Montana Geospatial Information Act Grant Program

Grant Writing Seminar Series

January 24, 2024

Montana Geospatial Information Act Grant Program Grant Writing Seminar Series

Welcome to the second seminar in the MGIA Grant Writing Seminar Series!

MGIA Grant Writing Seminar Series #2

1. Grant Writing Seminar #2 | Wednesday, January 24, 2023 – 9:30a – 3:00p | Hosted Virtually via Zoom
2. Developing Your Grant Project Proposal | "Virtual Office Hours Series #2"
   - *1-hour timeslots*
   - *Available to Eligible Grant Recipients*
   - Schedule directly with Janet Cornish
   - First come, first served | Follow-up email will be sent to all eligible Grant Writing Seminar #2 attendees.

Presented by

- Janet A. Cornish, Community Development Services of Montana

- Montana State Library MGIA Grant Program Team Members:
  - Erin Fashoway, Montana GIS Coordinator & Grants Program Administrator
  - Matt Trebesch, GIS Analyst Grant Project Manager
  - Sean Anderson, Montana State Library, Grants Contracts Coordinator

Seminar Overview

- Welcome and Introductions
- MGIA Grant Program Overview
- Applicant Eligibility
- Readiness - Scoping Your Project
  - Developing Your Scope
  - Establishing a Timeline
  - Examining Technical Feasibility
  - Budgeting
- Understanding Project Relevance – Benefits and Beneficiaries
- Project Management
  - Sound Project Management Principles
  - Organizational Capacity
  - Working with Consultants
- Cohesive Writing

Tuesday, January 24, 2023	
Agenda	
9:30 AM	Welcome & Introductions
9:45 AM	
10:00 AM	MGIA Grant Program Overview
10:15 AM	MGIA Application Overview
10:30 AM	
10:45 AM	Applicant Eligibility
11:00 AM	Readiness - Part 1 - w/class break outs
11:15 AM	
11:30 AM	Break
11:45 AM	Readiness - Part 2
12:00 PM	
12:15 PM	Questions & Discussion
12:30 PM	Lunch Break
12:45 PM	
1:00 PM	Project Relevance
1:15 PM	
1:30 PM	
1:45 PM	
2:00 PM	Project Management - w/class break outs
2:15 PM	
2:30 PM	
2:45 PM	
3:00 PM	Cohesive Writing
3:15 PM	Final Wrap-up & Questions
3:30 PM	Facilitators Wrap-Up
3:45 PM	

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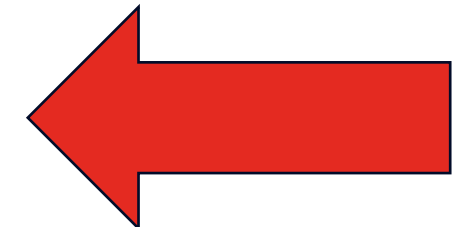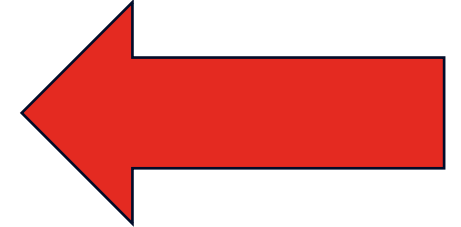
Tell Us A Little About Yourself

HELLO

My name is

- Name
- Why are you interested in this training?
- What you are hoping to achieve by the end of the series.

Please Turn Cameras On

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Montana Geospatial Information Act (MGIA)

- Adopted by the Montana Legislature in 2005 in order to:
  - Collect, maintain, and disseminate digital information regarding Montana's natural and artificial Geospatial characteristics in a manner that is sustainable
  - Assure that Geospatial information is consistently collected, accurately maintained, and made commonly available, in accordance with established standards
- Codified under 90-1-401 MCA

Provisions of the MGIA

- Creates the Montana Geospatial Information Advisory Council (MGIAC)

- Calls for the preparation of an **annual geospatial information plan that describes the priority needs to collect, maintain, and disseminate geospatial information**

- Establishes an MGIA account, administered by the Montana State Library, funded by $1.50 of each fee collected locally for recording a standard document per §7-4-2637 MCA (no federal funding)

- Establishes the Montana State Library as administrator, including for those duties associated with the MGIA Grant program
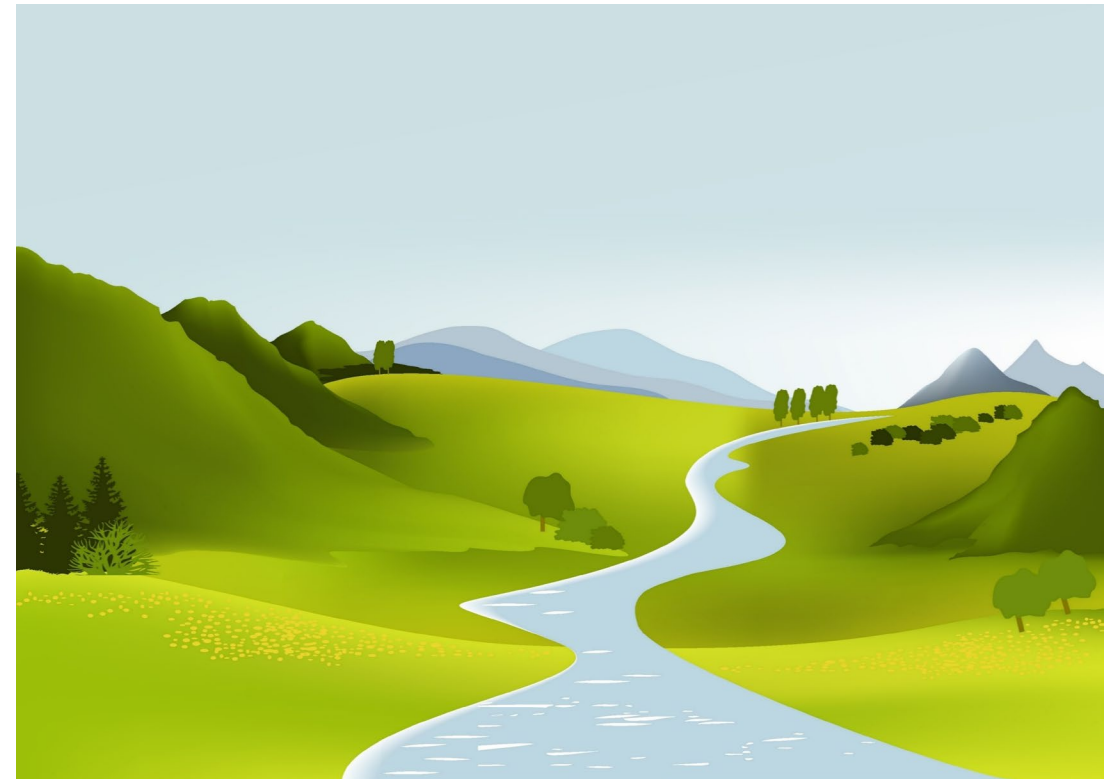
The Geospatial Information Plan sets for priorities for…

The MGIA Grant Program ✓

Development and Maintenance of the Montana Spatial Data Infrastructure (MSDI)

Overall GIS Coordination

The Montana Spatial Data Infrastructure (MSDI) Framework Data Layers

Stewarded by the MSL

- Administrative Boundaries
- Cadastral
- Elevation
- Geographic Names
- Hydrography
- Imagery
- Mapping Control
- Structures & Addresses
- Transportation
- Wetlands & Riparian

Stewarded Outside the MSL

- Climate
- Geology
- Hydrologic Units
- Land Cover
- Soils

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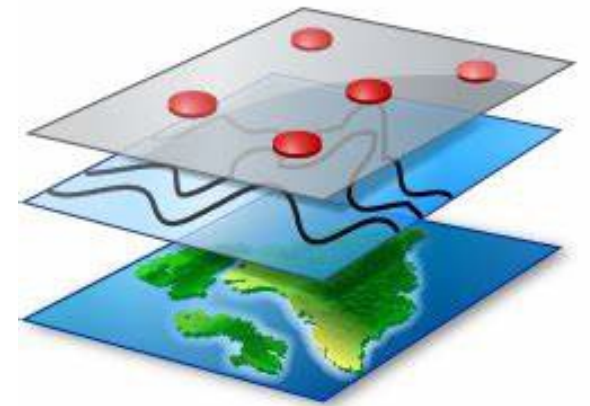
FY 2025 Funds Available

$250,000 (Projected)

Planning grants of no more than $1,500 (required cash match of 50% of awarded funds)

Project grants of any amount less than $250,000

Reminder: these are not Federal Funds

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Eligible applicants

- Any division of state government
- Any city, county, or other division of local government
- A tribal government within the state
- A unit of the Montana University System
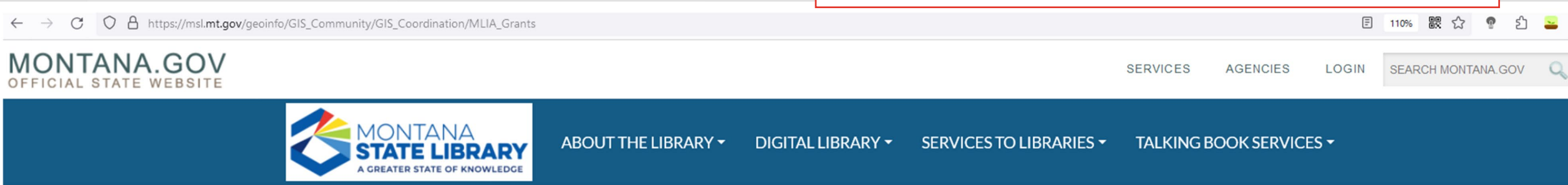

Beaverhead Co. Courthouse

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MGIA Application Overview
Submitting your Application

MGIA Grant Program

https://msl.mt.gov/MGIAgrants

← C 🛡 🔒 https://msl.mt.gov/geoinfo/GIS_Community/GIS_Coordination/MLIA_Grants

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OFFICIAL STATE WEBSITE

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Home > GeoInfo > GIS Community > Montana State GIS Coordination > **MGIA Grant Information**

MGIA Grant Information

In accordance with the Montana Geospatial Information Act (MGIA), the Montana State Library administers an annual grant program to distribute accumulated funds from the Montana Land Information Account, established by MGIA. Grant applications are evaluated by the State Library and its advisory council, the Montana Geospatial Information Advisory Council, and follow the MGIAC Grant Subcommittee Code of Ethics. Grant criteria are established based on the original intent of the MGIA and the goals and objectives of the annual Montana Land Information Plan.

