



Welcome to the CLU-IN Internet Seminar
CARE Project Officer's Training
Sponsored by: CARE National Program

Delivered:

June 16, 2011, 12:00 PM - 4:00 PM, EDT (16:00-20:00 GMT)

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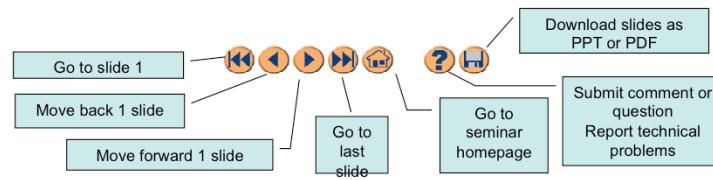
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Visit the Clean Up Information Network online at www.cluin.org

Housekeeping

- Please mute your phone lines, Do NOT put this call on hold
 - **press *6 to mute #6 to unmute your lines at anytime (or applicable instructions)**
- Q&A
- Turn off any pop-up blockers
- Move through slides using # links on left or buttons



- This event is being recorded
- Archives accessed for free <http://cluin.org/live/archive/>

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Although I'm sure that some of you have these rules memorized from previous CLU-IN events, let's run through them quickly for our new participants.

Please mute your phone lines during the seminar to minimize disruption and background noise. If you do not have a mute button, press *6 to mute #6 to unmute your lines at anytime. Also, please do NOT put this call on hold as this may bring delightful, but unwanted background music over the lines and interrupt the seminar.

You should note that throughout the seminar, we will ask for your feedback. You do not need to wait for Q&A breaks to ask questions or provide comments. To submit comments/questions and report technical problems, please use the ? icon at the top of your screen. You can move forward/backward in the slides by using the single arrow buttons (left moves back 1 slide, right moves advances 1 slide). The double arrowed buttons will take you to 1st and last slides respectively. You may also advance to any slide using the numbered links that appear on the left side of your screen. The button with a house icon will take you back to main seminar page which displays our agenda, speaker information, links to the slides and additional resources. Lastly, the button with a computer disc can be used to download and save today's presentation materials.

With that, please move to slide 3.

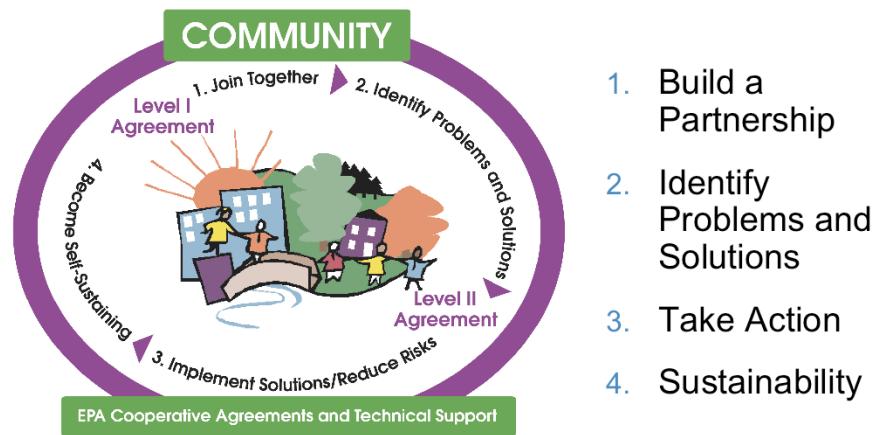
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CARE Roadmap and PACE-EH

Marva King
2011 CARE Project Officer Training
June 16, 2011

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Four-step CARE process



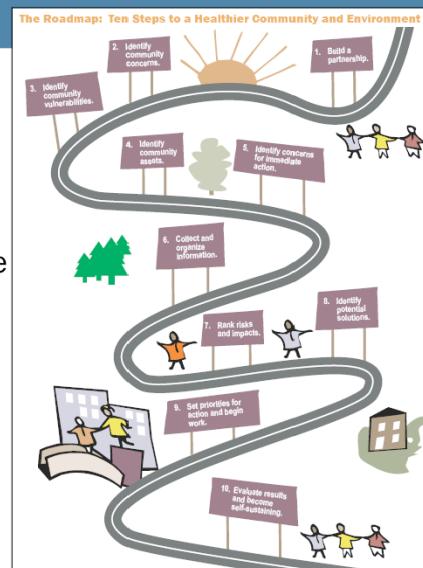
How can this be accomplished?

- CARE doesn't prescribe a single model, but there are a couple of models available:
 - CARE Roadmap (<http://www.epa.gov/care/library/20080620roadmap.pdf>)
 - PACE-EH (CDC and NACCHO's *Protocol for Assessing Community Excellence in Environmental Health*, (<http://www.cdc.gov/nceh/ehs/CEHA/background.htm>)
- Another resource: CARE grantees share their experience on periodic calls and at the annual workshop

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CARE Roadmap

1. Build a partnership
2. Identify community concerns
3. Identify community vulnerabilities
4. Identify community assets
5. Identify concerns for immediate action
6. Collect and organize information
7. Rank risks and impacts
8. Identify potential solutions
9. Set priorities for action and begin work
10. Evaluate results and become self-sustaining

