**Lake Champlain Basin Program project workplan template**

Revised August 2022

**Guidelines**

Please remove this guideline section from your finished workplan and begin with the following cover page.

* Please work with your assigned LCBP Project Officer on the development of your workplan, which **must be approved** to initiate a contract. Your final grant contract will provide the complete requirements of your grant, some of which are summarized in these guidelines.
* Work on the project **should not begin** until you have received your **grant contract with signatures** from NEIWPCC and your organization or your NEIWPCC Purchase Order number. The LCBP/NEIWPCC cannot reimburse contractors for any costs incurred outside of a formal contract agreement period.
* Additional COVID-19 safety requirements have been added to all contract agreements. LCBP and NEIWPCC are committed to providing events that keep all participants as safe as possible and promote the well-being of our community. See <https://neiwpcc.org/about-us/working-with-neiwpcc/contractor-guidance/> for more information.
* Please contact your LCBP Project Officer to determine if your project requires a QAPP. Work that includes **environmental data collection, analysis, or modeling of environmental systems** will require a **Quality Assurance Project Plan (QAPP)** before work can begin (see more information at <https://www.lcbp.org/about-us/grants-rfps/grant-toolkit/qapp/>). To expedite review and approval of the workplan, it is recommended that you simply reference the development of a QAPP as a work item listed in the workplan. QAPP development typically requires 20-30 hours of staff time, and the complete process may take as long as 10 weeks, from initial development to final approval. If you plan to use professional services/a consultant, they should be hired before the QAPP is started. Your project officer for this grant will be available to assist you during your QAPP development process.
* All LCBP-funded projects with field elements must include **invasive species spread prevention methods** in their project workplan. More information about invasive species spread prevention procedures can be found at <http://www.lcbp.org/water-environment/aquatic-invasive-species/aquatic-invasive-species-spread/>. Contact your Project Officer if you have questions about this guidance.
* Procurement of supplies, equipment and services that are greater than $10,000 and do not cost more than $250,000 require that the recipient obtain multiple price quotes through a documented competitive process. Good faith efforts to obtain services from disadvantaged business enterprises should also be made, including contacting the small business administration and minority business development agency to inform them about the opportunity for businesses to submit price quotes as part of the competitive process. At least three price quotes for the contract work must be secured. The selected item or service does not need to be the lowest cost if it does not meet your requirements or you can otherwise demonstrate that the higher price offers the “best value.” Justification must be provided for the outcome of the bid process. This process may take place prior to the submission of a proposal for LCBP funds. For further information, please contact your project officer.
* Please be consistent with these definitions throughout your workplan:

	+ **Objective:** An individual goal of the project, e.g., plan plantings for the fall
	+ **Task:** Activities to fulfill an objective, e.g., develop planting plan, contact volunteers and schools, purchase supplies, schedule planting date(s).
	+ **Deliverable:** A physical or electronic product created and submitted to LCBP, e.g., interim report, literature review, final report.
	+ **Output:** An activity or product completed as a result of a task, e.g., hold four meetings, educational booklet, etc.
	+ **Outcome:** Results or effects of all activities, e.g., reduced phosphorus loading to Lake Champlain through the Winooski River, the public is better informed on aquatic invasive species, etc.

**Effective after the release of 2022 Opportunities for Action, all LCBP projects and grants will be required to provide standardized reporting metrics within the project workplan and final report.** Reporting metrics will be based on project type. Additional clarification will be provided once the new reporting metrics are in place.

**All reporting materials must be submitted electronically** as editable documents (Word, Publisher, Excel, etc.) to your LCBP Project Officer following provided templates (<http://www.lcbp.org/about-us/grants-rfps/grant-toolkit/>. Final reports should clearly document all deliverables and outputs completed with LCBP funding, and expected outcomes from the project in the long term. Scanned images of news clippings, brochures, and other project materials may be submitted as PDF documents. The final report must be accompanied by a minimum of five high-resolution photos, sent as attachments. The final report may be published on the LCBP website.