Please direct all grant program questions to MLIAGrants@mt.gov.

FY2025 MGIA Grant Program Materials:

○ Application Registration – *Register Today!*

   ○ Registration is required to apply for the FY2025 MGIA Grant Prog

   ○ Registration Deadline: 12:00 p.m. on February 29, 2024

APPLICATION REGISTRATION LINK -
https://forms.office.com/g/0Kt09hC9
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The Application Process

1. **Complete Registration Form**
   - Gather contact info., basic project information

2. **Registration Approval**
   - MSL reviews registration for approval
   - Bad/mis-typed emails may result in denial

3. **Submit (share) Application Materials**
   - Approved registrants will receive link to shared folder
   - Folder contains all necessary documents & templates

4. **Application Window Closes**
   - February 29, 2024

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Completing the Registration Form

- Read this section carefully!

- Open a support ticket for any registration issues
- Register for Proposal Writing Workshop
- Note important application deadlines
- General questions? Email MGIAGrants@mt.gov

Completing the Registration Form

Completing the Registration Form

- ZIP code and fax number should be ONLY numbers
  - No dashes, parentheses, etc.

Completing the Registration Form

- **Primary and secondary contact info is critical**
  - Please double-check email addresses
  - Phone number should be <u>ONLY</u> numbers – no dashes, parentheses, etc.

Completing the Registration Form

14. Secondary Contact Name *
This individual serves as a backup to the primary contact or cocreator of the MLIA Grant Application. This cannot be a hired consultant.

Kerry King

15. Secondary Contact Title *

Planner 2

16. Secondary Contact Email *
Please enter the correct email, any errors could result in a denial of registration.

kerry.king@county.gov

17. Secondary Contact Phone *
Please enter a 10-digit number.

4061234567

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- Primary and secondary contact info is critical
  – Please double-check email addresses
  – Phone number should be ONLY numbers – no dashes, parentheses, etc.

Completing the Registration Form

FY2025 MGIA Grant Project Information

Please do your best to tell us about your Grant Project. This information does NOT need to be exhaustive, and will be finalized in the final application.

18. Topic of Project *

Land Planning for Montana County

19. Are you collaborating with any other organization(s) for this grant? *

- ◉ Yes
- ◯ No

20. Collaborators: *

Please list the collaborating organizations you're apply with for your grant.

Neighboring County

- Note: Do <u>not</u> list contractors as Collaborating Organizations

Completing the Registration Form

20. Identified Grant Priority *
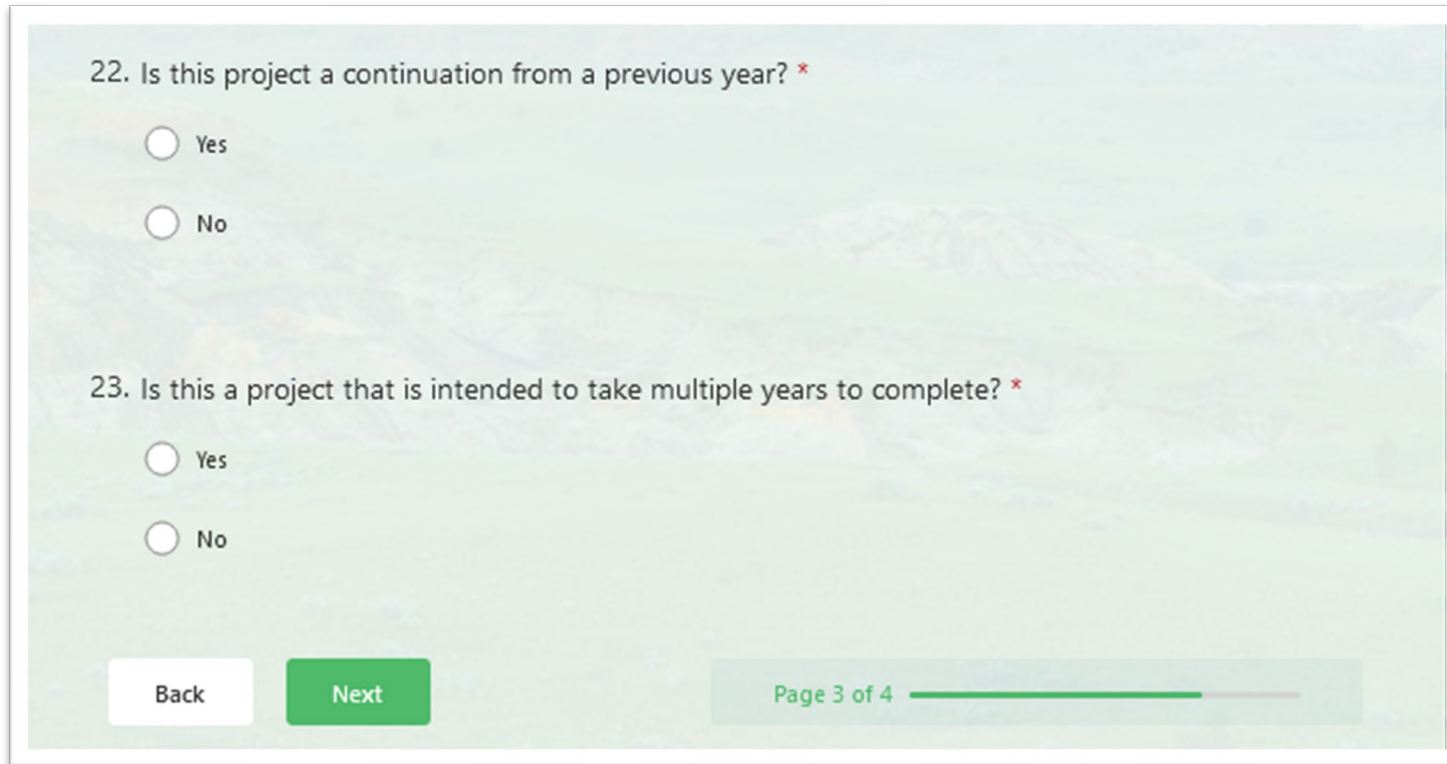
Please review the FY2025 Montana Land Information Plan, located here: https://docs.msl.mt.gov/MGIA/grants/fy2025/MGIAFY2025_GrantProgramPriorities.pdf

Based on your review, choose the priority level of your project, in accordance with Montana Land Information Plan priorities:

○ Tier 1: Development of Next Generation 9-1-1 (NG9-1-1) GIS data of boundaries, addresses or road centerlines

○ Tier 1: Improvements to Public Land Survey System (PLSS) representation

○ Tier 1: Development and enhancement of layers recognized within the MSDI Administrative Boundary theme

○ Tier 1: Integration of GIS data into the planning and preparation for Geo-Enabled Elections (GEE)

○ Tier 2: GIS Planning

○ Tier 2: Development of GIS data layers including, but not limited to, land use planning, infrastructure, water resources, and asset management

○ Tier 2: Support GIS for Public Safety, Emergency Management, Disaster & Emergency Services Operations, and Community Resilience Planning Services Operations, and Community Resilience Planning

○ Tier 2: RTN Network Buildout

- Grant Priority should conform to the priorities identified in the MGIA Grant Program Priorities for FY2025 - *Link*
  - *Also, see pg. 6 of Grant Information Package*

