Office of Grants Management Application Training Series
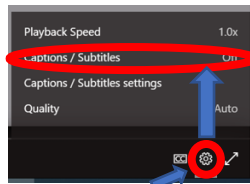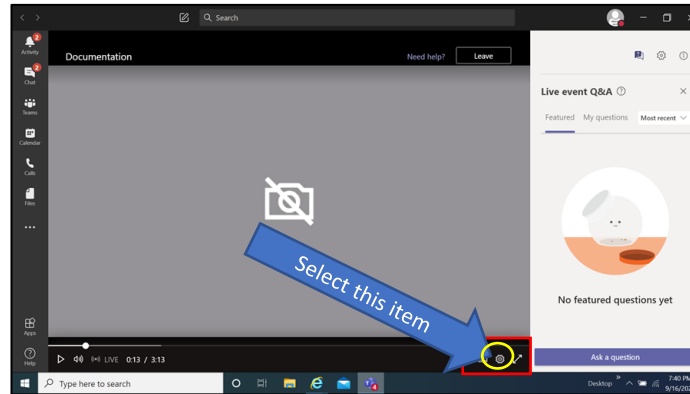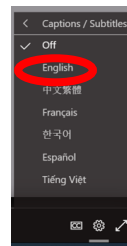
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choose **captions / subtitles**

You then select
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Disclaimer

The translations provided in this application use what is referred to as mechanical translation technology. Although this method of translation is very effective and provides a high rate of accuracy it is NOT 100% word for word accurate. Things that may affect it are the quality of the microphone used and potentially a person speaking that may have an accent.

Application Training Series: Project Budget, Budget Narrative & Project Staffing Plan Tasks

July 14, 2023

Prepared by Montgomery County Office of Grants Management

Welcome!

- This meeting will be recorded and posted for future viewing on the Office of Grants Management online application portal

- The slide deck will also be posted in the same location for your reference

- Online Application Platform Home Page: https://mcmdgrants.smapply.org

Information Session Agenda

- Provide an overview of the grant application tasks: Project Budget, Budget Narrative and Project Staffing Plan

- Provide insight into Review Committee process and feedback/tips for applications

- Walk through the application platform

- Open up for participant questions (put your questions in the Q&A box)

- Any questions we cannot answer during the Information Session will be addressed and posted on the platform

Application Tasks

- **Applicant Information (Reusable) Task:** Organization contact info and supporting documents (data fields and uploads)
- **Applicant Background (Reusable) Task:** Organization size and leadership demographics (*data collected will never be seen by Review Committees or used for awarding*)
- **Project Strategy Task:** Project data & narrative
- **Project Budget Task:** Project cost details
- **Budget Narrative/Justification Task:** Brief explanation of Project Budget
- **Project Staffing Plan Task:** Outline of staff roles
- **Project Work Plan/Timeline:** Implementation schedule
- **Performance Plan and Performance History:** Outline of metrics and outcomes both to be achieved and already achieved
- **Optional Supporting Documents to be Uploaded Task**

Project Budget Task: Guidelines & Formatting

- The Project Budget should contain **detailed itemized cost information** for all proposed expenses plus indirect costs.

- **Include the value of any cost-shares** such as donations, other grants received, and in-kind or pro bono services that you anticipate being donated for the project implementation.

- If applying as a collaboration, please include the appropriate division of budget between the two or more organizations that are applying.

- If a Grant Program allows **multi-year budget requests**, include an estimated inflationary increase for each year.

- **MS Excel format preferred**

- Typically, no page limit or standardized template is required

- If an organization wishes to include quotes or back up for prices listed in the budget, they may upload these items in the **Other Supporting Materials** section of the application.

Project Budget Task: Indirect Costs

- Project Budgets should also include indirect costs. Applications will not be penalized for including indirect costs in their budget.

- Indirect costs cover general administrative costs such as: legal, accounting, liability insurance, audits, and the like.

- If applicants have a federal Negotiated Indirect Cost Rate Agreement (NICRA), then they must use that rate within their application.

- Applicants without a NICRA may use a rate of up to 15%.

- *Charging and collecting indirect costs are an important step in maintaining the health of a nonprofit program AND ensuring quality programming by that organization.*

Project Budget Task: Capital Expenses

Most Grant Programs (i.e. FY24 Community Grants) are primarily for on-going operating expenses required for project implementation. However, applicants may include up to 10% of the total project value for capital expenses that cover fixed asset costs required for project implementation. As a general rule, single items over $500 count as capital expenses while lower cost items are considered supplies (i.e. soccer ball vs. soccer goal).

These could include, **but are not limited to:**

- IT equipment such as computers, monitors, tablets, and printers
- Furniture such as office desks and chairs
- Minor construction expenses such remodeling, upgrading, or making repairs to existing facilities
- Program related equipment such as major sports gear (i.e. gym equipment)

Applicants will need to justify why these capital costs are necessary for their project.

