RRC Technical Assistance Match Funding Guide

Everything a community needs to know to access RRC TA Match Funding

Contents

RRC Formal Request Approval Dates (Fiscal Year 2023)

All completed RRC TA Match Funding requests must be submitted for review by the full RRC Team at least **two full business days prior** to the team meeting (typically every Monday of the month). Any questions should be directed to the community's Community Planner.

Handbook Updates

- September 2022: Updated to weekly review timelines and increased project & lifetime maximums. Form 1 + Form 2 updated.
- December 2021: Updated to allow for multipart projects with additional milestones + clarifications to use of Essentials maintenance funding.
- October 2021: Updated to reflect new process and fiscal year approval dates.
- July 2021: Updated to reflect process for handling end-of-fiscal-year requests in July to allow for weekly approvals and clarify time where new requests cannot be considered. Other minor updates such as typo corrections made as well.
- May 2021: Updated approval dates to account for holiday variations.
- February 2021: Updated to address training as an encouraged and supported use of funding.
- February 2021: Updated to include RFQ/RFP tips and updated submission deadlines.

Introduction

RRC Technical Assistance (RRC TA) match funding is a resource available to eligible communities who are actively engaged in Redevelopment Ready Communities (RRC). RRC TA match funding may provide financial support for various projects needed to reach or maintain the RRC Essentials or RRC Certified designations including plan updates, zoning, economic development strategies and more.

This guide provides details on requesting RRC TA match funding as the process exists on the date indicated on the cover. Feedback on the process is regularly solicited and the process is adjusted as needed to foster a predictable and positive experience for communities. Communities are encouraged to contact their Community Planner directly and early to begin the process and learn if any updates have been made to the information contained in this handbook.

Process Overview

Requesting RRC TA match funding is a partnership between the community and the Community Planner assigned to the area. Depending on when the process is started and how the community chooses to select a provider, it can be completed as quickly as one month from the initial ask to RRC approval. This guide will take you through each step. *Note: For training-only requests, only steps 1, 2 & 8 apply.*

The community's assigned Community Planner will track progress on the TA match request via the community's customized RRC Trello Board; be sure you are familiar with the system and are able to receive notifications.

Step 1: Initial Request to Community Planner

Step 2: Confirm Eligibility & Capacity (Form 1)

Step 3: Community Solicits Proposal, Timeline & Cost

Step 4: Formal Request (Form 2)

Step 5: RRC Team Decision

Step 6: Grant Agreement

Step 7: Progress Updates & Payment Milestones

Step 8: Project Complete & Feedback to RRC

Step 1: Initial Request

Step 1 is as easy as it sounds! If the community has identified a project from its RRC baseline report recommendations that it would like to complete, communicate that in an email, phone call, Trello comment, or meeting with your Community Planner. The Community Planner will talk through options and explain the rest of the process.

What can a community use the funding for?

For engaged communities (those who have not yet achieved RRC Essentials or RRC Certified)**,** projects must move a community closer to RRC Essentials or Certified status by accomplishing unaligned RRC Best Practices. Examples for use during a community's efforts to reach a designation include:

- New or updated master plan
- New or updated downtown/corridor plan
- Developing a capital improvements plan
- New or updated zoning ordinance
- Board and commission training
- New or updated economic development strategy
- New or updated marketing plan.

All RRC TA match funded projects are expected to **result in deliverables which meet the <u>Certified</u> designation** standards, even if the community has declared its intent to pursue RRC Essentials.

For RRC Essentials or RRC Certified communities (those who have reached and are maintaining one of these designations)**,** funds may be used for any project which helps the community maintain its current designation or takes a community "above and beyond" RRC best practices towards accomplishing community goals. Examples include enhanced plans, new or updated zoning ordinance, fiscal impact analysis of various growth scenarios, zoning audit, downtown district parking audit, website or other technology needs, master plan implementation efforts, training for elected/appointed officials, etc.

How much funding support may a community receive?