Completing the Registration Form

22. Is this project a continuation from a previous year? *

○ Yes

○ No

23. Is this a project that is intended to take multiple years to complete? *

○ Yes
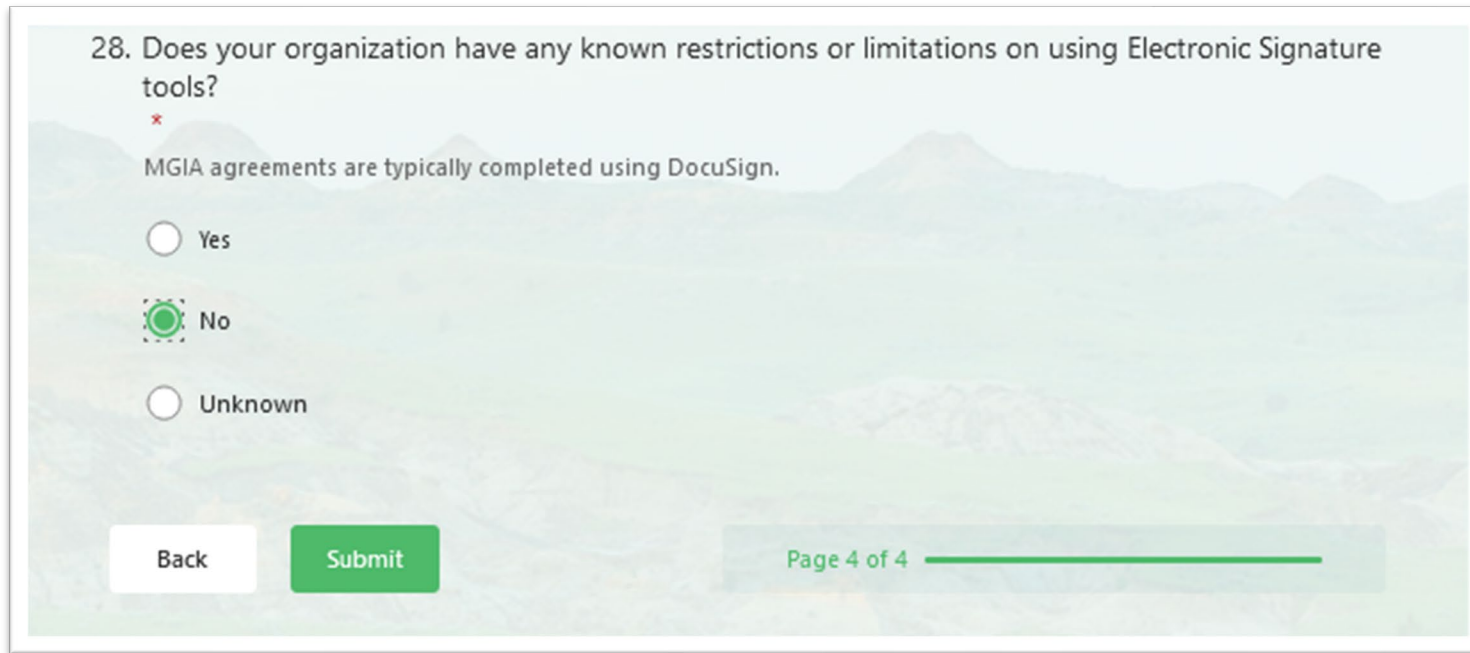
○ No

Back Next

Page 3 of 4

- Note: If this grant is a continuation of a previously-funded MGIA/MLIA project, you will be required to identify that project in the application process.

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Completing the Registration Form

28. Does your organization have any known restrictions or limitations on using Electronic Signature tools?
*

MGIA agreements are typically completed using DocuSign.

○ Yes

◉ No

○ Unknown

Back | Submit

Page 4 of 4

- **MSL uses DocuSign to collect signatures and share completed applications and agreements**
  - If your organization is unable to use electronic signatures, we can make accommodations.

Completing the Registration Form

Completing the Registration Form

Thank you for your FY2025 MGIA Grant Registration Submission. Response ID: FY2025- Montana City/County-1162024-1243PM Inbox ×

MGIAGrants 12:44 PM (0 minutes ago)
to me

Montana City/County:

Thank you for registering for the FY2025 Montana Geospatial Information Act Grant Program Application System. We are currently working on reviewing your request.

If you do not receive an approval/rejection email within 1 business day, please email: MGIAGrants@mt.gov

Thanks!

MGIAGrants@mt.gov

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Registration received by MSL

Invitation to fill out FY2025 MGIA Grant application form for: Montana City/County-Planning/GIS Inbox ×

MGIAGrants 12:45 PM (1 minute ago)
to me

Montana City/County,

Thank you for beginning the **FY2025 MGIA Grant Program Application** process.

An email will be sent with the provided "SharePoint" shared folder link. This shared folder will include required documents for the application process. The email will come from MGIAGrants@mt.gov. This will be sent to both the designated Primary and Secondary contacts provided in your registration form submission.

You will be required to verify your email account to use the shared folder through SharePoint. Please note that only the approved contacts will be able to access the shared folder.

Please complete the application, and required supplemental documents, per the instructions provided in the FY2025 MGIA Grant Program Info Package. Completed application materials should be uploaded to the provided subfolder called "Final Submission " within the shared folder.

If you have any questions, please reach out to MGIAGrants@mt.gov or visit https:/ /msl.mt.gov/MLIAGrants.

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Registration APPROVED by MSL

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MGIA Grant Application Materials

MGIA Grant Application Materials

Reference Documents

- Program Info Package
- NGS Guidelines for CORS

Include with Final Submission

- Grant Application (Template)
- Detailed Budget Table
- PLSS Form (If Required)
- RTN Buildout Form (If Required)

Documents > FY2025 MLIA Grant Applications > Montana City > **County_1162024-124**

	Name ∨	Modified ∨	Modified By ∨
📁	Final Submission	4 minutes ago	Beckstrom, Nick
📊	MLIA_FY2025_DetailedBudgetTable.xlsx	4 minutes ago	Beckstrom, Nick
📊	MLIA_FY2025_PLSSForm.xlsx	3 minutes ago	Beckstrom, Nick
📄	MLIA_FY2025_RTNNetworkBuildoutTemplat...	3 minutes ago	Beckstrom, Nick
📄	MLIAGrantApplicationTemplate_FY2025.docx	4 minutes ago	Beckstrom, Nick
📄	MLIAGrantProgramInfoPackage_FY2025.pdf	4 minutes ago	Beckstrom, Nick
📄	NGSGuidelinesforEstablishingCORS_2020Edi...	3 minutes ago	Beckstrom, Nick

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MGIA Grant Application Materials
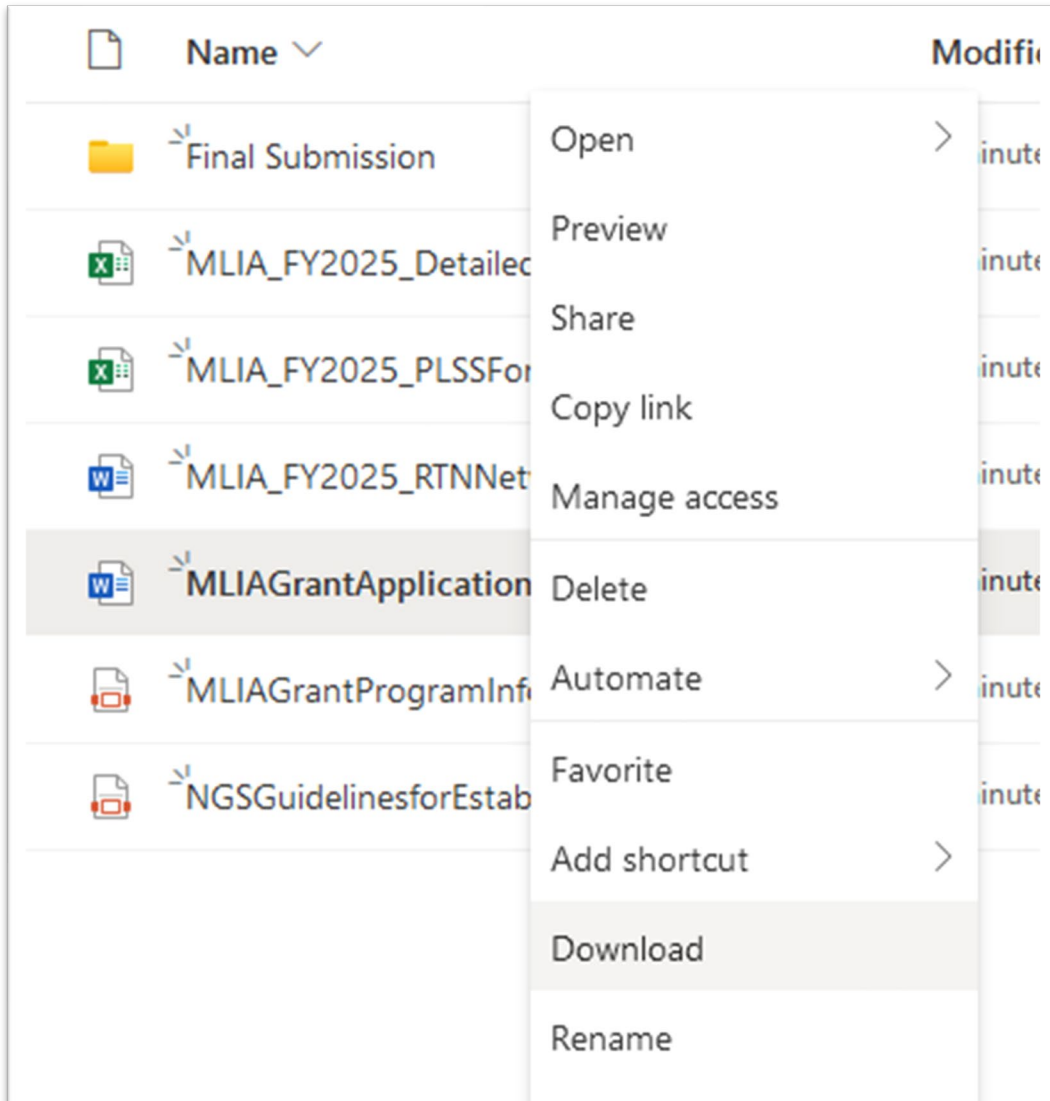
- Materials may be downloaded for editing <u>OR</u> edited in-browser

- Completed applications (and additional documents) should be moved or copied to "Final Submission" folder

I Submitted – Now What?

