

MONTCO



MONTCO 2040: IMPLEMENTATION GRANT PROGRAM

GUIDEBOOK 2022



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Part I. Program Description

Montgomery County's comprehensive plan, *Montco 2040: A Shared Vision*, lays out a vision for the county over the next 25 years. The county is following a detailed implementation plan in order to achieve this vision, but it will take many partners in order to succeed. The Montco 2040 Implementation Grant Program has been established to help municipalities participate in this vision at the local level.

The list of potential project categories is quite large, and examples are offered in this guidebook. However, a specific set of Focus Categories will be announced for each program year. These categories will highlight current issues and initiatives from the Planning Commission and they will receive additional consideration during the grant application review process.

If a grant application is awarded funding by the County Commissioners, the actual money will be presented on a reimbursement basis as work progresses, subject to the rules established in this guidebook. The Montgomery County Planning Commission will administer the program with grant management assistance from the county's Department of Housing and Community Development. Any questions or concerns should be directed to Anne Leavitt-Gruberger at the Planning Commission.

Changes to the 2022 Edition Guidebook

- MCPC is committed to projects that advance social equity. The just and fair inclusion of all Montgomery County residents where everyone can participate, prosper, and reach their full potential is an important part of our work. Diversity, equity, and inclusion have been added as scoring criteria in this year's guidebook.
- An additional project type - namely projects that address heat island impacts - has been added to the eligible project list under the Adaptation and Resiliency category. In addition, we've clarified that playground equipment does not qualify as an eligible purchase.
- Extension guidelines have been expanded. Grant recipients are eligible for a single one-year extension beyond the two year project timeline. After this, a municipality can reapply for funds for the same project alongside a new project application, during the regular application timeline.

Part 2. Eligibility

A. APPLICANTS

All municipalities in Montgomery County are eligible to apply for an implementation grant.

1. The application must be submitted by a representative of the municipality and approved by the chief elected official. The municipality will bear all responsibility of completing and maintaining a project if a grant is awarded.
2. Municipalities may partner with other public agencies, non-profit organizations, or private entities, but the municipality will still be responsible for facilitating and administering a grant.
3. A municipality may submit and have under review up to two applications at a time, however only one grant will be awarded in a funding round.
4. Municipalities may submit a multi-municipal application for projects that cross local boundaries. These submissions, if awarded, *will not* count towards the single grant award restriction for any of the participating municipalities (item A.3).

B. COSTS

Only physical improvements or acquisitions are eligible for implementation grant funding. Some non-physical components of a project, such as design or engineering, can be recognized as part of the local match, but they will not be reimbursed as part of the grant.

1. Eligible Costs
 - a. Construction
 - b. Infrastructure and Site Work
 - c. Materials
 - d. Land Acquisition (purchase price only)
2. Ineligible Costs
 - a. Plan Preparation
 - b. Site Surveys
 - c. Appraisals
 - d. Environmental Assessments
 - e. Engineering/Architecture
 - f. Closing Costs
3. Eligible costs incurred prior to the award of the grant are not eligible for reimbursement.
4. Improvements may be on private property, but the impact and long-term viability of a private land or structure improvement will be carefully assessed during the grant application review process.

C. PROJECTS – GENERAL CATEGORIES

Projects must address at least one specific goal listed in the [county comprehensive plan](#) under any of the plan's three themes: Connected Communities, Sustainable Places, or Vibrant Economy. The following is a generalized list of potential projects as they relate to those themes. They represent the most obvious connections between goals and improvements, but this list is not considered finite. Creative and effective projects that still address the goals are welcome for consideration. See Appendix A for a listing of goals in the comprehensive plan.

When applicable, all projects are expected to follow the principles of the county's two recently adopted policies: Complete Streets and Health in All Policies. Details on these policies are located at montcopa.org/completestreetspolicy. Additional consideration will be given to projects that address local equity and social justice concerns. For more information about planning and equity, please see Appendix F.

Connected Communities

- Sidewalks / pedestrian connections
- Bicycle improvements and/or facilities
- Local trail connections to county trails or natural areas (or connect to high profile areas, such as employment, shopping, downtown, transit centers, etc.)
- Local greenway preservation
- Specific downtown revitalization initiatives
- Arts and culture facility improvements
- Library improvements

Sustainable Places

- Improving existing roadway connections
- Road diets
- Traffic calming
- Green streets
- Energy conservation or reduction of greenhouse gas emissions
- Stormwater management improvements
- Limiting the impact of flooding
- Natural resource protection
- Make communities more walkable
- Increase the supply of local, fresh food
- Local park improvements, excluding playground equipment
- Preservation of historic properties
- Reinvigorate tree canopy in built environments