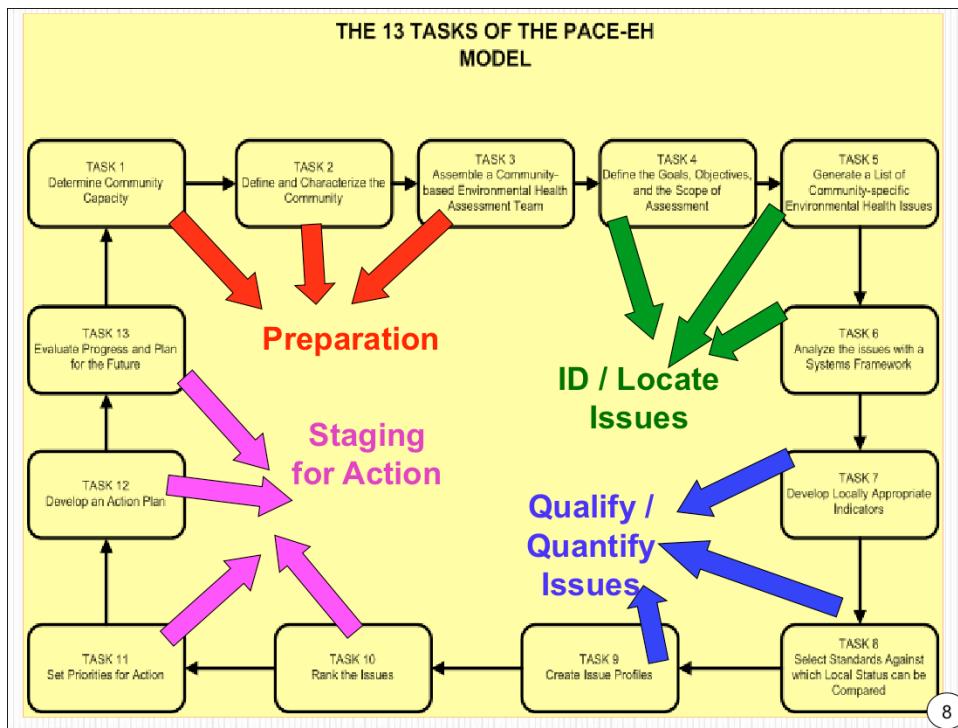


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PACE-EH

- PACE-EH has more steps than CARE Roadmap and CARE 4-Step process but correlates with both processes.
- There are 13 Tasks of the PACE-EH Model.
- The 13 Tasks can be arranged into 4 major groups.
- Preparation; Identify and Locate Issues; Quantify or Qualify Issues, and Stage for Action.

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KEY OBJECTIVES CARE Roadmap

PACE-EH

<ul style="list-style-type: none">• Reduce Environmental Hazards and Protect Human Health• Target Community Suffering the Greater Environmental Hazard• ID concerns, Rank and Prioritize Risks.• Become Sustainable	<ul style="list-style-type: none">• Evaluate Environmental Health Conditions• Target Populations At Risk• Identify Concerns and Set Priorities• Become Sustainable
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CARE Roadmap

PACE-EH

- Step 1-Build Partnership
- Steps 2 (ID community concerns, 3 (ID vulnerabilities) and 4 (ID assets)).
- Step 5 – ID concerns for immediate action.
- Preparation Grouping -- Tasks 1 (Determine capacity), 2 (Define and Characterize) and 3 (Assemble Team)
- ID/Locate Issues Grouping- Tasks 4 (Define Goals/Scope), and 5 (List Issues).
- Task 6 Analyze issues with Systems Framework.

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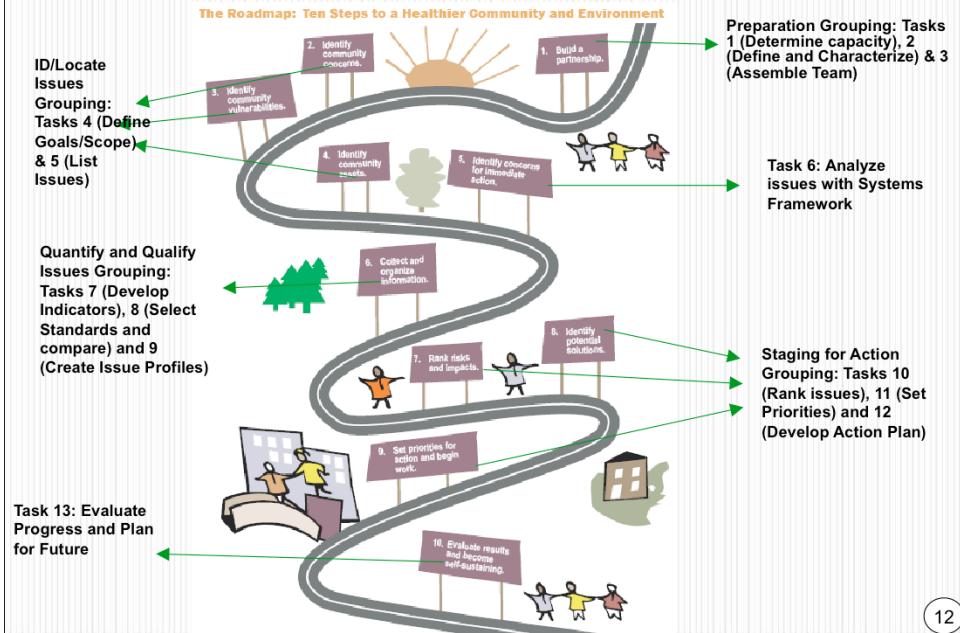
CARE Roadmap

PACE-EH

- Step 6- Collect and organize information
- Steps 7 (Rank risks/ impacts), 8 (ID solutions), and 9 (Set priorities for action)
- Step 10 – Evaluate Results and Be Self-Sustaining.
- Quantify and Qualify Issues Grouping --Tasks 7 (Develop Indicators), 8 (Select Standards and compare) and 9 (Create Issue Profiles).
- Staging for Action Grouping- Tasks 10 (Rank issues), 11 (Set Priorities) and 12 (Develop Action Plan).
- Task 13 – Evaluate Progress and Plan for Future.

