

Project Leaders Course

Planning Guide

Federal Assistance Training Program
Division of Federal Assistance
U.S. Fish and Wildlife Service
National Conservation Training Center

August 2003

Federal Assistance Project Leaders Course

Course Design

The course consists of ten learning modules designed to address the most common training needs of state fish and wildlife project leaders (field biologists, unit leaders, area managers etc) who are responsible for developing, submitting and reporting on grants under the Sport Fish and Wildlife Restoration Acts. The course is not only designed to allow individual states to tailor it to their specific needs, but also to provide a core group of learning modules that address the most common issues such as writing project statements, completing performance reports, and dealing with compliance issues.

Modules

The minimum course, which consists of modules A - D, F, G and J requires a commitment to two full days (16 hours) of class. A full length course which includes all modules requires two and a half days of class time (20 hours). To help us tailor the course to your state, we need your opinions and decisions on how to fine tune each module to your specific situation. This guide will walk you through making those decisions, ask you specific questions about your training needs, and provide a place to record of your thoughts about the course.

Guide Instructions

The first section of each module description states the purpose of the module and provides a basic outline of the individual parts. The windows of some pages contain examples of items from the pilot course with West Virginia. The odd numbered pages provide a structured way of gathering your responses to the questions posed in each module. **(1) Please review the modules described in the guide, then (2) type your responses on the even numbered pages and answer the questions or note your opinions as they pertain to your training needs.** If you have Adobe Acrobat, you can save the completed file and email it to the address below. If you cannot save the completed file, simply print out the even pages and fax them to the number below. We will review your responses, and tailor each module to meet your needs. Before the course, we will review the modules and discuss course logistics with you.. If you have any questions regarding the modules or instructions, please contact either Blake Weirich at 302-876-7465 or Steve Leggans at 304-876-7463.

Send a copy of your completed answer sheets to:

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Federal Assistance Fish and Wildlife Restoration Project Leaders Course

Learning Objectives & Table of Contents

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<p>Module A (45 min.) - Welcome, Introductions and Opening Sessions</p> <p>Learning Objectives:</p> <ol style="list-style-type: none"> 1. Complete the pre-course survey and personal profile card using handouts provided. 2. Introduce participants and guests. 3. Participate in an overview of key agenda items/processes. 4. Review and understand the goals and objectives of the Federal Assistance Training Program. 5. Review the state's/territory's purpose and objectives for the Project Leaders Course. 	1
<p>Module B (60 min)- Introduction to Federal Assistance Toolkit</p> <p>Learning Objectives:</p> <ol style="list-style-type: none"> 1. Become familiar with the content & layout of the Federal Assistance Toolkit. 2. Navigate through the Toolkit using the Adobe Acrobat search engine. 3. Use the search engine to find words and phrases in the contents of the Toolkit. 4. Identify terms and concepts used later in the workshop to address state specific grant management issues. 	3
<p>Module C (90 min) - Specifics of the Federal Assistance Programs</p> <p>Learning Objectives:</p> <ol style="list-style-type: none"> 1. Become familiar with the history and purposes of the Sport Fish and Wildlife Restoration programs. 2. Identify the mission of the Division of Federal Assistance and program cornerstones. 3. Describe the importance of assent legislation to state natural resource agencies. 4. Describe other funding sources, apportionment formulas and the cyclic nature of each program. 	5
<p>Module D (25 min) - Grants Management Process Overview</p> <p>Learning Objectives:</p> <ol style="list-style-type: none"> 1. Become familiar with the steps in the general grants management process. 2. Compare current state grant proposals with standard proposal requirements. 3. Compare current state grant agreement with standard agreement requirements. 4. Describe the need and reasons for modifying both grant agreements and proposals. 5. Identify the requirements for closing a grant segment and need for monitoring a grant. 6. Describe the general intra-agency cooperation needed to support the state's/territory's grants. 7. Become familiar with the structure and content of the Federal Assistance Information Management System (FAIMS). 	7
<p>Module E (45 min)- Grant Management Roles and Responsibilities</p> <p>Learning Objectives:</p> <ol style="list-style-type: none"> 1. Describe the roles and responsibilities of State staff in managing Federal Assistance grants. 2. Describe the roles and responsibilities of federal staff in managing Federal Assistance grants. 3. Explain why everyone's support and expertise is needed to keep the grant process on track and the agency current in meeting its obligations. 	9

