

GRANT AND LOAN MANAGEMENT ROLES RESOURCE

The following summarizes the differences between the different Grant and Loan Management roles and how they should be used to implement brownfield grant and loan projects. Further questions should be directed to your Brownfield Coordinator.

	ADMINISTRATION	3 RD PARTY OVERSIGHT	PROJECT MANAGEMENT
Who:	Local unit of government (LUG) or consultant on their behalf.	Brownfield specialist or consultant that has experience managing EGLE brownfield grants or loans and is independent of the developer and not directly implementing the grant or loan activities.	Consultant or other agent (approved by EGLE) implementing the grant or loan activities.
Why:	To ensure the proper administration, tracking, and reporting of the grant or loan in accordance with the agreement. Ultimately, the LUG is responsible for the proper administration of the funds.	To provide technical capacity to the LUG to assist with the proper implementation of the project.	To oversee and direct resources to ensure proper management and implementation of the project scope of work, schedule, and budget.

	ADMINISTRATION	3 RD PARTY OVERSIGHT	PROJECT MANAGEMENT
What:	<p>May include:</p> <ul style="list-style-type: none"> • Work and budget tracking in accordance with approved work plans • Ensuring compliance with the agreement terms and conditions • Coordinating project activities and communications • Attending project meetings • Preparing, collecting, reviewing, and submitting: <ul style="list-style-type: none"> ○ Quarterly reports ○ Reimbursement requests ○ Final reports ○ Project closeout documentation • Management of payments and reimbursements 	<p>May include:</p> <ul style="list-style-type: none"> • Technical review/feedback on: <ul style="list-style-type: none"> ○ Work plans ○ Invoices and documentation needed for reimbursement consistent with approved work plans ○ Deliverables and submittals (reports, bids, specifications, etc.) ○ The grant or loan final report • Attending meetings and assisting with communications of a technical nature, if warranted • Limited site inspections or field visits, if warranted. (This is not intended to be oversight of field activities) 	<p>May include:</p> <ul style="list-style-type: none"> • Managing the grant or loan funded work • Scheduling staff and subcontractors • Contractor oversight and management • Preparing and maintaining project documentation • Preparation and review of reimbursement requests ensuring backup documentation and deliverables are present and annotated to correspond with the work plan • Review of reports and submittals • Schedule and attend project meetings • Field visits • Project communications and updates
When:	Duration of the grant and loan.	ONLY if approved by EGLE.	Duration of the grant and loan.
Maximum Amount:	Up to 3% of the total grant and loan award. It is the LUG's responsibility to ensure the allotted budget lasts throughout the course of the project.	Up to 5% of the total grant and loan award.	EGLE staff will review proposed and incurred project management costs to ensure they are both reasonable and appropriate. The general industry rule of thumb is project management accounts for 5 to 15% of the project budget.

	ADMINISTRATION	3 RD PARTY OVERSIGHT	PROJECT MANAGEMENT
<p>Other Considerations:</p>	<ul style="list-style-type: none"> • Detailed billing as required in the Grant and Loan Deliverable Resource • The administration task and budget is approved upon signature of the agreement • Non-eligible costs include, but are not limited to: <ul style="list-style-type: none"> ○ Project management ○ Site planning, site plan review, and general development management ○ Coordinating or managing other incentives ○ Preparation or review of Brownfield Plans and or Act 381 Work Plans unless the Act 381 Work Plan is directly related to an EGLE Loan ○ Local zoning ordinance changes ○ Legal fees ○ Coordination of permits not funded by the grant or loan 	<ul style="list-style-type: none"> • Consultant must have experience managing EGLE brownfield grants or loans and be approved by EGLE in advance • EGLE decides when 3rd party oversight is necessary, reasons may include: <ul style="list-style-type: none"> ○ Lack of experience or capacity of the LUG ○ Lack of experience of the consultant or other agent implementing grant or loan activities ○ EGLE’s past experience with LUG or consultant or other agent warranting additional oversight • Detailed billing as required in the Grant and Loan Deliverable Resource • Consultant is contracted directly by the LUG • 3rd party oversight review comments and feedback should be addressed prior to submittal of work plans and other deliverables to EGLE 	<ul style="list-style-type: none"> • Detailed billing as required in the Grant and Loan Deliverable Resource • Multiple layers of project management costs (e.g., environmental consultant, construction manager, developer, etc.) should be avoided to prevent redundancy and unnecessary use of grant or loan funds. EGLE staff closely monitor and typically will not approve reimbursement for multiple layers of project management.

EGLE does not discriminate on the basis of race, sex, religion, age, national origin, color, marital status, disability, political beliefs, height, weight, genetic information, or sexual orientation in the administration of any of its programs or activities, and prohibits intimidation and retaliation, as required by applicable laws and regulations.

To request this material in an alternate format, contact EGLE-Accessibility@Michigan.gov or 800-662-9278.