



## Appendix N: Mid Project Performance Report

*FOR REFERENCE ONLY. SUBJECT TO CHANGE*



## IMPORTANT. READ BEFORE PROCEEDING

This serves as a reference guide and may be subject to change until project execution.

This reference guide includes all possible questions, regardless of project type. The actual online form will adapt to your specific project, presenting only relevant questions for your project type, this report will be filled out online through the most current form of the Grant Management System.

- This is a reference guide only.
- The online form tailors questions to your project type.

# Private Forest Accord Grant - Fall 2023 Solicitation

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*Oregon Department of Fish and Wildlife*

## *Grant Information*

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### **Project Name\***

Insert the full project name assigned by ODFW, including the unique code before the Project Title that was given in the agreement.

(Example) PFAMIT XXXX-XX\_ ProjectTitle

*Character Limit: 200*

### **Invoice Period Start Date\***

*Character Limit: 10*

### **Invoice Period End Date\***

*Character Limit: 10*

### **Reporting Type\***

Select the project type this report is for

#### **Choices**

Advancement Project

Standard Reimbursement Project

### **Reimbursement Request?**

For reimbursement-based projects, are you requesting a project reimbursement with this report?

#### **Choices**

Yes

No

### **Match/Cost-Share\***

Does your project have a match or cost-share to report on?

#### **Choices**

Yes

No

## *Grantee Information*

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### **Grantee Name\***

*Character Limit: 200*

**Address\***

(To send a check to)

*Character Limit: 250*

**Submitter Name\***

*Character Limit: 200*

**Submitter Phone Number (###-###-#### x###)\***

*Character Limit: 50*

**Submitter Email\***

*Character Limit: 254*

## *Statement of Work*

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To ensure the effectiveness of public investment, funded projects are subjected to a one-time review and evaluation halfway through the performance period. This review and evaluation may replace a standard performance report. The goal of the Mid-Project Performance Report is for ODFW staff to assess successes and pitfalls to ensure projects will be successful. Mid-project reviews should be more comprehensive than quarterly reports.

It is required to attach supporting data, photos (survey, before and after, etc.), baseline and monitoring data, meeting agendas, engineer drawings, mapping files, copies of permits, and other supporting documentation. Attachments should be referenced in the narratives below.

**Summary of Activities\***

Summary of activities that occurred during this grant reporting period since the last performance report and next quarterly outlook. (i.e. general updates on the project to help document progress, such as kick-off meetings, agreement executions, delays, permitting, groundwork, expenditures, etc.). Briefly discuss any quantifiable implementation metrics such as acres of restoration implemented, stream miles opened, culverts modified, replaced, or retrofitted, acreage of floodplain reconnected, miles of road disconnected, or any other fish passage improvement metric).

*Character Limit: 5000*

**Challenges Faced\***

Challenges faced during the grant reporting period and possible challenges in the future. (e.g., delays, cost changes, difficulty finding contractors, change of project manager, permitting issues, project material delays, weather delays have changed the anticipated timelines and resulted in expected project amendments, etc.)

*Character Limit: 5000*

**Relation of Activities to Goals\***

Relation of activities identified to overall goals, deliverables, milestones, and project timeline. (i.e., is the project on schedule and meeting expectations? Directly linking the grant milestones, objectives, and/or timeline here with a discussion is acceptable.)

*Character Limit: 5000*

**Project Monitoring and Data Collection\***

(i.e., how has the project been quantifying metrics of success through data collection such as stream surveys, photo points, vegetation monitoring, temperature and flow monitoring, etc. Attach any supporting reports, photos, and documentation in the Attachments section.)

*Character Limit: 5000*

**General Outlook & Overall Accomplishments\***

Describe any major accomplishments, milestones, deliverables, and/or objectives achieved along with a general project outlook and your expectation if the project will be completed ontime.

*Character Limit: 5000*

*Reimbursement Financials*

**Budget Item Requests for THIS Invoice Period**

Fill out this table to request a reimbursement for the invoice period you listed above in "Grant Information." Funds must be reported based on the categories in your pre-approved budget. All fields are required. Enter 0 as applicable.

