



## Instructions for Work Plan Status Updates

### **Instructions for Work Plan Status Update Report:**

- Status update reports are due twice per year on the dates and reporting schedule you originally selected in Section XI, “Reporting Requirements”, of your work plan. Near the beginning of the month in which you have a report due you will receive an email reminder; however, it is ultimately your responsibility to keep track of the due dates you selected and ensure you submit status updates on time. Significant delays in status update reporting can result in your project being put on hold.
- For your status update reports, your LCCMR approved Work Plan and Project Budget documents act as working documents. You provide status update reports by updating and inserting information into the appropriate sections in those documents and the updated versions that are submitted become your current work plan.
- For status update reports, be sure to start with the current version of your work plan.
- When submitting a status update report always include both the updated work plan document (Word document) and the updated project budget (Excel spreadsheet), even if there is no update to the project budget (Excel spreadsheet) since your last status update.
- For all projects involving acquisitions (fee title and conservation easements) and/or restoration, also submit an updated version of your Acquisition/Restoration List that provides updates on the current status for each the listed parcels in the “Status” column. If you wish to add new parcels to the list an amendment request is required.
- Prior to submission please carefully review and proofread your status update reports for clarity, accuracy, and completeness. This will help reduce the need for revisions.
- Email your status update reports, your project budget document, and, as applicable, your updated acquisition/restoration list to [lccmr@lccmr.leg.mn](mailto:lccmr@lccmr.leg.mn) by the due date you originally selected.
- Follow the instructions below to help you complete your status update reports.
- If you have any questions about the status update reports or these instructions, please contact an LCCMR staff member at 651-296-2406. This will help reduce the need for revisions.

### **WORK PLAN DOCUMENT (WORD DOCUMENT)**

#### **Cover Page (Page 1)**

**Date of Status Update Report:** Each time you submit a status update report and/or an amendment request, update this date with the date of status update submission.

**Date of Next Status Update Report:** Each time you submit a status update, update this date with the due date for your next status update report based on the reporting dates originally selected by you (see Section XI of your work plan).

**Date of Work Plan:** This field indicates the date on which your work plan was approved and will never need to be changed.

**Project Completion Date:** This field indicates the date on which the appropriation for your project expires. This date is set in the session law for your appropriation. This date will only ever be changed if legislative action is taken to extend the availability of funds for your project. For that to occur an amendment request is required and the extension of the completion date must be adopted through the legislative process.

**Is this an amendment request?** If the submission contains a work plan amendment request, indicate so here. Otherwise leave blank.

**Project Manager:** If there is a change in the designated project manager, contact LCCMR staff to inform them directly and make all relevant changes to contact information for address, telephone, and email address. This is considered a work plan amendment and must be documented and approved.

**Total ENRTF Project Budget:** Update the “Amount Spent” and “Balance” to reflect **total expenditures** to date (not the amount requested for reimbursement to date – if that is different) at the time you are submitting the status update report.



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### Remainder of Document

**II. Project Statement:** This section will not change when doing status update reports unless you propose a related work plan amendment that would impact the description provided in this section.

**III. Project Status Updates:** A line stating "Project Status as of [date]" is listed for each of your selected project status update reporting dates. For the reporting date pertaining to the relevant update report submission, provide a concise, cumulative description (approximately 250 words or less) that summarizes the progress you have made to date, including any problems encountered. This section is intended to provide a "snapshot" overview or "executive summary" of the more detailed updates you will be providing for each of your individual activities in Section IV, "Project Activities and Outcomes". The description should summarize specifics such as total number of acres purchased, total number of acres restored, total number of stewardship plans completed, total number of students participating, etc. For subsequent status update reports, **do not delete** the previous updates.

**IV. Project Activities and Outcomes:** In this section you will describe in greater detail the progress you have made to date for each specific activity and related outcomes. If an activity has not yet begun or no additional work was completed then indicate that as your update.

- **Description:** The description for each activity should not change from what was originally approved in your work plan unless a related amendment that would impact the activity description is proposed at a later date.
- **Summary Budget Information:** For each activity, update the "Amount Spent" and "Balance" to reflect **expenditures** to date (not the amount requested for reimbursement to date – if that is different) at the time you are submitting the status update report.
- **Activity Status as of [date]:** A line stating "Activity Status as of [date]" is listed for each of your selected project status update reporting dates. For the reporting date pertaining to the relevant update report submission, provide a detailed description of work completed under the activity and progress pertaining to the activity outcomes, including any delays or problems you may have encountered. These detailed descriptions for each of the activities are what will be summarized for the description provided in Section III, "Project Status Updates". For subsequent status update reports, **do not delete** previous updates.