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Module F (150 min)- State Compliance and Assurance Issues	11
Learning Objectives:	
1. Describe the different levels of legal responsibilities associated with Federal Assistance grants.	
2. Use the toolkit to determine how federal regulations (43 CFR or 50 CFR) apply to the administration of grants under the funding programs.	
3. Determine what compliance issues exist outside general grant administration and the funding Acts.	
4. Explain the purposes for and requirements of the Statement of Assurances	
5. Determine the need for filing a Section 7 Evaluation with a current grant and review the format.	
6. Determine the need for filing a NEPA compliance checklist with a current grant and complete a checklist.	
7. Use a matrix to compare grant types and compliance requirements	
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1. Determine what a project is and its relative importance to the overall grant proposal.	
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4. Identify the criteria used to establish whether a grant proposal is substantial in character and design.	
5. Critique active state research and development grant proposals using generally accepted standards.	
6. Synthesize new project objectives based on current FAIMS data.	
7. <i>*(Determine how state cost codes relate to approved work in a current grant.)</i>	
Module H (20 min)- Grant Agreement - Project Leaders Responsibilities	15
Learning Objectives:	
1. Identify the parts of a current grant agreement.	
2. Determine if parts of a specific grant agreement are eligible for funding under the appropriate Act.	
3. Explain how the work listed in a grant agreement relates to the proposal.	
4. Determine how compliance issues are addressed in examples of current state agreements	
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Learning Objectives:	
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Learning Objectives:	
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2. Explain the differences in reporting requirements among different grant types.	
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4. Define the differences between annual performance reports, final research reports, and grant evaluation reports.	
5. <i>*(Explain the procedures for reporting costs on state performance reports.)</i>	

* Depends on individual state/territory training needs.

Module A (45min.) - Course : Welcome - Introductions - Agenda - Objectives

Purpose of Section : To welcome the participants, introduce everyone, review the general flow of the course, assess pre-course subject knowledge, and review the purpose and objectives of the course.

Individual Parts:

- A. Welcome - Accommodations - General Site Issues
- B. Objectives of Module - A
- C. Pre-course Survey and Participant information
- D. Federal Assistance Training philosophy
- E. Introductions of instructors, guests and participants
- F. Purpose of the Course from the Federal Viewpoint
- G. Purpose - Goals and Objectives of the Course from the State Viewpoint

Input Needed from State - What you need to do.....

1. Decide exactly why you are holding the course for your staff.
 - >> What is the purpose of the course from your viewpoint?
 - >> What changes do you want your staff to undergo by taking the course?
2. Look over the examples below and develop your own list of learning objectives and the overall course purpose..... Type these on the next page in the form space provided.



West Virginia's Purpose for the Project Leaders Course :
 > to increase overall staff knowledge and effectiveness in dealing with Federal Assistance grants.

 > to increase the realization that Federal Assistance funding is vital our agency's mission and fish and wildlife efforts.

 > to avoid future audit findings in Federal Assistance expenditures.
 > to increase the understanding of the relationship between compliance issues and continued federal funding.
 compliance issues and continuity of federal funding

Primary course Objectives:
To increase project leaders ability to:

 > write more precise grant narratives.
 > write concise performance reports & final evaluations.
 > identify and address all compliance issues relating to work under their grants

Secondary Course Objectives: *Upon completion of the course, project leaders will be able to:*
 >> describe the roles and responsibilities of individuals involved in West Virginia's federal grants as they relate to grant administration/ protocol.
 >> describe the general grant management process including the need for grant amendments.
 >> use the computer and Federal Assistance tool kit as part of the resources available for working with Federal Assistance grants.
 >> explain the importance of assent legislation and its relation to West Virginia's funding.

Module A

PURPOSE(s) OF COURSE

COURSE OBJECTIVES

1.

2.

3.

4.

5.

6.

Module B (90min.) - Federal Assistance Tool Kit

Purpose of Section : To develop a familiarity with the Federal Assistance Toolkit and practice the computer skills necessary to use the Toolkit in making decisions about the development and management of grants. This module is designed to allow course participants to become aware of the use and usefulness of the Federal Assistance Toolkit in dealing with every aspect of the grant management process. The Toolkit and computer are used extensively throughout the rest of the course.