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PACE-EH and the CARE Roadmap



Important Points to Remember About Both Processes

- Examples of tools you can use –if you choose to do so.
- Steps are simultaneous and iterative. For example partnership building and data collection are ongoing steps.
- Ultimate goal is create a more healthy community.
- Process is designed to achieve consensus and facilitate action.

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What to expect as a CARE Project Officer

2011



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What to expect as a CARE Project Officer



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Review

Roles of a Project Officer

What to expect as a CARE Project Officer

Negotiating a CARE Cooperative Agreement



What to expect as a CARE Project Officer

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Roles and Responsibilities

Know CARE

(e.g. RFP, Roadmap, PACE-EH, your Proposal, your Grantees' Workplan)

Listen! Pitch In! Ask for Help!

Celebrate Small Successes!

Help your grantee thru the CARE Roadmap



What to expect as a CARE Project Officer

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What to expect as a CARE Project Officer

Familiarize yourself w/ your community and how it works

- Walk around
- Check out their website
- You'll be one of the perceived experts in the room so know what is going on there (politics, informal leaders, what they do for fun, where to find good food).



What to expect as a CARE Project Officer

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What to expect as a CARE Project Officer

Tread lightly when you first start working with a new community.

Be a keen observer, observe reactions, understand who has credibility and respect in the community

Ask (respectfully) lots of questions

Learn about your community's culture, etc. – their formal protocols, their food, their dress, their sense of time.



What to expect as a CARE Project Officer

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Roles and Responsibilities

Review the Roles and Responsibilities summary sheet for Regional Coordinators and Project Officers, the Terms and Conditions document, and how to Negotiate a CARE workplan

Read the CARE 2010/2011 RFP and the original project application.

Understand what the final workplan states and what commitments have been made by the Grantee and the Agency.



LOCAL PARTNERSHIPS. HEALTHY COMMUNITIES.

What to expect as a CARE Project Officer

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Roles and Responsibilities

Travel to your site as often as possible

Find regional technical help and State and local partners and other available various resources to help sustain the grantee's CARE partnership

Help your partnership “connect the dots” to risk reduction, help them find good measures for their work, sustainability resources, and EPA technical help



What to expect as a CARE Project Officer

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Roles and Responsibilities

Provide EPA Voluntary Program tools and expertise

Help grantee's detail their commitments (through action and documentation) (see Martha Barber's Post Award handout)

Help them understand the Quarterly Report and Measurement Matrix and how best to fill them out.

Documentation IS AN IMPORTANT TASK FOR BOTH PARTIES!



What to expect as a CARE Project Officer

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Roles and Responsibilities

Look over the CARE Sustainability Checklist at the beginning of your CARE Level 1 or 2 grant process. Work with your grantee to address action items suggested on the Checklist.

Review the CARE “Measurements and Tips” sheet. Use it when creating your CARE workplan.



What to expect as a CARE Project Officer

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Roles and Responsibilities

Identify & help address gaps/concerns

(e.g. Is the entire community involved; What type of education might work best; How should information be presented; What partners are not at the table; How can their process(es) be improved; How will they make decisions; Is the spoken or written language being used a barrier for members of the community?)



What to expect as a CARE Project Officer

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Roles and Responsibilities

Bring experts (other CARE grantees, State Leads, HQ, other Regions) to your grantee – these partners might have beneficial resources available that they do not possess.



What to expect as a CARE Project Officer

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What to expect as a CARE Project Officer

Meet w/ your CARE Regional
Coordinator and talk CARE “shop talk”
often

This work is challenging; difficult;
confusing; & rewarding ---all wrapped
up together



What to expect as a CARE Project Officer

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What to expect as a CARE Project Officer

Know that the project most likely will be audited. Help your grantee work, document and deliver work products as if an audit is certain.

You don't have to do this work by yourself, seek out others' help who can guide you (use the CARE "Themes" document to find other Project Officers and grantees working on the same issues.)



What to expect as a CARE Project Officer

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What to expect as a CARE Project Officer

Find a CARE mentor – You'll need one

Participate on the CARE Project Officer Calls –
let us know what you want to talk about

Meet often w/ your grantee (through face-to-face meetings and/or conf. calls) – it helps!



What to expect as a CARE Project Officer

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What to expect as a CARE Project Officer

Your workplan, the CARE RFP, the CARE website, and your CARE mentors will be your helpmates and guideposts

**Ask for help if you or your grantee is
struggling (Don't be surprised if this happens -
It most likely will happen somewhere along
the way)**



What to expect as a CARE Project Officer

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CARE Level 1 Project Officer Tips & Frequently Asked Questions

Your job is to know HOW to proceed thru the CARE Roadmap – Help your grantee define & implement HOW they will proceed.

Understand and be able to explain the need for a defined decision-making process



CARE Level 1 Project Officer Tips & Frequently Asked Questions

What will their ranking and prioritization process look like and how should it be implemented? – These questions will come up often.

Should the grantee use a neutral facilitator during the meetings???



What to expect as a CARE Project Officer

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CARE Level 1 Project Officer Tips & Frequently Asked Questions

Help your grantee understand “How to best keep their volunteers?

There most likely will be political barriers – help clear them.



What to expect as a CARE Project Officer

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CARE Level 1 Project Officer Tips & Frequently Asked Questions

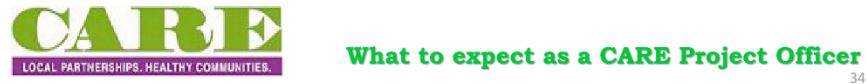
Help grantee understand how info can be collected w/out a survey.

Make sure that your grantee understands their budget & their Terms and Conditions – this cooperative agreement is a legally, binding contract.



CARE Level 1 Project Officer Tips & Frequently Asked Questions

Refer to the Sustainability Checklist with your Grantee throughout the 2 year grant period. Determine what the grantee can do to ensure long term changes.



CARE Level 2 Project Officer Tips

Your job is to know HOW to proceed thru your grantee's workplan – Help your grantee define & implement HOW they will proceed.

Find out what EPA resources your grantee can access to deliver risk reduction and sustainable local solutions and partnerships.



What to expect as a CARE Project Officer

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CARE Level 2 Project Officer Tips

**Find out what other L2 grants are similar to yours
– meet w/ them to reap their knowledge & experience**

Use the Sustainability Checklist throughout the L2 time period.

Review, Edit, Improve, Document and Broadcast your Measures of Success



What to expect as a CARE Project Officer

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CARE Level 2 Frequently Asked Questions

How do we engage & keep our partners?

What kind of public engagement is necessary at the L2 process?

How can the PO engage Regional/HQ/state experts to help them?

**What happens if there are problems with:
Contractors, sub Grantees, politicos, work stoppage,
personnel issues?**



What to expect as a CARE Project Officer

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How do you Negotiate a CARE Workplan?



What to expect as a CARE Project Officer

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How do you Negotiate a CARE Workplan?

Start with:

- 1) RFP**
- 2) Proposal**
- 3) Roadmap**
- 4) Your notes**



What to expect as a CARE Project Officer

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How do you Negotiate a CARE Workplan?

Get the answers to these questions
when creating the workplan:

How will they implement each task?

Who will implement the task?

When will they implement the task?



How do you Negotiate a CARE Workplan?

Get the answers to these questions
when creating the workplan:

How does the budget support the task?

**How can their partners help with the
task?**



What to expect as a CARE Project Officer

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How do you Negotiate a CARE Workplan?

Read you're the proposal & highlight all of the stated and potential actions

Highlight areas that you have questions or where there are gaps.

Identify what is going to be accomplished and find out HOW it will be accomplished during the negotiations.



What to expect as a CARE Project Officer

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How do you Negotiate a CARE Workplan?

Know that your workplan is a “best estimate”.

If the workplan is not clear to you – gain clarity during the workplan negotiation or at your first face-to-face meeting.

Circulate your proposal & workplan to others in your Region for their insight



What to expect as a CARE Project Officer

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How do you Negotiate a CARE Workplan?

Circulate your proposal & workplan to others in your Region for their insight

Does your workplan need a Quality Assurance Plan?

Consider using a Logic Model to help you & the grantee keep track of where they are at, what is next, and how they are doing



What to expect as a CARE Project Officer

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How do you Negotiate a CARE Workplan?

Define what the grantee's Terms and
Conditions will be

Does their Budget make sense and does it
support the work?

Make sure all Contracts and Subgrants are
clear and compete if need be.



What to expect as a CARE Project Officer

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How do you Negotiate a CARE Workplan?

**Work with and befriend your Grant Specialist
– they will help you understand what can
and cannot be done**

**Are you a certified Project Officer? If not,
you will need to become one.**



What to expect as a CARE Project Officer

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How do you Negotiate a CARE Workplan?

Your PO job after the award –

Review, finalize and post all CARE outputs from the grant to IGMS & to the CARE ESC

Deliver all quarterly reports from your grantee to HQ on time.

Check in often w/ your grantee

Check the Financial Data Warehouse re: their budget usage throughout the grant period.

If amendments need to occur, make sure they are officially documented and approved.



What to expect as a CARE Project Officer

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How do you Negotiate a CARE Workplan?

If you have questions, ask for help from:

Regional Coordinator

Your CARE team

Your CARE Grants Specialist

Your Regional Counsel

Another CARE PO (in/outside of your Region)



What to expect as a CARE Project Officer

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**It is a lot of fun, hard work and experiential learning and growth –
But, remember to
BREATHE
and
Enjoy the Ride!**



What to expect as a CARE Project Officer

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What to expect as a CARE Project Officer

**If you ever want to
call me for help:**

**Kathleen Fenton
913-551-7874
fenton.kathleen@epa.gov**



What to expect as a CARE Project Officer

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Grants Do's and Dont's



Do's

- ▶ Ask questions when you have questions
- ▶ Communicate with your recipient and your Grant Specialist early and often
- ▶ Set the bar – be clear about your expectations
- ▶ Focus on being a partner, not a policeman



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Don'ts

- ▶ Wait
- ▶ Wonder
- ▶ Worry



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Recipient Responsibilities

- ▶ Read the requirements of the award
- ▶ Identify an authorized organizational official
- ▶ Agree to comply with the laws, regulations, policies, terms and conditions
- ▶ Maintain separate financial and programmatic records of their work on the project
- ▶ Submit timely cost reimbursement requests
- ▶ Submit progress reports
- ▶ Notify the EPA if any changes occur/issues arise

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Project Officer Responsibilities

- ▶ Understand (or know where to find) the cost principles for an award
- ▶ <http://ecfr.gpoaccess.gov/>
 - CFR Title 2, Part 230: Cost Principles for Non-Profit Organizations
 - CFR Title 2, Part 220: Cost Principles for Educational Institutions
 - CFR Title 2, Part 225: Cost Principles for States, Local Governments, Tribes