- After February 29, 2024:
  - MSL will compile and request signature on each completed application

- By May 15, 2024:
  - MGIA Council will review and prioritize projects for funding
  - MSL Commission makes final funding approval

- By July 1, 2024
  - MSL and Grantees develop and sign Scope of Work agreements

- July 1, 2024
  - FY2025 Grant year begins

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General Guidelines, Tips

- [Watch Previously Recorded Trainings!](#)

- Read and understand Montana Land Information Plan priorities

- Discuss your project with your org.'s leadership

- Check and double-check email addresses, contact info.

- Check spam/junk folders

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Application Support

- For problems with Grant Registration
  - Email MGIAGrants@mt.gov

- For problems with Grant Application Materials, Technical Issues
  - Open a Support Ticket
  - https://msl.mt.gov/geosupport

- Support system requires the use of an Okta account
  - Okta account creation is simple
  - Procedures are available at okta.mt.gov

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Readiness – Developing your Scope

Scoping Your Project – The Basics

Step 1. Establishing Need

Step 2. Identifying Your Project

Step 3. Evaluating Alternative Approaches to Addressing Need (Defining the Project)

Step 4. Developing a Scope of Work for your Project (more)

Hierarchical Approach

Defining Need → Setting Goals → Defining Objectives → Identifying Strategies → Evaluating Outcomes
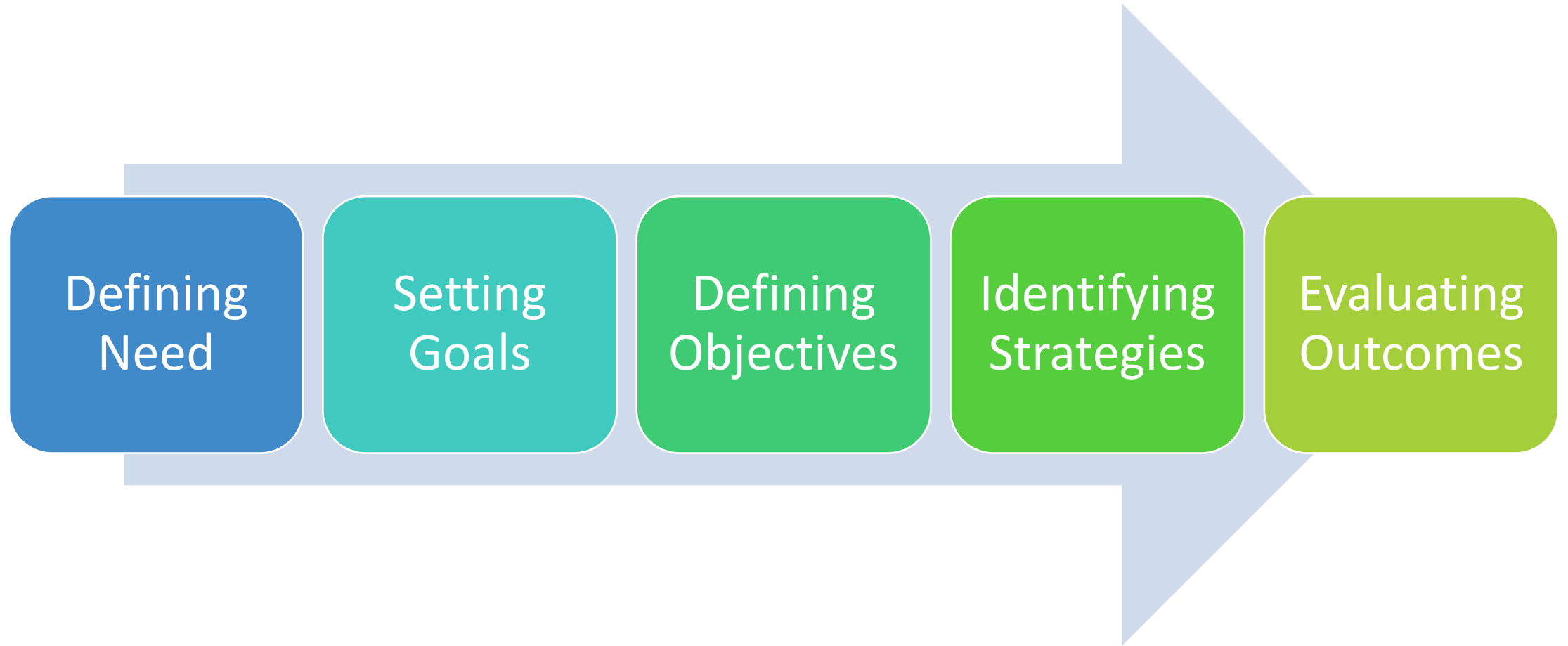
Scoping - continued

Step 5. Defining Project Goals and Objectives (Outcomes)

Step 6. Identifying Partners

Step 7. Identifying an Evaluation Methodology

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Step 1. Establishing Need

- Key Informants
- Changing and/or Urgent Conditions
  - Demographic
  - Environmental
  - Regulatory
- New Technologies
- Community Input – Survey
- Case Studies/Examples
- Statistical Analysis

Step 2. Identifying Organization Information – Needs and Priorities

Strategic Plans

Information Technology Plans

Growth Policies

Emergency Management Plans

Resiliency Plans

Transportation Plans

Capital Improvement Plans

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Step 3. Evaluating Alternative Approaches to Addressing Need (Defining the Project)

- Immediate and Long-Term Costs
- Expertise Required for Implementation and Maintenance
- Technical Feasibility
- Associated Impacts
- Partnerships that can be Brought to the Effort
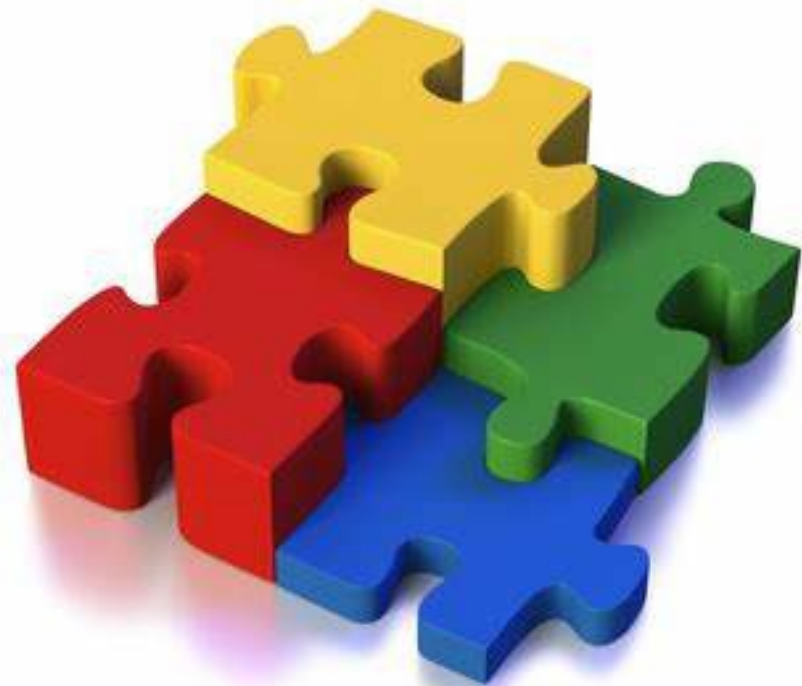
Step 4. Identifying Projects and Programs that are:

Based on need

Reflective of Alternatives Analyses

In keeping with FY2025 Grant Priorities

FY 2025 MGIA Grant Priorities

Projects and programs should be tied specifically to the Goals and Strategies set forth in the Montana Geospatial Information Plan and Grant Priorities:

https://docs.msl.mt.gov/MGIA/grants/fy2025/MGIAFY2025_GrantProgramPriorities.pdf

Class Exercise 1
Aligning Project to the MGIA FY2025 Grant Priorities

Class Exercise Questions – 15 to 20 Minutes

1. Under what FY 2025 priority does your project fall (it may align with more than one)?
   – For a complete list of grant priorities, use the following link:
     https://docs.msl.mt.gov/MGIA/grants/fy2025/MGIAFY2025_GrantProgramPriorities.pdf
2. Select the priority that is the most applicable to your project.
3. Justify your identification of this priority for your project.

Step 4. Developing the Scope of Work for Your Project

Highlight the significance, timeliness, appropriateness and/or the innovative aspects of your approach (tied to identified needs and the alternatives analysis).

Demonstrate the feasibility of your approach (manageable steps).

Demonstrate knowledge of potential obstacles and how they will be addressed.

