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- For 2019 NFWF Chesapeake Bay Stewardship Fund Applicants -

NATIONAL FISH AND WILDLIFE FOUNDATION NFWF

Chesapeake Bay Program
Science. Restoration. Partnership.

UNITED STATES ENVIRONMENTAL PROTECTION AGENCY

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This guide provides step-by-step instructions for the use of FieldDoc.org to estimate nutrient and sediment load reductions and associated interim metrics for applicants to the 2018 Chesapeake Bay Stewardship Fund administered by the National Fish and Wildlife Foundation (NFWF). It offers complete instructions from initial FieldDoc.org account registration through FieldDoc.org data entry, and input of FieldDoc.org outputs into NFWF's online *Easygrants* system. It also provides links to additional information and documentation necessary to understand land uses, Best Management Practice definitions, and modeling approaches used to calculate nutrient and sediment load reductions.

This guide is intended to serve as a supplement to the online help tools available at help.fielddoc.org, providing further context on how NFWF expects interested grantees to use FieldDoc.org for generating nutrient and sediment load reductions and associated interim metrics for their 2019 Stewardship Fund grant applications. Additional guidance and training will be provided for grants successfully awarded through the 2019 Stewardship Fund on how FieldDoc.org will be used for ongoing grant reporting and tracking. Additional functionality will be provided to increase the utility of FieldDoc.org for project and grants management.

It is important to note that FieldDoc.org does not replace NFWF's *Easygrants* grants management and reporting tool, but instead offers an additional tool to ensure the quality and consistency of data and information reported via *Easygrants* for grant applications and interim and final reporting. This guide will provide information on how to utilize FieldDoc outputs for *Easygrants* data entry.

Where specific fields are required in FieldDoc.org, this guide will offer further Field Entry Guidance, highlighted in yellow throughout the document for quick reference. FieldDoc.org and associated data collection methodologies are further detailed in "Metrics and Protocols for Progress Assessment in Chesapeake Bay Stewardship Fund Grants" available at NFWF's Chesapeake Bay Stewardship Fund website.

Example Field Entry Guidance

Field/Question	Guidance
1. What is the name of your project?	Start with your *Easygrants* number, then copy and paste your "Project Title" from *Easygrants* (ex: #12345 Stream Restoration in Fishertown)
2. Which funder is providing the grant?	Select "National Fish and Wildlife Foundation"
3. What type of grant are you requesting?	Select the specific NFWF program to which you're applying
4. Please provide a short project description.	Copy and paste your "Project Description" from *Easygrants*

Step 1. Register for a FieldDoc.org account.

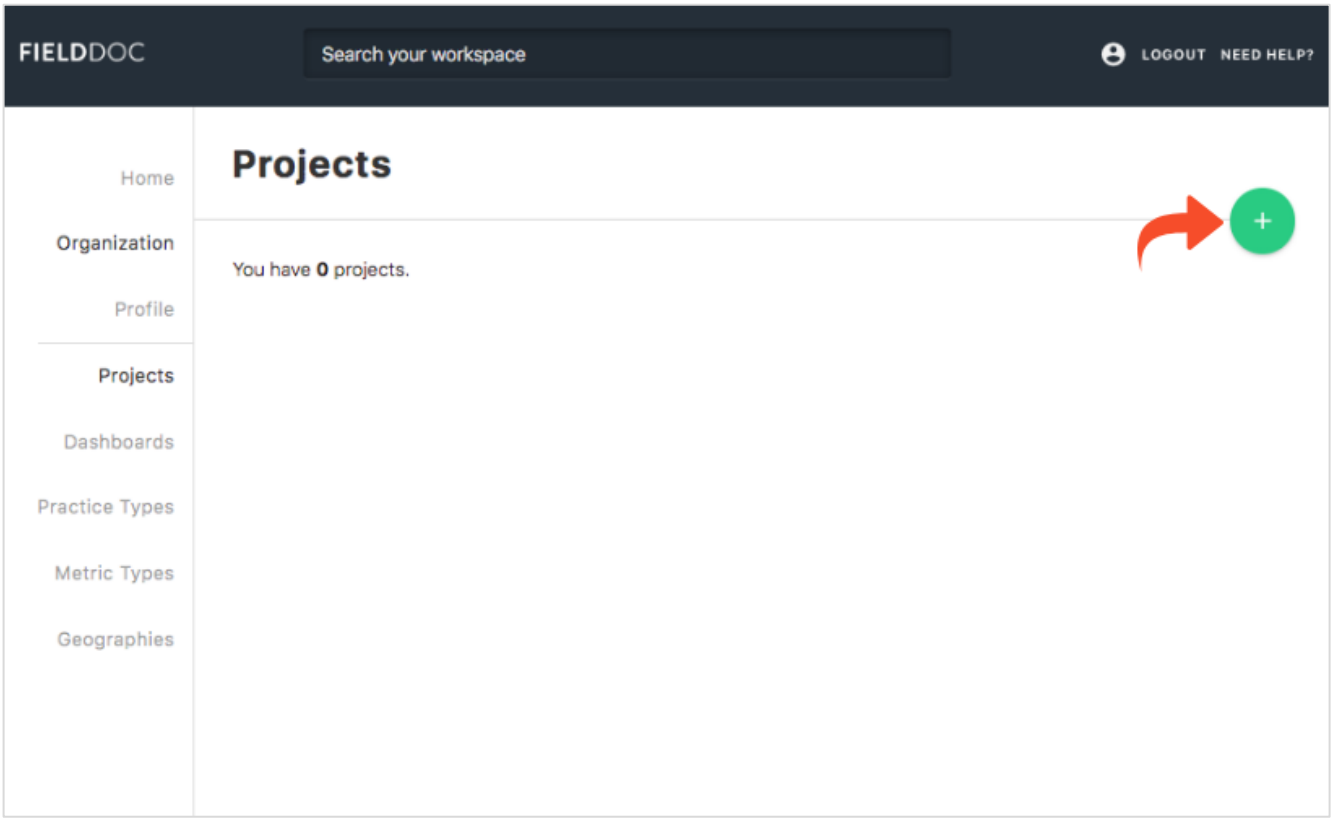
Registration can be found at https://www.fielddoc.org/register. Be sure to complete the registration process with a valid email, first name and last name, organization, and password.

Important: If you are an existing user, we ask that you log in and ensure that your full account information is completed and correct.