Individual Parts:

- A. Exercise - Getting to Know the Toolkit and the Acrobat Reader
- B. Exercise - Toolkit Information
- C. Exercise - Exploring the Toolkit
- D. Exploring the Toolkit Extras
- E. Using the Toolkit Search Engine

Input Needed from State - What you need to do.....

In the pilot course with West Virginia, topics like compliance, ineligible activities, and performance reporting were worked into the exercises in this module in order to increase awareness regarding the topics and build more detailed discussions about individual topics into later modules in the course.

1. If you want specific issues..... such as compliance requirements, performance reporting, writing project statements, etc..... addressed throughout the course, some of the issues can be brought into focus by incorporating them into the exercises in this module. Write down the issues you are interested in emphasizing on the next page. -----



2. The Federal Assistance Toolkits and laptop computers used throughout the course rely on a piece of software (Adobe Acrobat Reader) for manipulating the interconnected files. At the end of the course each participant will be given a CD with the toolkit and the software on it to download into their own computer. You may want to check to see if there are any complicating factors that would prevent the use of the CD or download procedure for your project leaders.

Please note any potential problems on the next page. -----



Module B - FEDERAL AID TOOLKIT

Specific Issues/problems/concepts that could be highlighted with toolkit exercises:

Comments or Questions about the use and installation of the toolkit:

1.
2.
3.
4.
5.
6.
7.

A.

Module C (48min.) - Background of the Federal Assistance Programs

Purpose of Section : To develop a more thorough level of awareness of the history, uniqueness and purpose of the Sport Fish and Wildlife Restoration Programs and the newer funding programs like State Wildlife Grants and the Landowner Incentive Program. Overall, this part of the course reviews the historical aspects of both restoration acts and brings the class participants to a more thorough understanding of the flow of funding, types of work that can receive funding and the importance of old and new acts to their agency’s funding base.

Individual Parts:

- A. Federal Assistance Mission, Program Cornerstones, General Administration of Program, Key Roles of state and federal staff .
- B. Sport Fish and Wildlife Restoration Programs - History of act, assent legislation, sources of income, apportionment of funds, apportionment trends, cyclic nature of each program.
- C. Review of six other funding sources, their purposes, restrictions, fund distribution.

Input Needed from State - What you need to do.....

This module sets the stage and provides the background for more detailed discussions of funding restrictions, acceptable project standards and compliance

issues addressed later in the course.

If you have a mixed group of project leaders (fish and wildlife biologists along with engineers or lands specialists) you need to consider going through the entire module. If you are only dealing with a group that works under just one act, this module can be reduced in scope to meet your needs.

1. Decide if you need to discuss only one act or need to review multiple funding sources.
2. Review the module objectives below and decide if you want to add other

objectives or a different emphasis to this module.

Type in your responses on the next page: ----- --



<p>Objectives:</p> <ul style="list-style-type: none"> > Become familiar with the history, uniqueness, and purpose of the Sport Fish and Wildlife Restoration Programs. > Identify the Federal Mission and program cornerstones > Describe the importance of assent legislation to state natural resource agencies. > Describe the funding sources, apportionment formulas and cyclic nature of each program. > Describe other funding sources, (SWG, Section 6, LIP etc.)
--

Module C -HISTORY and Specifics of Funding Acts

(Check one of the boxes below)

We will have a mixed group and need to review both acts

We will have a homogenous group and only need to review the history of

the Wildlife Restoration Act Sport Fish Restoration Act

(P. R. Act)

(D.J. Act)

Other funding Acts (LIP, SWG, WCRP etc.)

Additional Objectives this Module Should meet are:

1.

2.

3.

4.

Comments:

Module D (25min.) - Overview of Grant Management Process

Purpose of Section : To give the participants an quick overview of the administrative process that is used to: fund state projects - meet grant administration standards - track funds and performance - closeout grants. This short module presents a global picture of the grants administration process to demonstrate what each step in the process accomplishes. Later modules will cover more detail about each step in the process. One of you current grants that involves some of the participants will be used as a real-time example.

Individual Parts:

- A. Grant Proposal - match parts with current state proposal.
- B. Grant Agreement - example of current agreement & what it does.
- C. Grant Modifications - amendments to proposals and agreements.
- D. Grant Agreement Closure - report requirements & financial closure.
- E. Monitoring Projects and Agreements - cooperation and evaluation.
- F. Introduce the basic information contained in FAIMS and iFAIMS.