Vibrant Economy

- Improve access to employment centers
- Expand or improve transit options in employment centers
- Assist in the redevelopment of underutilized or vacant industrial land
- Modernizing older office and business parks through access, amenity, or infrastructure improvements
- Assist in the creation of walkable, mixed use, transit-friendly, and entertainment-supportive employment centers, towns, and destinations
- Meet the needs of an aging population through improvements or connections
- Signage and wayfinding systems to promote destinations and help visitors get around

D. PROJECTS - FOCUS CATEGORIES

Focus Categories will be announced each year by the county’s planning commission in order to encourage specific project types that address current initiatives and issues in Montgomery County. The categories may extend into more than one annual cycle if the need and effectiveness of potential projects warrants further grant awards in that category. The focus categories for 2022 are mostly unchanged from the prior year:

1. Walk and Bike Montco—Trails, Paths, Sidewalk Connections and Bike Facilities

Walkability is more than a buzzword and making our communities more walkable is a winning proposition. It provides transportation choices, improves health, creates better community connections, makes the county more appealing for young workers, and improves the environment. Biking also provides a healthy alternative to getting around, but all too often the effort is made difficult by streets designed solely for the automobile.

This category is connected to the county’s adopted Walk Montco and Bike Montco plans. Areas that currently impede the ability to walk or bike through insufficient design, lack of facilities, or dangerous conditions should be targeted. Potential projects include:

- a. Improvements that create safer conditions in and around popular school routes, downtown business areas, suburban commercial areas, or public transit facilities
- b. Trails, paths, or sidewalks that open or improve access to other trail or park connections from a neighborhood or employment area
- c. Road diets incorporating some combination of bicycle lanes, landscaped medians, rain gardens, on-street parking, crosswalks, sidewalks, other BMPs, and traffic calming
- d. On-road bicycle facilities such as sharrows, standard bicycle lanes, or protected bicycle lanes – either on or near Bike Montco’s planned bicycle network
- e. Off-road bicycle facilities such as bike racks or bike sharing systems
- f. Pedestrian-oriented wayfinding signage
- g. Trailheads with parking and signage

2. Support Downtowns and Community Destinations

Mixed use areas with thriving businesses, cultural venues, libraries, green infrastructure, and urban parks provide places for people to gather and make connections with their community while improving the quality of life for surrounding neighborhoods.

This category enables municipalities to facilitate the development of their downtowns and community destinations in a manner that supports a central business district while emphasizing physical activity and social connections. There are many creative ways to approach this goal, including but not limited to these potential ideas:

- a. Create or improve public gathering spaces, such as plazas, within the business district
- b. Create or improve downtown pocket-parks or urban parks in the vicinity of a downtown
- c. Improve the identity of a downtown and its surrounding neighborhoods with unique public improvements, such as public art, wayfinding signage, or other place-making installations
- d. Urban greening improvements such as green roofs, living walls, rain gardens, street trees, and plantings
- e. Enhance the function or prominence of a cultural venue through exterior physical improvements
- f. Library improvement projects that enhance physical connectivity through improved public facilities, such as community spaces, outdoor plazas, or other locational improvements

3. Adaptation and Resiliency

Continued growth and development in the county coupled with climate change and extreme weather events accelerates the decline of natural systems and ultimately threatens public health and quality of life. Communities must adapt to these changes and become more resilient to better sustain their futures.

This category supports the most needed projects that help protect against or recover from negative environmental changes. Applicants should be prepared to demonstrate the extent of the problem being addressed and the success of its proposed actions. Municipalities may need to reference their MS4, TMDL, PRP, Stormwater Management Plan or Hazard Mitigation Plan for competitive projects. Potential projects include:

- a. Floodplain Mitigation – Reduce the impact of flooding through an emergency services flood warning system, removal or retrofit of structures in the floodplain, installation of flood control structures, and natural resources protection
- b. Streambank Restoration – Rapid erosion and changing courses can impact floodplains, increase pollution, and damage ecosystems. Identify the cause of streambank degradation and implement appropriate naturalization techniques
- c. Heat Island Impacts - Heat islands are areas with higher average temperatures than their surroundings due to structures such as buildings, roads and other infrastructure which absorb, retain, and generate heat. As a result, heat islands contribute to higher daytime temperatures, reduced nighttime cooling, and elevated air pollution levels, all of which lead to health impacts and heat-related deaths. Projects that address heat islands may include but are not limited to building green infrastructure improvements into regular upgrades or infrastructure projects, the construction of community amenities such as spray parks or cooling centers, the distribution of air conditioners to affected neighborhoods, planting trees and other vegetation, modifying standard roofs with “cool roof” systems, or applying cool pavement technologies.
- d. Retrofit Municipal or School District Property with Stormwater BMPs – Address critical flooding or erosion issues with naturalized basins, vegetated swales, rain gardens, porous pavement, stormwater extended detention ponds, and constructed wetlands
- e. Green Streets – Incorporate landscaped areas and tree canopy designed as stormwater BMPs to promote runoff infiltration and filtering of pollutants. Other components include stormwater curb extensions, planters, vegetated swales, rain gardens, and street tree planting
- f. Community Gardens – Utilizing vacant lots or excess land for gardening can promote localized food production, encourage healthy eating habits, reduce pesticide and fossil fuel use, and connect residents to where their food comes from
- g. Open Space Preservation – Conserving natural resources and environmentally-sensitive areas can help maintain ecosystems, improve water quality, reduce flooding, provide needed buffers to developing areas, or provide recreation opportunities. Desirable projects may protect critical conservation areas, promote active tourism, increase opportunities to exercise, or green the county’s towns. Open Space Preservation projects are required to have a minimum 50% local match, which may come from any combination of municipal or outside funding sources. A current appraisal from a state-certified general real estate appraiser must be submitted with any land acquisition or easement purchase.

E. INELIGIBLE PROJECTS

Projects may fall under a wide variety of categories as listed above, provided they represent a physical improvement. The following types of projects are not eligible under the Montco 2040 Implementation Grant Program.

1. Any project that does not address one of the goals in the county comprehensive plan.
2. Maintenance projects and other projects that would normally be funded by local municipalities. Playground equipment falls into this ineligibility category.
3. Personnel, including staff costs for otherwise eligible projects.
4. Plans and studies, including feasibility studies.
5. A program that disburses grants or loans to subgrantees, such as a façade improvement program or business loan program.

Part 3. Grant Application Requirements and Criteria

A. LOCAL MATCH

The local match is the required commitment from the municipality to support the project.

1. The minimum local match must be at least 20% of the total grant amount. Open Space Preservation projects will require a minimum local match of 50% of the total grant amount.
2. The local match may come from other funding sources obtained by the municipality. However, there should be a letter of commitment from the funding source for any of the required matching funds.
3. In-kind services may not be used for this match, except for the cost of municipal labor directly used for construction.
4. Eligible local match costs are as follows:
 - a. Construction
 - b. Infrastructure and Site Work
 - c. Materials
 - d. Acquisition
 - e. Site Surveys
 - f. Appraisals
 - g. Environmental Assessments
 - h. Engineering
 - i. Design
 - j. Closing Costs
5. Site surveys, environmental assessments, engineering, and design costs for the proposed project incurred prior to the application submittal may be used for the required match, provided these costs occurred no more than three years prior to the application. If the pre-application costs are used as part of the local match, they must be presented before or with the first request for payment. All other eligible local match money must be spent after the grant is awarded.

B. GRANT LIMITS

1. The maximum grant amount is \$200,000.
2. The minimum grant amount is \$10,000
3. Projects must be completed within 24 months from the date the applicant is sent a funding agreement contract. Grant recipients may request a single one-year extension in writing by no later than one month prior to the expiration of the grant, subject to approval by the current grant selection committee.

Applicants who do not have any remaining extensions or who choose to not apply for an extension may resubmit an application in the next round of funding if there is a desire to continue with a project. A resubmitted project application may be submitted alongside a new project application with no penalty, although a municipality cannot exceed two simultaneous applications. A project with expired funding will be canceled by vote of the grant selection committee. No outstanding or additional expenses can be submitted for reimbursement after a grant is canceled.

C. PROJECT EVALUATION CRITERIA

The following criteria will be used to evaluate implementation grant applications. All criteria are not weighted equally, but the combination of relevant factors will determine the overall likelihood of funding. Projects should not be expected to score at a maximum level for all of the noted subfactors, nor will one particular low score necessarily prohibit any chance for funding. A committee of Planning Commission board members, county planning staff, and interdepartmental representation will determine the measures that each potential project achieves based on the submitted application.