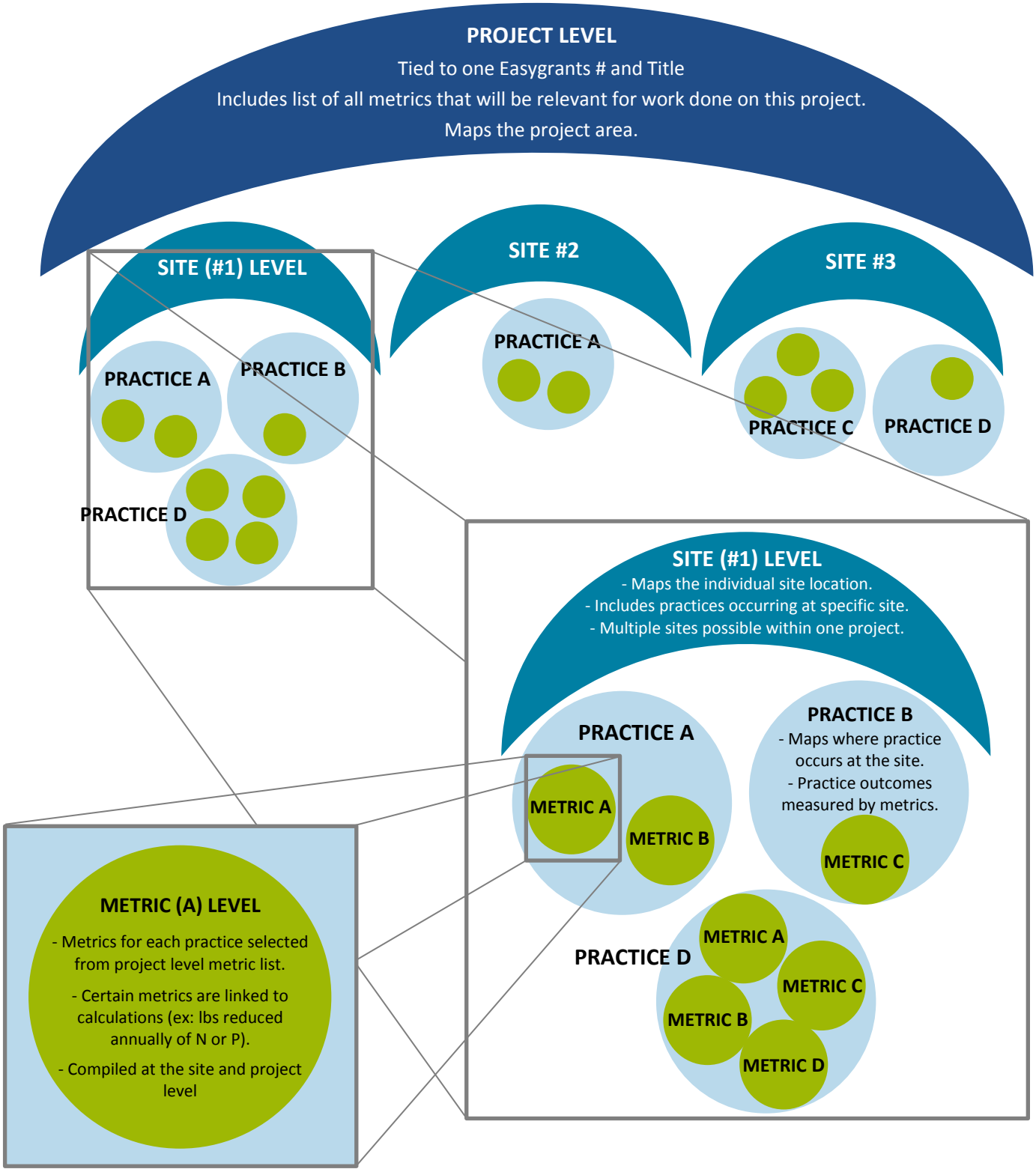
For new users, visit https://help.fielddoc.org/fielddoc-training-walk-through-the-platform/getting-started-basic-account-information/create-your-fielddoc-account for account registration details.

Step 2. Create the Project Plan for your grant application.

Once logged into your FieldDoc.org account homepage, click "Create Project" in the upper right-hand corner to enter data on your Stewardship Fund grant application. In the FieldDoc.org workflow, the Project Plan is commensurate with your NFWF grant project.



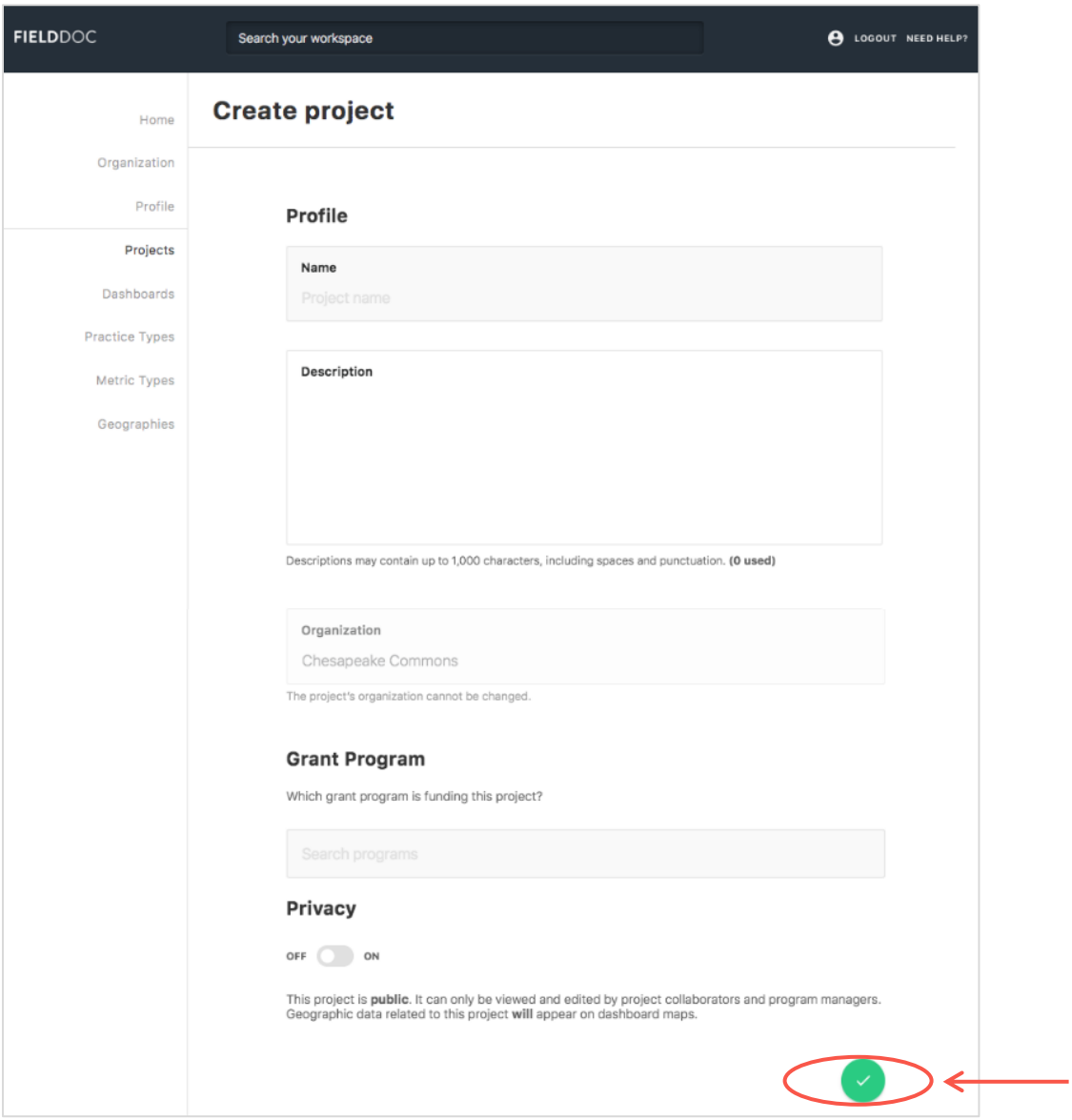
It is important to note that there are various components under the overarching project umbrella that will require their own editing and navigation. It is important to keep track of if you're on the site, practice, or project level. The project-site-practice flow is diagrammed below:



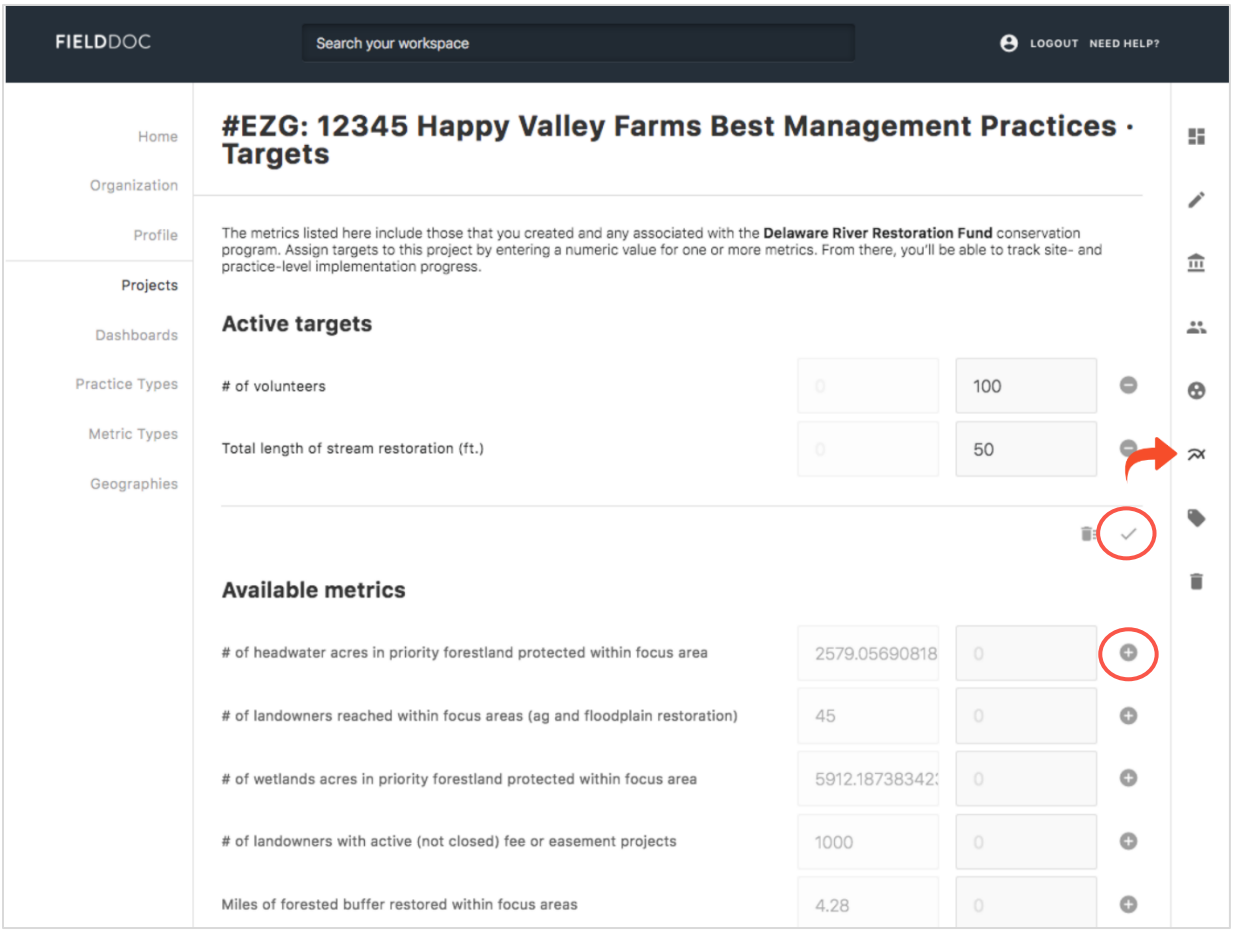
Step 3. Enter basic information about your proposed grant project.

Enter basic information about the proposed grant project on the "Create Project" page. This information should be consistent with what you've entered in *Easygrants*. Click the Green Check Circle when you're complete.

Field/Question	Guidance
1. Name	Start with your *Easygrants* number, then copy and paste your "Project Title" from *Easygrants* (ex: #12345 Stream Restoration in Fishertown)
2. Description	Copy and paste your "Project Description" from *Easygrants.*
3. Grant Program	Select the specific NFWF program to which you're applying.
4. Privacy	Choose the correct privacy setting. You can choose the privacy setting at the project level or, if there are only certain locations that need to remain private, you can toggle on privacy at those specific locations.



Step 4. Add Project Metrics



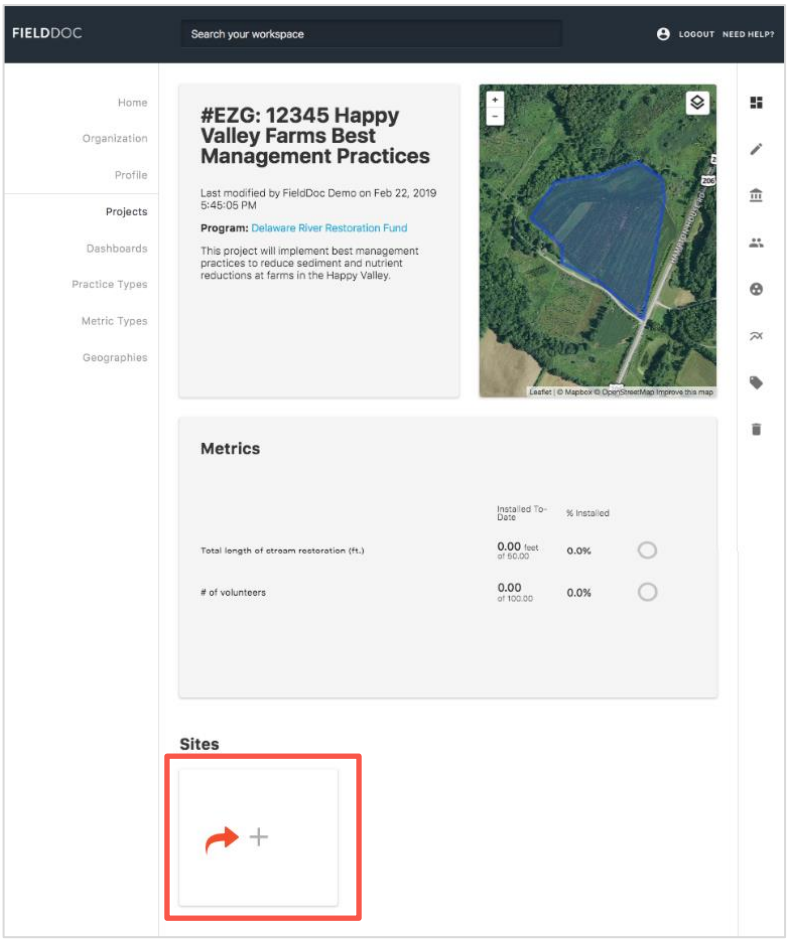
On the project targets page, add any metrics that will be relevant to your project by clicking the grey plus sign. The metrics listed here include those that you as a user created and any available through the Funding Opportunity program.

TIP: If you have additional metrics not available in the provided list, you can add them through the Metric Types on the Left hand navigation page.

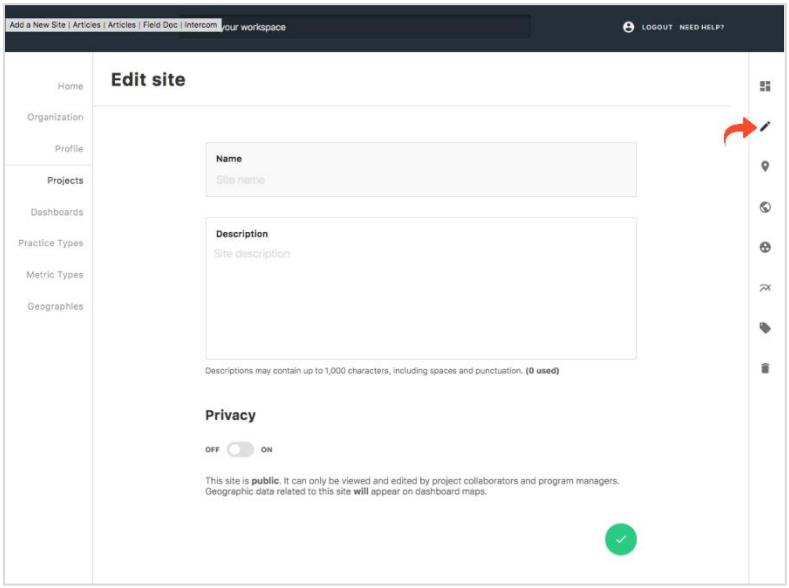
To add metrics from the list, scroll through the Available Metrics to choose one to add. Add it to your list of Active Targets by clicking on the circled plus sign. Tip: If you don't see the metric that you want to add, go to the Metric Types Page (available on the left hand side of your page) and create a new metric.

Once you've added a metric by clicking on the circled plus sign, you'll want to set your target by adding in the value your project will achieve for that metric. You'll be able to allocate your project totals for each metric at a site and practice scale.

Step 5. Add a restoration site(s) for your project



You can add as many sites to your proposed project as you'd like at this stage. However, NFWF will only require that each applicant identify at least one site, per the guidance provided below. Add a new site by clicking on the **plus sign** on your Project Overview page.



Name. Choose something easily identifiable for the project implementation team.

Description. Include a brief description of the site.

Privacy. This is up to you and we strongly recommend ensuring you have land owner's permission prior to adding their own personal information to the name and description field. You can also adjust privacy setting as needed via the toggle at the bottom.

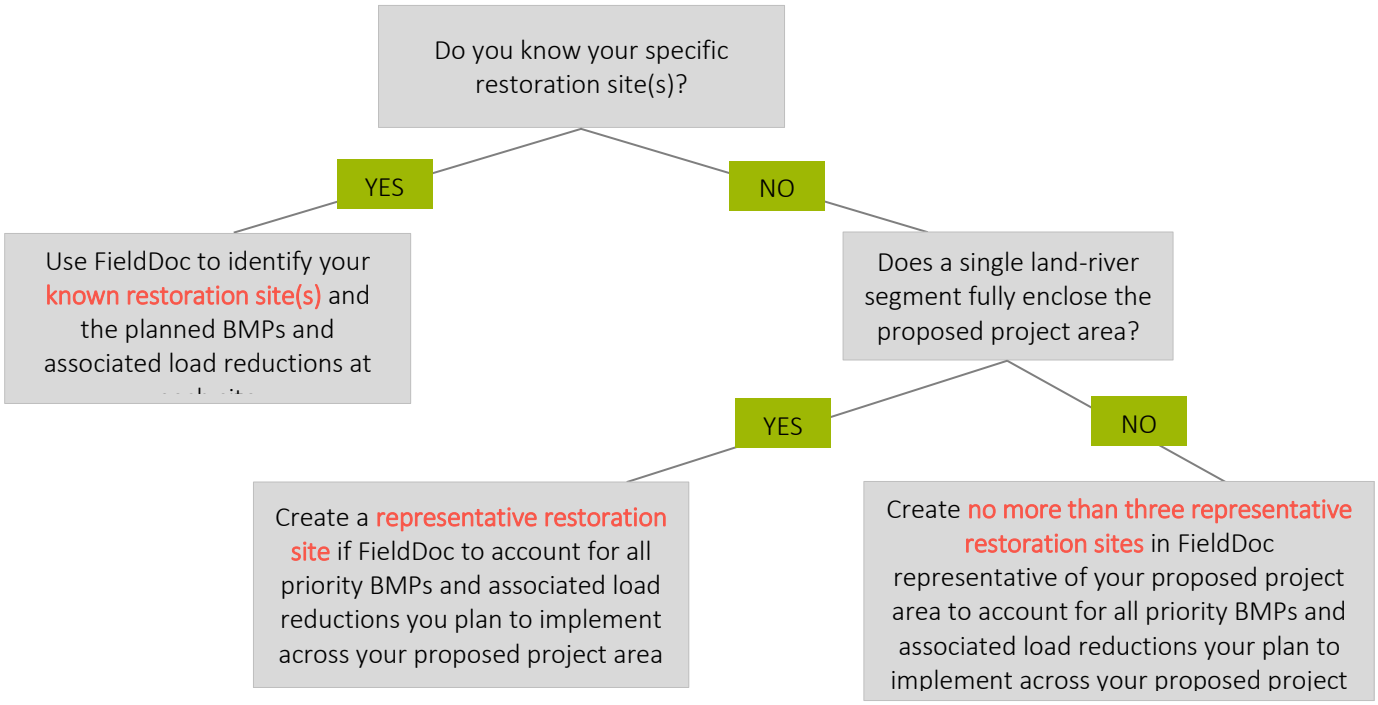
Step 6. Selecting a known or representative restoration site and enter site data.

Because FieldDoc.org uses geographic information to generate baseline nutrient and sediment loading information and calculate load reductions, you'll need to identify your specific restoration site(s) or, at least, a site(s) representative of the landscape or location in which you plan to work.

FieldDoc.org provides detailed loading information down to the land-river segment scale, a combination of county, physiographic, and watershed boundaries used by the Phase 5.3 Chesapeake Bay Watershed Model. There are roughly 1,000 individual land-river segments delineated in FieldDoc.org with an average area of roughly 66 square miles or 42,000 acres, though the size and scale of segments varies considerably based on geography, political subdivisions, and local hydrology.

