

## SEP Project Implementation – updates and Q&A

June 28, 2023 – GoToMeeting

Can join from computer, tablet or smartphone.

<https://meet.goto.com/738620973>

You can also dial in using your phone.

United States: [+1 \(646\) 749-3129](tel:+16467493129)

Access Code: 738-620-973

## Objectives:

- Improve efficiency in project implementation by sharing lessons learned
- Identify challenges and solutions in project implementation

## Draft Agenda

### **3 PM: Welcome and Round Robin; Treasury Updates**

Recommendation on what to highlight – focus on what the group could learn from:

- Things learned (techniques, procedures, docs, etc) that could benefit other counties
- Problems county RESTORE programs are running into that others might have faced, might face in the future
- What are you dealing with now that you have questions about or could use help with?

**County list:** Escambia, Santa Rosa, Okaloosa, Walton, Bay, Gulf, Franklin, Wakulla, Jefferson, Taylor, Dixie, Levy, Citrus, Hernando, Pasco, Hillsborough, Pinellas, Manatee, Sarasota, Charlotte, Collier, Lee, Monroe

### **3:45 PM: RESTORE Council and FDEP updates as needed**

### **4 PM: SEP project implementation discussion**

- Grant application reminders; (new) templates
- Procurement reviews
- Co-funding commitments
- SEP amendments for cost increases
- Post-award reporting and monitoring meetings

### **4:30 PM: Recommendations for next meeting – what to focus on, topic of interest?**

## Where's my application, when will an award be made?

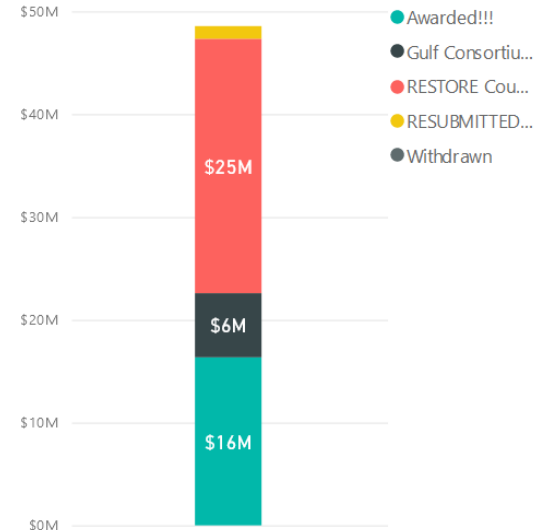
<http://datavisual.balmoralgroup.us/GulfConsortiumProjects>

(p. 8, navigation arrows at bottom)

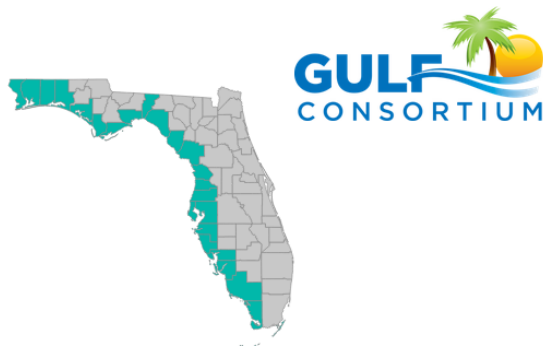
Grant application status

County	Project Name for RAAMS	Status	Amount	Total Consortium Contractual
Bay	5-2: St. Andrew Bay Stormwater Improvement Program – St. Andrew Bay Watch – Water Quality Monitoring	Awarded!!!	\$586,768	
Bay	5-2: St Andrew Bay Stormwater Improvement Program - Construction	Gulf Consortium review	\$1,144,923	
Charlotte	Wastewater Improvement – Combined Project 1	Awarded!!!	\$294,608	
Charlotte	20-1: Charlotte Harbor Septic to Sewer - Zone 3 Construction	RESTORE Council review	\$4,069,681	
Citrus	13-2: Cross Florida Barge Canal Boat Ramp - E&D	Awarded!!!	\$695,024	
Citrus	Wastewater Improvement – Combined Project 1	Awarded!!!	\$301,090	
Citrus	13-1: NW Quadrant Sewer Force Main Project – Construction	RESTORE Council review	\$3,359,281	
<b>Total</b>			<b>\$48,559,354</b>	<b>\$1,2</b>

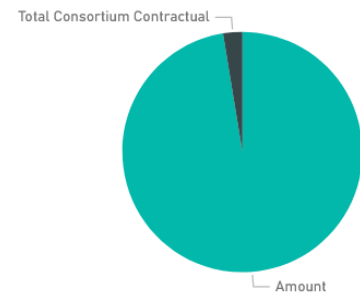
Amount by Status



County



Total project \$ and management/ legal/ oversig...



Status

- Awarded!!!
- Gulf Consortium review
- RESTORE Council review
- RESUBMITTED - in RESTORE review
- Withdrawn

Plan for **at least** 12-18 months from the time you submit to Gulf Consortium to the time RESTORE Council makes an award



## What is needed to submit a subaward application?

- See guidance documents and templates at <https://www.gulfconsortium.org/grant-resources>
1. Project Narrative
  2. Milestone information (spreadsheet; **include deliverables**)
  3. Budget and Budget Narrative – fillable pdf
  4. Observational Data Plan spreadsheet
  5. Environmental Compliance Checklist
  6. GIS shapefiles – or map/picture (don't let this hold you up – we can quickly make these)

## New Budget/Budget Narrative – fillable pdf form

- Pay attention to cost categories: put costs and justifications in correct sections
- Don't put anything in section "H. Subrecipient" **unless** the County has a subrecipient.
- This form has text boxes to provide justification and source for all costs.
- Costs are added automatically by the pdf
- Gulf Consortium prepares recipient version of this



### BUDGET NARRATIVE

**Notes:** The Award budget controls. Any inconsistencies/discrepancies between the budget narrative and the Award budget are resolved in favor of the Approved Budget included in the Notice of Grant Award (NGA). If additional space is needed for any budget category table, please list the total cost for that category in the corresponding table and then complete and attach an itemized list using a blank budget table. [Reset Form](#)

Recipient Name:  Project or Program Name:

Type:  FAIN:

Subrecipient Name, if applicable:

Project Workplan Name, if applicable:

Co-Funding Source Name, if applicable:

#### I. FUNDING SUMMARY

Total Amount of Pre-Award Costs Requested	\$ 0.00
Total Amount of Direct Costs Requested	\$ 0.00
Total Amount of Indirect Costs Requested	\$ 0.00
Total Amount of Federal Funding Requested	\$ 0.00
Total Amount of Co-Funding Being Provided	\$ 0.00
Total Amount of Anticipated Program Income	\$ 0.00
Total Project/Program Costs (including co-funding and program income)	\$ 0.00

## New Budget/Budget Narrative – fillable pdf form

- Should avoid missing information and math errors
- All information needed has a separate text or number entry box
- Some things will be NA, but don't use NA for something you don't know.
- Example: section D.  
Construction, Q.6 “Will the recipient or subrecipient have control of the land for the estimated useful life of the project? Yes/No/NA. **If no – we need to explain who will have control in Q.7**

4a. What is the estimated useful life of the project? (Provide description if different components have different estimated useful lives)

4b. How was the estimated useful life determined?

5. Who will hold title to the land where the construction will occur?

If Other, provide the name and relationship, if any, to Recipient or Subrecipient.

6. Will the recipient or subrecipient have control of the land for the estimated useful life of the project?

7. If the recipient or subrecipient will not have title or otherwise have control of the land, who will control the land?