Please Note: Ten percent (10%) of the total funds granted will be withheld until the Project Completion Report and required supporting documentation are submitted. All charges in part by ODFW and another funding source must clearly indicate the portion that ODFW funds were used towards on the proof of payment document.

BUDGET CATEGORY	TOTAL COST (In US Dollars)
Personnel Costs	
Employee Benefits	
Contractual Costs	

<b>Supply Costs</b>	
<b>Equipment Costs</b>	
<b>Travel Costs</b>	
<b>Other Costs</b>	
<b>TOTAL REIMBURSEMENT REQUEST</b>	

### *Advancement Financials*

#### **Advancement Use for THIS Invoice Period**

Fill out this table to identify how the advancement was used for this reporting period, the invoice period you listed above in "Grant Information." Funds must be reported based on the categories in your pre-approved budget. All fields are required. Enter 0 as applicable.

Please Note: Ten percent (10%) of the total funds granted will be withheld until the Project Completion Report and required supporting documentation are submitted. All charges in part by ODFW and another funding source must clearly indicate the portion that ODFW funds were used towards on the proof of payment document.

**All advancements must be fully used within 120 days of receipt by the Grantee.**

<b>BUDGET CATEGORY</b>	<b>TOTAL COST (In US Dollars)</b>
<b>Personnel Costs</b>	
<b>Employee Benefits</b>	
<b>Contractual Costs</b>	

<b>Supply Costs</b>	
<b>Equipment Costs</b>	
<b>Travel Costs</b>	
<b>Other Costs</b>	
<b>TOTAL ADVANCEMENT USED</b>	

**Advance Funding Summary**

All fields are required. Enter 0 if none.

<b>Initial Advance Requested</b>	
<b>Previous Advance Used in Last Invoicing Period (ENTER AS NEGATIVE)</b>	
<b>Current Advance Used (ENTER AS NEGATIVE; Should match "Total Advancement Used" above)</b>	
<b>REMAINING ADVANCE</b>	

*Project Match/Cost Share*

**Current Project Match/Cost Share (if applicable)\***

Define the total match/cost share reported for this invoice period, which was defined above in "Grant Information." Lump all match/cost share into one line item.

*Character Limit: 20*

**Cumulative Project Match/Cost Share (if applicable)\***

In total, what is the total project match/cost share reported to date.

*Character Limit: 20*

### **Match/Cost Share Narrative\***

Briefly describe how match/cost share was used for this invoice period.

*Character Limit: 2500*

## *Supporting Attachments*

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- **Attach supporting documentation here (i.e., receipts, invoices, proof of payment, photos, contracts, agreements, flyers, baseline data, survey reports, other supporting data, etc.).**
- **If requesting reimbursement**
  - **Similar receipts may be clumped into one line item attachment.**
  - **All charges in part by ODFW and another funding source must clearly indicate the portion that ODFW funds were used towards.**

### **Optional Document URL**

If documents are stored in an accessible location such as Dropbox, you may enter the url here.

*Character Limit: 2000*

### **Attachment 1**

*File Size Limit: 10 MB*

### **Attachment 2**

*File Size Limit: 10 MB*

### **Attachment 3**

*File Size Limit: 10 MB*

### **Attachment 4**

*File Size Limit: 10 MB*

### **Attachment 5**

*File Size Limit: 10 MB*

### **Attachment 6**

*File Size Limit: 10 MB*

### **Attachment 7**

*File Size Limit: 10 MB*

### **Attachment 8**

*File Size Limit: 10 MB*



## Attachment 9

*File Size Limit: 10 MB*

## Attachment 10

*File Size Limit: 10 MB*

## *Certification*

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### **Grantee Certification\***

I declare that the narrative and expenses for this project are true, correct, and complete to the best of my knowledge.

### **Choices**

Yes

### **Grantee Authorized Representative\***

*Character Limit: 200*