Input Needed from State - What you need to do.....

As shown below, the objectives of this module are fairly straightforward. It can be tailored to begin to emphasize some specific points you want to make about certain parts of your grant management process.

1. Look over the objectives below and decide if you want to add any specific objective that would help emphasize a particular issue in your state's process. Add any objectives on the next page.-----



Module D - Grants Management Process

Objectives:

- > Become familiar with the steps in the general grants management process.
- > Establish how different parts of the process work in your state
- > Emphasize the legal obligations of conducting work funded with federal Sportfish and Wildlife Restoration Funds.
- > Describe the intra-agency cooperation needed to support the grant management process in your state.

2. Describe any particular points you want reviewed about: > how your state process runs, your need for working on parts of the process cooperatively within your agency and with other people outside your agency, your need for better communication, etc.....

Use the next page to list any points



Module D - GRANTS MANAGEMENT PROCESS

Additional Objectives this module should meet are:

1.

2.

3.

Examples of Specific State Process considerations needing emphasis:

Projects that need preplanning:

Cooperative working agreements:

State compliance issues:

Reporting issues :

(Optional) Module E (45-75min.) - Roles and Responsibilities

Purpose of Section : To discuss and define the roles and responsibilities of both state and federal personnel as they relate to developing grant proposals, addressing compliance issues, tracking costs, reporting on work progress and general grant administration. This module is designed to generate and build an awareness by the class participants about their role in the grants management process. It also emphasizes roles and responsibilities of other players in the grant process and everyone's responsibility to communicate and offer appropriate support.

Individual Parts:

- A. Exercise - Identifying Roles and Responsibilities in the overall Grant Process
- B. Exercise - Matching people with their specific tasks in the grant process.
- C. Discussion of State specific issues, issues with other intra-state agencies, communication with the Federal Assistance Office. (Emphasis placed on continuous communication and planning ahead.)

Input Needed from State - What you need to do.....

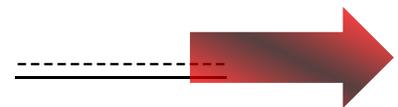
Although this is an optional module, it is an important topic since it creates an open discussion of individual responsibilities. It also builds an awareness that the grant process requires continuous cooperation and communication among and between the various state and federal personnel administering the grants.

Example: The West Virginia pilot course addressed the general roles of the state and Federal Assistance staff, and then, by design, evolved into a discussion about the interactions that needed to occur within their state agency and with other state and federal agencies. This built the background for discussions in later modules that focused on roles and responsibilities in:

- > proposing grants that involved compliance issues,
- > obtaining permits prior to spending funds on certain grants,
- > estimating work costs and reporting costs and
- > obtaining SHPO documentation from another state agency.

1. Decide how much time and emphasis you want to place on this topic, and what special role issues you have that can be addressed within the module.

Look over the notes example and fill in the sections on the next page.



Module E - ROLES AND RESPONSIBILITIES

1. Do you want to include this basic module (45 min.) in the course?

Yes No

(If yes, go to 2)

2. State specific responsibility issues: (20 - 30 min.)

> Do you have roles and responsibility issues that need addressed in a general discussion? Yes No

(If yes continue)

Which roles and responsibilities need clarified/discussed ?

> What parts of your grant process may need more emphasis?: (check)

Writing Grant Proposals

Addressing NEPA issues

Completing Section 7 forms

Obtaining Permits

Developing cost estimates

Reporting costs

Writing annual reports

Writing evaluations

Others (please list):

Module F (150 min.) - State Compliance and Assurance Issues

Purpose of Section : To discuss and define broader legal compliance requirements associated with federal grants and investigate specific examples of applying NEPA, Section 7, and other rules and regulations to a variety of grants. This module is designed to acquaint project leaders with the rationale behind the most common compliance issues and then focus on the more specific issues that consume time and may delay the initiation of a grant.