The **LCBP and NEIWPCC logos** must appear on **all publications** (<http://www.lcbp.org/about-us/grants-rfps/grant-toolkit/>). Publications should also indicate that the project was funded with support from the Lake Champlain Basin Program (where appropriate).

* Submission of volunteer participation and/or project **photographs** is required for LCBP publications so that we may highlight how your organization is working to improve the watershed. Proper photo accreditation should be provided so we can accurately credit your photos in publications or presentations. **Photos must be submitted as separate JPG or TIF files, rather than** embedded in a Word document, PDF, or other file. Photos must be high resolution (5” x 7” at 300dpi, or equivalent pixel dimensions of 1500 x 2100, or greater). Submission of these materials as specified will allow the LCBP to promote the outcomes of your project most effectively, and implies unrestricted use by the LCBP. Photo credit to the appropriate organization will be applied whenever a photo is used by LCBP for publication.

**A. Cover page**

**Project title:** Provide a concise and descriptive title.

**Contact information:**
Organization:

Name of primary point of contact:

Address:

Phone number(s):

Email address:

Website URL:

**Authorized representative:**

Provide the name, position, organization address, telephone and email of the person who is authorized to sign the agreement with NEIWPCC.

**Tracking information:**

Federal Tax Identification Number:

UEI Number:

Certified Disadvantaged Business Enterprise (DBE): (Yes or No)

*In April 2022, the federal government stopped using the DUNS number to uniquely identify entities registered in the SAM System (sam.gov). All NEIWPCC/LCBP Contractors will be required, as part of the contract process, to submit their UEI as part of the agreement process. The DUNS number will no longer be used as a unique entity identifier and only the Sam.gov created number will be accepted.* ***Remember to submit a copy of your SAM registration when you submit your workplan.***

**LCBP award amount:** *(as provided in your award letter)*

**Non-federal match:**

**Total project cost:**

**Project location:**Specify which [town(s), county(-ies)](https://atlas.lcbp.org/people-economy/political-boundaries/), and [HUC-8 sub-watershed(s)](https://atlas.lcbp.org/nature-environment/watersheds-and-tributaries/) of the Lake Champlain Basin in which the project will occur. Provide detailed site(s) description(s) if applicable and a brief description of the land uses that will be addressed in the project (e.g. urban, suburban, agriculture, forested lands, aquatic habitat). Latitude and longitude should be provided for the project site(s) if appropriate, and project area maps are highly encouraged. If applicable, provide a brief description of the target audience that will be addressed via the project.

**Project description**:

Please describe your project in **3-5 sentences**. Include details about specific **outputs** and **outcomes** (see definitions of each in the template guidelines above).

**Photo:**
High resolution JPG or TIF as specified in the above template guidelines and include a caption. Suggestions: a before photo**,** past project, similar project, etc.

**B. Introduction**

Present brief background information on the project, an overview of the work and products, and the relationship of the project to *Opportunities for Action* (available at <http://plan.lcbp.org/>).

**C. Project task table with timeline**Use the **example format below** to outline your project objectives, tasks to fulfill these objectives, deliverables or outputs produced by each task, and timeline for task completion. The following are required deliverables:

* **An approved QAPP (if applicable to the project).**
* **Quarterly reports.** Quarterly progress reports that detail progress based on your task schedule must be filed with the LCBP project officer within 10 days of the last day of each calendar year quarter (due January 10, April 10, July 10, and October 10).
* **Approved final report.** Please include the final reports as a deliverable in your table within the final task, and include a draft due date.
* **Project metrics report:** LCBP has developed a list of project metrics to measure quantifiable outputs from all projects. Reporting on these metrics is a requirement for all projects. Please download the guidance [at the grantee toolkit webpage](https://www.lcbp.org/about-us/grants-rfps/grant-toolkit/).
* **High-resolution digital photographs (if applicable).**
* **Data submission (if applicable).** The workplan must clearly state how environmental data developed during the project will be delivered to the LCBP in an understandable and useable format for managers and scientists. You may include this as a deliverable in the task table below.