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Project Officer Responsibilities for Budget Review

- ▶ The budget is the financial expression of the project.
- ▶ Review project costs to ensure costs are reasonable, allocable, allowable.
- ▶ Cost Categories include:
 - Personnel, Fringe Benefits, Travel, Equipment, Supplies, Contracts, Construction, Other, Indirect Costs, Cost Share (Match)



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Unallowable Costs

- ▶ Advertising/Promotions
- ▶ Alcohol
- ▶ Entertainment
- ▶ Food that does not contribute towards mission/goals of project
- ▶ Fund Raising
- ▶ Bad Debts

Red Flags

- ▶ Narrative and budget don't synch
- ▶ Progress reports and \$ requests don't synch
- ▶ Whole \$ draw downs
- ▶ All \$ drawn down
- ▶ Even \$ draw downs



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Remedies

- ▶ If a recipient fails to comply with the terms and conditions of their agreement, the EPA may:
 - Impose additional requirements
 - Withhold cash payments pending corrective action
 - Disallow costs
 - Wholly or partly suspend current award
 - Withhold future awards
- ▶ The EPA will always provide recipients ample opportunity to respond to requirements and appeal decisions



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Project Officer Responsibilities for Monitoring

- ▶ Review progress reports diligently
- ▶ Monitor programmatic conditions
- ▶ Complete performance and financial monitoring
 - programmatic baseline monitoring
 - programmatic advanced monitoring
- ▶ Communicate

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What's New in Grants

- ▶ Tribal Indirect Cost Policy
- ▶ Non-Profit Indirect Cost Policy



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Tribal IDC Policy

Recipients must submit an IDC proposal to their cognizant agency (Department of Interior, DOI) for negotiation.

Option 1: Tribes may use a negotiated IDC rate that is up to three (3 years old)

Option 2: Tribe may charge a flat IDC rate of 10% of salaries and wages.

Option 3: Tribe may use a current provisional/final IDC rate from an existing grant with DOI.

Non Profit IDC Policy

Recipients must submit an IDC proposal to their cognizant Federal within 90 days of receiving award.

Option 1: Recipient may charge a flat IDC rate of 10%. (proposal submission not necessary)

Option 2: Recipient may use a current provisional/final IDC rate from an existing grant with their Federal cognizant agency.

Do's

- Ask questions
- Communicate
- Set the bar
- Be a partner
- Have Fun



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IGMS Grantee Compliance Database for Project Officers

National Policy, Training and
Compliance Division

June 2011

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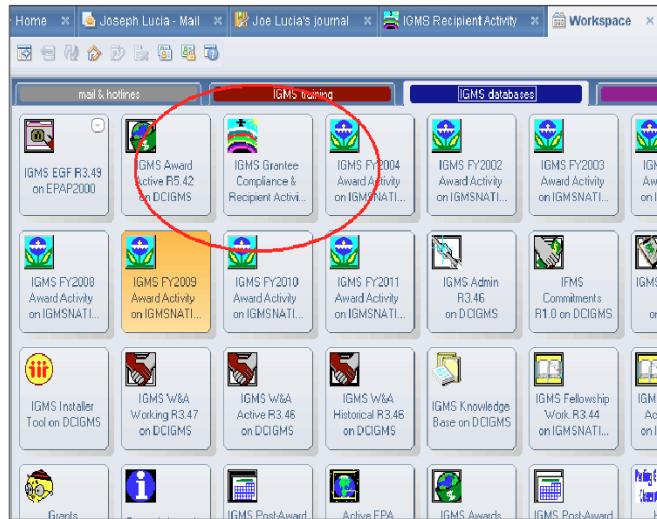
What is the Grantee Compliance Database?

- Repository of information about recipients that have received (or have current) grants from EPA.
- Place where Programmatic Advanced Monitoring reports are loaded and stored – must be entered and validated to get credit in the Quarterly Performance Measures (10% target).
- Method of communication between Compliance Team, Project Officers and Grant Specialists for administrative compliance issues with recipients.

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Step 1: Finding the Database

- Open your Lotus Notes Workspace.
- You should see the rainbow icon labeled "IGMS Grantee Compliance & Recipient Activity" database.
- If not, contact the IGMS Help Desk to get access, or the IGMS Hotline at (703) 676-4499
- Open the IGMS Grantee Compliance and Recipient Activity database.



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Step 2: Finding a Specific Recipient

- The best view for finding recipients is the "Recipient Summary" view
- Note where the cursor is for the database (on NAMAC) the bold frame rectangle.
- If you open the database and immediately click on "add programmatic report" or "add administrative report" your report entry will go under the outlined recipient.
- To add a report to a specific recipient (so you can find it again), you need to find the correct recipient entry first.

Recipient	Office	State	Zip	
NAMAC	Natl Assoc of Mongolian Agricultural Cooperatives	559647155	FC	49
NTA	Nelson Township Auth	199434954	PA	16249
1000ef IA	1000 Friends of Iowa	161488958	IA	50310
1000efF	1000 Friends of Florida Inc		FL	32314
1854 AUIH	1854 Authority	195241850	MN	55811
20544	U.S. Courts		DC	20544
27709 NIEHS	HHS Nat'l Inst. of Environmental Health & Sciences	927645168	NC	27709
3Rivers	Three Rivers Area Health Education Center	009513169	GA	31904
3RW	3 Rivers Wet Weather Inc.	12519654	PA	15224
59101a	Department of Health & Human Services Billings IHS	102365474	MT	59101
80225 5127	USDA Forest Service R2	929332484	CO	80401
911MAC	911 Media Arts Center		WA	90109
AA NET	Allergy/Asthma Network/Methas of Asthmatics	788090200	VA	22031
A BIOMF	Assoc. for Biodiversity Information		VA	22209
A STATA	American Statistical Association	070110936	VA	22314
A & AIA	Asthma & Allergy Foundation of America		MA	02467

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Step 2: Finding a Specific Recipient (cont.)

- Always open the search bar when trying to find a recipient.
- Go to "View" and then "Search This View" to open the search. The search window should stay up the next time you enter the database unless you manually close it.
- Enter the name (or part of the name) of the recipient you would like to find.

- When searching, open the "More" tab and "show all documents (sortable)". This shows all recipients alphabetically. Sorting by relevance (the default) only shows results for the word(s) you entered and may not show the recipient you are looking for.

The screenshot displays two windows from a software application for managing recipients. The top window is titled 'Search in View "Recipient Summary"' and shows a list of recipients with columns for 'Abbrev', 'Recipient', 'DUNS', 'State', and 'Zip'. The bottom window is titled 'Search in View "Recipient Summary"' and shows a search results grid with the same columns. Both windows have a red box highlighting the search bar and the 'More' tab in the top-left corner of the interface.

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Step 3: Interpreting Search Results

- Here's a sample search for University of Nevada.
- There are 23 documents in the database that have your search terms somewhere in them.
- Any document that matches your search term has a check mark in the leftmost column.
- Additional documents are located under the main heading if you click on the triangle next to the recipient name.

Add Programmatic Report Add Administrative Report Add Training Add Pre-Award Certification Add Indirect Cost P						
Q 23 documents in View 'Recipient Summary' matched your search.						
Search for University of Nevada		Search		Clear Results		
Abbrev	Recipient	DUNS	State	Zip	Ind	Lead
<input checked="" type="checkbox"/> BR UCSSN	Board of Regents-UCSSN University of Nevada	146515460	NV	89557	State Inst High Lead	
<input checked="" type="checkbox"/> BR UCSSN0	Board of Regents-UCSSN University of Nevada		NV	89557-0246	State Inst High Lead	
<input checked="" type="checkbox"/> BIA	Programmatic Report Grant: 8298000 Activity Date: 03/22/2005 Creativity: Pcto: 5					
BRA GRAT	Boston Redevelopment Authority	801923219	MA	02201	Man	
BRA SANCTY	BRA of the County of Grand	055938437	MI	48847	Cen	
	Brownfield Rev. Authority of Sanilac County	181500201	MI	48471	Cen	

- If you highlight the next entry after the last check mark and hit search again it will take you to the next entry in the database from the 23 matches for University of Nevada.

Add Programmatic Report Add Administrative Report Add Training Add Pre-Award Certification Add Indirect Cost P						
Q 23 documents in View 'Recipient Summary' matched your search.						
Search for University of Nevada		Search		Clear Results		
Abbrev	Recipient	DUNS	State	Zip	Ind	Lead
<input checked="" type="checkbox"/> DR UCSSN	Board of Regents-UCSSN University of Nevada	146515460	NV	89557	State Inst High Lead	
<input checked="" type="checkbox"/> DR UCSSN0	Board of Regents-UCSSN University of Nevada		NV	89557-024	State Inst High Lead	
<input checked="" type="checkbox"/> BIA	Programmatic Report Grant: 8298000 Activity Date: 03/22/2005 Creativity: Pcto: 5					
BIA GRAT	Boston Redevelopment Authority	801923219	MA	02201	Man	
BIA GRAL	BIA of the County of Grand	055938437	MI	48847	Cen	
BIA SANCTY	Brownfield Rev. Authority of Sanilac County	181500201	MI	48471	Cen	

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Step 3: Interpreting Search Results (cont.)

- Here's a search for Georgia Department of Natural Resources.
- The search bar is not case sensitive, so you don't have to capitalize the terms you search for.
- The search found several entries with the same name. The triangle next to each name shows that there are reports posted under each.
- This is likely because there are multiple entries for this recipient in the IGMS Public Address Book (PAB).
- You may need to look under all versions of the name to find the report you are looking for.
- Clicking on the triangle opens the entries under each entity name.

41 documents in View 'Recipient Summary' matched your search.

Search for: georgia department of natural resources

Search

Del	Abbrev	Recipient	DUNS	State
✓	GA DNR EPD	► Georgia Department of Natural Resources	146985544	GA
	GA DNR LPD	► GA Dept of Natural Resources	146985544	GA
	GA DNR MSP	► Georgia Dept. of Natural Resources	146985544	GA
	GA DNR PPD	► GA Dept of Natural Resources	146985544	GA
	GA DNR WRD	► GA Dept of Natural Resources	146985544	GA
	GA DOAq	► GA Dept of Agriculture	066494436	GA
	GA DOT	► GA Dept of Transportation	090344248	GA
	GA EastPCS	City of East Point		GA
	GA Eatonton	► City of Eatonton Georgia	927898551	GA
	GA ED	► Georgia Environmental Organization	012688300	GA
	GA EFA	► GA Environmental Finance Authority	089697358	GA
✓	GA DDA SocCr	Downtown Development Authority of Social Circle	027185065	GA
	GA DekalbPks	► Dekalb Co. Park and Recreation Department	061420535	GA
	GA DHR	► GA Dept of Human Resources		GA
	GA DNR CRD	► GA Dept of Natural Resources	146985544	GA
	GA DNR EPD	► Georgia Department of Natural Resources	146985544	GA
✓	GA DNR EPD	► GA Dept of Natural Resources	146985544	GA
		>Programmatic Report: Grant: 03174701 Activity Date: 05/23/2005 Cre		
		>Programmatic Report: Grant: 96449806 Activity Date: 09/13/2006 Cre		
		>Programmatic Report: Grant: 96424905 Activity Date: 11/02/2006 Cre		
		>Programmatic Report: Grant: 00489906 Activity Date: 10/18/2006 Cre		
		>Programmatic Report: Grant: 97401205 Activity Date: 06/16/2005 Cre		
		>Programmatic Report: Grant: 97495804 Activity Date: 08/18/2006 Cre		
		>Programmatic Report: Grant: 98492405 Activity Date: 06/16/2005 Cre		
		>Programmatic Report: Grant: 98492405 Activity Date: 09/05/2006 Cre		