While exact investment parameters vary based on numerous factors, RRC TA match funding can provide support for technical assistance projects *up to* 75% of a project's cost, with the remaining amount coming directly from the community or its partners (see next section for more details on local match). Projects coming in with a higher local match will be viewed more favorably. Caps apply based on the community's current RRC status and its declared goal.

<u>For communities who do not currently have a formal RRC Designation (Essentials or Certified)</u>

Current Status	Goal Status	Amount Available
Engaged	Essentials	Up to $30,000
Engaged	Certified	Up to $40,000

A few special considerations to be aware of:

1. **For those pursuing Certified who were in RRC prior to 2019:** If a community used general technical assistance dollars under the previous cap/match of $30,000 and 50/50, those communities could go up to the new $40,000 total with the new match of 75/25. For example, if

a community used $20,000 for a zoning update at 50/50, it could now ask for another $20,000 at 75/25 for a second project.

2. **For those who achieved Essentials and then choose to pursue Certified**: Communities who achieve their original stated goal of Essentials but then choose to pursue Certified can gain access to an additional $10,000 in TA which must be spent on items that *directly relate* to achieving Certified status such as marketing plans, economic development strategies, zoning updates related to green infrastructure, etc. Items not related to achieving Certified can be supported through maintenance funds (see below). This additional $10,000 can be increased by whatever amount of the original $30,000 a community didn't use.

   For example: Community X used $12,000 in RRC TA funding to complete zoning updates to get to Essentials. Two years later, a new City Manager and Council wants to pursue Certified instead. Upon officially declaring that goal, the community will gain access to $10,000 + the remaining $18,000 to complete Certified-only items. This is in addition to their $25,000 maintenance funds which can only be spent on non-Certified items.

Communities who currently have an RRC Essentials or RRC Certified Designation

Once a community has achieved a designation (Essentials or Certified), it gains access to ongoing technical assistance to maintain and enhance its planning, zoning, and economic development documents. The amount is capped based on the following values and is reset each time a community renews its designation (every five years):

Certified, Maintaining	$50,000/maintenance period (5 years)
Essentials, Maintaining[1]	$40,000/maintenance period (5 years)

Other factors to be aware of that could impact a community's request:

Combined Projects: RRC TA can be used to combine projects when efficiencies exist such as doing a combined economic development & marketing plan or including a downtown chapter in an updated master plan. RRC defines a combined project as a project resulting in a *single deliverable*.

Multipart Projects: Communities may make requests for *multipart* projects (defined as a project which results in multiple separate deliverables such as a master plan + zoning ordinance) when efficiencies exist; however, if approved, the grant agreement will include additional milestones requiring the community complete other RRC best practice criteria throughout the project period to ensure the community makes ongoing self-investment in implementing the RRC Best Practices overall.

Multiple Projects: RRC TA Match Funding may be used on multiple projects throughout the community's efforts to reach a designation, however typically only one project may occur at a time, and additional progress must be demonstrated via Trello before new project(s) will be considered.

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[1] *Requested uses of these funds are limited to RRC Essentials-related items for the first maintenance period (5 years) and cannot be used to pay for Certified-only items during that time. This helps ensure a fair playing field for everyone working toward RRC Certified.*

Minimum Grant Amount: In general, RRC TA requests should exceed $5,000 due to the work associated with formal grant agreements. For projects lower than $5,000, the community should talk with the Community Planner about their options.

How does local match work?

For **engaged** communities (those who are not currently maintaining a designation):

- Match can go *as high as* 75/25 (75% MEDC and 25% community) but can fluctuate above or below that in certain instances. See RRC Policy on Flexible Local Match for more details.
- Projects under $ $3,000 do not require a local match but do count against the cap.
- Match must be financial, not in-kind.
- Match can be provided through non-governmental or non-local sources such as foundations, EDA, or other state programs like EGLE's Coastal Resiliency grant or Treasury.