**Example task table**

Each task must be 100% complete before an invoice for that task can be processed. If necessary for your invoicing purposes, please split tasks into multiple phases.

All tasks must have an associated budget. If a task has no associated cost, please include it within a different task item.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Task #** | **Task title** | **Objective** | **Deliverable or Output** | **Timeline** |
| 1 | Choose consultant  | Hire consultant to develop planting plan and assist with planting implementation.  | Consultant chosen  | January 2022 |
| 2 | Develop QAPP | Describe quality assurance procedures that will maintain project performance. | Approved QAPP | April 2022 |
| 3 | Determine planting locations | Meet with landowners of 3 potential locations (identified in a previous project), determine interest, and sign agreement with landowner(s). | List and map of project sites | May 2022 |
| 4 | Plan plantings | Develop planting plan, contact volunteers and schools, purchase supplies, schedule planting date(s). | Planting plan and schedule, volunteer list, summary of supplies purchased | July-August 2022 |
| 5 | Implement plantings | Implement plantings with volunteers. Contact local media and provide press releases with credit to funding source(s). | 100 ft of re-vegetated riparian habitat, photos and # of volunteers, copy of press release  | September- October 2022 |
| 6 | Reporting | Complete quarterly reporting requirements. Compile project summary and all project deliverables (plans, maps, articles, photographs, etc.) in a final report. | Quarterly ReportsApproved Final reportData and photos submittedProject metrics report | Quarterly reports submitted throughout contract period. Final Report due December 30, 2022 |

**D. Task descriptions**Please describe each project task in more detail and associate each task with the correct task number from your project task table above. Provide specific information on project locations and methodologies whenever possible. Please state which tasks, if any, have been or will be completed with funding other than your LCBP award. For projects requiring fieldwork, please provide the measures taken to reduce the spread of invasive species. **Your task descriptions will likely require more detail than the examples listed below.**

**Example task descriptions:**

**Task 1.** Create and issue request for proposal for professional consultant using the LCBP/NEIWPCC approved procurement policy. Review proposals and make a selection.

**Task 2.** Working with the selected consultant, quality assurance procedures will be described that will maintain project performance in a Quality Assurance Project Plan (QAPP). The QAPP will be submitted to LCBP/NEIWPCC and EPA for review and approval.

**Task 3.** Conduct site visits andmeet with landowners of three potential locations (identified in a previous project), determine interest, and sign agreement with landowner(s). Choose riparian planting locations within each site, and produce map of sites and locations.

**Task 4**. Develop planting plan, including dates, area to be planted, number and types of species that will be planted and locations of plants. Contact known volunteers and potential sources of other volunteers (e.g., schools, local conservation board), purchase supplies, schedule planting date(s).

**Task 5.** Implement plantings with volunteers. Document number of volunteers and photo document planting event. Contact local media and provide press releases with credit to funding source(s).

**Task 6.** Quarterly reports will be submitted throughout the grant contract period to be filed with the LCBP project officer within 10 days of the last day of each calendar year quarter or December 31, March 31, June 30, and September 30. A draft final report will be submitted that compiles a project summary and all grant deliverables including plans, maps, data, articles, photographs, etc.

**E. Budget**
Provide a budget breakdown by major budget categories (e.g., personnel, equipment), linking costs to specific tasks and deliverables wherever possible. The breakdown should clearly show costs covered by this LCBP award, costs covered by partner organizations (if applicable), applicable matching funds, and totals. Your budget table should be similar to the one submitted with your proposal or grant application.