## What is needed to submit a subaward application?

<https://www.gulfconsortium.org/grant-resources>

**Please use templates:**  
more complete applications =  
less management cost

**Save each of the blank  
templates; then save as  
project-specific name  
and fill them in**



### Templates

The templates below provide guidance/instructions on content and format for each piece of the applications. Please complete each portion in the template and delete the guidance/instructions. **Please use these exact templates. Having the same format and completed content sections reduces management costs.**

[Project Narrative](#)

[Milestone Information](#)

[Budget and Budget Narrative fillable pdf](#)

[Observational Data Plan - new spreadsheet template](#)

[Environmental Compliance](#)



## **IMPORTANT for reducing overhead:**

- Don't separate projects into smaller pieces than necessary... every grant/project needs an application and twice-annual performance and financial reports

**Next suggested date to submit applications by: 8/12/2023**

- **Summary of SEP projects and milestones at:**

**<http://datavisual.balmoralgroup.us/GulfConsortiumProjects>**

ask us for help or suggestions if you're uncertain about what can proceed

## **How to get costs right at grant application stage...**

- Don't rely on SEP estimated \$
- Do internal cost analysis
- If you have an engineer's estimate of construction costs – can it be updated with current cost data?

## **Update your SEP projects – start now for the 2023 SEP Amendment**

- Recognize increased costs and show co-funding on projects where needed or remove or reduce scope of projects where needed
- A change in scope in projects requires a SEP amendment – and if there's a major cost increase on 1 project that will likely be pulling \$ from other projects that haven't started

## Co-funding means other (not RESTORE Bucket 3) funds that are being used for the same work that RESTORE is funding

- Co-funding needs to be guaranteed by backup documentation
  - Grant award
  - Letter from County – from someone with authority to commit \$

Please use County letterhead/contact info

Date: INSERT DATE

Application #:  
Project Name:

Re: Co-Funding Commitment

1. Project related costs, also referred to as the non-Federal share or co-funding are voluntarily committed in the amount of \_\_\_\_\_ have been secured and will be used to complete the objectives of the project.
2. \_\_\_\_\_ is committed to providing the described co-funding from the following source(s):
  - a. *Fund source Account* \$ \_\_\_\_\_
3. The co-funding is to be used for \_\_\_\_\_
4. By signing this document, I certify that these funds are unencumbered, unrestricted, committed, and available when needed.

Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: INSERT DATE

See procurement FAQs doc at

<https://www.gulfconsortium.org/grant-resources>

- Follow county policies
- Be sure procurement is federally compliant (2 CFR 200)

**Let Gulf Consortium legal and management contractors know about procurement plans**

- Send to [ddourte@balmoralgroup.us](mailto:ddourte@balmoralgroup.us) AND [erosenthal@ngn-tally.com](mailto:erosenthal@ngn-tally.com)

- See “Procurement Information” section at <https://www.gulfconsortium.org/grant-resources>

**Compliance with:      2 CFR § 200.317 - 326**

## These procurement documents need to be provided to Gulf Consortium management and legal:

Send this **BEFORE** releasing procurements publicly:

- Draft RFP/RFQ/ITB/other

Gulf Consortium contractors will review draft procurement docs and suggest any edits needed for 2 CFR 200 compliance.

Send this **AFTER** procurement is complete:

- Final RFP/RFQ/ITB/other
- Ranking/scoring sheet
- Resulting contract
- Documentation of MBE outreach

## Important Links:

- Performance Report - <https://webportalapp.com/webform/performancereport>
- Financial Report - <https://webportalapp.com/webform/financialreport>
- Invoicing - <https://webportalapp.com/webform/paymentrequest>
- Deliverables - <https://webportalapp.com/webform/deliverables> ; plans, permits, reports, data



- **Performance Report** template at <https://www.gulfconsortium.org/grant-resources>
- Let us know right away if you're behind schedule or if there's a major change in your project
- Update your ODP
- **Financial Report template provided to subrecipients by email for 1<sup>st</sup> report**, then it is updated for future reports

- Performance Reports: minimum 1/year
  - **quarterly project status meetings** (recurring meetings) – scheduled with each county with active/awarded projects
  - These are recurring meetings with standard agenda including milestones review and status updates.
  - Will be scheduled starting Jan. 2023
- Financial Reports: minimum 2/year
  - **More frequent, detailed financial reviews** for moderate or high risk counties

## Important Links:

- Final Performance Report with ODP closeout template at <https://www.gulfconsortium.org/grant-resources>