For communities who have obtained and are maintaining **RRC Essentials or RRC Certified status**:

- The standard match is 75/25 in almost all cases and commonly won't be below that unless the project exceeds the cap, or the community requests a lower RRC contribution to save funds for a later request. RRC can offer a lower local match in certain situations, but that request should come early in the process to allow time for team discussion. RRC does have a flexible match policy for communities facing financial distress.
- Projects $5,000 or less do not require a local match but do count against the cap for that cycle.
- Local match can be more flexible, including the use of other projects the community is paying for such as a concurrent plan update to match the requested project.
- Match can be provided through non-governmental or non-local sources such as foundations, EDA, or other state programs like EGLE's Coastal Resiliency grant or Treasury.

Step 2: Confirm Eligibility & Capacity

Once the initial request has been communicated and agreed upon in principle, the next step is to establish eligibility and capacity. To assist with this step, the Community Planner will work with the community to complete the **RRC TA Match Interest Form (Form 1)**[2] which includes basic information and questions to help the team assess the request. Typically, the Community Planner can quickly determine whether a community meets the eligibility and capacity thresholds, but that decision is often taken to the full RRC Team in the interest of communication and consistency.

What makes a community eligible?

To request funding, a community must meet five key thresholds:

1. Be engaged and in good standing in RRC.
2. Have received a Baseline Report and adopted a resolution to continue.
3. Have declared a goal RRC designation.
4. Can demonstrate that they have made recent progress (past six months) toward the goal designation.

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[2] *If the community is requesting an RRC-funded training event, it will instead fill out Form 1T and a team decision will occur at this step instead of step 5. Training does not require a formal grant agreement.*

a. *There is no set number of items to complete but in general it should be more than just one or two small items. It should show **true self-investment** and support the idea that the community is likely to continue working toward Essentials or Certified **during and after** this project is complete.*

5. Can demonstrate capacity to complete the project on time and on budget.

Unsure if your community is eligible to apply? Chat with the Community Planner for your region. Being eligible to request funds does not guarantee approval. Projects are approved on a case-by-case basis and consider other factors such as cost, local match, capacity, competitiveness compared to other projects requesting funding, and more. See further down for a full list of factors.

How does RRC define "good standing"?

A community is considered in good standing when it consistently communicates with the RRC Team and can demonstrate recent progress on RRC items. Ways to maintain good standing include:

- Respond to RRC emails, Trello tags or phone calls on a consistent basis
- Demonstrate recent, measurable progress on RRC within the past three months
- Keep annual items up to date (fee schedules, PC annual reports, etc.)

Community Planners work diligently to help communities maintain good standing throughout the RRC process.

How does RRC determine capacity for a project?

Capacity can be an ever-evolving concept. RRC recognizes that communities may have limited capacity one month, but a few months later be better positioned for a project. To help assess this as consistently as possible, the RRC Team considers the following information:

- Past experiences with the community on any RRC, MMS, or MEDC projects (whether MEDC funds were involved or not).
- Other known major projects or issues present in the community which could impact their capacity to complete the requested project.
- Any impending departures of key staff or officials which may impact the project.
- Intended public engagement activity and/or any existing public participation plan.
- Any recent training the community has provided or intends to provide to the board(s) responsible for the requested project.
- Whether the board(s) in charge of the proposed project has a set meeting schedule.

A community has not had any training to prepare for this project. Will that impact its chances of receiving funding?

As part of the capacity assessment, your Community Planner will inquire about any recent training that will help officials prepare for the project. If there has not been any recent training to prepare the identified board for this project, do not worry. RRC can help the community identify some as part of the project. This may come from the selected consultant, from an outside organization such as MML/MAP or just a commitment to conduct training internally. RRC encourages communities to take this opportunity to secure training that might otherwise be outside of its reach without funding support.

Who should oversee the project on a local level?

For administrative purposes, the designated RRC point of contact will take the lead on an RRC TA Match supported project unless the individual delegates that authority to another staff member or official.