**Please use the format on the following page for your budget table.**

* If the LCBP request is part of a larger project, please indicate the estimated total project value and the funding source.
* All expenses should be placed into one of the following major categories:
	+ Direct Costs - subcategories include: Personnel, Fringe Benefits, Travel, Supplies, Professional Services.
	+ Indirect Costs – The indirect budget should not exceed 10% of the direct project budget, and indirect offered as match should similarly not exceed 10% of direct match contributed, unless a higher federally negotiated indirect rate is in place. The LCBP Indirect Policy can be found here: <http://www.lcbp.org/about-us/grants-rfps/grant-toolkit/>
* List additional specific expense categories where appropriate.
* The budget table should match the task table above, and clearly indicate which work components will be paid for with LCBP funding from this grant and which will be from other sources. At minimum, show which items will be covered by the LCBP grant and which items will be part of your matching contribution (if matching contributions will be used).
* The budget must include whole numbers only, no cents, in order to be approved. Please be sure that all whole numbers sum properly in each row and column **after rounding**.
* The budget table in your workplan must be editable text and numbers, **not a pasted spreadsheet image**. You can do this by copy-pasting the content directly from an Excel spreadsheet.
* A budget table template is available in Excel format on the [grantee toolkit webpage](https://www.lcbp.org/about-us/grants-rfps/grant-toolkit/).

**Example budget table:**

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Task number** | **Task title** | **Personnel** | **Fringe** | **Travel** | **Supplies** | **Prof. services** | **Indirect costs** | **Total budget** |
| 1 | Choose consultant |  $ 500  |  $ 150  |  $ -  |  $ -  |  $ -  |  $ 65  |  $ 715  |
| 2 | Develop QAPP |  $ 1,200  |  $ 360  |  $ 100  |  $ 200  |  $ -  |  $ 186  |  $ 2,046  |
| 3 | Determine planting locations |  $ 800  |  $ 240  |  $ 300  |  $ -  |  $ -  |  $ 134  |  $ 1,474  |
| 4 | Plan plantings |  $ 495  |  $ 148  |  $ 100  |  $ 2,000  |  $ 2,500  |  $ 524  |  $ 5,767  |
| 5 | Reporting |  $ 1,000  |  $ 300  |  $ -  |  $ 500  |  $ -  |  $ 180  |  $ 1,980  |
| **All tasks** |  **$ 3,995**  |  **$1,198**  |  **$ 500**  |  **$ 2,700**  |  **$ 2,500**  |  **$1,089**  |  **$ 11,982**  |

**Example match table:**

|  |  |
| --- | --- |
| Personnel |  $ 3,000  |
| Fringe |  $ 1,030  |
| Volunteer time |  $ 2,000  |
| Travel |  $ 400  |
| Supplies |  $ 1,200  |
| Professional services |  $ 1,000  |
| Indirect |  $ -  |
| **Total match** |  **$ 8,630**  |

**F. Detailed budget justification**

The budget justification should explain all costs associated with your budget. Examples:

* **Personnel:** Staffing for RFP development (Task 1) 5 hrs @ $x per hour, QAPP development (Task 2) 20 hrs @ $*x* per hour, initial project planning & outreach for site ID (Task 3) 60 hrs @ $*x* per hour, project implementation planning & site design (Task 4) 40 hrs @ $x per hour, project execution (Task 5) and Project wrap-up and reporting (Task 6) 40 hrs @ $*x* per hour. Proposed match includes staff time and volunteer time for all tasks.
* **Fringe:** Fringe refers to benefits and is calculated as an appropriate percentage of personnel costs for each Tasks (this example uses 30% of personnel costs). Proposed Match can include unrecovered costs to applicant not included in this grant request.

**Supplies:** Examples are photocopying (Task 1), planting equipment (Task 3), a software license to process data (Task 4). Match includes the value of donated materials, including plants.

**Professional Services:** Hiring a subcontractor for QAPP development (Task 2) 20 hrs @ $*x* per hour, and riparian buffer planting installation in (Task 3) 8 hrs @ $*x* per hour. Match includes non-federal funds from a different grant source.