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Step 4: Information about a Recipient (Recipient Summary)

- If you double click the recipient name a new window opens.
- This Recipient Summary has the recipient's address, contact information and other items.
- This is also the screen where you can add programmatic reports, administrative reports and other documents by clicking on the correct tab in the top grey bar.

- The document also has a list of active grants posted in IGMS under this entry.
- You can click on "All Awards" or "Active Awards" and the link will take you to the Electronic Grant File (EGF) database entry for this recipient.

Project Number	Title	Grant Specified	Project Officer	Award Date	Due Date
101-1100-1	Ground F-3 P-1	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-2	06 JUN 2010-06 JUN 2010 SURVEY	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-3	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-4	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-5	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-6	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-7	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-8	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-9	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-10	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-11	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-12	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-13	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-14	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-15	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-16	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-17	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-18	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-19	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-20	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-21	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
101-1100-22	06 JUN 2010-06 JUN 2010-06 JUN 2010	State of Georgia	David C. White	06/22/10	06/22/10
Total	7				

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Step 5: Creating or Viewing a Programmatic Advanced Monitoring Report

- Let's look at a programmatic advanced monitoring report.
- Select a Programmatic Report entry and double click to open it.

- Note that the recipient name is listed in the green header bar.
- When creating a new report entry, make sure the correct recipient name is listed – or your report will be posted under someone else.
- If you input the eight digit grant number (omit the program letter code) the project description from the IGMS award auto-populates.
- When you create your entry you will select the relevant activity type from the pop-up window for the type of report you've performed (onsite, desk, etc.).

The image shows a software interface for managing reports. At the top, a list of reports is displayed, with the first item highlighted. A red arrow points to the first item in the list. Below this, a detailed view of a selected report is shown in a large window. The window title is "Programmatic Activity Report" and the subtitle is "GA DNR LPD - GA Dept of Natural Resources". The report details are as follows:

- Activity Information:**
 - Activity Type: Programmatic
 - Report Title: GA DNR LPD - GA Dept of Natural Resources
 - Report Attached: GAEP3_P2009_2010_Para_Annual_Report.pdf
 - Additional Notes: Grant Data
- Grant Information:**
 - Grant ID (8 digit): 9541128
 - Project Description: This correspondence approves funding in the amount of \$100,000 to further assist the State of Georgia in developing and implementing environmental monitoring and mitigation strategies. This grant strategy (RS) utilizes the existing Environmental Monitoring and Technology Program Award 2009.
- GRMS Post Award Tracking Document:**
 - Post Award Tracking
- Program Summary:**
 - 1. Is payment history consistent with progress to date? Yes
 - 2. Is the work under the agreement on schedule? Yes

A red box highlights the "Select Keywords" button, and a red callout box points to the "Keywords" list, which includes items like "Programmatic", "Programmatic Review Cycle", "Programmatic Environmental", "Programmatic Management Plan", and "Programmatic Environment".

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Step 5: Creating a Programmatic Advanced Monitoring Report (cont.)

- Under the “Program Synopsis” heading are the standard questions section you should respond to when performing your review.
- Each question has a dropdown answer and a textbox available for explanation.
- If you return to a previously posted report, double click anywhere in the answer sections to begin editing the report document.

Program Synopsis	
1. Is payment history consistent with progress to date?	Yes
Explanation:	
2. Is the work under the agreement on schedule?	Yes
Explanation:	
3. Is the actual work being performed within the scope of the recipients workplan?	Yes
Explanation:	
4. Are the recipient's staff and facilities appropriate to handle the work under the agreement?	Yes
Explanation:	
5. Are the products/progress reports submitted on time?	Yes
Explanation:	
6. Are the products/progress reports acceptable?	Yes
Explanation:	
7. Is the recipient making adequate progress in achieving outcomes and outputs and associated milestones in the assistance agreement work plan?	Yes
Explanation:	
8. If the recipient is experiencing significant problems meeting agreed-upon outcomes and outputs, has the recipient been required to develop and implement a corrective action plan?	N/A
Explanation:	
9. Has the recipient complied with the programmatic terms and conditions on the award? (e.g., CMF, Human Subjects, Program Income, etc.)	Yes
Explanation: QAPP is currently under development	
10. Did the recipient purchase equipment/property as planned in the agreement?	N/A
Explanation:	
11. Has the equipment been used as planned in the agreement?	N/A
Explanation:	
12. Does this review indicate any need to amend the award?	No
Explanation:	

Step 5: Creating a Programmatic Advanced Monitoring Report (cont.)