## **Financial Integrity training from RESTORE Council**

- Nov. 30 in Gulf Shores, AL – *The Lodge at Gulf State Park, a Hilton Hotel*  
*21196 East Beach Blvd Gulf Shores, Alabama 36542 USA*
- **Optional and free (you have to pay for travel) and highly recommended**
- **Remote participation: TBD**

## Public Access to Gulf Consortium Project Outputs:

### [Gulf Consortium StoryMap](#)

#### What's here:

- Project scopes and abstracts
- Deliverables – plans, permits, data, as-built documentation

#### Why?

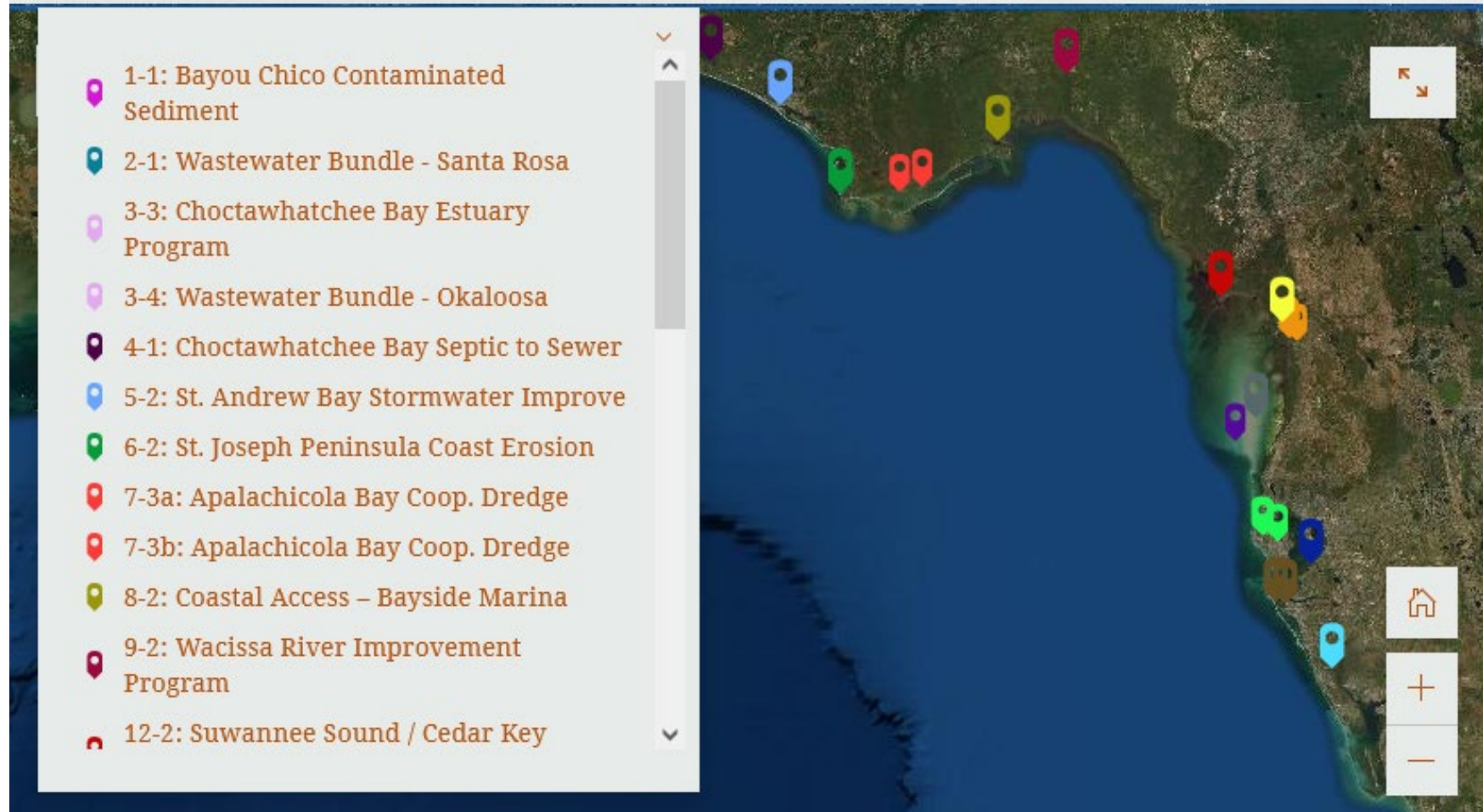
- Public projects should have easily accessible information on what the project is and what the outputs are
- Required by RESTORE awards

