YOUR OWEB GRANT FROM START TO FINISH
TO BOLDLY GO — first steps for project development

I NEED MORE POWER!
-a project becomes a grant

LIVE LONG AND PROSPER
-wrapping up and monitoring a project
TO BOLILY GO — first steps for project development
But first… POLL TIME!
What we’ll cover:

○ Strategy
  ➢ Pre-consultation with RPR
  ➢ Landowner/partner conversations
  ➢ Conceptualization

○ Budget Development

○ OWEB review
  ➢ Decision Pathway
  ➢ Site Visit Prep
  ➢ Review Team meetings
  ➢ Funding lines
STRATEGY – How do I get there from here?

1. Pre-consult with OWEB project manager

- Determine eligibility
- Consider pre-app site visits
2. Landowner and Partner conversations

- Transparency
- Expectations for the future
- State $ = public information
3. Project Conceptualization

- Discuss alternatives
- Permit
- Telling the Story
- Why here, why now?
- Hit the HIGH BAR
I’m a project manager, not an accountant!
Tips for developing your mission...

"Oh, laddie. You've got a lot to learn if you want people to think of you as a miracle worker."

-Scotty
Design the project!

• Be clear and concise with the budget
• Avoid the dreaded “Lump Sums”
• Get help from others-
  • Past projects
  • Contractors
  • Other organizations doing similar work

Now you are a fiscal engineer.
1. Work with budget categories

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary, Wages, &amp; Benefits</td>
<td>Staff from applicant organization</td>
</tr>
<tr>
<td>Contracted Services</td>
<td>Work done by contractors, partners</td>
</tr>
<tr>
<td>Travel</td>
<td>Staff from applicant organization</td>
</tr>
<tr>
<td>Materials &amp; Supplies</td>
<td>Things applicant is purchasing</td>
</tr>
<tr>
<td>Equipment</td>
<td>Things that cost more than $2500 and have a life of two years or more</td>
</tr>
<tr>
<td>Other</td>
<td>Items that don’t fit anywhere else-permit fees, rental fees, etc</td>
</tr>
<tr>
<td>Post Grant</td>
<td>Costs incurred after grant is closed</td>
</tr>
<tr>
<td>Indirect</td>
<td>Overhead and admin costs that cannot be readily identified to a specific project</td>
</tr>
</tbody>
</table>
2. Work with your fiscal staff

- Probably have rates for staff
- Can advise about that mysterious category: Indirect costs
- Help sort out questions about categories
3. Be sure you have adequately budgeted

- To avoid having to do unnecessary budget amendments, consider the following:
  - Project Management from applicant
  - Are you SURE you have adequately budgeted for travel?
  - Do you have all the equipment necessary for successful project completion?
  - Are there any permits or fees that might be necessary?
  - Contingency: on a line item and only up to 10%
Contingency within OWEB budgets

<table>
<thead>
<tr>
<th>Description</th>
<th>Quantity</th>
<th>Unit Cost</th>
<th>Total Cost</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Seeding</td>
<td>1,000</td>
<td>$1,000</td>
<td>$1,000</td>
<td>$220</td>
</tr>
<tr>
<td>Mulching</td>
<td></td>
<td>$220</td>
<td>$220</td>
<td>$220</td>
</tr>
<tr>
<td>CONSTRUCTION CONTINGENCY (See Attachment 4)</td>
<td></td>
<td>$70,000</td>
<td>$70,000</td>
<td>$70,000</td>
</tr>
<tr>
<td>Offhaul Excess Excavated Material</td>
<td>881 CY</td>
<td>16.40</td>
<td>$14,448</td>
<td>$14,448</td>
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<tr>
<td>10% Contingency: Offhaul Excavated Material</td>
<td>445.00</td>
<td></td>
<td>$1,445</td>
<td>$1,445</td>
</tr>
</tbody>
</table>
DEcision Pathway

- Review Team Recommendation to Staff
- Site Visit
- Mtg.
- Appl.

Staff Recommendation to Board
- Evaluation
- Funding Line

Award

Board Decision
SITE VISITS
SITE VISITS

- Plan for access
- Handouts
- Involve appropriate partners or contractors
- Be prepared for technical questions
- Review application prior to site visit
- Do a “Dry Run” to determine route and time needed
"Stakeholder Engagement Project" means a project whose purpose is to communicate and engage with landowners, organizations and the community about the need for, feasibility, and benefit of a specific eligible restoration or acquisitions project or program that leads to development of eligible projects within an identified geography.
Review Team Meeting

Discussion
Recommend Fund or No Fund
Prioritize
DECISION PATHWAY

- Appl.
- Site Visit
- Mtg.