1. Impact of Project – This criterion considers the impact and benefits of the proposed project, including:
 - Reach of project - how large an area or how many people does it serve
 - Transformative ability – does it reverse a problem area or issue
 - Visibility
 - Longevity
 - Educational component or public engagement
2. Local Planning and County Connections – Overall consistency with relevant plans will be assessed with consideration for the following:
 - Consistency with current local plans or specific mentions of projects with a significant local planning effort
 - Consistency with other county plans or the principles of county policies
 - Connections to county-owned assets – projects that augment the county’s system of parks, trails, open space, or infrastructure will score higher
 - County planning assistance contracts – municipalities with a planning assistance contract active within the last year or are a member of a multi-municipal regional planning group will score higher
3. Project Readiness – This criterion considers a variety of factors that affect a municipality’s ability to complete the project, including:
 - Necessary preliminary steps, such as acquiring permits, environmental issues, or engineering/design needs
 - Project timeline
 - Maintenance plan including frequency and funding
 - Past history with county funded projects or maintenance issues
 - Progress on outstanding or current Montco 2040 projects
4. Funding – This criterion will consider factors relating to the following:
 - Amount of local match percentage
 - Other grants or private funding secured
 - Reality of proposed project budget
 - Any demonstrated need for funding
5. Diversity, Equity, and Inclusion – This criterion considers how the applicant or the project takes into account disparities in access to services or programs in some or all of the following areas:
 - Race
 - Age
 - Income
 - Gender or gender identity
 - Ethnicity or national origin
 - Physical ability
 - LGBTQ populations
 - Social and/or environmental justice

Part 4. Grant Application Process

All applications must be submitted online at www.montcopa.org/Montco2040GrantProgram. An interactive pdf is set up to guide the required information. Note that some browsers do not currently function with this format, and we suggest only using Internet Explorer when filling out the application. An attachment file will also need to be created in order to supply the required narrative and supplemental information in the application. All attachments must be condensed into a single pdf file no larger than 15 MB and simultaneously submitted via the online mailbox. The file should be named under the following formula: (municipal name)_(project name)_2022. For example: UpperHanoverTwp_TrailExtension_2022.pdf

An official resolution authorizing the municipality to submit an application is also one of the requirements. If there is any scheduling conflict that prohibits a resolution prior to the application submission, contact Anne Leavitt-Gruberger at the Planning Commission to determine the feasibility of a delayed resolution submission

See Appendix B for a copy of the application form and its requirements.

The expected timeline for the grant application process during a full annual cycle of the program is as follows:

- A. New focus categories and any revisions to the program guidelines are announced by January of a given year.
- B. Funding will commence with an application deadline of March 1. Applications may be submitted at any time up to the deadline.
- C. Staff will review the applications and follow-up with the applicant as necessary.
- D. The Implementation Grant Committee will review and score applications forwarding its recommendations to the County Commissioners.
- E. County Commissioners will pass a resolution for an approved grant.
- F. Notifications will be sent to municipalities for grants approved by the County Commissioners and a funding agreement will be sent with a signed and returned copy expected within 30 days. Funding agreements should be returned to the Department of Housing and Community Development. Applicants who are not approved for funding will also be notified.
- G. The length of the process from application deadline until the awarding of grants is expected to be approximately two months.

Part 5. Administration for Approved Grants

A. TIMEFRAME FOR USING FUNDS

The timeframe for each implementation grant begins on the date that the funding agreement is mailed to the applicant by Montgomery County

1. Funding agreements must be signed by the primary municipal contact person listed on the application. The agreements must be returned to the Department of Housing and Community Development within 45 days of mailing by the county. Because project completion times are based on when the county first mails a funding agreement to the applicant, delays in signing an agreement will lead to less time after the agreement is signed to complete a project.
2. All necessary matching funds, as listed in the original approved application and funding agreement, must be committed and guaranteed by the appropriate party within one year of the date a project application was submitted. In addition, applicants must demonstrate that they have control of the matching funds.
3. Applicants not continuing with a project or using less than their contracted county funds for a project shall notify the Planning Commission in writing of the amount of funds that will not be used.

B. RECAPTURE OF FUNDS

The county, at its discretion, may recapture funds and void grants for violations of the procedures in this guidebook, for failure of a project, or for inability to comply with the timeframes in this guidebook.

C. FUNDING AGREEMENT

For all approved project applications, a funding agreement between the county and the applicant must be signed. This serves as the formal contract between the county and the applicant and will include the terms and conditions for the funding, as well as a project description, project timeline, and budget summary.

Funding Agreements include both the contract and several exhibits. Exhibits include:

1. A narrative summary detailing the project's implementation. This will be based on the project description provided in the application; however, if partial funding is approved the applicant will be required to submit a revised project description. This shall be Exhibit A.
2. A budget summary that lists the project costs in detail. This will be based on the project budget provided in the application; however, if partial funding is approved, applicants must submit a revised project budget. This shall be Exhibit B.
3. A list of documentation that must be submitted to receive reimbursement. This shall be Exhibit C.

D. BIDDING AND OTHER LEGAL REQUIREMENTS

1. Bidding for projects must meet the requirements established by the Commonwealth of Pennsylvania for municipalities. Projects that are not required by Pennsylvania to go through a competitive bid process are not required by this program to go through a competitive bid process. All other projects must have, as documentation, three different price quotes and proposals.
2. For all construction and building projects, the application must provide a guarantee that the proposed improvement will remain in place for the expected useful life of the improvement. This guarantee can take many forms, including ownership by a municipality of the property where construction is occurring or an easement, lease, or lien in favor of the applicant that protects the proposed improvement.