Individual Parts:

- A. Presentation on levels of legal responsibilities involved in obtaining and administering federal grants under the Federal Assistance grant programs.
- B. Exercise comparing how two sets of federal regulations (43 CFR with 50 CFR) effect administration of Federal Assistance grants.
- C. Examination of the Statement of Assurances and its relation to a grant proposal and agreement.
- D. Exercise to determine the number of environmental requirements that may need to be considered for a current state research grant and review of the regional Section 7 (Endangered Species) process needed for grant approval.
- E. Exercise to determine the validity of a current state development grant and completing a NEPA check list for the grant.
- F. Reviewing a matrix of Federal Assistance grant types and compliance issues.
- G. Discussion of state specific compliance issues.

Input Needed from State - What you need to do.....

From the Federal Assistance viewpoint, this module presents a topic that probably causes more delays in initiating grants than any other issue. If you are relying on project leaders to address all or some of the compliance issues involved in developing a grant proposal, this module should be included in your workshop.

1. Decide how much time and emphasis you want to place on this topic, and what special aspects apply to your situation.

2. Fill out al the applicable categories on the next page.-----



Module F - STATE COMPLIANCE AND ASSURANCE ISSUES

We have found this to be an important part of the overall course and include it as a basic module

1. Which of your current research and development grants could be used in the exercises listed on the previous page?

Name & # _____

Name & # _____

2. What are the top four compliance issues you want to emphasize?

___ NEPA and

___ categorical exclusions

___ Environmental Assessments

___ EIS

___ Section 7 and Endangered Species

___ SHPO (State Historical Preservation)

___ State Clearinghouse

___ ADA

___ EEO

___ Grant reporting requirements (due dates)

___ Project eligibility requirements (under WR or DJ acts)

___ Animal Welfare Act

4. Are there any intra-state compliance issues that need attention?

Module G (275 min.) - Grant Proposals and Project Statements

Purpose of Section: To emphasize the importance of the project statement to the overall grant process, To expose the project leaders to: (1) the rationale behind writing standard project statements, (2) the rationale for critiquing proposals and (3) the synthesis of a new project objectives and statements. This module involves familiarizing project leaders with each part of the project statement and gives them experience in critiquing current grant proposals and synthesizing a new short term proposal.

Individual Parts:

- A. Presentation and discussion defining projects, project statement parts and eligible purposes under the Sport Fish and Wildlife restoration Acts.
- B. Interactive review of each part of a grant statement, examples of each part and the standards used in assessing the validity of a grant proposal.
- C. Exercise in critiquing a current state grant that involves a substantial project statement.
- D. Exercise in synthesizing a new grant objectives based on current FAIMS information with class presentations.
- E. Optional exercise involving state specific issue areas (as requested)

Input Needed from State - What you need to do.....

Teaching project leaders how to write good project statements has been the most requested topic for this course. Your most important input is deciding which of your current research, development or other types of grants you want used in the exercises.

1. Our pilot state chose a research grant from wildlife and a development grant from fisheries as their examples. You will be asked to provide each participant with a copy of the full grant proposals you choose. Each grant will be critiqued and course participants will get a chance to see how their current grant compares to the parts of the project statements we will discuss and the standards we will establish for determining substantially in character and design.

2. To give the participants experience in applying the knowledge they gain, they will also work on a group exercise to develop new grant objectives from grants that are currently in FAIMS. Think about your current grants, assess the issues you want to emphasize with the project leaders and then answer the questions on the following page. -----



Module G - GRANT PROPOSALS AND PROJECT STATEMENTS

1. Which of your current grants do you want to use for the critiquing exercise? (list two or three)

Grant Name & # _____

Grant Name & # _____

Grant Name & # _____

2. If you want to address a grant that is coming up for renewal or you have a specific group of issues that pertain to a certain grant type, we can develop a scenario that will be used in the grant synthesis exercise. We will need a certain amount of pertinent data to give to the class in order for them to develop a new grant proposal. Our pilot state used the information they had about their current hunter education program. You may have other needs. Think over the topic and write down your ideas for our consideration.

3. Are there any other aspects of the grant proposal process you want explored with the project leaders?

(Optional) Module H (20 min.) - Grant Agreements

Purpose of Section : To involve the project leaders in a review of the relationship between grant agreements and grant proposal and discuss details of the process for submitting an annual grant agreement. This module involves acquainting project leaders with what they need to do and pay attention to when submitting the schedule of work to be performed during an annual grant agreement period.

Individual Parts:

- A. Presentation reviewing the parts of a grant agreement.
- B. Review of current grant agreements, discussion of compliance issues and eligibility.
- *C. *Determination of estimated costs for agreement segment.*

Input Needed from State - What you need to do.....

