial Report – including spending to date.
    1. Indication of any changes (or anticipated changes) to budget.
    2. Deviations from the approved budget.

Please note, any major changes from original SOW need to be approved and SOW amended.



# Invoicing

“The [grantee] may submit monthly invoices with necessary documentation to the Montana State Library.” ...*Standard MLIA Grant SOW language*

To request granted MLIA funds, the grantee must invoice the Montana State Library. Here are some of the requirements for invoicing:

1. Requests can be made monthly.
2. Reference the MLIA Grant Number.
3. For each line item there is supporting documentation\*.
4. Categories for the reimbursement request need to be defined.
5. Invoices will be reviewed, and Grantee will be notified if there are discrepancies or further documentation is needed.
6. “Upon approval of the most recent quarterly report and quarterly financial report, the [Grantee] may continue to monthly invoices.” ...*Standard MLIA Grant SOW language*

## Example Budget:

| <b>MLIA GRANT BUDGET SUMMARY</b> |            |                |            |         |           |
|----------------------------------|------------|----------------|------------|---------|-----------|
| <b>Applicant Summary</b>         |            |                |            |         |           |
| Category                         | MLIA Share | Applicant Cash | Other Cash | In-kind | Total     |
| a. Personnel                     | \$ 5,000   |                |            |         | \$ 5,000  |
| a. 1. Fringe Benefits            | \$ 500     |                |            |         | \$ 500    |
| b. Travel                        | \$ 1,000   |                |            |         | \$ 1,000  |
| c. Equipment                     | \$ 7,500   |                |            |         | \$ 7,500  |
| d. Supplies                      | \$ 500     |                |            |         | \$ 500    |
| e. Contractual                   | \$ 20,000  |                |            |         | \$ 20,000 |
| f. Other                         |            |                |            |         | \$ -      |
| Total                            | \$ 34,500  |                |            | \$ -    | \$ 34,500 |

*\*See next few slides for supporting documentation*

# Invoicing Documentation – Personnel & Travel

## Category:

- a. Personnel – Documentation describing the following:
  - Employee Title
  - Dates of work completed
  - Hours worked
  - Hourly Rate
  - Short description of work completed.
- b. Travel - Receipts for travel expenditures.

## Example Budget:

| <b>MLIA GRANT BUDGET SUMMARY</b> |            |                |            |         |           |
|----------------------------------|------------|----------------|------------|---------|-----------|
| <b><i>Applicant Summary</i></b>  |            |                |            |         |           |
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| d. Supplies                      | \$ 500     |                |            |         | \$ 500    |
| e. Contractual                   | \$ 20,000  |                |            |         | \$ 20,000 |
| f. Other                         |            |                |            |         | \$ -      |
| Total                            | \$ 34,500  |                |            | \$ -    | \$ 34,500 |

# Invoicing Documentation – Equipment, Supplies, Contractual, & Other

## Category:

- b. Equipment - Receipts for equipment purchased.
- e. Supplies - Receipts for supplies purchased.
- f. Contractual – Invoices from consultant for work completed.
- g. Other – Documentation for purchases – will depend on each negotiated SOW.

## Example Budget:

| <b>MLIA GRANT BUDGET SUMMARY</b> |                  |                |            |             |                  |
|----------------------------------|------------------|----------------|------------|-------------|------------------|
| <b><i>Applicant Summary</i></b>  |                  |                |            |             |                  |
| Category                         | MLIA Share       | Applicant Cash | Other Cash | In-kind     | Total            |
| a. Personnel                     | \$ 5,000         |                |            |             | \$ 5,000         |
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| b. Travel                        | \$ 1,000         |                |            |             | \$ 1,000         |
| c. Equipment                     | \$ 7,500         |                |            |             | \$ 7,500         |
| d. Supplies                      | \$ 500           |                |            |             | \$ 500           |
| e. Contractual                   | \$ 20,000        |                |            |             | \$ 20,000        |
| f. Other                         |                  |                |            |             | \$ -             |
| <b>Total</b>                     | <b>\$ 34,500</b> |                |            | <b>\$ -</b> | <b>\$ 34,500</b> |

# SOW Changes

- SOW amendments can be requested if any unforeseeable or unpredictable changes occur that effect a grant project.
- Requests will be considered for approval if the request is reasonable, follows MSL policy/state law, and there is no change from the original intent and goals/objectives of the original grant request.
- If a request is approved an amendment must be drafted and signed by the grantee and the Montana State Library.
- Example of a SOW change:
  - Timeline extension

# Closing Out a Project

## Time

- Project has completed – early or on time
- Project SOW end date has passed, Grantee does not request extension.
- Extension is requested

## Funds

- All money has been requested.
- All invoices must be submitted before the end of the negotiated SOW end date.

## Final Report

- Final Report due 45 days after grant close out.

## Submitting Data

- Data must be submitted by the end of the negotiated SOW end date.
- Please work with Agency Project Manager for data submittal.
- All data must be posted to the Montana GIS Data List - <http://msl.mt.gov/GIS/DataList>

This is an overview of the grant process, please refer to your original SOW for your questions.



Thank You!

Please contact [Erin Fashoway](#) for questions or further clarification.