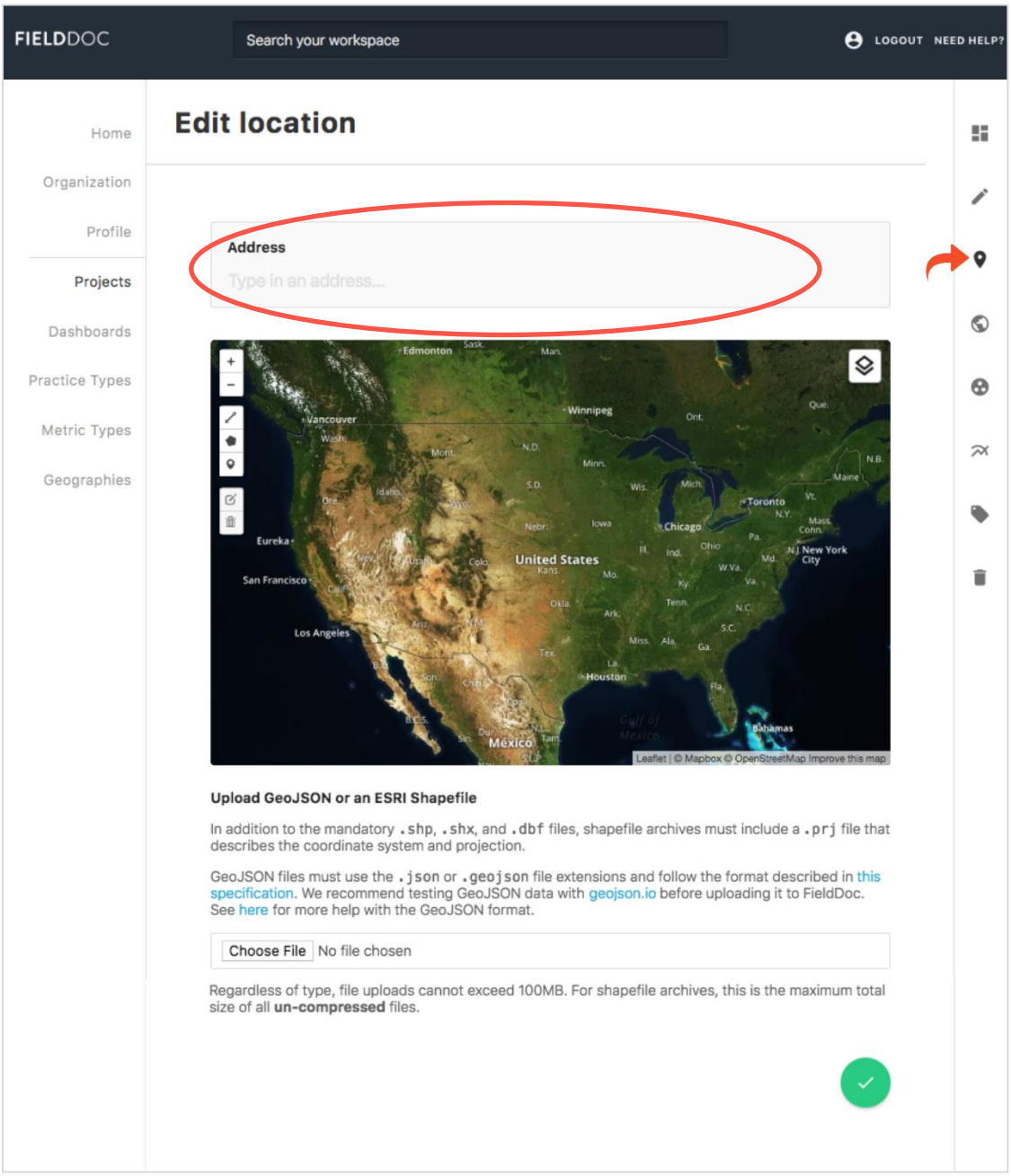
Importantly, nutrient and sediment load reduction calculations in FieldDoc.org do not vary significantly across adjacent or connected land-river segments. Moreover, the selection of a specific site within a land-river segment will have no impact on the load reduction calculations for that site or specific BMPs at that site. That is, for load reduction purposes in FieldDoc.org, it matters only which land-river segment in which you're working, and not exactly where within that land-river segment you're proposing to work.

For many Stewardship Fund applicants, a land-river segment as delineated in FieldDoc.org may wholly capture the proposed project area. However, NFWF understands that some projects may propose work across several segments. Moreover, some projects may not have specific restoration sites yet identified, or may propose work at a larger scale with specific restoration sites identified through the term of the grant project. To address these special cases, NFWF advises Stewardship Fund applicants to use the following decision tree to determine how best to identify either a **known restoration site** or **representative restoration sites** in FieldDoc.org:



To help answer these questions, visit the “Edit Location” page and the associated the mapping tool. Here, you can either search for specific areas using the search function, or manually move the blue pin to identify your restoration site. If you chose to use the search function, autocomplete functionality will allow you to select the appropriate area as you type.

We recommend uploading a .shp file of the individual parcel, however you can draw the geographic boundary using the map draw tools.