Project Budget Task: Limitations

In addition to other limitations set in this program, program funds cannot be used:

- For lobbying;

- To cover any expenses made prior to the grant award;

- To supplant (replace) funds from other grant sources;

- To support projects already funded by the County are not eligible for additional funding during the same fiscal year; or

- To provide services that wholly occur outside of Montgomery County (unless these services are **exclusively** for Montgomery County residents);

Organizations with other County funded projects may still apply for separate projects.

Project Budget Task: Review Panel Feedback

- The Project Budget is often the focus of review discussions, **especially when making final funding recommendations.** The panel often reviews line items in detail, especially for partial awards.

- Footnotes or an additional notes column should be used to provide **clarity on the budget**.

- All elements of your application should be **consistent** with each other. Review Committee Members (RCMs) often note a lack of consistency between budget and other application Tasks.

- If an organization uploads budget related items (quotes or documentation of prices listed in the budget) in the **Other Supporting Materials** section of the application, cite this in the budget. RCMs usually appreciate this due diligence and detail.

Budget Narrative Task

- Include the purpose of an expenditure and an explanation of how costs were calculated. This may also be achieved through notes in the budget.

- Briefly **outline the cost-share source(s)** identified in the Project Budget.

- Specify how your project would be affected if **partial funding** were awarded. State whether your project could be completed with a smaller amount, and how your projected outcomes would be affected by any funding reduction.

- If your organization does work regionally or has other funding sources, provide us with information to reassure us that the Montgomery County funds will not simply enable you to shift current, non-County monies to operations outside the County but rather will allow you to add to or expand your work on behalf of services in Montgomery County.

- **PDF format strongly preferred, Mac formats cannot be reviewed**

Review Committee Narrative Feedback: the Six Cs

1. **Concise -** Be concise, when possible. Review Committee Members (RCM) have difficulty absorbing information from long narratives.

2. **Concrete** – Be specific and direct in **_how_** your proposed project will achieve its stated goals. RCMs often see gaps in how a project will work.

3. **Clarity** – RCMs prefer that you include the question you are answering or add sub-headings for clarity. Application task uploads should also include the title of the application task, organization name and project title as headers.

4. **Connection -** All elements of your application should show a clear connection with the grant priorities and scoring criteria, as outlined in the NOFO.

5. **Consistent -** All elements of your application should be consistent with each other. RCMs often note a lack of consistency between budget and strategy.

6. **Cite -** Feel free to refence other application sections/Tasks in your narrative. Specifically cite the application Task name so the RCM can go directly there. Hyperlinks to external sources (i.e. news article, research paper, your website, etc…) can be helpful too. Overall, no need to repeat information that is in other places in your application or external source.

Project Staffing Plan: Guidelines & Formatting

- The Project Staffing Plan should detail the staff assigned or to be hired for the program, staff positions, and percentage (%) of time spent on the program.

- If the position is not filled, a projected start date as to when the position will be filled should be supplied.

- **PDF format preferred**

- If an organization wants to include resumes of incumbents in the positions and/or position descriptions of these positions if they are not filled, they may upload these items in the Other Supporting Materials section of the application.

Project Staffing Plan: Budgeting Personnel

- If an employee is to be paid 100% through grant funds from this program, all of their professional time, over and above routine administrative tasks, must be devoted to the proposed project's eligible work.

- Do not low-ball deliverables so as to allow program-funded staff to do work outside this grant.

- If you want the staff to be available to help efforts outside the grant, be sure to include only partial salary for that person in your staffing and budget proposals.

- Likewise, do not double count staff time paid for by other Montgomery County, Federal, State, District of Columbia, or private foundation grants.

- *Note that grantees in the past have sometimes had trouble hiring staff at very low wages; your application will not be penalized for proposing that staff be paid commensurate with their specialized talents and experience in delivering the proposed services.*

Project Staffing Plan

The Staffing Plan should detail at a minimum for the incumbent, position to be filled, and/or contractors to be supported by the project:

- The name of the position;

- Expected salary or hourly rate for the position;

- Percentage of staff time to be dedicated to the proposed project;

- Any relevant degrees, licenses, certifications, or other professional credentials related to the project;

- Outline of language skills and/or cultural competencies; and

- Description of the position role in relation to the proposed project.

- If applying as a collaboration, please note the organizational affiliation of each staff member.

Project Staffing Plan: Sample Format

Staff Member/ Position Title	Position Description	Position Skills/ Requirements *(relevant degrees, licenses, certifications, or other professional credentials, language skills and/or cultural competencies)*	Salary or Hourly Rate	Percent of Time Spent on Program	Affiliated Organization (Collaboration only)
Full Name, Program Manager	Provide programmatic and administrative oversight, reporting, and coordination of partners for project	Requirements include: • Certificate in Community Organization • MPA Nonprofit Management • Intermediate Spanish	$80,000/ year	25%	Montgomery Example
Outreach Specialist	Manage social media and develop marketing materials for project	• Google Certificate in web graphic design • BA Communications	$70,000/ year	10%	Montgomery Example
Program Coordinator (to be hired upon grant start)	Responsible for outreach and engagement with Aspen Hill area community members	• BA and/or 2+ years experience community organizing in Latino/a/e/x communities • Bilingual Spanish	$62,000/ year	100%	Collaborator with Montgomery Example
Program Coordinator (to be hired upon grant start)	Responsible for outreach and engagement with Wheaton area community members	• BA and/or 2+ years experience community organizing in Latino/a/e/x communities • Bilingual Spanish	$62,000/ year	100%	Collaborator with Montgomery Example
Full Name, Program Assistant	Provide logistical and administrative support to program	• MS Office certificate • Bilingual Spanish	$21/hour	30%	Collaborator with Montgomery Example

Additional Task Trainings

OGM will provide additional trainings specific to each Task focused on more detailed explanations of the Task, optional templates, and past Review Committee feedback on what they felt was useful.

Training Topic	Time, Date, and Link to Event/Recording
Applicant Information and Applicant Background Reusable Tasks	Wednesday, July 12, 2023 11:30 AM - 12:30 PM
Project Strategy and Project Work Plan/Timeline Tasks	Wednesday, July 12, 2023 3:00 PM - 4:00 PM
Project Budget, Project Budget Narrative/Justification, and Project Staffing Plan Tasks	Friday, July 14, 2023 10:00 AM - 11:00 AM
Performance Plan and Performance History Task	Friday, July 14, 2023 2:00 PM - 3:00 PM

General Recommendations

- Be direct and clear in your proposal on *how* your program will achieve the grant program's goals and priorities.
- Ensure that all the pieces of your application present a consistent strategy/approach in your proposal.
- Consider this program's Priorities and Scoring Criteria/Weight when developing your proposal.
- Feel free to use graphics, charts, tables, maps, project workflows, and other non-narrative tools to clarify or enhance your proposal.
- Develop, coordinate, and finalize your application offline and then upload all materials into the application.
- Uploads in pdf format are preferred (except the Project Budget, MS Excel please) but other formats are also welcome. **The application platform has difficulty reading Mac formatted documents** (i.e. Pages, Numbers, and Key Note) so these should be submitted as PDFs or converted to MS Office formats.
- Start now on getting your legal house in order, if needed.

Review Process

- OGM convenes a review panel made up of qualified neutral, qualified individuals in Montgomery County Government, and possibly the broader community, selected for their experiences in the grant program's subject area, grants administration, and/or project management.

- In applications with multiple target populations, each target population pool of resources may have a separate Review Committee evaluating all proposals falling under that category. The same project proposal may be reviewed by multiple Review Committees.

- The panel members will review and score applicant proposals based on the criteria and priorities established in the NOFO.

- Final decisions will be made based on the scores, reconciliation of funding across categories, and other factors such as applicants past performance on previous County awards.

Review Instructions

- The Review Committee receives a training about the grant program goals, priorities, target populations, and application components.
- Each member of the review committee will assess each application for:
  - Eligibility (required metrics, if applicable),
  - provide a score against set criteria outlined in the NOFO, and
  - make an ultimate recommendation if the application should be funded.
- The Review Committee receives guidance from OGM of the Review Policies (see next slide).

General Review Policies

- **Judge the impact of the proposed project, not the quality of the proposal.** Montgomery County is one of the most diverse communities in America. However, not all applicants may have the experience or training to develop highly refined proposals. However, their proposed projects may reflect the best solutions for problems within their specific communities.

- **Score proposals with a consistent method, including adjusting scores on previously reviewed applications if necessary to maintain this consistency.** As reviewers go through the applications and gain a sense of the broader quality of the overall pool, they may feel that their scoring of early applications is no longer accurate. If this is the case, reviewers are encouraged to go back to already completed applications to adjust scores (up or down) as necessary to maintain a consistent scoring method.

- **Review proposals independently, your scoring approach does not need to be consistent with peers.** Reviewers are bringing different expertise and experience to the table, as well as diverse life perspectives. This will likely result in different scores between reviewers. These differences are important and will be addressed during the final awarding discussions.

- **Provide concise, constructive comments.** Brief comments that justify your score are not only helpful for the final awarding discussions, but may also be used to help applicants understand why their proposal was, or was not, funded.

Further Questions?

Montgomery County Office of Grants Management

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OGM online grants application platform for information, updates, and to apply for County Grants (OGM website coming soon)
https://mcmdgrants.smapply.org