- In the findings section of the report, some are only for administrative and financial reviews (conflict of interest or cost/price analysis).
- Others apply to program reviews like Unallowable Costs (out of scope work), Undocumented Cost Share, Progress Reports, Quality Assurance, Noncompliance with Terms and Conditions, Property Management, Subrecipient monitoring, Results not being Achieved and Environmental Results.
- Add an explanation if you have Other findings to report.
- Any follow up actions should be provided in the Specifics section.

- Always enter your Region and AA ship at the bottom.
- This data is used to track your programs annual performance and if it's meeting its advanced post award monitoring commitments.
- It also helps you find the report again.

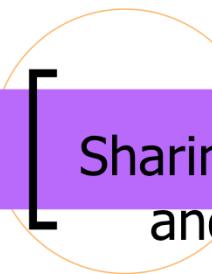
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Step 6: Finding Previously Created Reports

- One you create a report you can switch to the “By Creator” view, go to your name and easily find it.
- Here’s the GA Dept of Natural Resources that Aaron Casteen posted under her name.
- The other “views”under GCAI activities are similar and self explanatory.

- Here's a view by AA ship with the twisty open for OAR.
- For these two reports the author completed the division data element at the bottom of the database entry as "Climate Change Division" so its easy and quick to find with this view.

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Marketing CARE : Sharing CARE Stories, Results and Promising Practices

Presented by Tiana Blount
2011 CARE PO Training
Thursday, June 16, 2011

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[Telling the CARE Story and Results: Objectives]

- The Importance of Marketing
- Types of Marketing
- Marketing Tips
- Marketing Questions
- Promising Practices



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Telling the CARE Story and Results: The Importance of Marketing

External Benefits

- Community Involvement
- Community Exposure
- Increased Partnerships
- Financial Support
- Future Sustainability

Internal Benefits

- Technical Support
- Financial Support
- Program Exposure
- Increased Partnerships
- Future Sustainability



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[Telling the CARE Story and Results: Types of Marketing]

- Public Events: Big Check Ceremonies, Ribbon Cutting Events, Press Events, Signings, Workshops, Trainings, Collections, Cleanups, and Community Meetings
- Media: Radio, TV, Newspapers, Minority Press, Internet (Email, Facebook, Twitter, YouTube, and Blogs)
- Materials: Signs, Posters, Banners, Pamphlets, Brochures, and Publications (EPA's Promising Practices)



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[Telling the CARE Story and Results: Marketing Tips]

- Grantees Should:
 - Specify outcomes by quantifying measures (e.g., reductions in pollution)
 - Explain how the community has built capacity for future action and emphasize leveraging methods
 - Use innovative approaches to get results
 - Present in a manner that's easily/quickly "digestible" to your audience



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[Telling the CARE Story and Results: Marketing Tips]

- Project Officers and Regional Coordinators Should:
 - Encourage community-driven marketing (externally and internally)
 - Ensure grantee includes marketing in the workplan budget
 - Work with Regional Public Affairs Office and Communication Officer (Identify the process specific to your region)
 - Proper use of EPA logo
<http://www.epa.gov/productreview/guide/app2.html#reprint>
 - Utilize Public Event Checklist when applicable (see handout)



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[Telling the CARE Story and Results: Marketing Questions]

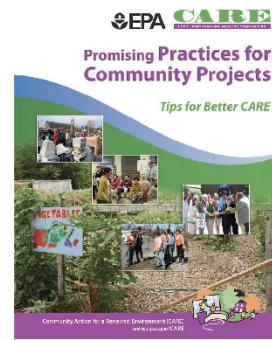
- Keep goals front and foremost as EPA and community work together:
 - What will we want to be able to say about our accomplishments at the end?
 - What are the measures of success?
 - What results do we want to be able to report on? Can we get quantifiable results?
 - How did CARE change the community?
 - Is there a promising practice that's being used?



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[Telling the CARE Story and Results: Promising Practices]

- This Promising Practices Document meets both needs of marketing and promoting peer-to-peer learning.
- Features 14 CARE communities and their stories
- End of each story is a “Project Results,” 4-6 bullet box defining key results (e.g. reductions in pollution, outcomes, outputs, sustainability factors)



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[Telling the CARE Story and Results: Promising Practices II]

- In the process of developing Edition II to feature more stories and market CARE.
- All regions are developing at least one 2-page story now.
- Focus on clearly articulating quantifiable and other “results” and telling a story



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Telling the CARE Story and Results: Promising Practices Results Box Example #1

(New Haven Government)

- Over 12,000 households made a renewable energy commitment, 50% businesses signed up for energy efficiency program, city purchased 20% in renewable energy
- Revitalized brownfields site and installed wind turbine
- Retrofitted 150 vehicles and 300 school buses in city fleet
- Reduced rates of asthma and lead poisoning (%age would be preferable)
- Built bike paths, installed bike racks across city, etc...



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[Telling the CARE Story and Results: Promising Practices Example #1]

(New Haven City Government)

- Used Environmental Sustainability
 - Every new city policy and regulation had to consider the environment and environmental sustainability
 - Rewrote city policies, zoning, standards to improve the environment
 - Greened New Haven, incorporated renewable energy, addressed diesel and asthma issues.



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[Telling the CARE Story and Results:
Regional Examples/Wrap Up/Questions]

- The Importance of Marketing
- Types of Marketing
- Marketing Tips
- Marketing Questions
- Promising Practices

QUESTIONS



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Resources & Feedback

- To view a complete list of resources for this seminar, please visit the [Additional Resources](#)
- Please complete the [Feedback Form](#) to help ensure events like this are offered in the future

Need confirmation of your participation today?
Fill out the feedback form and check box for confirmation email.

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