This module is optional, but you may want to consider it since it builds on the previous project statement module. This section reemphasizes the importance of a good project statement by showing how easy it is to assemble the annual agreement if a good project statement is included in the grant proposal.

1. Decide if you want to include this module in the workshop. If you do, you will need to provide each participant with copies of the grant agreements that match the grant proposals used in module G.

2.* In addition, if you have an issue regarding the accuracy of the estimated costs for or cost accumulations under your annual agreements, you may want to also review how segment costs should be developed and charged against during the agreement period. Fill in #'3 1 - 4 on the next page when you have determined your answers to 1 and 2 above. -----



(Optional) Module H - GRANT AGREEMENTS

1. Do you want to include this basic module (35 min.) in the course?

Yes No

(If yes, go to 2)

2. Several examples of grant agreements can be used to show how simple it is to handle the submission of the agreement if the proposal is adequate. Which grant agreements do you wish to include as examples?

Grant Name and # _____

Grant Name and # _____

3. Do you want to emphasize any aspect of estimating costs for a grant agreement? Yes No

(If yes, go to 4)

4. Provide an example of a budget report and/or an outline of the budgeting procedure you use to calculate annual agreement costs. What issues or pitfalls do you want to emphasize about estimating costs?

(Optional) Module I (30 min.) - Modifying Grants

Purpose of Section : To review the requirements and procedures for modifying a grant proposal and agreement. This module involves exposing the project leaders to the legal requirements for modifying both a grant proposal and grant agreement. It is a logical part of the overall grant process and emphasizes the need to formally contact the Federal Assistance staff when conditions of the proposal and/or agreement change.

Individual Parts:

- A. Presentation reviewing the reasons for and differences between proposal and agreement modifications.
- B. Exercise using toolkit to review various types of proposal and agreement changes.

Input Needed from State - What you need to do.....

1. Decide if you want to include this module in the workshop.
2. If you have specific issues regarding the changing of grant agreements or proposals in your state they can be emphasized in this module.
3. Fill in the questions on the next page when you have determined your answers to 1 and 2 above. ----- 

Module I - GRANT MODIFICATIONS

1. Do you want to include this basic module (30 min.) in the course?

_____ Yes _____ No

(If yes, go to 2)

2. What specific issues do you want to emphasize in the examples in this exercise?

Issue # 1

Issue #2

Issue #3

Notes:

Module J (90 min.) - Performance Reporting and Grant Closure

Purpose of Section : To review the requirements and procedures for writing performance reports, and evaluations, and closing grant agreements and proposals. This module concentrates on the second most requested training need for project leaders. It involves: (1) exposing the project leaders to different types of reporting requirements associated with Federal Assistance grants, (2) discussing examples of the different types of reports, and (3) critiquing performance reports and evaluations.

Individual Parts:

- A. Presentation reviewing grant closure procedures and regulations requiring performance reporting.
- B. Toolkit investigations of the general and specific aspects of performance reporting for different types of grants.
- C. Comparison of performance reports and evaluations.
- D. Discussion of a standard format outline for reporting on state specific activities.

Input Needed from State - What you need to do.....

This is the final part of both the grant administration process and the workshop. It will give closure to the process and emphasize the timeliness of the reporting requirements for grant agreements and the evaluations necessary to end research and survey and inventory grant proposals.

1. You need to decide:
 - a. which of your current grants you wish to use as examples,
 - b. whether you have specific issues with the timing of performance reports that you want to focus on,
 - c. any report format you wish to emphasize, and
 - d. whether you want to add an additional part regarding cost reporting on performance reports.

After you have decided about your specific needs, fill in the sections on the next page.



Module J - PERFORMANCE REPORTING AND GRANT CLOSURE

1. Which of your current grants and associated reporting do you want to use as examples ?

Grant Name and # _____

Grant Name and # _____

2. Specific reporting issues you would like emphasized

- timing of reports types of reports
- cost reporting
- Other

3. Do you currently use your reports for reasons other than federal aid?

- Yes No

4. Is there a specific report outline you would like to emphasize?

- Yes No (if yes explain)

5. Do you need to review specific cost accounting reporting with the project leaders? Yes No

 If Yes, we will need to add the explanation to the module.