3. County funds used for a construction or building project that is subsequently demolished, rendered unusable due to poor construction or maintenance, or removed before its expected useful life has expired shall be paid back to the county on a pro-rata basis, based on the amount of county funds and the amount of time remaining on the expected useful life of the project, as determined by the county. For example, if the county provided \$100,000 for a project and the project was demolished halfway through its expected useful life, the applicant would have to pay back the county half the original county amount, or \$50,000.
4. For land or building purchases, a current appraisal must be prepared. The appraisal must be submitted to the Department of Housing and Community Development for review prior to actual closing.
5. To acknowledge county participation, construction projects must post the following language and incorporate this language into their public acknowledgments where applicable: This project is financed in part by Montgomery County through the Montco 2040 Implementation Grant Program.
6. Any proceeds from the sale of property purchased or improved with County funding must be refunded to the county on a pro rata basis or reinvested within the municipality on a pro rata basis, in accordance with the following standards:
 - a. The pro rata amount will be based upon the proportion of the county grant amount to the total project cost, as well as the market value of the property when it was sold, based on an appraisal.
 - b. Refunded amounts shall be paid directly to the county.

E. STATUS REPORTS

Project status reports shall be submitted by the municipality one year from the date a grant funding agreement is sent to its recipient. Status report forms are located in the Appendix, but may be submitted online. If a municipality is requesting an extension near the end of a project period, a status report must also accompany the request.

A close out report shall be requested at the conclusion of each project, in addition to the reimbursement request that is sent to the Office of Housing and Community Development. All close out report submissions must be accompanied by an opportunity for MCPC staff to visit the project site. The close out report form is also located in the Appendix.

Part 6. Reimbursement Procedures

Reimbursement for all Implementation Program grants will be handled by the Department of Housing and Community Development, in accordance with the requirements listed in this section. Submit requests to:

Department of Housing and Community Development

For Mail: PO Box 311
Norristown, PA 19404-0311

For UPS/Fed-Ex: 1430 Dekalb Street, 5th Floor
Norristown, PA 19401

A. TIMING OF REIMBURSEMENTS

1. The timing for all reimbursements will be at the discretion of the county.
2. Grant payments for construction and renovation projects will occur as stages of projects are completed. Funds will not be advanced for any work or stage of work before it is completed, and the county may re-appropriate funds or cease distributing funds if requirements are not being met.
3. Grant payments for land or building acquisitions will be reimbursed after settlement.

B. REIMBURSEMENT FOR ALL PROJECTS

Reimbursements will only be made for project costs that are specifically set forth in Exhibit B, Budget Summary, of the Funding Agreement. Applicants requesting reimbursement must provide the following information:

1. Any documents needed to support the reimbursement request, as outlined in Exhibit C of the Funding Agreement. All bidding documents listed on Exhibit C must be on file at the Department of Housing and Community Development prior to processing reimbursements.
2. A detailed budget outlining all costs associated with the project, particularly in the case where the grant amount is less than the amount on the original application. This should be completed as part of the funding agreement.
3. One copy of the Request for Payment form, with original signatures and documentation needed to support the request.
4. Copies of canceled checks, front and back, if any, or copies of the face of the check issued and a bank statement.
5. When the funded activity is carried out by a party other than the applicant, a copy of the agreement (to be known as a third party agreement) between the applicant and the third party.

C. ADDITIONAL COST DOCUMENTATION PROCEDURES

1. For expenses of \$50 or less, provide the following:
 - a. Copies of receipts and/or invoices.
 - b. Identification of contractor or provider chosen.
2. For expenses of more than \$50 that were not submitted for bids, provide the following:
 - a. Copies of receipts and/or invoices.
 - b. Identification of contractor or provider chosen.
 - c. List of contractors or providers contacted for this expense and their price quotes. These contacts can be made by mail, fax, phone, or internet and should include the date of the contact, name of person or source of quote, and the quotes. At least three (3) price quotes shall be submitted.
 - d. Submission of proof of payment.

3. For expenses submitted for bids, provide the following:
 - a. Request for goods and services or a submission of bid package and final plans and specifications, including the schedule and advertising for the construction bids.
 - b. Tabulation of proposal for professional services or tabulation of bids for construction projects.
 - c. Municipal resolution to award contract, award letter to service provider or contractor to perform work, and any purchase orders, price quotes, resolutions, etc., pertaining to the project.
 - d. Copy of signed agreement with service provider or contractor.
 - e. Submission of contractual amendments or change orders.
 - f. Service provider's or contractor's applications for payment.
 - g. Submission of proof of payment (such as canceled checks).

