**DELTA CONSERVANCY PROP 1 GRANT PROGRAM**

**QUARTERLY AND ANNUAL progress report template**

**INSTRUCTIONS**

The Conservancy requires quarterly progress reports, as specified in the grant agreement. Quarterly reports are due between the 1st and the 5th day of the second month following the end of the quarter along with the quarterly invoice (see schedule below). Reports must be sent to the Prop 1 email: Prop1grants@deltaconservancy.ca.gov, with a copy to the Grant Manager.

This Progress Report form collects cumulative information over a calendar year. Answer questions only for the current quarter for which information is being reported. Each quarterly report will be cumulatively added to the previous quarterly reports of that calendar year, culminating in a report that includes all four (4) quarterly reports for that calendar year. Do not delete information from previous quarters.

At the end of each calendar year of the Grant Funding Term, the Grantee shall submit the Annual Report included with this template. This Annual Report will serve as a supplement to the 4th Quarter Report and will include information on progress accomplished during that calendar year, findings, conclusions, cost share contributions, and plans for the next calendar year. The Grantee shall submit the completed Annual Report with the 4th Quarter Report.
 **REPORTING SCHEDULE**

* 1st Quarter Progress Report January 1 - March 31 Due May 1-5
* 2nd Quarter Progress Report April 1 - June 30 Due Aug 1-5
* 3rd Quarter Progress Report July 1 - September 30 Due Nov 1-5
* 4th Quarter Progress Report October 1 - December 31 Due Feb 1-5
* Annual Report January 1 – December 31 Due Feb 1-5

**DELTA CONSERVANCY PROP 1 GRANT PROGRAM**

**QUARTERLY progress report template**

|  |  |
| --- | --- |
| Project Title |  |
| Grantee |   | Reporting Year |   |
| Grant Number |   | Date Submitted |   |
| Grant Funding Term |  Start: | End: | Reporting Period |  From: | To: |

**Summary:** Briefly summarize work completed for the current reporting period.

**1st Quarter:**

**2nd Quarter:**

**3rd Quarter:**

**4th Quarter:**

**Task & Deliverables:** Refer to the Scope of Work in the Grant Agreement. Provide details of accomplishments by task, including a qualitative assessment of the degree of completion for each task. Include specific information about the progress of achieving each specified deliverable.

 *Task 1. –*

**1st Quarter:** [[Estimate Percent Complete]]

**2nd Quarter:** [[Estimate Percent Complete]]

**3rd Quarter:** [[Estimate Percent Complete]]

**4th Quarter:** [[Estimate Percent Complete]]

 *Task 2. –*

**1st Quarter:** [[Estimate Percent Complete]]

**2nd Quarter:** [[Estimate Percent Complete]]

**3rd Quarter:** [[Estimate Percent Complete]]

**4th Quarter:** [[Estimate Percent Complete]]

*Task 3. –*

**1st Quarter:** [[Estimate Percent Complete]]

**2nd Quarter:** [[Estimate Percent Complete]]

**3rd Quarter:** [[Estimate Percent Complete]]

**4th Quarter:** [[Estimate Percent Complete]]

**Schedule:** Is the project on schedule per the schedule in the Grant Agreement? If not, what is not on schedule and why not? If there are changes to any of the due dates in the Schedule and List of Deliverables, submit a revised version with your report for approval by the Grant Manager.

**1st Quarter:**

**2nd Quarter:**

**3rd Quarter:**

**4th Quarter:**

**Challenges:** Did organizational, staff, construction, financial, or other challenges arise? If so, explain the effects that they may have on the project. Will you be able to stay on schedule and within the approved budget?

**1st Quarter:**

**2nd Quarter:**

**3rd Quarter:**

**4th Quarter:**

**Next Steps:** Explain what you plan to accomplish in the next quarter. Are there any anticipated changes to the grant agreement?

**1st Quarter:**

**2nd Quarter:**

**3rd Quarter:**

**4th Quarter:**

**Administrative Updates:** Note if there have been any changes to the address, project staff, agreement signatories, or other administrative issues this quarter.

**1st Quarter:**

**2nd Quarter:**

**3rd Quarter:**

**4th Quarter:**

**Other:** Describe any new or upcoming opportunities, significant events, and/or activities related to the project.

**1st Quarter:**

**2nd Quarter:**

**3rd Quarter:**

**4th Quarter:**

**Attachments:** For each quarterly reporting period, list any relevant attachments to this report, including subcontracts, planning documents, construction photographs, news articles, fliers, etc. If submitting large files, list them below and work with your Grant Manager to arrange for large file transfer. Send no hard copies.

**1st Quarter:**

**2nd Quarter:**

**3rd Quarter:**

**4th Quarter:**

I certify that this Quarterly Progress Report is accurate, and that this project is in compliance with the grant agreement.

Authorized Signature: Title:

Printed Name: Date:

**DELTA CONSERVANCY PROP 1 GRANT PROGRAM**

**annual progress report template**

|  |  |
| --- | --- |
| Project Title |  |
| Grantee |   | Reporting Year |   |
| Grant Number |   | Date Submitted |   |
| Grant Funding Term |  Start: | End: | Reporting Period |  From: | To: |

**Summary:** Briefly summarize the major milestones of the past calendar year.

**Variances:** Have there been any major variances/alterations to the project? If so, explain. In the explanation, include if and how these changes will affect the project schedule and/or budget.

**Lessons Learned:** Identify any important lessons learned in the past calendar year and explain if and how the project will be adapted as a result of these lessons.

**Cost Share:** Provide a summary of the cost share contributions that occurred during the past calendar year. Identify sources of cost share, list the cost share form(s)(cash or in-kind) and amounts, briefly explain how cost share contributed to the project, and include confirmation letters from the identified sources.

**Forecasting:** What do you plan to accomplish in the next calendar year? Are there any anticipated changes to the scope of work regarding these next steps? Will you be able to stay on schedule and within the approved budget for these next steps?

**CEQA:** If applicable, explain how actions taken during the past year comply with CEQA requirements.

**EcoAtlas:** If applicable, explain efforts to maintain accurate and current data in EcoAtlas.

**Outputs/Outcomes:** If applicable, insert the Performance Measures Table from the Grant Agreement. For each output, include specific information about the progress made during the last year, including degree of completion. Describe how these outputs will lead to the project outcomes.

I certify that this Annual Progress Report is accurate and that this project is in compliance with the grant agreement.

Authorized Signature: Title:

Printed Name: Date: