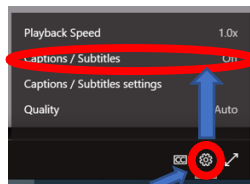
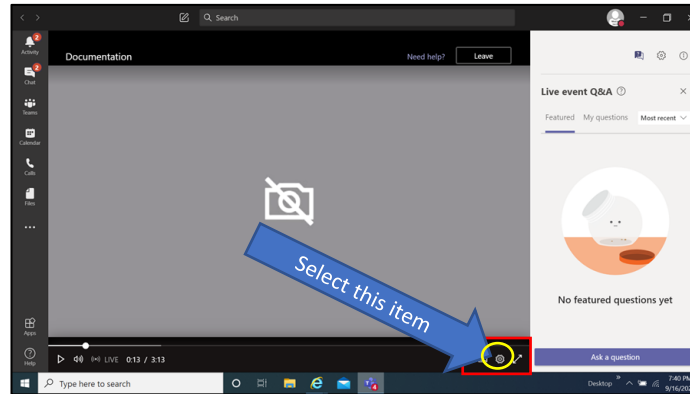
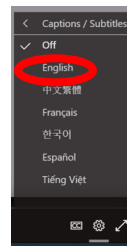


# Office of Grants Management Application Training Series

## How you can view the multi-lingual closed captions



When you select it a menu appears, choose **captions / subtitles**



You then select the language of choice



It will then display the language chosen

### 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.



*Montgomery County Office of*  
**Grants Management**

**Application Training Series:  
Performance Plan &  
Performance History Task**

**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: Performance Plan and Performance History
- 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**

# Overview: Performance Plan & Performance History Task



The **Performance Plan** outlines how you will measure success for your proposed project during the grant term.

- Some Grant Programs may not require any specific metrics or milestones and organizations are given full flexibility to develop a Performance Plan that fits their proposed strategy.
- Any required metrics will be designated by the Grant Monitoring Team and will be listed in the Performance Plan Task of the NOFO.

The **Performance History** outlines the history of outcomes achieved by this project or similar projects that are being emulated through this proposal.

- Provides historical evidence that the proposed project will have a meaningful impact on the target population(s).
- Recommend that some specific metrics or milestones remain consistent between the Performance Plan and Performance History to evaluate project performance between grant years.

# Performance Plan Task



To measure the impact of the project on the target populations, include any of the following related to your project:

**Key Performance Indicators (KPIs) and metrics** - Provide an outline of:

- metrics to be collected;
- targets for each metric;
- the data collection method for each metric;
- and any qualitative evaluation methods.

**Milestones** - Provide an outline of:

- milestone to be achieved;
- a target date to achieve each milestone;
- the impact achieving it will have on the organization.

**Qualitative/Other Evaluation:** - Provide an outline of any qualitative or other evaluation methods the program will be using.



# Performance Plan Task

Both target **outputs and outcomes** should be addressed.

- Outputs typically track what you do and who you reach through your project.
- Outcomes assess impact on the target population (short-, medium- and long-term goals).
- In cases where outcomes are a challenge to measure or cannot be appropriately measured, the applicant may use research or past project performance as a proxy for demonstrating project outcomes.

For Grant Programs allowing **multi-year proposals**, include KPIs, metrics, and/or milestone information for the additional years of project (assuming continued appropriations and satisfactory project performance).

Post Award: organizations should expect **quarterly or semi-annual financial and performance reporting**, modeled on the submitted Performance Plan.



# Performance Plan Task: KPI Table Sample Format



Key Performance Indicator	Targets	Data Collection Method(s)	Qualitative Evaluation Method(s)	Additional Notes
<b>Outputs</b>				
Number of Visits by Montgomery County residents	300	Excel, EHR Platform		Head of household
Number of Home visits provided to Montgomery County residents	100	EHR Platform		
Number of residents receiving goods and services ( <i>be specific as to the goods/ service</i> )	750	Excel		Average household size for participants = 2.5
Number of educational workshops/programs provided	10	EHR Platform		
<b>Outcomes</b>				
Residents complete an intake	200	EHR Platform		Short-term
Residents receive goods and services		Excel		Short-term
Residents who report that the program's services saved them money to spend on other basic needs	270	Satisfaction/ Exit Survey	Case worker notes	Long-term (90% of total survey responses)
Participants of educational workshops/programs who report an increase in subject knowledge ( <i>be specific as to the subject</i> )	30	Satisfaction/ Exit Survey	Case worker notes	Long-term (75% of total survey responses)

# Performance History Task: Existing Programs



- The central question to be answered is: **How do the outcomes in achieved in the past provide evidence that your proposal will achieve these outcomes in the future?**
- The **outcomes described in the Performance History** may be the result of projects funded by previous Community Grants, other funding sources, initiatives outside of the County that your proposals seek to emulate in the County, or be based on research and/or other best practices.
- Some Grant Programs are designed to support **experimental, innovative projects that address new, complex issues** with no clear best practices yet.
- Projects addressing a unique/new need that does not have an established history of results and/or best-practices should describe the knowledge gap and related **evidence supporting your overall project strategy.**
- Applicants should **summarize previous reports** in the Performance History and upload the actual reports as Program Related Materials in the Supporting Documents to be Uploaded Task.

# Application Length Expectations



- Smaller requests may have more brief Task responses.
- Larger requests should have more details and support included.
- Even for large requests, Review Committees prefer applications be as concise as possible.

# Review Committee 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 narratives.
6. **Cite** - Feel free to reference other application sections/Tasks (i.e. budget or staff plan) in your narratives. 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.

# 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.



# Recorded Task Trainings

OGM has provided 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	Link to Recording
<b>Applicant Information and Applicant Background Reusable Tasks</b>	<a href="#">View Session 1 Recording</a>
<b>Project Strategy and Project Work Plan/Timeline Tasks</b>	<a href="#">View Session 2 Recording</a>
<b>Project Budget, Project Budget Narrative/Justification, and Project Staffing Plan Tasks</b>	<a href="#">View Session 3 Recording</a>
<b>Performance Plan and Performance History Task</b>	<a href="#">View Session 4 Recording</a>



# 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?



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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>**