When considering who should oversee the project overall, the answer can vary. RRC-related projects are commonly overseen by Planning Commissions or Downtown Development Authorities. In other instances, it may make sense to form an ad hoc committee. This could include members from multiple groups or just a smaller subset of members from the same board. In limited situations, projects may be best suited for only one person to oversee.

The community's Community Planner can help determine the best approach for overseeing the project. When considering this aspect, the community should be sure to **consult its public participation plan** to ensure it is respecting any commitments it made in that plan.

Step 3: Secure Proposal, Timeline, & Budget

This step will be primarily completed by the community, but Community Planners will be available to assist as needed.

How does a community select a technical assistance provider?

Communities are welcome to secure a proposal, timeline, and budget however they would like to do so (respecting local policies, of course). RRC commonly sees it done in one of three ways:

- Work with the community's existing planning and zoning service provider.
- Issue an RFP/RFQ to receive bids.
- Talk with RRC to identify a provider suited to the community's needs.

The Community Planner can talk the community through which of these options may be best.

What needs to be in the proposal, timeline, and budget?

There is no one format for proposals, timelines, and budgets submitted to RRC (each service provider's submission will look different), but the team does look for three key elements:

- That it clearly identifies alignment with the RRC Best Practices as an outcome.
- That it includes a clear schedule (this impacts the length of the grant agreement).
- That it includes a clear budget broken down by task.

In general, the more detail the better. The breakdown is especially important if the proposal includes components that cannot be funded by RRC.

Tips for a successful RFQ/RFP process

If a community chooses to issue an open request for bids from service providers, RRC recommends the following tips to increase the likelihood of a successful request.

Consider issuing a *Request for Qualifications* (RFQ) instead of a Request for Proposals (RFP)
By issuing an RFQ, the community can focus on finding a service provider who first and foremost fits the community's needs versus a single, specific project. Instead of project-specific parameters, an RFQ instead solicits things like firm profile, sample of similar projects, CV of key personnel, workload,

etc. Once a community finds its preferred provider, it can then negotiate the specifics of the TA project or it can select a few preferred providers and issue a formal RFP for the project.
Clearly define the scope (work with RRC)
Take time to clearly indicate exactly what the community is looking for. For example, "the community is looking to update its master plan" provides less clarity than "the community's master plan from 2011 needs both content and structural updates. The outcome of this project will be a fully updated and more user-friendly master plan with more charts and maps, a bigger focus on implementation, and new content to address emerging issues such as housing affordability and resiliency." Have RRC review the scope and RFQ/RFP prior to release to help get a statewide perspective on your level of detail. Request a detailed timeline for major scope elements, meetings and expected deliverables.
Identify the community's expected budget for the project
While some may fear this "tips their hand", it actually helps potential providers understand a key parameter of the project and whether their services fit with that parameter. This helps both providers and communities by saving time in not submitting and reviewing unrealistic proposals based on the community's available resources.
Clearly define the selection process, including timelines
Knowing the process ahead of time provides predictability for the community and service providers. Be sure your timeline is realistic and that all players know their role. Ideally, schedule out review meetings ahead of time before the RFQ/RFP is even released.
Schedule a virtual pre-submission conference
Including a pre-submission conference in the RFQ/RFP timeline allows the community a chance to meet providers before they submit and for providers to ask any questions. This saves the community from needing to answer the same question multiple times and helps providers submit more tailored responses.
Include information on the community's purchasing process
If the community has a purchasing policy such as cost thresholds, forms, approval paths, etc. provide that information up front to help the selected provider plan for those steps.
Provide background documents
Including background documents such as old plans, studies, reports, etc. allows providers to research the community and submit a more tailored scope for the project. Ideally, these should be available online and linked in the document but if that is not possible, include them as attachments.
Clearly indicate that the community is pursuing RRC Essentials/Certification and which best practices this project will help it meet
This helps providers understand upfront the expectations around the project and that RRC will need to be looped in. While all RRC TA Match funded projects must meet Certified expectations, it helps to know the community's RRC goal.

What can a community use for local match?

