

This document provides an outline of reporting requirements in various parts of the PFA program as of August 2023. Please review all 5 sections as they are all independent excerpts from documents.

**Please don't hesitate to edit this and provide any edits directly back to Andy in track changes, and he will incorporate them into the correct documents. This is not a shared document, so please send the individual word doc back.**

### Section 1: The following is language pulled from Draft Grant Guidelines

#### **Project Reporting & Reimbursement**

Commented [SAJ\*O1]: i.e. Quarterly & Final Reports

*All funded projects are required to submit a quarterly progress performance report, even if no fiscal activity has occurred. Any request for reimbursement of funds, or advancement of funds, requires a progress report that documents progress, which will be detailed in project agreements with ODFW and the Grantee.*

*At a minimum, the progress reports should include a summary of activities the grant paid for since the last submitted report, such as implementation targets met (e.g., barriers removed, stream miles opened up, restoration acres achieved, etc.), fiscal expenditures, invoices, project highlights, achieved milestones, and next quarter expectations, reference Appendix L: Template Reimbursement Performance Report Form) and Appendix O: Template Advancement Performance Report Form. Quarterly reports should also include a discussion of lessons learned, project shortcomings, and any adaptations necessary to keep the project on track, in budget, and on time. **The first progress report(s) for all projects should include any baseline data such as ArcGIS files, landowner agreements, and any other plans for long-term monitoring such as photo points, stream surveys, measurements of flow, temperature response, restoration treatments, etc.** Each quarterly report should provide updates and supporting documentation to demonstrate continued monitoring efforts throughout the project to quantify metrics of success. A final report will also be required, a template is provided in Appendix S: Template Final Report. Applicants should budget time into proposals to account for reporting.*

#### **Mid-project performance reports**

*To ensure the viability and longevity of public investment, funded projects are subjected to a review and evaluation period halfway through the performance period. This review and evaluation period may replace a quarterly report. The goal of the Mid-Project Performance Report is for ODFW staff to work with funded project proponents to better understand successes and pitfalls, ensuring that projects succeed and provide the highest conservation value as practically possible. The Mid-Project Performance Report should be incorporated into project staff costs, project grantees should expect to prepare the following for ODFW staff review. ODFW staff may request additional clarification or documentation as needed to help determine the status of the project, or a field trip to the project location. The following is what ODFW staff will request for mid-project performance reviews, which are to be more comprehensive than quarterly reports:*

1. *Comprehensive Budget Update*
2. *Update on Goals, Milestones, and Objectives*
3. *Overall successes and potential pitfalls*

4. Match update (if applicable)
5. Ability to complete the project on time and in budget
6. (Optional) In-person field tour.

If a review and evaluation results in the possibility of the funded project not being completed as previously agreed, ODFW staff will work with project grantee to amend the grant agreement to restructure timelines and deliverables to ensure the original benefit is met.

**Section 2: The following is language pulled from Draft Application/Scope of Work questions**

Question #14: Describe any plans to measure the effectiveness of the project, including how the project plans to quantify metrics of success. Describe how baseline and monitoring data will be gathered throughout the project (i.e. in-stream monitoring, temperature response, photo monitoring, etc.). Limit response to 5,000 characters.

**Section 3: The following is language pulled from the Quarterly Report, which is due every quarter for grantees regardless of any fiscal expenditures**

**Pay special attention to Question #5 below**

**Please answer all questions in narrative form. Refrain from using short, non-descript summaries. Please use the forms.**

1. **Summary of activities that occurred during the grant reporting period.** (i.e. general updates on the project to help document progress such as kick-off meetings, agreement executions, delays, permitting, groundwork, expenditures, etc.). Also discuss any implementation reporting metrics such as acreage accomplished or stream miles opened/restored, etc.)
2. **Challenges faced during the grant reporting period and possible challenges in the future.** (i.e., delays, cost changes, difficulty finding contractors, change of project manager, permitting issues, project material delays, etc.)
3. **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.)
4. **Did the project experience significant challenges, and do you have any plans to mitigate the situation?** (i.e., weather delays have changed the anticipated timelines and resulted in expected project amendments.)

**Commented [SAJ\*O2]:** This is an open-ended narrative to allow for the applicants to fill in what they think is necessary to "tell the story"

5. **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, documentation.)
6. **General outlook and overall accomplishments**

**Section 4: The following is language pulled from the Final Report**

Total Impacted project acreage: \_\_\_\_\_

Check all of the Habitat Conservation Plan Covered Species the Project benefited.

- Native salmon and trout (*Oncorhynchus spp.*) Specify Species: \_\_\_\_\_
- Bull trout (*Salvelinus confluentus*)
- Mountain whitefish (*Prosopium williamsoni*)
- Pacific eulachon/smelt (*Thaleichthys pacificus*)
- Green sturgeon (*Acipenser medirostris*)
- Columbia torrent salamander (*Rhyacotriton kezeri*)
- Southern torrent salamander (*Rhyacotriton variegatus*)
- Coastal giant salamander (*Dicamptodon tenebrosus*)
- Cope's giant salamander (*Dicamptodon copei*)
- Coastal tailed frog (*Ascaphus truei*)

1. Summary of activities that occurred during the grant.
2. Summary of how projects goals, objectives, and/or milestones were completed.
3. Describe lessons learned and challenges faced during the grant performance period.  
Examples being delays, contractual issues, permitting, funding, changes to the project Scope of Work or amendments, etc.
4. Describe the General outlook and overall accomplishments of the grant project.
5. Describe how effective the project was using the proposed metrics of success outlined in the original project application. Please attach any supporting monitoring reports, surveys, and photo points.
6. Describe any next steps for the project, if any.

DRAFT Reporting Requirements September 2023

*Please list all attachments below and submit as separate files. **DO NOT** insert photos into this document. Include all project data collected such as photo points, habitat surveys, reports, PDF maps, etc..*

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