Review Team Recommendation to Staff

- Evaluation
- Funding Line

Staff Recommendation to Board

Award

Board Decision
DRAWING FUNDING LINES

Spending Plan

$8 million

Recommended

$9.71 million
Recommended May 2018 Open Solicitation Grant Proposals

~$8 Million in Restoration Statewide

40 Restoration I 14 Technical Assistance I 6 Stakeholder Engagement
I NEED MORE POWER!
-a project becomes a grant
What we’ll cover:

• Anatomy of your Grant Agreement
• First fund requests
• Progress reporting
• Budget amendments
• Scope of Work changes
• Time extensions
Getting to know your GA is important
First Step: READ your grant agreement

OREGON WATERSHED ENHANCEMENT BOARD
FEDERAL RESTORATION GRANT AGREEMENT

Grantee: Deep Space Universe Council
Grant Name: Starship Restoration
Award Amount: $10,000,000
Award Date: 10/19/2324

Grant Number: 219-9999
Project Completion Date: 12/31/2364
Progress Report Date: 1/31/2360

Post-Implementation Status Reporting Period: 100 years (See Exhibit D)
Post-Implementation Status Reporting Schedule: Four (4) reports due in years 25, 50, 75, and 100 following the date of approval of the Project Completion Report (PCR).
Second Step: LOOK for key information

- End date
- Reporting requirements
- Landowner Agreements
- Match
- Funding source
- Special conditions
Third step: SIGN your grant agreement

- Places to sign and fill out:
  - Send to Katy Gunville: katy.gunville@oregon.gov
  - Not negotiable

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**INSURANCE REQUIREMENTS**

Section C of this Agreement specifies the base insurance requirements. The Board considers some projects and project activities to have an increased risk to the organization, organization's employees, volunteers, and the community and may require additional insurance, if required for the Project under this Agreement, the additional insurance types required, the amount, and who will carry the insurance are set forth below. More information on OWEB's insurance requirements can be found here: https://www.oregon.gov/OWEB/insurance.

- [ ] The work related to this Project will not require additional insurance beyond base Agreement requirements.
- [ ] The work related to this Project will require additional insurance beyond base Agreement requirements.

Grantee shall carry the insurance types and amounts described below and will continue this coverage through Project completion. In addition, the Grantee shall require that all contractors or consultants hired for construction, restoration, technical design, assessment or monitoring activities carry the minimum insurance types and amounts described below. The requirements of Sections 1C(2) and 1C(3) of this Agreement apply to this additional insurance.

<table>
<thead>
<tr>
<th>Insurance Type</th>
<th>Coverage Amount</th>
<th>Organization carrying insurance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The work related to this project will not require permits or licenses.
FIRST FUND REQUESTS

- Require more documentation than other types of requests
- Different requirements with each grant agreement – read your GA!
- Allow for extra time to compile materials

Starship Enterprises, LLC

Payee: Spock

Grant Number: 001-1234

Payment Request Number 1 OR Final Request _________
Common Requirements

- Permits
- Landowner Agreements
- Proof of Secured Match
- Land Use Form
- Pre-project photos and map
- Expenditure tracking sheet
EXHIBIT E
PERMITS AND LICENSES

Section D.1. of this Agreement outlines requirements for permits and licenses. Exhibit B Conditions of Agreement may contain additional conditions with respect to permitting, licensing and fund release.

Before the release of Board funds for activities requiring a permit or license, or for activities dependent on portions of the Project for which a permit or license has yet to be issued, the Grantee must submit to the Board’s Project Manager copies of all required permits or licenses, or submit written evidence acceptable to the Board that permits and licenses are not required.

OWEB may release funds for elements of the Project that do not require a permit or license. To be considered for release, Grantee must provide written documentation to the Board’s Project Manager requesting such consideration and affirming that the Project element(s) for which no permits or licenses are required will lead to ecological benefits consistent with the Project objectives, and are not dependent on the portion of the Project for which a permit or license has yet to be issued.

The following are often required for projects involving waterway alteration or watershed enhancement.