All RRC TA Match Funding requests must come with a **clearly identified local financial match** (a *minimum* of 25% of a project's cost) which is either already secured or the community can demonstrate that it will be secured within a reasonable timeframe of approval for match funds (typically 30 days)[3]. In-kind match will not be accepted. If a project is approved pending local funds, MEDC will not issue a grant

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[3] If local funding is not secured, RRC funds will not be released, nor will the project be cleared to start until those funds are secured. RRC reserves the right to rescind approval if local funding is not secured within the timeframe agreed to upon approval.

agreement until the local funds are secured. Historically, communities have used a variety of sources as match funding:

- General revenue or department funds
- DDA or other TIF funds
- Local Economic Development Corporation (EDC)
- Local foundation or non-profits
- Capital improvements funding (be sure the project fits within the local definition of a capital investment)

How can a community approach outside partners to consider providing funding?

In an environment of limited resources, RRC understands that providing a local match from government sources may prove to be difficult. RRC encourages communities to work with local partners to collaborate and potentially share the cost of the local match. Unsure how to approach local partners? Begin to build your pitch with these talking points (customize as needed to fit the project):

Plans	Ensuring our community's master plan is up to date is essential to guiding future growth in a way that brings all our partners together.
Zoning	Helping local government streamline processes and align zoning with our plans can remove unintended barriers to entrepreneurship and expansion of existing businesses.
Economic Development Strategy	The community is looking to be a more active partner in our economic development efforts – having a local strategy will help us leverage our strengths.
Marketing Plan	Much of our marketing is done by you, our partners. As part of RRC, we are looking to better understand all that you do for us and better coordinate with you via an established plan.
Overall Support	Community development is a team sport. We are looking to strengthen our partnerships through RRC and hope you can help us invest in the community.

Step 4: Formal Request

Once the community and Community Planner agree on the scope and budget, the community will work with the Community Planner to complete the **Formal Funding Request (Form 2)**. This form provides all the necessary information for the team to review the project and issue a grant agreement if the request is approved. The Community Planner will provide the form to the community once the Community Planner and community agree on the scope and budget.

*Please note: RRC will accept request for match funding from communities ONLY. Requests directly from consultants on behalf of communities are not accepted.

Step 5: RRC Team Decision

The RRC Team reviews completed request forms generally on each Monday of the month. Form 2 must be completed and signed by the community at least **two business days prior to the meeting** so the full RRC Team has sufficient time to review the request.

- **If fully approved**, the Community Planner will communicate the decision to both the community and the selected service provider and move on to step 6.
- **If partially approved**: In some instances, RRC may approve only part of the request. The Community Planner will communicate why and discuss the community's options.
- **If the request is denied**, the Community Planner will clearly communicate to the community why and make recommendations for next steps. Communities are welcome to resubmit requests once any concerns have been addressed.

Step 6: Grant Agreement

Once approved, the community will need to sign a formal grant agreement with MEDC. During this phase, it will continue to communicate with the community's Community Planner but also interact with MEDC's contracts and grants teams.

How long does it take to get a grant agreement in place?

Depending on MEDC's workload, this process could take up to six weeks (though we certainly aim for a shorter timeframe), so communities should plan accordingly.

Can the community start the project before the agreement is signed?

In general, RRC recommends that communities not begin the project until a formal grant agreement is signed, but that is ultimately up to the community and consultant's comfort level. No payment can be issued until the grant agreement is signed and the first milestone is met.

Will the community need to sign a contract with the service provider too?

Yes, the community will also need to sign a contract with its selected TA provider and is responsible for all payments to the provider as outlined in that contract. A copy of the signed contract must be provided to RRC.

Step 7: Progress Updates & Payment Milestones

During this step, the community will proceed with the project as normal, being sure to keep RRC updated on progress. RRC grant agreements tie payments to customized, achievable milestones and are built in a way the provides some money for the project in the early stages while still creating accountability for completing the project on time and in a way which aligns with the RRC Best Practices.