Appendix A. Montco 2040 Comprehensive Plan Goals

See the full publication of *Montco 2040: A Shared Vision* online at www.montcopa.org/Montco2040 for more background on the following goals.

Connected Communities - People want to be connected and part of a broader community. A key role for the county is to help these connections occur beyond local municipal boundaries.

- Encourage collaboration and partnerships among governments, businesses, institutions, schools, higher education, and other stakeholders
- Improve transportation quality and expand options for county residents and workers
- Expand and connect county trails, local trails, greenways, natural areas, and parks
- Support strong downtowns and community destinations, including mixed use areas, arts and culture focal points, libraries, and other gathering places

Sustainable Places - The county is full of wonderful neighborhoods and communities. These places need to be sustained and enhanced in a long-lasting and effective way.

- Support a modern, resilient, green, and energy-efficient infrastructure network
- Improve stormwater management and reduce the impact of flooding
- Conserve natural resources, environmentally-sensitive areas, and farmland
- Provide more opportunities for residents to exercise and have healthy lifestyles
- Support housing choices and opportunities to meet the needs of all people
- Enhance community character and protect neighborhoods

Vibrant Economy - A strong economy is critical for all places. With a vibrant economy, residents can earn and spend more, governments can make needed infrastructure improvements, and businesses can grow.

- Improve transportation access to businesses
- Encourage development and transformative investment where infrastructure already exists
- Attract and retain businesses and vital community assets
- Flexibly adapt to changing market conditions and demographics
- Facilitate the marketing of the county and its assets

Appendix B. Application Form 2022

Application Form
Montco 2040 Implementation Grant Program
Montgomery County, Pennsylvania

Applications must be filled out and submitted online with appropriate attachments at
www.montcopa.org/Montco2040GrantProgram

We suggest saving all grant program documents to your computer to fill out with your preferred pdf software.
Do not use your browser to fill out this document.

Applicant and Contact Information

Applicant (Municipality): _____

Name of Chief Elected Official: _____

Primary Contact Person for this Project: _____

Primary Contact Person's Title: _____

Mailing Address: _____

Telephone Number: _____

Email: _____

List any partners or third parties involved with the project:

1. _____

2. _____

3. _____

Funding Request Information

What is the name of this project? _____

In which municipality is this project located? _____

Please give a street address, if applicable. _____

Please give a brief description of this project. _____

What is the estimated project start date? _____

What is the estimated project completion date? _____

Has this project, or a related project, previously received county funding? yes no

If yes, for what project was it received, and what was the amount and source of the funding? _____

Expected life of improvement? _____

Project Narrative

A project narrative, including maps, plans, photos, and other attachments must be submitted online with this application. This narrative must include the information listed below in a numbered report that follows the order outlined. All attachments should be grouped into a single pdf file no larger than 15 MB and given a name in the following format: "Municipality_Project Name_20xx.pdf". When you hit 'submit' at the end of this application form, an email will be created in your default email program with the completed form attached. Before sending the email, be sure to attach the narrative pdf file as well.

1. Complete narrative description of the project and its expected benefits. Provide details on who will benefit from the project and the extent of the project's impacts. Point out any connections to county-owned assets.
2. Identify the goal(s) from the Montco 2040 comprehensive plan being addressed through the project.
3. How does your project address diversity, equity, and inclusion in your community? Please see Appendix F for more information on diversity, equity, and inclusion and how it relates to planning.
4. Include a map and photos of the project location(s) and the project municipality. The map should be on an 8½ by 11 inch page. Photos are very useful in conveying the location and context of the proposed improvement.
5. Plans for the project, if applicable. Plans should be reduced to fit on an 8½ by 11 inch page; full sized plans may be submitted as an addendum.
6. A list and explanation of any parties responsible for implementing the project
7. An explanation of permits needed and their status.
8. A description of public knowledge of and involvement in this application, including any letters of support and public meetings or hearings.
9. Demonstrate consistency with the municipal and regional comprehensive plans (if applicable), as well as any other active local planning documents. Note if the project is specifically addressed as an action item in any local plans.
10. A detailed maintenance plan for the project including frequency, cost, and how it will be funded.
11. Discuss any educational or public engagement opportunities that the project will present. Discuss how you will address equity and inclusion through your engagement process.
12. Provide an itemized budget for the project in addition to the Project Budget Form on the following page. Include appraisals for any land acquisition or easement projects.
13. A resolution from the municipal governing body authorizing the project application.