- Removal/Fill permit(s) – Dept. of State Lands
- Water Right Permit(s) – Water Resources Dept.
- Zone or Development Permit(s) – City or County Planning Department
- State, Federal and Tribal Cultural Resources Protection permits
- 401 Water Quality Certificate - Department of Environmental Quality
- Fill permit(s) – US Army Corps of Engineers
- City or County permit(s)
Common Requirements

- Permits
- Landowner Agreements
- Proof of Secured Match
- Land Use Form
- Pre-project photos and map
- Expenditure tracking sheet
EXHIBIT F

COOPERATIVE/LANDOWNER AGREEMENT(S)

A sample Cooperative/Landowner Agreement form is available on OWEB’s website at www.oregon.gov/OWEB/Pages/forms_linked.aspx. All Cooperative/Landowner Agreements for Projects shall include (but is not limited to):

- Landowner’s certification that the landowner owns the land where the work will be carried out;
- Landowner’s agreement to allow Grantee to carry out the work, or a portion of the work on the Landowner’s property;
- Landowner’s agreement to maintain the Project, or allow maintenance of the Project, over a time period consistent with the grant application;
- Landowner’s agreement to allow the OWEB Board and its representatives access to the site where the work is being carried out for inspection and evaluation; and
- Landowner’s acknowledgment that he/she is aware of the application to OWEB and that information relating to the work, including effectiveness monitoring data, is a public record.
Common Requirements

- Permits
- Landowner Agreements
- Proof of Secured Match
- Land Use Form
- Pre-project photos and map
- Expenditure tracking sheet
Proof of Secured Match

MATCH FUNDING FORM

OWEB accepts all non-OWEB funds as match. An applicant may not use another OWEB grant to match an OWEB grant; this includes ODA Weed Board projects because they are funded through OWEB grants. However, an applicant who benefits from a pass-through OWEB agreement with another state agency, by receiving either staff expertise or a grant from that state agency, may use those benefits as match for an OWEB grant. (Example: A grantee may use as match the effort provided by ODFW restoration biologists because OWEB funding for those positions is the result of a pass-through agreement.)

At the time of application, match funding for OWEB funds requested does not have to be secured, but you must show that at least 25% of match funding has been sought. On this form, you do not necessarily need to show authorized signatures ("secured match"); but the more match that is secured, the stronger the application. Identify the type of match (cash or in-kind), the status of the match (secured or pending), and either a dollar amount or a dollar value (based on local market rates) of the in-kind contribution.

If you have questions about whether your proposed match is eligible or not, see Allowable Match document in OGMS http://apps.wvd.state.or.us/apps/oweb/fiscal/login.aspx under Technical Assistance application or contact your local OWEB regional program representative (contact information available in the instructions to this application).

<table>
<thead>
<tr>
<th>Match Funding Source</th>
<th>Type (1 one)</th>
<th>Status (1 one)*</th>
<th>Dollar Value</th>
<th>Match Funding Source Signature/Date*</th>
</tr>
</thead>
<tbody>
<tr>
<td>cash</td>
<td>☐</td>
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<td>cash</td>
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<td>in kind</td>
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</tbody>
</table>

* IMPORTANT: If you checked the "Secured" box in the Status Column for any match funding source, you must provide either the signature of an authorized representative of the match source in the final Column, or attach a letter of support from the match funding source that specifically mentions the dollar amount you show in the Dollar Value Column.
Common Requirements

- Permits
- Landowner Agreements
- Proof of Secured Match
- Land Use Form
- Pre-project photos and map
- Expenditure tracking sheet
ATTACHMENT B

LAND USE INFORMATION FORM

This information is needed to determine if the proposed project complies with statewide planning goals and is compatible with local comprehensive plans (CRS 19.15B). The completed and signed form must be submitted before OWEB releases grant funds. OWEB will release grant funds only if the project is either not regulated by, or is compatible with, the local comprehensive plan and zoning ordinance. If a project is regulated by the local comprehensive plan and zoning ordinance OWEB will void grant agreements for projects the county determines to be incompatible with the local comprehensive plan and zoning ordinance. If the county requires additional local approvals for a project regulated by the local comprehensive plan and zoning ordinance, OWEB will not release grant funds until these conditions are satisfied.