Step 4 (cont.) Elements of Your Approach – Organizing Your Scope of Work
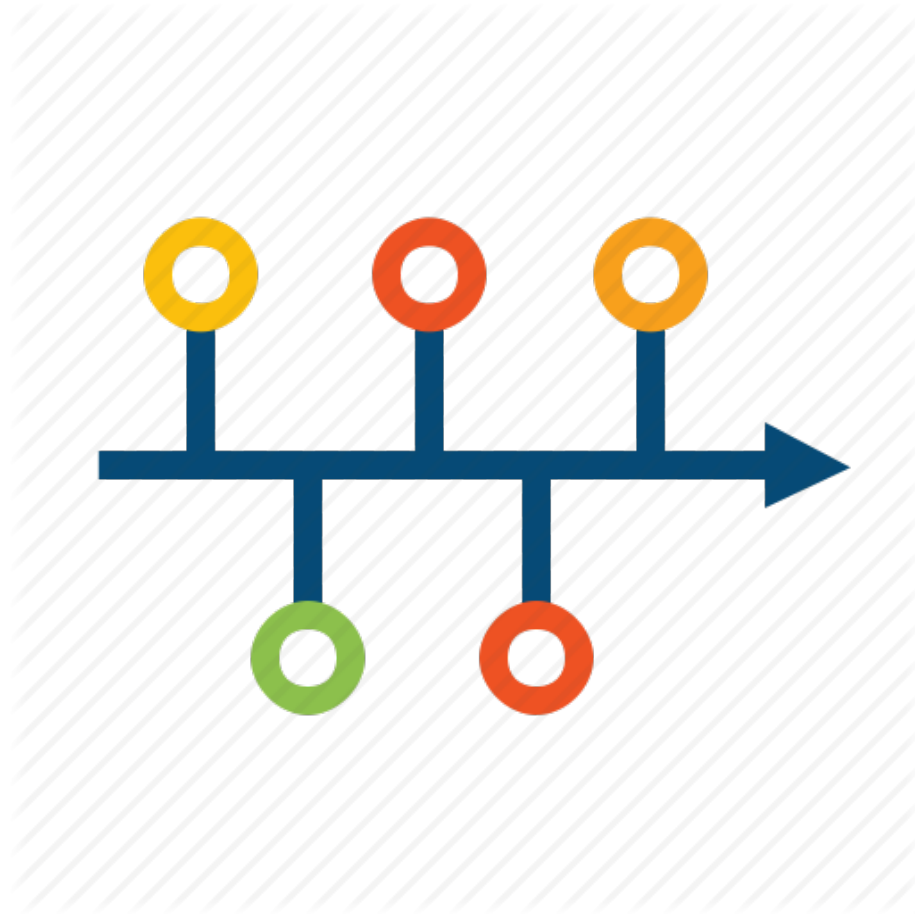
- Your scope can be organized by phase, category, or chronology.

- Key elements in the scope should be arranged in a timeline of events, in line with reporting requirements.

- **Preliminary and Final Deliverables** should be identified and noted on the timeline.

Include Administrative Activities as Elements

- Procurement of consultants and equipment
- Meetings of the local governing councils and commissions

A Note on Deliverables

- Develop specific descriptions of draft and final products.
  - Datasets
  - Code
  - Maps
  - Training Materials
  - Documented Workflows
  - Photographs
  - Video
- Assure that this information aligns with the tasks identified in the scope of work and associated timeline.

Step 4 (cont.) Personnel

- Internal
  - Project Staffing and Management
  - Financial Management
- External
  - Consultant Services
  - Partner Participation

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Step 5. Identifying Project Goals and Objectives

Each project goal should have at least one measurable outcome or objective.

Goals and objectives are *ends,* not means and should not be confused with methods.

Goals and objectives should be **reasonable and achievable** in line with available resources.

Project goals and objectives must align with identified needs and advance the priorities for grants set forth in the FY 2025 Geospatial Information Plan.

Step 6. Identifying Partners

- Is this project being undertaken by a partnership?
  - Who are the partners and associated responsibilities? (*Remember: Your project consultant is not a partner!*)
  - Have you confirmed your partners?
    - Agreements
    - MOUs
    - *Letters of Support – application requirement*
  - How will you sustain partnerships overtime?

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Step 6. Determining Partner Responsibilities

- Who will be the lead partner?
  - Fiscal responsibilities
  - Project management responsibilities
  - Point of contact

Step 6. Partners provide and opportunity to…

- Improve project efficiency.
  - Contribute matching dollars
  - Assist with project management
  - Help make MGIA funds go further

- Share expertise and infrastructure. (more)

And…

Increase public benefit and support.

Enable the project to encompass a larger geographic area

Bring more stakeholders (supporters) to the table

$ Increase the likelihood for your agency being awarded a grant.

Reduce duplication of efforts while sharing responsibilities.

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Step 7. Identifying an Evaluation Methodology
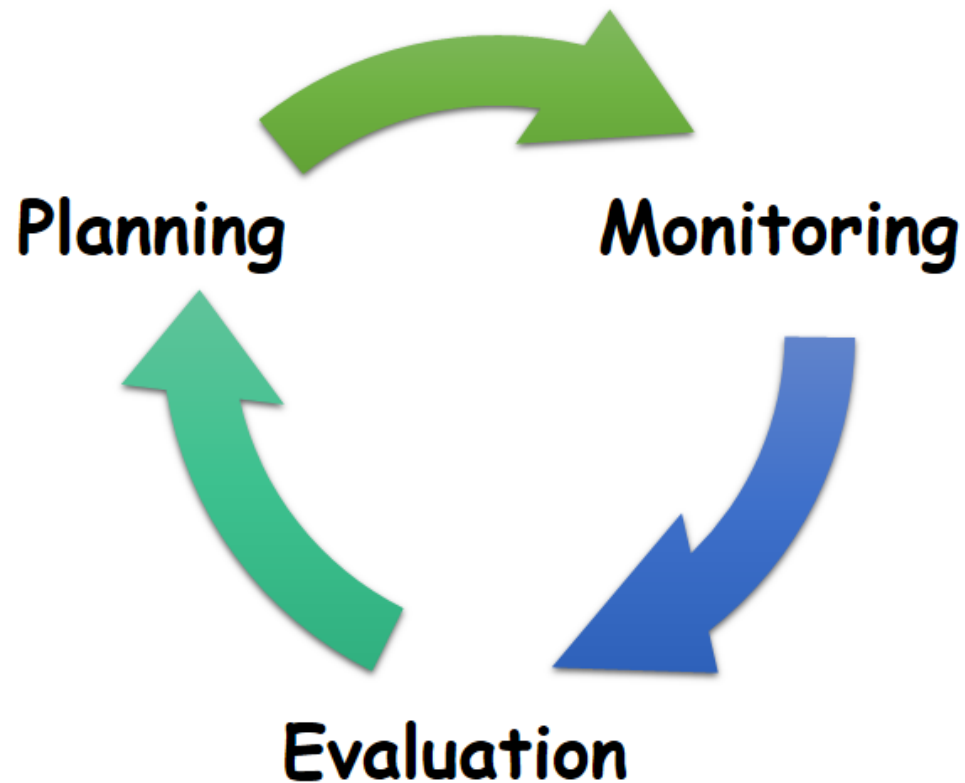
- What are you going to evaluate?
- When will evaluation occur?
- Who will be responsible for the evaluation?
- How will the evaluation results be used in decision-making?
- How will evaluation results be provided to the funder?

Step 7 (cont.) Evaluating Outcomes

How does your scope of work enable you to meet your objectives (outcomes)?

How are your projected outcomes tied to identified need with respect to:

- The population to be served
- The geographic area to be served

How do your projected outcomes advance the goals of the FY 2025 Geospatial Plan?

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Readiness – Establishing Your Timeline

Timelines...

- Summarize project tasks with starting and ending dates.

- Demonstrate to the funder that project will be undertaken in a timely manner.

- Provide a monitoring tool once the project is funded.

- Allow for future planning.

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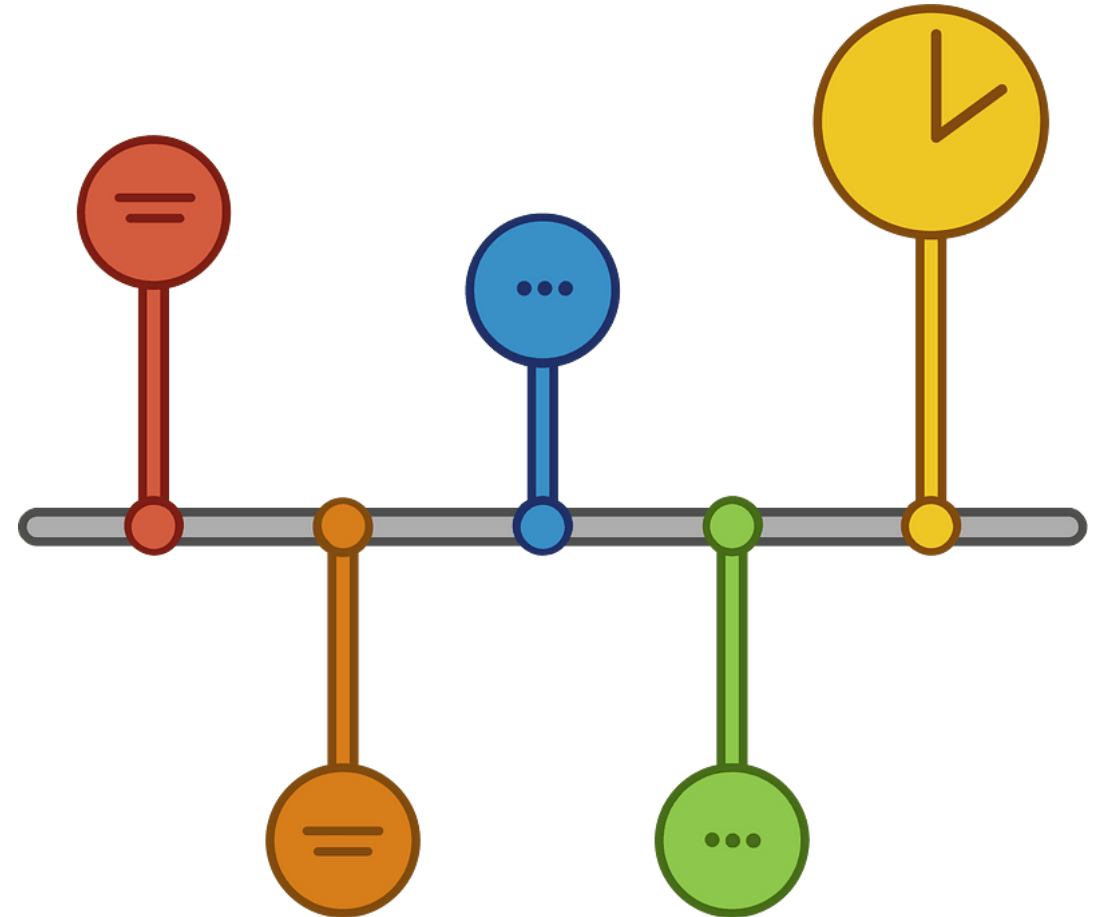
Preparing a Timeline

- Establish a timeline with **reasonable** goals.
  - Promising more than you can reasonably accomplish does not serve you well.
- Identify each task and associated subtasks.