**V. Dissemination:** In this section you will provide information on any project efforts related to dissemination, presentation, data sharing, media coverage, etc., that have occurred.

- **Description:** The description for dissemination should not change from what was originally approved in your work plan unless a related amendment that would impact the description is proposed at a later date.
- **Status as of [date]:** A line stating "Status as of [date]" is listed for each of your selected project status update reporting dates. For the reporting date pertaining to the relevant update report submission, provide a description of any relevant efforts. For subsequent status update reports, **do not delete** previous updates.

### **VI. Project Budget Summary:**

- **A. ENRTF Budget:** This section should not change from what was originally approved in your work plan unless a related amendment that would impact the budget is proposed at a later date. The numbers in each category should be the same as those in Attachment A.
- **B. Other Funds:** This section indicates the other funds that will be used towards implementing the project. The funds you originally proposed should not change unless additional other funds for the project are



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obtained, in which case you would add a row for the funds and indicate the addition with a note underneath the table. For each status update report, update the "\$ Amount Spent" column for each of the funds identified in your table.

**VII. Project Strategy:** None of the subsections in this section should change from what was originally approved in your work plan unless a related amendment that would impact these sections is proposed at a later date.

**VIII. Acquisition/Restoration List:** For projects involving acquisitions (fee title and conservation easements) and/or restoration, also submit an updated version of your Acquisition/Restoration List that provides updates on the current status for each of the listed parcels in the "Status" column. Any proposed changes, such as adding a parcel, must be submitted as an amendment request.

**IX. Visual Element or Map(s):** This section should not change, unless the Acquisition/Restoration List is amended.

**X. Acquisition/Restoration Requirements Worksheet:** This section should not change.

**XI. Research Addendum:** This section should not change.

**XII. Reporting Requirements:** This section should not change from what was originally approved in your work plan unless a related amendment that would impact the budget is proposed at a later date. Amendments to reporting dates are allowed if needed.



## Instructions for Work Plan Status Updates

### **PROJECT BUDGET DOCUMENT (Excel Spreadsheet)**

**Legal Citation:** Confirm that your legal citation is correctly inserted and matches what appears on page 1 of your work plan.

**Project Manager:** If there is an approved change in the designated project manager, be sure to make the change here in addition to on page 1 of your work plan.

**Date of Update:** Each time you submit a status update report and/or an amendment request, update this date with the date of submission.

### **Budget Columns**

Update all relevant project budget columns to reflect **expenditures** to date (not the amount requested for reimbursement to date if there is a DNR contract applicable for reimbursement) at the time you are submitting the status update report. For each activity, the “Amount Spent” and “Balance” columns should be updated. Additionally, the “Total Budget” and “Total Balance” columns should be updated. Always submit your updated project budget document along with your status update reports.

### **ACQUISITION/RESTORATION LIST DOCUMENT (Excel Spreadsheet) – IF APPLICABLE**

If your project involves land acquisition or restoration an updated version of this document must be submitted with each status update. Most of the columns will likely remain the same

**Legal Citation:** Confirm that your legal citation is correctly inserted and matches what appears on page 1 of your work plan.

**Project Manager:** If there is an approved change in the designated project manager, be sure to make the change here in addition to on page 1 of your work plan.

**Date of Update:** Each time you submit a status update report and/or an amendment request, update this date with the date of submission.

### **Columns to Update for Status Updates**

**Estimated Cost:** If the estimated cost for a parcel has changed, update that amount in this column then insert a note in the “NOTES” row explaining that the change was made and why.

**# of Acres:** If the number of acres for a parcel has changed, update that number in this column then insert a note in the “NOTES” row explaining that the change was made and why.

**Status:** Review the status column for each parcel listed and, as applicable, update this column to reflect the current status with each parcel. For example, if an acquisition has closed, indicate that; if planned restoration work with this appropriation on a parcel has been completed, indicate that.

### **Changes Requiring an Amendment**

If you wish to add new parcels to the list an amendment request is required. An amendment is not required to remove a parcel – if a parcel is no longer being worked on or pursued indicate something to this effect in the “Status” column.