How does RRC handle progress updates?

During the kickoff meeting, the Community Planner and community (and ideally the consultant) will agree to a regular communication schedule. That may include virtual meetings, phone calls, monthly emails, or something else. Once established, the community must adhere to that update schedule to fulfil its commitment in the grant agreement. While RRC seeks to build relationships with both the community and service provider, the community is ultimately responsible for ensuring updates are provided to RRC.

What type of milestones will be included in the grant agreement?

As part of the grant agreement, the community will agree to project-specific milestones and reporting commitments. While these will look different for each agreement, they'll commonly include:

- Conducting a kickoff meeting with RRC & the consultant
- Providing regular updates to the Community Planner via an established schedule
- Providing completed drafts for review by RRC
- Providing the final, adoption-ready version for RRC confirmation of alignment
- Ensuring the final products are available online (if applicable)
- Completing other RRC best practice items throughout the project period

An example payment schedule for a master plan could look like:

- Payment 1: 25% of grant funds upon execution of the grant agreement and scheduling of the kick-off meeting.
- Payment 2: 50% of grant funds once RRC has received a full draft of the master plan for review and the community completed the recommendations for best practice 3.4 and 4.1.
- Payment 3: 25% once the final product has been confirmed by RRC as aligned, adopted, and available online.

How does the community receive the funds?

Payment of any kind from MEDC requires the community to be set up in the **state's financial system (SIGMA) to accept Electronic Fund Transfers (EFTs)**. Most communities are already set up to receive ETFs from SIGMA but if yours isn't, your community will need to set that up while the grant agreement is being drafted.

How long does it take to receive the funds once the community achieves a milestone?

Once the Community Planner determines a community has achieved a milestone, a request for payment is submitted internally. Funds are *typically* in the community's account within 10 to 14 days of that request.

Step 8: Project Complete & RRC Feedback

Communities accepting RRC TA match funds are expected to work with their service provider to deliver the project **within scope and on time**. This is especially important as the grant agreement will be tied to that expected end date and payments cannot be made once the agreement expires. Once the project is complete, the Community Planner will close out project records and ask the community for feedback on their experience working with the service provider and RRC grant process.

What happens if the project is not completed on time?

RRC understands that occasionally things happen that are outside of a community's control. If the community has been in regular communication with RRC and has clearly made efforts to keep the project on track, RRC can request an extension to the grant agreement. Extensions are **never** guaranteed, so communities should do everything in their power to finish on time. Remaining payments cannot be issued if the agreement has expired.

What kind of feedback is RRC looking for?

RRC works with literally hundreds of communities across the state and to customize the RRC experience, RRC relies on an open feedback loop. Once a project is complete, RRC asks for feedback on the community's experience including:

- The community's thoughts on the service providers process and final products
- The community's thoughts on the RRC grant and payment processes
- The community's thoughts on RRC's support of the project throughout the process
- Anything else the community would like to share

As of this guide, RRC solicits this feedback either via direct conversations or email.

Appendices: RRC TA Flexible Local Match Policy, Sample Forms, and RRC TA Match Expectations

Local Match Flexibility Policy

RRC understands that there may be instances where a community's unique situation warrants consideration of a lower local match. Such requests are carefully reviewed and are approved only after certain conditions are determined to be present:

1. The community falls under one of the following categories:
    a. It is designated as **Low-to-Moderate Income (LMI)** community under federal CDBG guidelines ([see list here](#) – NOTE: Will download an excel file)
    b. The community has been designated as **Financially Distressed** under the Michigan Department of Treasury's Financially Distressed Cities, Villages & Townships (FDCVT) program. ([learn more here](#))
2. The community can demonstrate it has made substantial progress on RRC recommendations using local resources and cannot progress further without additional help.
3. The community can demonstrate that it has reached out to potential local partners (EDC, Chamber, Foundation, etc.) to secure match prior to requesting this exception.

There is never any guarantee that the match can be increased even when a community meets these parameters.