Funding Sources

In the table below, please outline the proposed method(s) of financing the total project costs. The total project cost is equal to only the summation of project costs or the project phases' costs that are covered in this application. The first line should indicate the amount of the Montco 2040 grant request, and all eligible local match costs should total at least 20% of the Montco 2040 request.

	Amount	Percent of Total	Source of Funds (CDBG, local budget, grant, etc.)	Are Funds Committed or Pending?	Date of Commitment, if Applicable	Type of Commitment (form, letter, etc.)
<i>County Funds</i>			Montco 2040 Grant	NA	NA	NA
<i>Local Funds</i>						
<i>Private Funds</i>						
<i>State Funds</i>						
<i>Federal Funds</i>						
<i>Other Funds</i>						
<i>Total Project Cost</i>						

Project Timeline Form
 Montco 2040 Implementation Grant Program
 Montgomery County, Pennsylvania

Project Category	Task	Month/Year to Begin	Month/Year to be Completed
CONSTRUCTION	Preliminary Design Complete		
	Final Design Complete		
	All Permits Acquired		
	Land Development Approval Obtained		
	Bid Package Ready to Go Out		
	Bid Accepted		
	Demolition, if necessary		
	Infrastructure and Site Improvements		
	Building Construction Begins		
	Building Construction Finishes		
	Building, if any, Occupied		
ACQUISITION	Appraisal of Property		
	Condemnation Proceedings Initiated, if applicable		
	Agreement of Sale		
	Property Obtained		

If you have any questions regarding the application or process, please contact Anne Leavitt-Gruberger at the Planning Commission, aleavitt@montcopa.org, or 610-278-3727.

REMINDER: Attach the additional narrative pdf file to the email created after hitting the “SUBMIT” button.

Appendix C. Status Report Form

Status Report Form
Montco 2040 Implementation Grant Program
Montgomery County, Pennsylvania

Please fill out a separate report for each project.

The Montgomery County Planning Commission must be updated annually upon the anniversary of the grant funding agreement on the status of approved and ongoing projects. Please fill out both sides of this form to provide this status update but feel free to attach any supporting documentation, including photographs and plans.

Applicant/Organizational Name: _____

Primary Contact Person for this Project: _____

Primary Contact's Email Address and Phone Number: _____

Project Name: _____

Project Location, with Street Address if applicable: _____

Initial Project Funding Date: _____

Project Number (if one has been assigned by the county): _____

Project Description: _____

Overview of the Project to Date

Describe progress made on the project and the next steps, including the expected timing of these next steps. Photographs of completed work are encouraged as part of this description..

Describe any difficulties with the project. _____

List concrete benefits that are a result of this project, including the benefits related to diversity, equity, and inclusion. Include statistics when possible. _____

Please have the Primary Contact Person sign this form.

Signature: _____

Title: _____

Date: _____

Please fill out the below matrix to track the phases of your project. Some projects will include all of these phases, while others will only include a couple of these phases. Please cross out any phases that are not applicable to your specific project

Phase	Month/Year to be Completed (from Exhibit B of the Funding Agreement)	Month/Year Actually Completed (or expected to be completed)
Construction		
Preliminary Design Complete		
Final Design Complete		
All Permits Acquired		
Land Development Approval Obtained		
Bid Package Ready to Go Out		
Bid Accepted		
Demolition, if necessary		
Infrastructure and Site Improvements		
Construction Begins		
Construction Finishes		
Acquisition		
Appraisal of Property		
Condemnation Proceedings Initiated, if applicable		
Agreement of Sale		
Property Obtained		

Please remit this form to:

Montgomery County Planning Commission, PO Box 311, Norristown, PA 19404--0311

If you have any questions regarding the status update, please contact Anne Leavitt-Gruberger at the Planning Commission, aleavitt@montcopa.org, or 610-278-3727.

Appendix D. Project Close Out Form

Project Close Out Form
Montco 2040 Implementation Grant Program
Montgomery County, Pennsylvania

Please fill out a separate report for each project.

Any municipality completing a project on or after January 1, 2022 is required to submit a close out form and to schedule a site visit with staff from the Montgomery County Planning Commission. Please fill out both sides of this form and attach any supporting documentation, including photographs, media, publicity, and/or other documentation.

Applicant/Organizational Name: _____

Primary Contact Person for this Project: _____

Primary Contact's Email Address and Phone Number: _____

Project Name: _____

Project Location, with Street Address if applicable: _____

Initial Project Funding Date: _____

Project Conclusion Date: _____

Project Number (if one has been assigned by the county): _____

Project Description: _____

Overview of the Project to Date

Describe the final project, including whether there were necessary deviations from the initial project scope. Photographs of completed work are encouraged.

Describe any difficulties with the project. _____

List concrete benefits that are a result of this project, including the benefits related to diversity, equity, and inclusion. Include statistics when possible. _____

Please have the Primary Contact Person sign this form.