1. TO BE COMPLETED BY THE APPLICANT/GRANTEE

Applicant/Grantee Name: ____________________________
Project Name: ____________________________________

2. TO BE COMPLETED BY CITY/COUNTY OR TRIBAL PLANNING OFFICIAL

Complete this section only after section 1, above, has been completed. Check the box below that applies:

☐ This project is not regulated by the local comprehensive plan and zoning ordinance.
☐ This project has been reviewed and is compatible with the local comprehensive plan and zoning ordinance.
☐ This project has been reviewed and is compatible with the local comprehensive plan and zoning ordinance.
☐ Compatibility of this project with the local planning ordinance cannot be determined until the following local approvals are obtained:
   □ Conditional Use Permit  □ Development Permit
   □ Plan Amendment  □ Zone Change
   □ Other

An application has ___ has not ___ been made for the local approvals checked above.

______________________________  ______________________________
* Signature of Local Official  Date

Print Name: ____________________________  Phone: ____________________________
Title: ____________________________  Email: ____________________________

* Must be an authorized signature from your local City/County or Tribal Planning Department, regardless of which box is checked above.
Common Requirements

- Permits
- Landowner Agreements
- Proof of Secured Match
- Land Use Form
- Pre-project photos and map
- Expenditure tracking sheet
Pre Project Photos and Map

Photo Points
1. Skookum Photo Point #1
2. Skookum Photo Point #2
3. Skookum Photo Point #3
4. Skookum Photo Point #4

Reservoir has been drained to reveal the natural extent of the lake.
Common Requirements

- Permits
- Landowner Agreements
- Proof of Secured Match
- Land Use Form
- Pre-project photos and map
- Expenditure tracking sheet
Expenditure tracking sheet

- Serves as the record for all grant expenses
- Make sure to add indirect costs to the tracking sheet
Ready to Submit?

- Submit materials to the appropriate OWEB Project Manager
- Download the latest RFF Form from the OWEB website
PROGRESS REPORTING

- What is a Progress Report?
- Where is this noted in my grant agreement?
- What should it cover?
- How do I submit?
- What if I don’t get it done?
Effective January 1, 2019, budget amendments are only required when you need to:

1. Shift 10% (cumulative) of the overall grant award
2. Add funds to a budget category that did not contain funds
What is 10% cumulative?

Example A = $32,388
- SWB = $9,450
- CS = $19,062
- Travel = $432
- M & S = $230
- Equip = $0
- Other = $27
- Indirect = $2,944

Wants to move $4,000 from CS to SWB

Example B = $149,236
- SWB = $8,435
- CS = $126,413
- Travel = $0
- M & S = $248
- Equip = $0
- Other = $0
- Indirect = $13,510

Wants to move $250 from CS to M & S
## OREGON WATERSHED ENHANCEMENT BOARD

### FORM for BUDGET AMENDMENTS

<table>
<thead>
<tr>
<th>Grant Budget Categories</th>
<th>Original Budget</th>
<th>Change #1</th>
<th>Change #2</th>
<th>Change #3</th>
<th>Change #4</th>
<th>Revised Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary, Wages and Benefits</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Contracted Services</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Travel</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Materials and Supplies</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Equipment</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
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<tr>
<td>Other</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>Indirect Costs</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
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<tr>
<td>Post-Grant</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td><strong>GRANT TOTAL</strong></td>
<td><strong>$0.00</strong></td>
<td><strong>$0.00</strong></td>
<td><strong>$0.00</strong></td>
<td><strong>$0.00</strong></td>
<td><strong>$0.00</strong></td>
<td><strong>$0.00</strong></td>
</tr>
</tbody>
</table>

**JUSTIFICATION FOR CHANGE:** Please provide answers to the questions below:

1. What needs to be changed and why the change is necessary?

2. How do the changes enhance the original intent of the project?

3. How are you able to accomplish the line item(s) from which funds are shifted?

The individual signing on behalf of the Grantee hereby certifies and swears under penalty of applicable law that s/he is authorized to act on behalf of Grantee.

Grantee Signature: ___________________________ Date: ____________

OWEB Project Mgr Approval: ___________________ Date: ____________
OREGON WATERSHED ENHANCEMENT BOARD
REQUEST FOR RELEASE OF FUNDS

Grantee Name: ___________________________ Phone: ___________________________

Payee: ___________________________ Grant Name: ___________________________

Payment Request Number OR Final Request ________________

In accordance with the terms of the Grant Agreement and the Budget Categories: Definitions & Policy document, I request funds as follows:

<table>
<thead>
<tr>
<th>Budget Category</th>
<th>Current Budget Amount</th>
<th>Total of All Amounts Previously Paid</th>
<th>CURRENT Request Amount</th>
<th>TOTAL Requested to Date</th>
<th>Remaining Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary, Wages and Benefits</td>
<td>9,100.00</td>
<td>572.82</td>
<td>8,663.57</td>
<td>9,236.39</td>
<td>(136.39)</td>
</tr>
<tr>
<td>Contracted Services</td>
<td>43,300.00</td>
<td>15,739.57</td>
<td>5,473.92</td>
<td>21,213.49</td>
<td>22,086.51</td>
</tr>
<tr>
<td>Travel</td>
<td>981.00</td>
<td>1,557.74</td>
<td>735.05</td>
<td>2,292.79</td>
<td>(1,311.79)</td>
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<tr>
<td>Materials and Supplies</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Equipment and Software</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Other</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Grant Admin / Indirect Costs</td>
<td>5,338.00</td>
<td>1,787.00</td>
<td>1,487.00</td>
<td>3,274.00</td>
<td>2,064.00</td>
</tr>
<tr>
<td>Post Grant</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>TOTALS</strong></td>
<td><strong>58,719.00</strong></td>
<td><strong>19,857.13</strong></td>
<td><strong>16,359.54</strong></td>
<td><strong>36,016.67</strong></td>
<td><strong>22,702.33</strong></td>
</tr>
</tbody>
</table>

Copies of receipts, invoices or supporting documentation, for amounts $250 or more will be required by OWEB. An expense tracking spreadsheet for all OWEB expenses is also required to document all funds previously received from OWEB for this grant within 120 days of the date of the payment. Watershed Council Capacity grants are not required to submit receipts, only an expense tracking spreadsheet.

By signing this request, I declare that expenses for this grant are to the best of my knowledge true, correct, and complete. Grantee’s signature on this form certifies that all funds being requested under the “Current Request Amount” column are for project activities that either do not require permit(s)/license(s) or copies of required permit(s)/license(s) for project activities have been provided to the OWEB Project Manager.

The individual signing on behalf of the Grantee hereby certifies and swears under penalty of applicable law that s/he is authorized to act on behalf of Grantee.

Grantee’s Authorized Signature: ___________________________ Date: ________________

Print Signature Name: ___________________________ Title: ___________________________

Name and Phone Number for Billing Questions:

E-mail Address for Billing Questions:

This request must be signed and forwarded to the OWEB Project Manager for signature below.

I find this request to be consistent with the Grant Agreement and all funding conditions have been met.

OWEB Project Manager: ___________________________ Date: ________________

201808.pdf
Communication!

*Things OWEB PM will want to know:*

- What is the change?
- Why is it necessary?
- Is it in the same watershed?
- Will it achieve or add to the original objectives?
- Will it require:
  - An addendum to the LOA?
  - New permits or extensions to existing ones?
  - Budget amendment or revised budget?
  - Metrics updated?
Approval IS NOT guaranteed

Get approval documented BEFORE you make changes
TIME EXTENSIONS

- An OGMS tool to help provide options when time is running out.

- Be realistic and build adequate amounts of time in your original project schedule.

- Justification – why is it necessary, will anything change?
• Talk to your OWEB project manager

• Don’t wait until the last minute to file an extension request

• Your grant fund source matters… it may not allow you to file an extension.

• Time extensions are noted in risk assessments – avoid frivolous requests
LIVE LONG AND PROSPER
-wrapping up and monitoring a project
What we’ll cover:

- Reporting the final metrics
- Project Completion Reports
- Final fund requests
- Photopoints
- Monitoring reports
Reporting the end result
Filling out the PCR

- Just tell us what happened.

“I can’t change the laws of physics”
Filling out your Project Completion Report (PCR)

- PCRs are submitted on OGMS
  - Completion Summary
  - Background
  - Description of the work done
  - Explanation of changes to the original proposal
  - Public Awareness summary
  - Lessons Learned
  - Recommendations
  - Special Conditions
Coordinate with the application

- Tell us all the wonderful things your project did
- Don’t leave anything out.
- Explain any changes
Tell the same story

- At application, you told us the project would…
- Giving credible information helps us be strategic with our partners.
Transporter Failure

Only 58% of original budget expended, but grantee didn’t tell us why
The away team didn’t come back

- OWEB
  - Application: $84,541
  - PCR: $84,541

- Land Trust
  - Application: $2,160
  - PCR: $2,160

- USFWS
  - Application: $32,445
  - PCR: $24,945

- USDA FSA
  - Application: $68,000
  - PCR: $30,843

Only 77% of total budget expended, but grantee didn’t mention changes.
  - Only reported 59% of projected match.