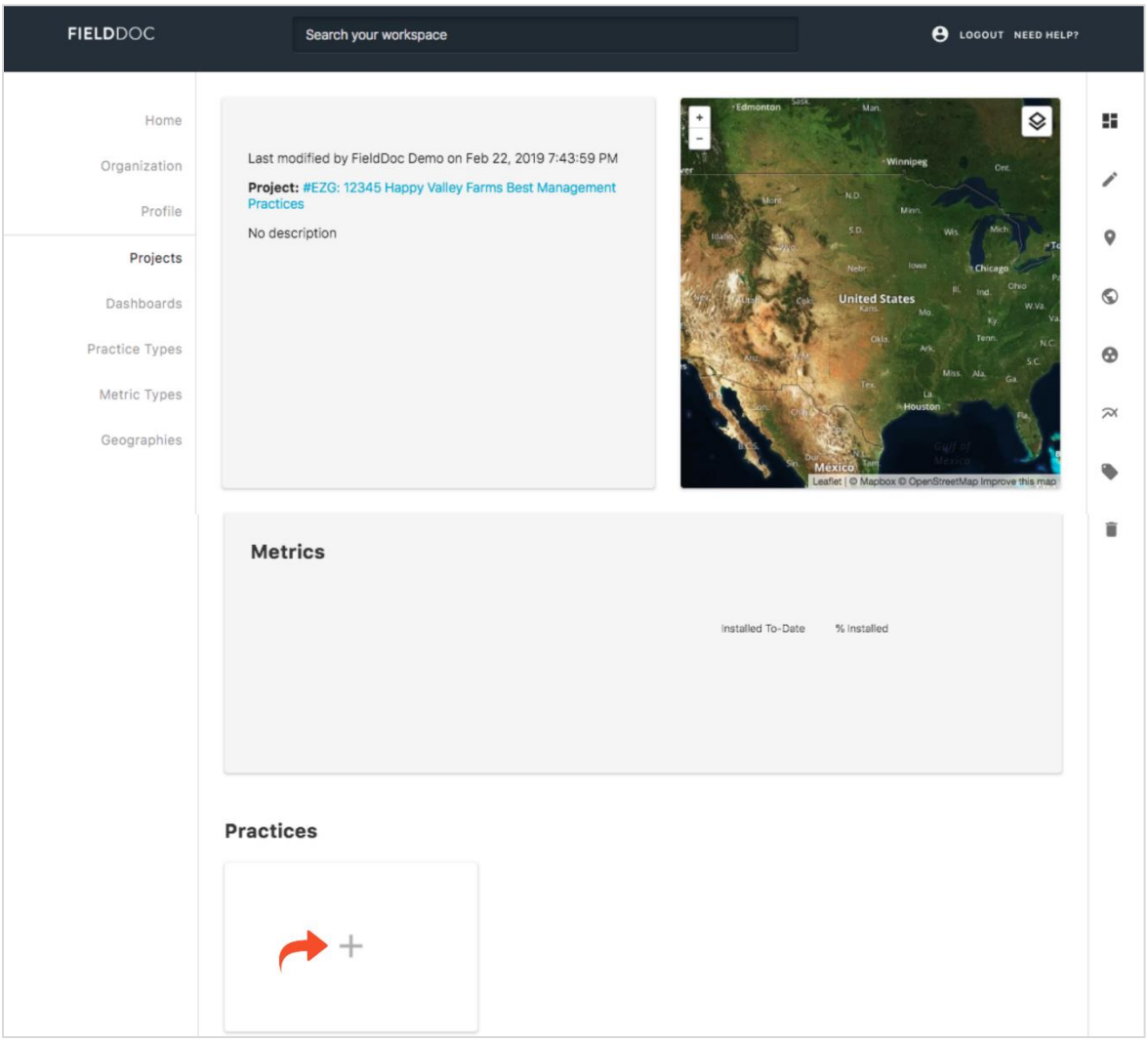


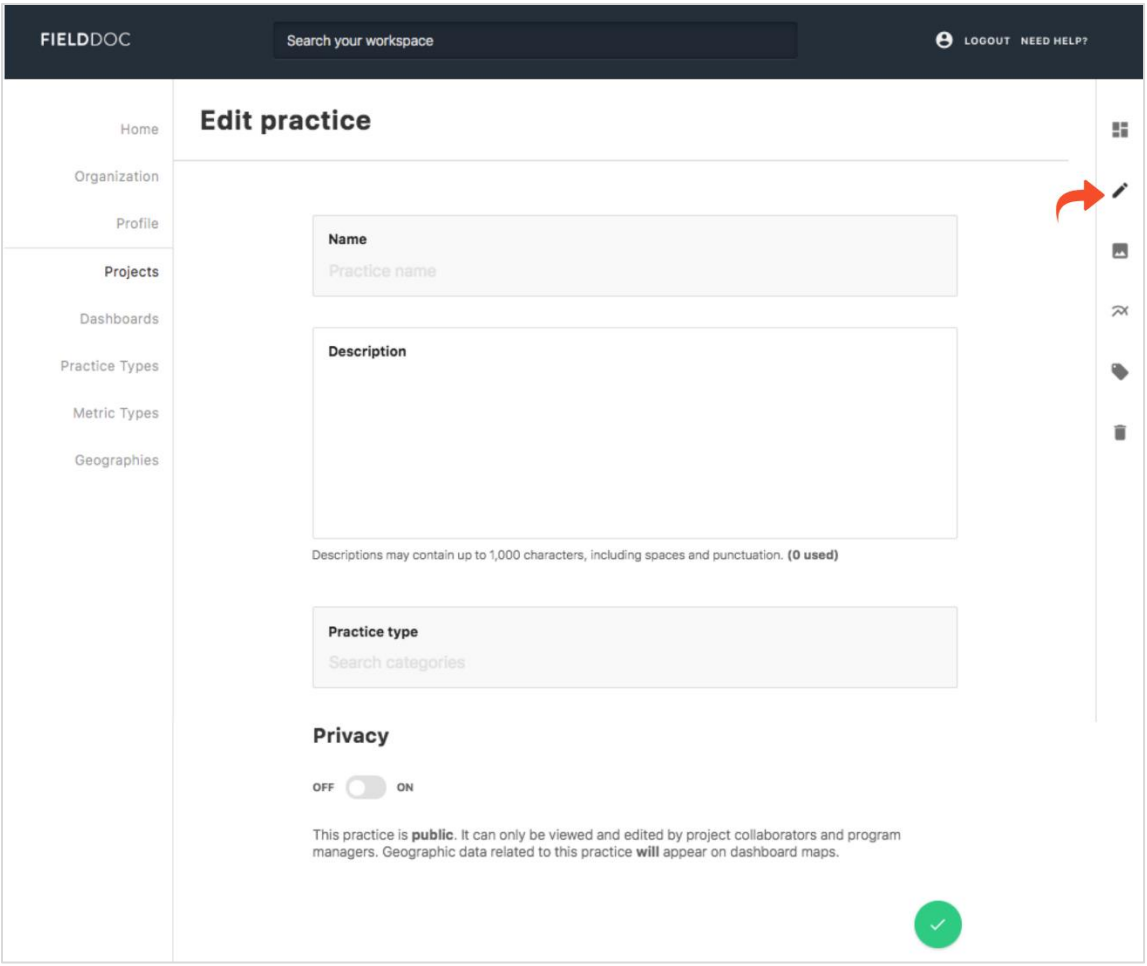
Click the big green button to save your changes after you are done editing or adding your geography.

Step 7. Add Best Management Practice (BMP) information at your project site.

Once you have at least one site associated with your project, you can start entering specific practice data to that site. Practices refer to the on-the-ground restoration work you and partners will complete through the life cycle of the project. Practices are identified and progressed towards completion through the sites. So, if your project will be installing the same practices at multiple sites, you'll need to add details separately at each site.

Click on the plus sign on the bottom of your Site Overview page.



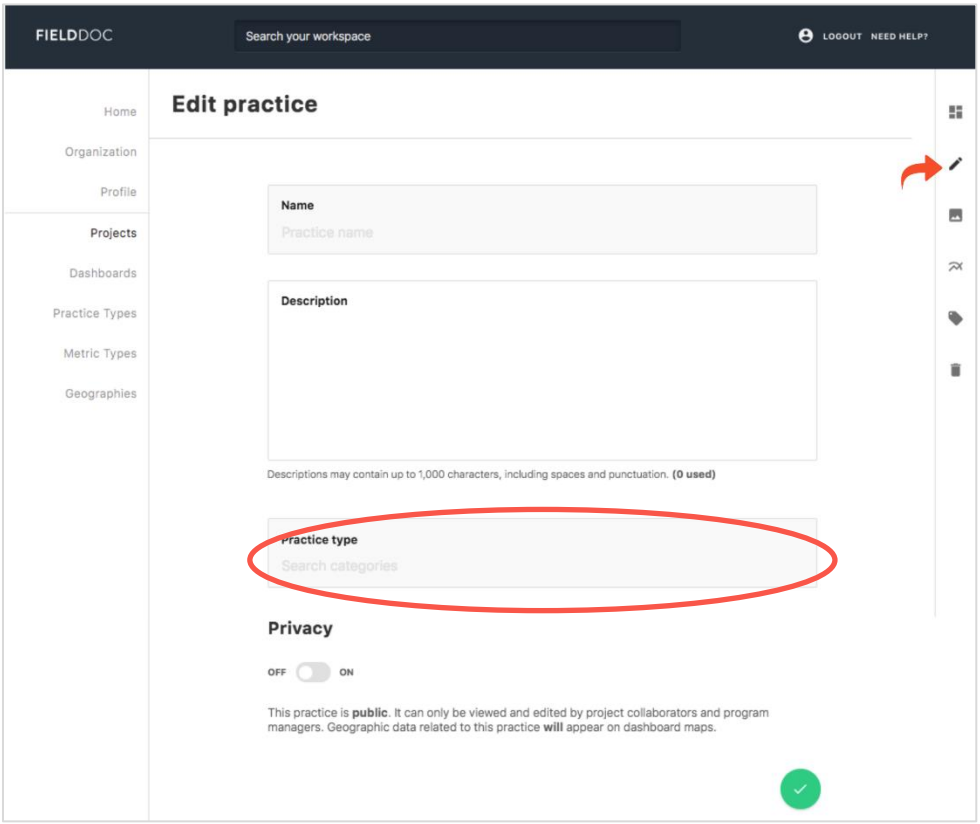


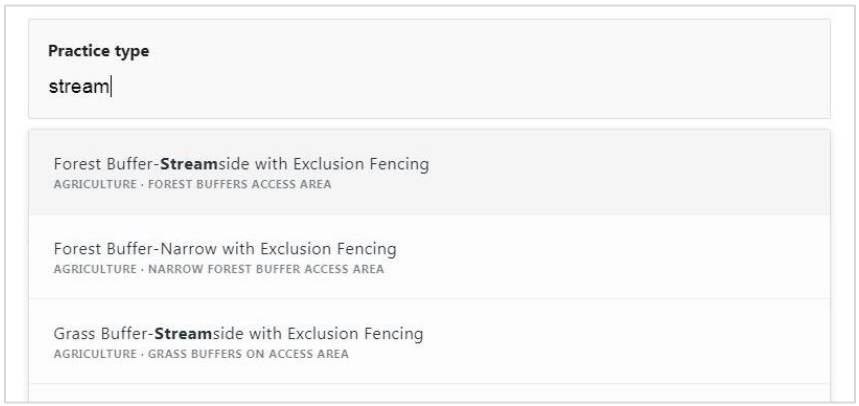
Field/Question	Guidance
1. Name	Enter in your practice's name. There are no restrictions on what you name this field.
2. Description	Enter in a description of your installation process, extent, or other information you want to keep handy for yourself or the Program Administrators.
3. Practice Type	When you start typing in your practice, suggested options will appear. Once you've chosen an option, additional details defining that practice as well as instructions on what data and geographic extent to provide appears. TIP: The available practices in FieldDoc are unique to the Funding Opportunity. If you are unsure which practice to choose or want to see the entire list, a link to the options will appear once you choose a practice.
4. Privacy	If the privacy setting was not selected at an earlier stage (Project or Site) you can toggle on the Privacy setting here if required.
5. Practice Location	Follow the same instructions as for the project site to upload your shapefile of the practice location.

Step 8. Adding a Practice Type

On the “Edit Practice” page (within a site), begin typing a practice type. When you start typing in your practice, suggested options will appear. Once you've chosen an option, additional details defining that practice as well as instructions on what data and geographic extent to provide appears.

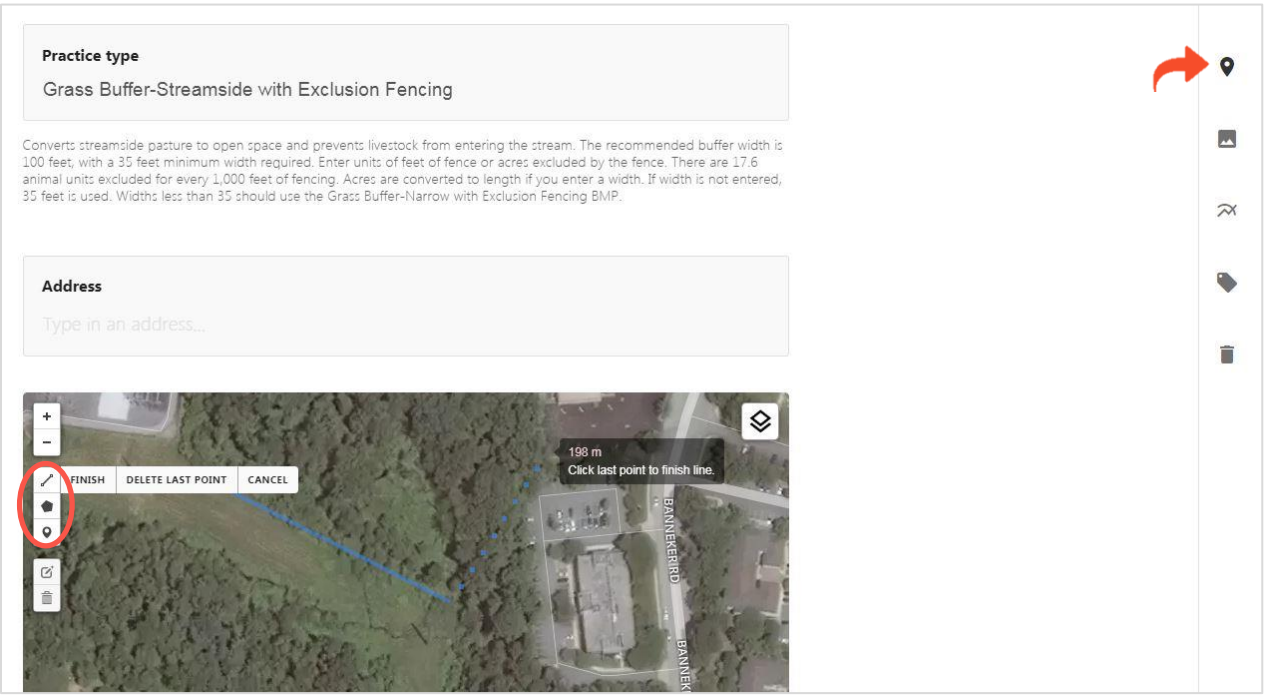
Load reduction estimates are based on Phase 6 Best Management Practices provided by the Chesapeake Bay Program. For a comprehensive list of practices, visit: https://www.fielddoc.org/models/1





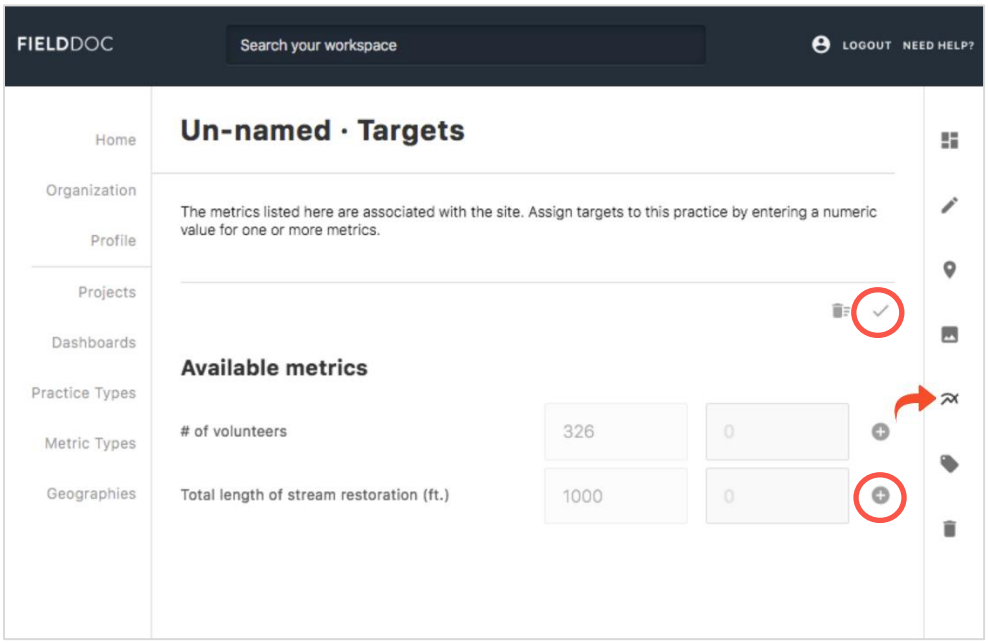
Step 9. Adding a Practice Location

Once you've selected a practice, a location icon appears on the right side menu bar. Use the "Edit Location" page of the Practice to draw a line, polygon, or point where the practice occurs within your site area.