Preparing a Timeline (continued)

- Note deliverables associated with each task.

- Anticipate needs.

- Assign responsibilities.

- Prepare a timeline for grant submittal as well as for a funded project.

- Write everything down (keep a journal) as you work through your timelines.

Preparing a Timeline (continued)

- Estimate the time required for each task and subtask with contingencies built in Remember, it's better to be ahead of schedule than behind.

- You can prepare a timeline using a table or spreadsheet. Microsoft Word has a timeline tool. Click on "insert", then "smart art" and then "process".

Additional Timeline Considerations

In addition to the specific technical tasks, your timeline should reflect:

- Authorizations from the local governing body
- Project and Financial Management
- Procurement requirements
- Required reports to the Montana State Library

Allow time for communication with…

- The GIS State Coordinator
- MSL project manager
- Project partners
- The public
- Your governing body

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And... Remember Unforeseen Events

- Staff changes
- Weather events / Accessibility
- Changing local priorities
- Other personal events

Readiness – Examining Technical Feasibility

Technical Feasibility

- Available expertise (internal/external) with respect to:
  - Knowledge of geospatial information data collection and maintenance standards (pertinent Montana Spatial Data Infrastructure [MSDI] layer protocols and associated steward)
  - Software and hardware experience
  - Specialized equipment operation experience
- Geospatial Information data availability and access
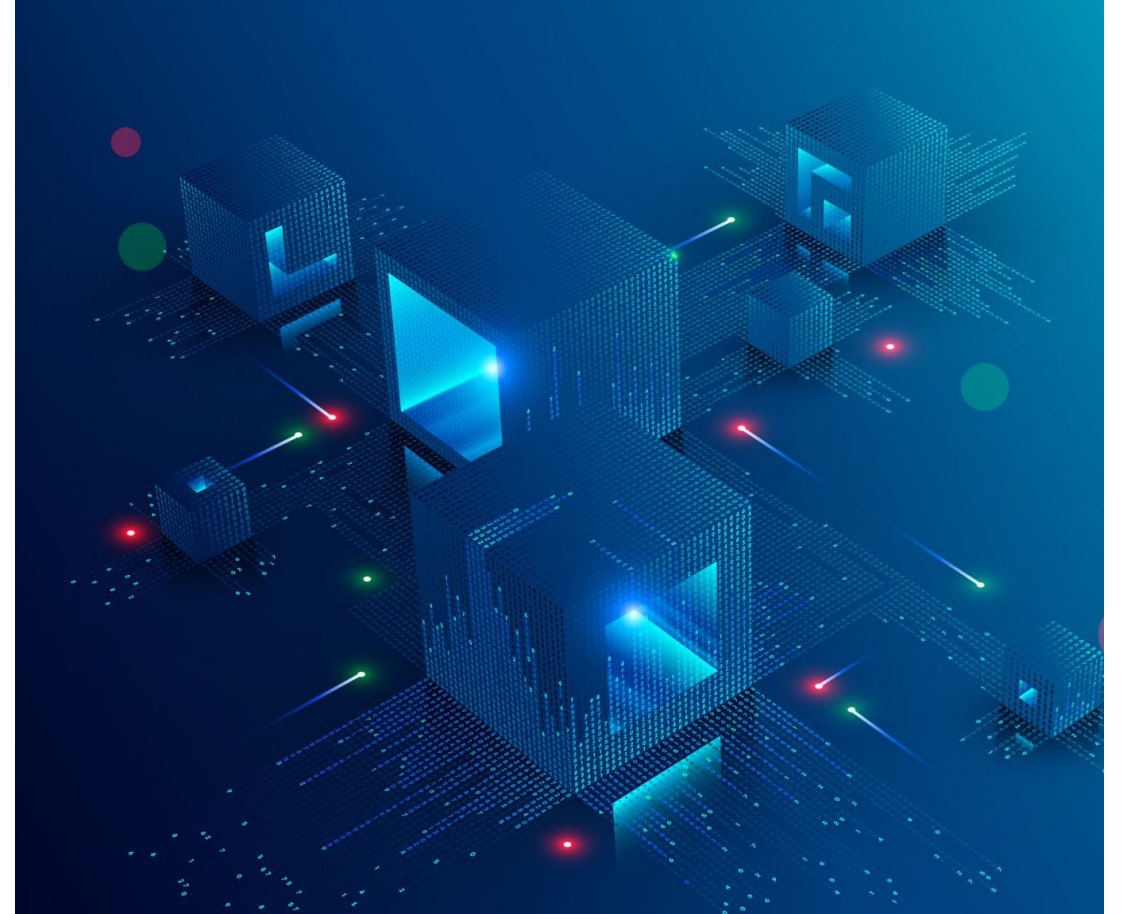
Technical Feasibility (cont.)

- Physical Space/Infrastructure to accommodate:
  - Personnel
  - Equipment
- Staff training considerations
- Consultant scheduling
- Long term Geospatial information maintenance capacity

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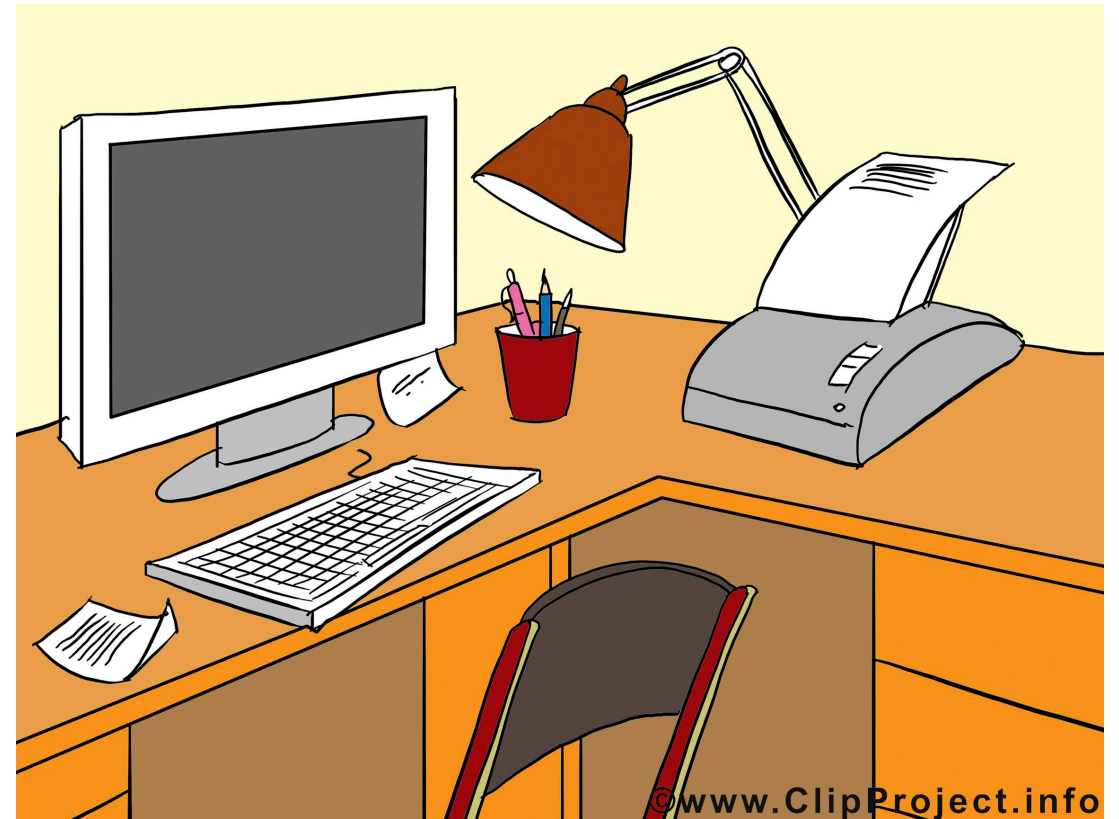
Technical Feasibility – Learning & Sustaining

If an applicant is new to GIS MSL will expect a learning plan

If an applicant is continuing a GIS program... we will expect the grantee to demonstrate sustainability

- Learning Paths
- Training
- Updates & Software Release
- Standard Operating Procedures
- Expanding across depts & training others
- Succession Planning

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Readiness – Budgeting

Budgeting

What does your program or project require to be successful?