“No major changes were made to the project.”
Uploads

WHAT DO YOU MEAN...

UPLOADS?!?
PCR Tips

- Be Honest
- Don’t forget to check Special Conditions
- Upload before and after photo points according to the directions and provide captions that tell what we are looking at.
- Save often and use Verify as a checklist throughout the process
Final Payment Requests

- Require more documentation than other requests
- Different requirements with each grant agreement – Review your GA!
- Allow for extra time to compile materials

Starship Enterprises, LLC
Spock
Starship Restoration
Common Requirements

- Final Expenditure tracking sheet
- Match Form for Final Report
- Budget Amendment
- PCR and Photos
- Federal lobbying certificate
- Metrics and reporting
Final Expenditure Tracking

- Serves as the record for all grant expenses
- Make sure to add indirect costs to the tracking sheet
Common Requirements

- Final Expenditure tracking sheet
- Match Form for Final Report
- Budget Amendment
- PCR and Photos
- Federal lobbying certificate
- Metrics and reporting
Match Form for Final Report

How to submit:

- Online in OGMS during Project Completion Reporting
Common Requirements

- Final Expenditure tracking sheet
- Match Form for Final Report
- Budget Amendment
- PCR and Photos
- Federal lobbying certificate
- Metrics and reporting
Federal lobbying and litigation certificate

- Funding source can be found on first page of grant agreement
- Upload form with PCR

**Fund Source:**

The award amount of $76,759.00 is funded from a federal source (Catalogue Federal Domestic Assistance Number 11.438). If the Grantee expends more than $750,000 in federal funds from all federal sources in one fiscal year, Grantee may be subject to the federal Single Audit Act requirements in 2 CFR 200.501 and additional federal requirements identified in Exhibit H (Federal Grant Requirements).

This Grant Agreement is between the Oregon Watershed Enhancement Board, hereafter called “Board,” and the Grantee as identified above, in consideration of the mutual covenants contained herein. This Agreement consists of the following, in descending order of precedence: modifications to this Agreement contained in Exhibit B, if applicable, this Agreement less all exhibits attached, Exhibits K (Grant Application selected for funding by the Board), H (Federal Grant Requirements), B (Conditions of Agreement), A (Schedule for Release of Funds), C (Project Completion Report Requirements), D (Post-Implementation Status Report Requirements), E (Permits and Licenses), F (Cooperative/Landowner Agreement(s)), G (Oregon Prevailing Wage Rate Law), I (Information Required for Federal Funding), and J (Insurance Requirements).
Common Requirements

- Final Expenditure tracking sheet
- Match Form for Final Report
- Budget Amendment
- PCR and Photos
- Federal lobbying certificate
- Metrics and reporting
Metrics and reporting

For Restoration and Water Acquisition:
  • OWRI (Oregon Watershed Restoration Inventory)

For Technical Assistance, Monitoring or Stakeholder Engagement:
  • Separate metrics forms for each type are available on the OWEB website
Ready to close your grant?

Submit materials:
- Upload to OGMS as part of PCR
- Submit directly with Payment Request

Important to Note:
- Final reporting and financials due 60 days after grant end date
- Expenses incurred after end date cannot be reimbursed
- There are two parts to closing out a grant
  - Project Completion Reporting
  - Final Fund Request Fiscal Review
PHOTOPOINTS & ID MAPPING

- Restoration grants now require pre-project photos submitted with the *First Funds Request*.
- Why? Photos can powerfully tell the story
- Factor in what time of day, time of year best represents your project’s outcomes.
- Note GPS points or landmark features to assure photos are taken in the same spot, same orientation.
- Include captions that tell what project component it shows, and the location, date and time taken.
Good Photopoint?

Bad Photopoint?
Good Photopoint?

Bad Photopoint?
Good Photopoint?

Bad Photopoint?
PISR Reporting

PISR reporting requires answers to the following questions noted in the grant agreement:

1. Assessment of whether the Project continues to meet the goals.
2. A description of any maintenance or modifications.
3. An accounting of any costs associated with project maintenance.
4. A summary of public awareness undertaken since project completion.
5. Lessons learned, if any, from the project.
Submitting your PISR report

- Email to your OWEB project manager as ONE PDF and label the file and the subject line of the email appropriately:
  
  PISR#2_216-6058-12473_7.10.19

- Once approved, documentation will be available on OGMS.