

SMALL GRANT PROGRAM

Checklist for Teams

Team Receives the Application Package

The New 2007-09 Application Form is Required (Available on the OWEB Web page)

http://www.oregon.gov/OWEB/GRANTS/smgrant_forms.shtml

In the Application Processing Information box on page 1 of the application:

- Number all applications received by the team, using the OWEB numbering system (Two digit team #—biennium 08—three digit project #, beginning with 001)

Example: XX-08-001

- Record the date the team received the application.

Check to see that the:

- Project is within the Team's Small Grant Area.
- Application is consistent with the team's priority watershed concerns and eligible project types
- Project administration does not exceed 10% of direct costs (see budget page)
- A minimum of 25% match is proposed on the budget page, column 4
- Applicant has signed the application (page 5)
- Landowner(s) have also signed the application, or have signed a Cooperative Landowner Agreement and have included it with the application package.
- Applicant has included with the application package all required attachments (see box on page 5 of the application).

Check to see if the following documents — optional at the application stage, but required prior to release of funds — are included with the application package:

- Secured Match Form, with signatures from authorized representatives for the required 25% match
- Copies of Permits, if applicable
- Land Use Form

Disposition of the Application

If the application package is *incomplete*:

- Contact the applicant on how and when to submit the missing information, OR
- Return it to the applicant with instructions for how and when to resubmit.

If the application package is *complete*:

- Make a copy for each reviewer of the application, the project location map, and if available, site drawings/diagrams.
- Attach the team evaluation form to the front of each package.
- Remind team members of the next review team meeting date.
- Send the package to each reviewer.

Team Application Review Meeting

In the Application Processing Information box on page 1 of the application:

- Record the date the team acted on the application.
- Record whether the application is recommended or denied.
- Sign the last line (must be the person authorized in the team Bylaws to sign off on applications on behalf of the team).
- Take notes of the team discussion.
- Log all reviewed applications (recommended and denied) on the tracking spreadsheets.
- Collect and attach Evaluation Worksheets to every application, recommended and denied.
- File recommended applications, evaluation worksheets, and discussion notes in one box. File denied applications, evaluation worksheets, and discussion notes in another.

Notify applicants of the team's action.

- If denied*, inform the applicant of the reasons for denial and the team's process for resubmission.
- If recommended*, send the original application package to your OWEB contact with the signed grant agreement.

Team Recommends the Application for OWEB Funding

The Team writes the Grant Agreement:

- Prepare the Grant Agreement, using the OWEB Small Grant template.
- Remember the project Completion Date on pages 1 & 6 must be 24 months after the Team "Acted on" date listed in the upper right box on the first page of the application. (Example: The Acted on date September 9, 2006, the Completion Date would be September 9, 2008)
- Make two copies of the grant agreement. Obtain the necessary signatures (if all signatures are not obtained within 90 days of the first signature, OWEB will void the Grant Agreement).
- Send the SIGNED Grant Agreement to OWEB along with the application package (be sure the box in the upper right-hand corner of the application has been completed). At this time, the grantee, in consultation with the project fiscal agent, may also send a first payment request. (See also Fiscal Agent Check List.) *However, OWEB will make no payments on the project until it has a fully executed grant agreement (OWEB is the last signer) in the project file.*

OWEB staff:

- *Reviews the application package for consistency with the team's priority watershed concerns and eligible project types, as well as consistency with the Small Grant Program Administrative Rules,*
 - *Approves or questions the team's recommendation (with the potential to deny an award if inconsistent with the above),*
 - *Secures the signature the OWEB Grant Program Manager and files the original,*
 - *Sends signed copies to the Team Contact.*
- Mail copies of the signed grant agreement promptly to the contact person for distribution to the signatories.
 - File the team's copy of the grant agreement with the corresponding application.

Team Reporting Responsibilities

A team Biennial Report is due by August 30 of each odd numbered year (60 days after the end of the biennium). The next one will be due August 30, 2009. It must be received and approved before a new team Grant Agreement for the next biennium will be written.

Submit a report to OWEB that:

(The form is available on the OWEB Web page. See Small Grant Administrative Rules 695-035-0020(18) for more detail.)

(a) Addresses how the Team's funded projects:

- Generally demonstrate clear watershed benefit to aquatic species, wildlife, or watershed health.
- Specifically met local priority watershed concerns and Agricultural Water Quality Management Area Plans.

(b) Evaluates the effectiveness of the Team's:

- External interactions with landowners, applicants, grantees, project partners, and OWEB Small Grant Program staff (i.e., the challenges that faced the team with each of these groups and whether the team was successful at resolving them).
- Internal interactions with each other (i.e., the challenges that faced the team and whether the team were successful at resolving them).

(c) Attaches the following:

- Tracking sheets for recommended and denied applications for the current biennium
- Revised operating procedures, priority watershed concerns, or eligible project types for the coming biennium, if any

Completion Report

Use the online OWEB Database to keep track of report deadlines.

Contact the Grantee to ensure submission to OWEB of:

- A Completion Report with color photos
- A current Restoration Reporting form with topographic map

Two Years After Submission of the Project Completion Report

Use the online OWEB Database to keep track of report deadlines.

- Contact the individual/organization responsible for the Year-Two Status Report (listed in the application, #6) The report should be on or about two years after the completion report is submitted. ***It cannot be accepted after only one year.***
- The designated report writer submits the Y-2 Status report (with color photos) to the OWEB Small Grants Manager in Salem, the Regional Program Representative for your area and to the Small Grant Team. OWEB may request follow-up information from the Team.
- The Team should review the report at the next Team meeting and may require follow-up information.
- A copy of the report should be kept in the team project file.