## [Gulf Consortium StoryMap](#)

### Send us project pictures!

If you have site visit or monitoring pictures, please send to us and we can include them here.

## Map and Deliverables of Awarded Projects



## Contact:

**Daniel Dourte**

**407.629.2185 ext. 113**

**[ddourte@balmoralgroup.us](mailto:ddourte@balmoralgroup.us)**

**Amy Bainbridge**

**407.629.2185 ext. 125**

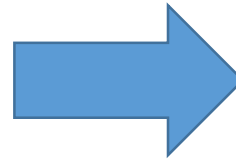
**[abainbridge@balmoralgroup.us](mailto:abainbridge@balmoralgroup.us)**

## Dashboard for Project Data

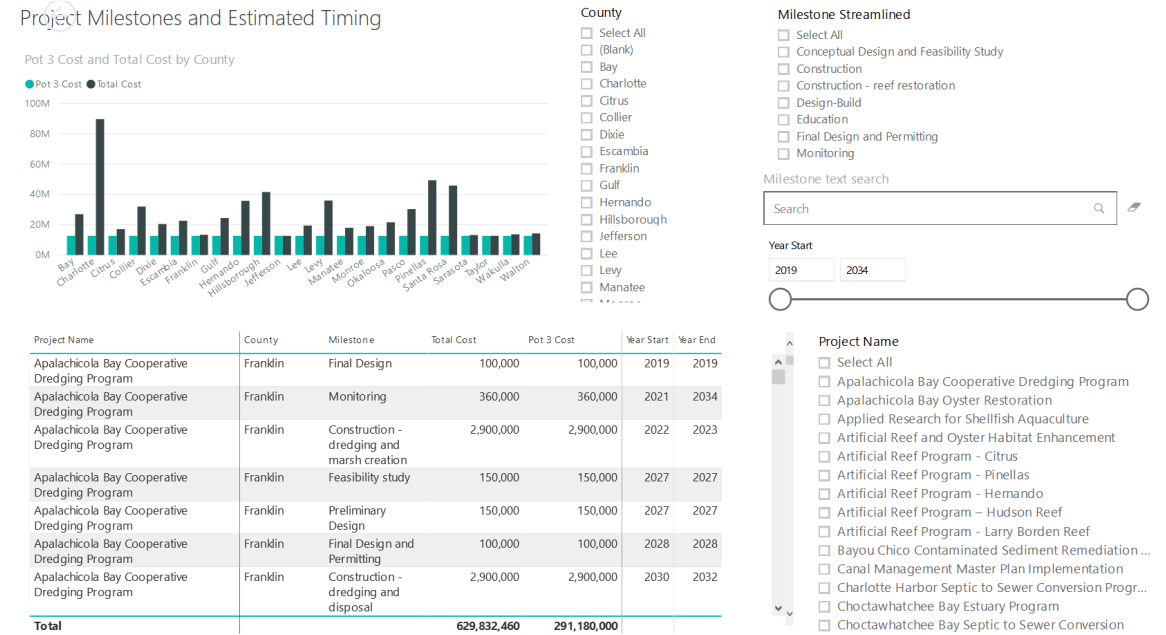
# State of Florida

## STATE EXPENDITURE PLAN

milestones, start years, cost, goals, funding sources



<http://datavisual.balmoralgroup.us/GulfConsortiumProjects>



## Interface for project details



## GOAL:

Efficient, accurate grant application preparation

- Better, faster decisions on grant timing, readiness, bundling
- Transparent tracking of progress and changes