How does the project fit into your overall organizational budget?

Who is responsible for managing the fiscal affairs of your organization?

How do you demonstrate project sustainability?

Getting a Handle on Costs

- Seek good and multiple estimates from providers of services, software and hardware.

- "Walk through a day."

- Confer with other organizations.

- Consider future costs for maintenance.

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Develop a Funding Strategy

- What is a good funding mix (in-kind v. cash; local match v. grant amount)?

- Leveraging funds makes for a more competitive proposal.

- Can this project be phased in accordance with funding availability?
  - Multi-year projects are acceptable to the MGIA grant program, but phases must be clearly articulated by year.
  - (There are no guarantees of renewed funding.)
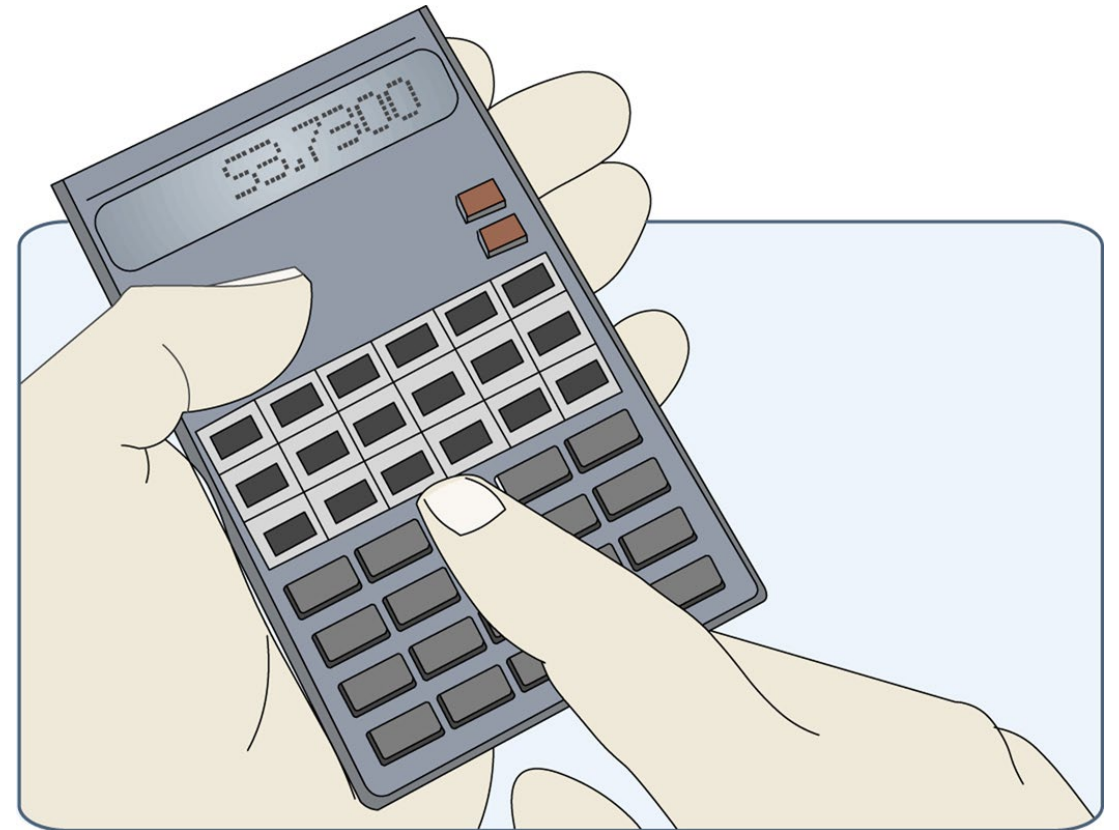
Sustainability

Consider how you will sustain your project over time, including a plan for long-term funding to allow for updates, future enhancements and staffing.

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Make Sure Your Budget Proposal...

Clearly demonstrates that the project can be completed within the proposed budget

Fully justifies all project expenditures reported in the budget and equipment purchases outlined in the scope of work

Clearly outlines the costs of all identified scope of work tasks/activities and demonstrates that the organization can leverage outside funding

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Justifying Costs

Gather and record information on how you derived costs

| Quotes from suppliers | Rates (e.g., mileage) | Previous projects/experiences |

Demonstrate that the budget is appropriate to the task

Clearly identify sources and uses of funds

One More Note on Readiness

Applicant Clarity

- Does the state, local, university, or Tribal governing body understand and champion the project – commitments and benefits?
- **Who is the project manager? (not the consultant)**
  - **Imperative that there is an identified Project Manager within the Applicant's agency. This is NOT a hired consultant.**
- What is the role, if any, of a professional consultant? (more later)

Fiscal Clarity

- Is your fiscal officer (treasurer, clerk, etc.) aware of the financial reporting requirements?
- What are your jurisdiction's procurement requirements?
  - Contracted services
  - Equipment (more)

Project Relevance and Public Benefit

Project Relevance

- Your proposal must meet the purpose of the Act, reference one grant category priority in the Geospatial Information Plan and clearly demonstrate how the grant project will further the Geospatial Information Plan objectives for the defined category. (See Tier 1 and Tier 2 objectives.)

- Remember that sustainability is linked to relevance.

- Note: This section is not required for applicants with the sole purpose of collecting new survey control data or MTSRN Buildout.

Public Benefit

The proposal must demonstrate how the grant project will benefit a specific MSDI theme, enhance the Geospatial information needs of multiple agencies and across jurisdictions and **improve delivery of services to the citizens of Montana.**

*This section is not required for GIS Project Planning applicants, MTSRN Buildout applicants, and applicants with the sole purpose of collecting new survey control data.
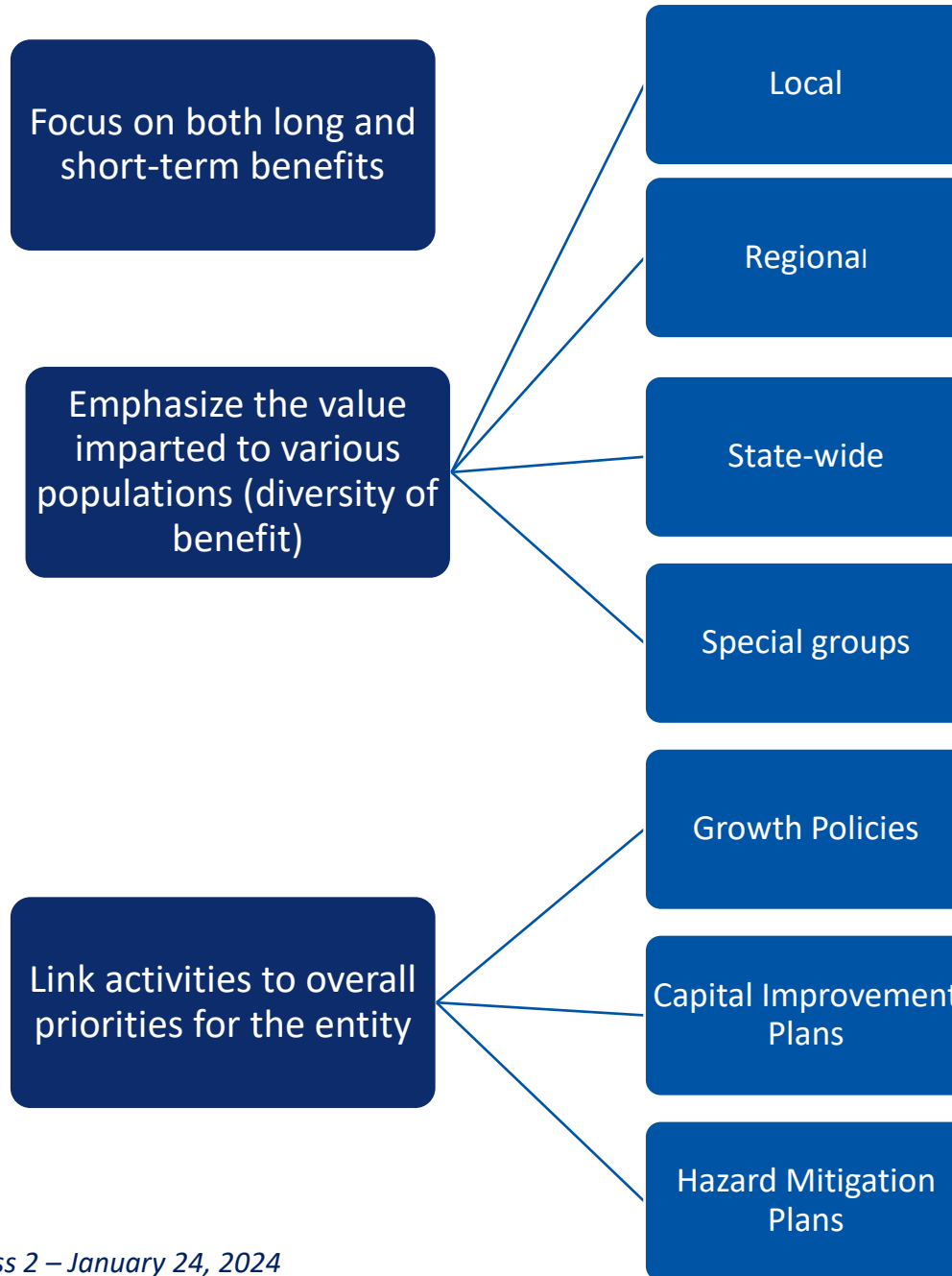
Benefits Analysis Example

Focus on both long and short-term benefits

Emphasize the value imparted to various populations (diversity of benefit)
- Local
- Regional
- State-wide
- Special groups

Link activities to overall priorities for the entity
- Growth Policies
- Capital Improvement Plans
- Hazard Mitigation Plans

Class Exercise
Establishing Relevance and Benefit
Group Project

Class Exercise Questions – 15 to 20 Minutes

Describe the project for which you are seeking funding and then answer the following questions.

1. What is the single most important goal of your project?

2. Under which 2025 Grant Priority does your project fall?

3. Which MSDI theme will benefit from this project?

4. Who are the beneficiaries of this project (populations, geographic areas, agencies, special groups)?

5. How does this project relate to the overall vision for your community or region? (Growth Policy, Hazard Mitigation Plan, etc.)?

Work together to answer these questions for each person's project.

Project Management

Project Management and Organizational Capacity

- Evaluate your performance with respect to similar projects.

- Examine your ability to implement the methodology described in the scope of work, focusing on the qualifications of the project manager, key personnel, partners and consultants.

- Evaluate your ability to maintain the project beyond the grant period.

Be Specific

- Identify Key Personnel
  - Project Manager (not the consultant)
  - Consultant (if known)
  - Financial Manager (e.g., tribal or local government budget director)
- Consider all potential ways in which you can demonstrate capacity.
  - Other grant-funded projects
  - Project management experience
  - Partnership development experience (more)

Document your Management Capacity

Gather evidence of commitment to management

- Reporting timelines
- Procurement methodologies
- Invoicing procedures (with samples)

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Understanding the Role of the Grantee Project Manager

Oversees all aspects of the project

Prepares and submits reports to the Montana State Library

Communicates regularly with the grantee governing body

City Council

County Commission

Tribal Council

State Agency/University Administrators

Follows proper local procurement guidelines

Develops consultant's scope of work and supervises consultant activities (if any)

Understanding the Role of the Project Consultant

Provides overall technical support to the grantee, including assistance with project design

Assures that information collected is consistent with standards set forth in the Montana Geospatial Information Act

Reports regularly to the grantee regarding activities, work products, overall progress and challenges

Assists, as necessary, with the preparation of quarterly reports

CDS MONTANA STATE LIBRARY

Establishing Good Habits

Always maintain flawless financial records.

Plan to stay in regular contact with the funder throughout the process.

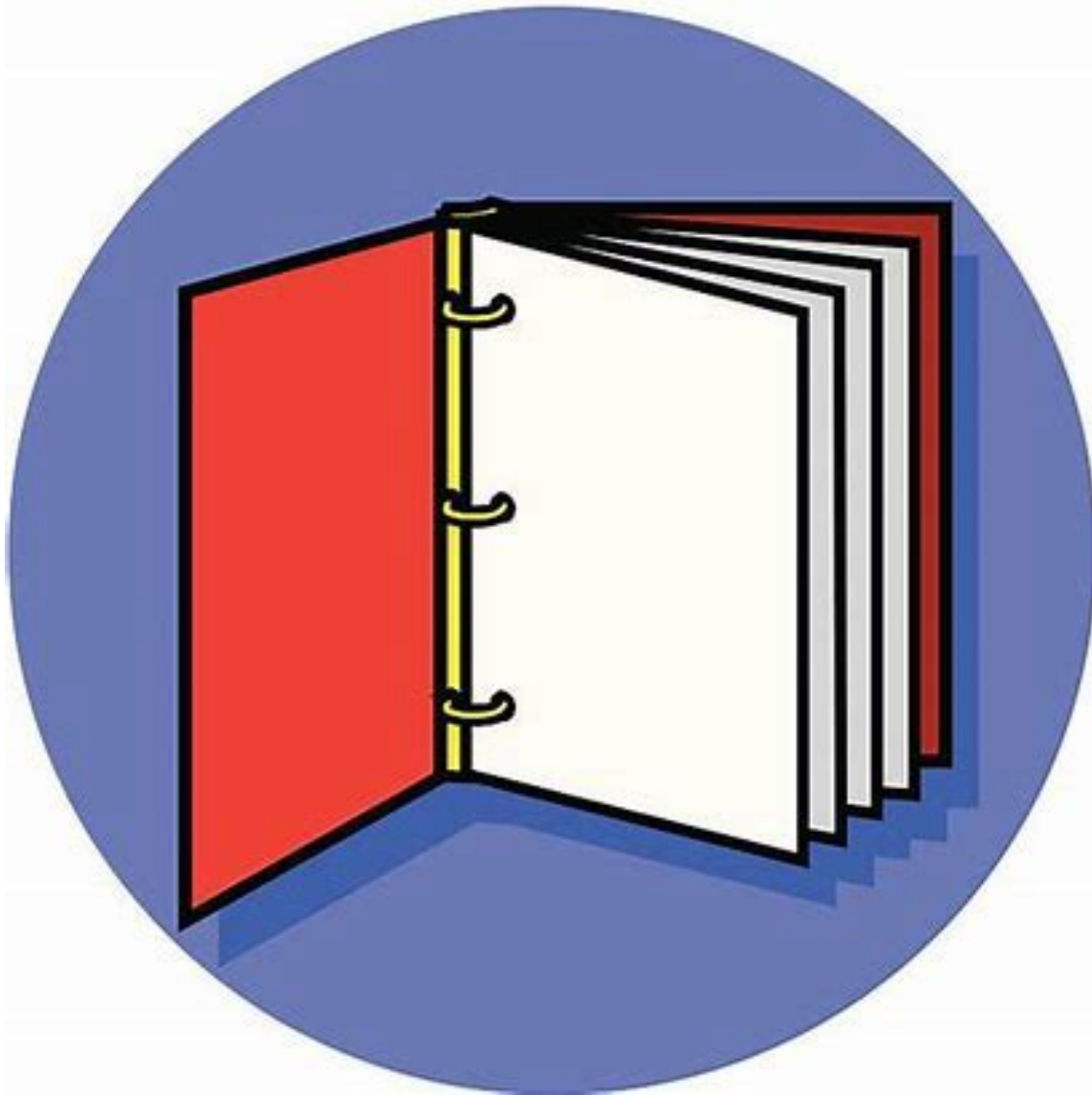**Submit all reports and deliverables on time.**

Plan on creating a good paper trail including:

- Procurement documents
- Invoices and payments (vouchers)
- Consultant reports
- Minutes of partner meetings
- Call logs
- Reports submitted to your governing body and to MSL staff
- Press releases
- Public meeting notifications
- Photographs

Consider creating a Project Notebook (paper and/or electronic)

Financial Management Responsibilities

- Adhere to your budget. Any changes will require approval by the MSL (and your governing body).

- Document all transactions.

- Watch the numbers. *Check invoices before paying then and before submitting them for reimbursement.*

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Management Ethics

Engage in ethical practice. Remember:

- You represent your local government or agency.

- You are responsible for managing your projects with hired consultants.

- You are in service to the people of the State of Montana who are funding your project/program.

Working with Consultants

A Closer Look at Consultant Services

- The scope of services to be performed by the consultant should be clear to the client (the grantee project manager) and the consultant.

- The scope will be attached to and made part of the contract between the consultant and the grantee.

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Special Notes

The consultant is responsible for the deliverables (work products) identified in the work scope. The consultant, however, is not an employee; work hours, place of work, and technical methodology are NOT set by the client.

The consultant can help in identifying challenges and issues that may arise. Solutions should be sought jointly among the MSL staff, the client and the consultant.

Cohesive Writing

Don't Mumble....

Make	Make the organization of your writing clear.
Use	Use short paragraphs, short sentences – and short words.
Make	Make your writing active and personal.
Avoid	Avoid vague adjectives and adverbs (state your meaning precisely). Avoid platitudes!
Use down	Use down-to-earth language.

Janet's Rules for Clear Writing

- Follow rules for numbers.
- Understand the differences in meaning between:
  - Affect and Effect
  - Around and About
  - Number and Amount
  - Adverse and Averse
- Eliminate "do" and "run" from your vocabulary .

More Rules

- Rid your writing of gobbledygook.
- Resist using semi-colons.
- Embrace parallel construction.
- Write for the "person" from Mars.

And…

- Remember the importance of geography.
  - your location on the map
  - your location in the organization
- Remember that "they" refers to a plural antecedent.
- Brevity is a virtue – make each word work hard.

Make Your Writing Accessible

Consider your audience (s).

Consider how the audience will use your document.

Organize the material logically from the reader's point of view.

More on Accessible Writing

Do a task analysis of the project or program and write down the steps in logical order.

Put yourself in the place of your reviewers. What questions are they likely to ask?

Write to express, not to impress.

Writing Ethics

> Always identify the sources of any facts, ideas, quotations and paraphrases.

"Repurposing" (cutting and pasting) of in-house material may not require citation but be careful!

Materials that have been published or submitted to an outside entity (including the MGIA Grant program) should be cited.

Always check underlying sources.

Questions and Concluding Remarks

Scheduling One-on-One Sessions with Janet

THANK YOU!