Signature: _____

Title: _____

Date: _____

Please fill out the below matrix with the final information about your project. Some projects will include all of these phases, while others will only include a couple of these phases. Please leave blank any phases that are not applicable to your specific project

Phase	Month/Year to be Completed (from Exhibit B of the Funding Agreement)	Month/Year Actually Completed
Construction		
Preliminary Design Complete		
Final Design Complete		
All Permits Acquired		
Land Development Approval Obtained		
Bid Package Ready to Go Out		
Bid Accepted		
Demolition, if necessary		
Infrastructure and Site Improvements		
Construction Begins		
Construction Finishes		
Acquisition		
Appraisal of Property		
Condemnation Proceedings Initiated, if applicable		
Agreement of Sale		
Property Obtained		

Please contact Daniel Farina at 610-278-3728 or dfarina@montcopa.org to set a time for a site visit. If you know the site visit date and time already, please list it here. _____

**Please remit this form to: Montgomery County Planning Commission,
PO Box 311, Norristown, PA 19404-0311 to the attention of Anne Leavitt-Gruberger.
This form can be emailed to the address below.**

If you have any questions regarding the status update, please contact Anne Leavitt-Gruberger at the Planning Commission, aleavitt@montcopa.org, or 610-278-3727.

Appendix E. Payment Request Form

Montco 2040 Implementation Grant Program
 Montgomery County, Pennsylvania
 Payment Request Form

As of the start of 2021, county staff continue to work from home due to Covid-19 concerns.
 Please email any reimbursement requests or questions to Terry McMullen at tmcmulle@montcopa.org.
 Please remit form to: Montgomery County Office of Housing and Community Development,
 PO Box 311, Norristown, PA 19404-0311

Project Name: _____ Project Number: _____
 Is This A Final Or Interim Payment Request? _____ Final _____ Interim
 Initial Project Funding Date: _____
 Indicate Approximate Percentage Of Project Completed: _____
 Expense Total (Attach Copies Of Payment Checks As Applicable): _____
 Reimbursement Percentage And Amount Of Payment Request: _____ \$ _____

I hereby certify that I have reviewed the attached invoice and find that, to the best of my knowledge, this payment request is an accurate and complete documentation of the project costs and complies fully with all requirements of the Montco 2040 Implementation Grant Program and is in accordance with the provisions of the project Funding Agreement. Accordingly, I have enclosed one copy of the subject invoice and do hereby request reimbursement / authorize payment on behalf of the Grantee named below.

Applicant/Organization Name & Address: _____ Signature: _____
 _____ Name: _____
 _____ Title: _____
 _____ Date: _____
 Telephone: _____ EMail: _____

For Montgomery County Use Only:

COMPLIANCE DOCUMENTATION

Contract documentation received: _____
 Project up to date: _____
 Comments: _____

 Project Manager Date

 Authorized By Date

FUNDING DOCUMENTATION

Payment Number: _____
 Grant Amount: _____
 Net Amendments: _____
 Previous Payments: _____
 Current Balance: _____
 Authorized Payment: _____
 Remaining Balance: _____

Voucher Number: _____
 Vendor Number: _____
 GL Number: _____

Date Received

 Fiscal Manager Date

 Date Paid

Appendix F. Resources on Diversity, Equity, and Inclusion

Montgomery County is committed, to the greatest extent possible, to fostering diversity, equity, and inclusion in the projects it funds through the Montco 2040: Implementation Grant Program. Here's how we're defining those terms.

- Diversity - The wide range of national, ethnic, racial and other backgrounds of U.S. residents and immigrants as social groupings, co-existing in our greater culture. The term is often used to include aspects of race, ethnicity, gender, sexual orientation, class, nationality, physical and other abilities, and much more.
- Equity - Just and fair inclusion into a society in which all can participate, prosper, and reach their full potential.
- Inclusion - A commitment to foster a climate that represents and values members of diverse social identity groups. Inclusive practices occur at the individual, cultural and institutional levels, creating a culture where all members feel they belong and their contributions are recognized and valued.

Why this additional focus?

The work that planners do has a direct impact on making communities better places for all. It is why many of chose this career path, and chose a life of public service. But past policies have not always done that, and years of exclusion have taken their toll both here and across the country. While we cannot change the past, we can have a more equitable eye toward the future. This new criterion on diversity, equity, and inclusion is a starting point to reconcile with communities and residents that unfairly borne the burdens of past planning policies.

For more information on the intersection of diversity, equity, inclusion, and planning, please visit the following resources:

American Planning Association's [Planning For Equity Policy Guide](#)

Additional resources can be found on the American Planning Association [website](#).