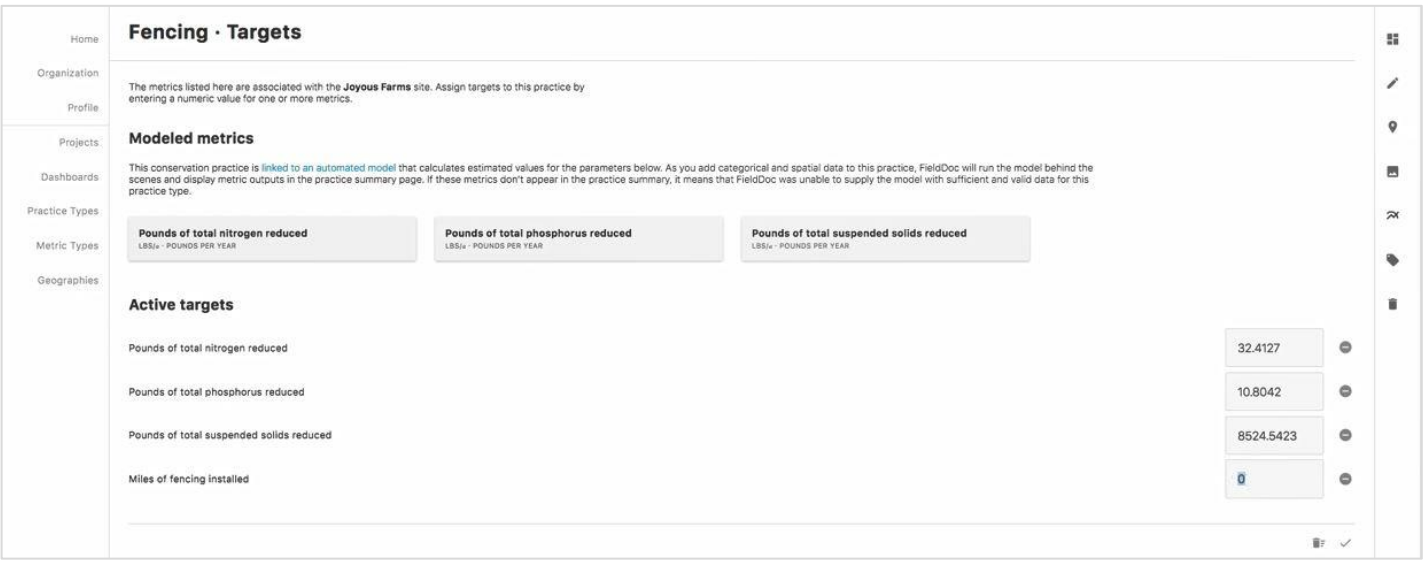
Step 10. Adding Practice-Specific Metrics and Targets

Assign targets to the practice from the list you selected at the site level. Add in your target metric goal for this specific practice at this specific site. You can add metrics by clicking the grey plus sign and then clicking the check mark to save them.



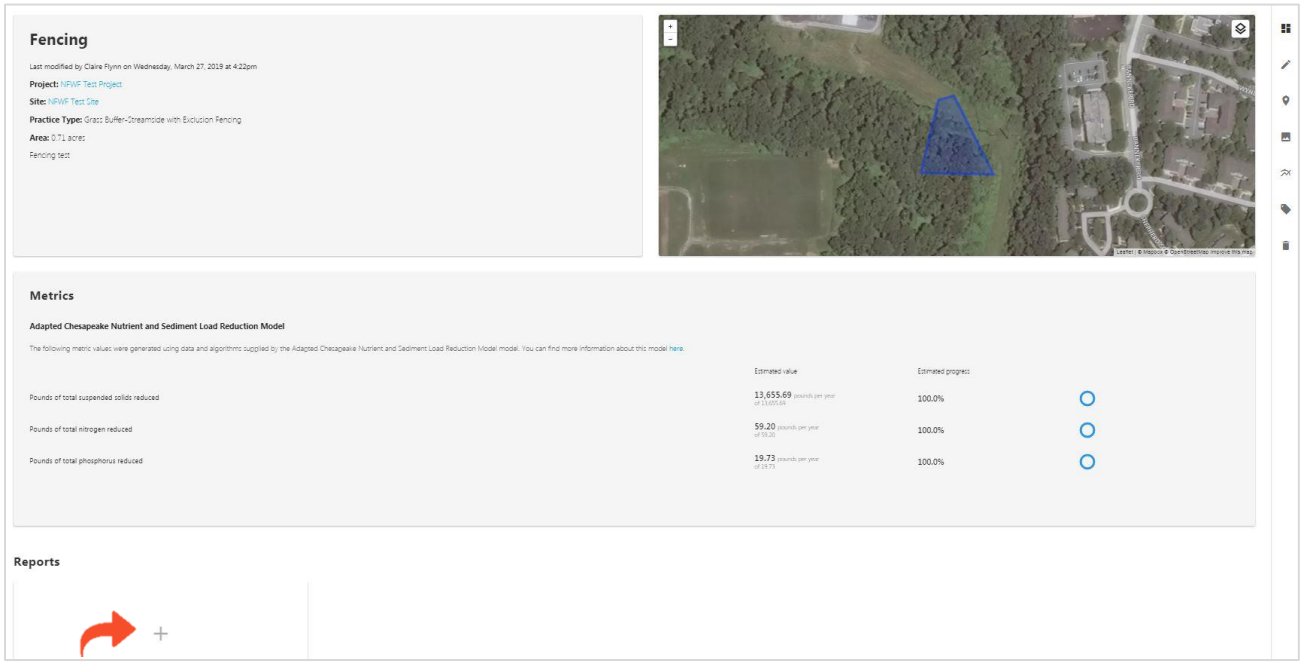
Certain metrics are linked to automatic load reduction calculations, such as pounds reduced annually of sediment, nitrogen and phosphorus. Your available metrics can also be selected and made active here, with the ability to set active target values.

Calculations are based on the practice type, polygon size, and practice location.

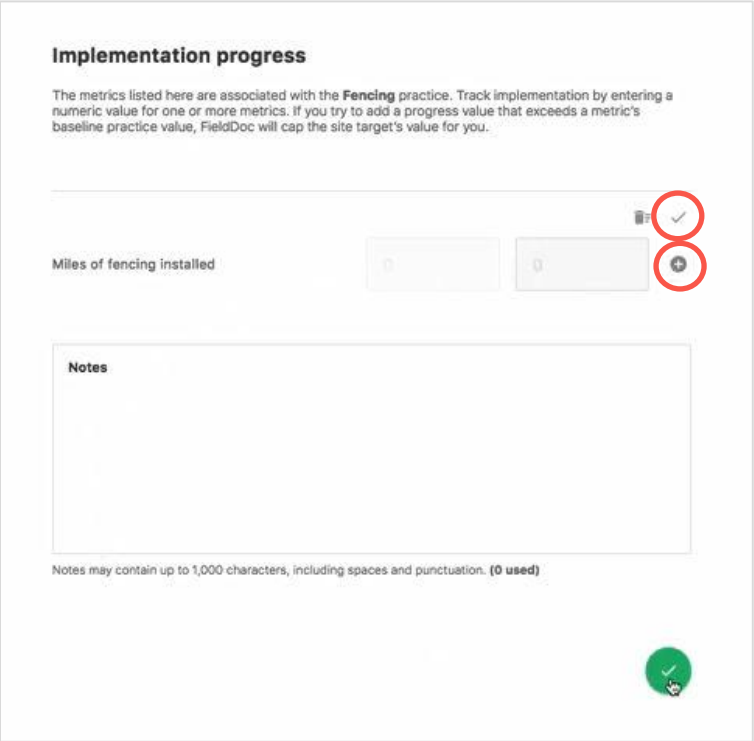


Step 11. Add implementation data/progress report at the site-specific metric level.

At the practice level, you can update your progress toward your target outcomes by filling out a practice report. Click the "Reports" plus sign on the practice page.

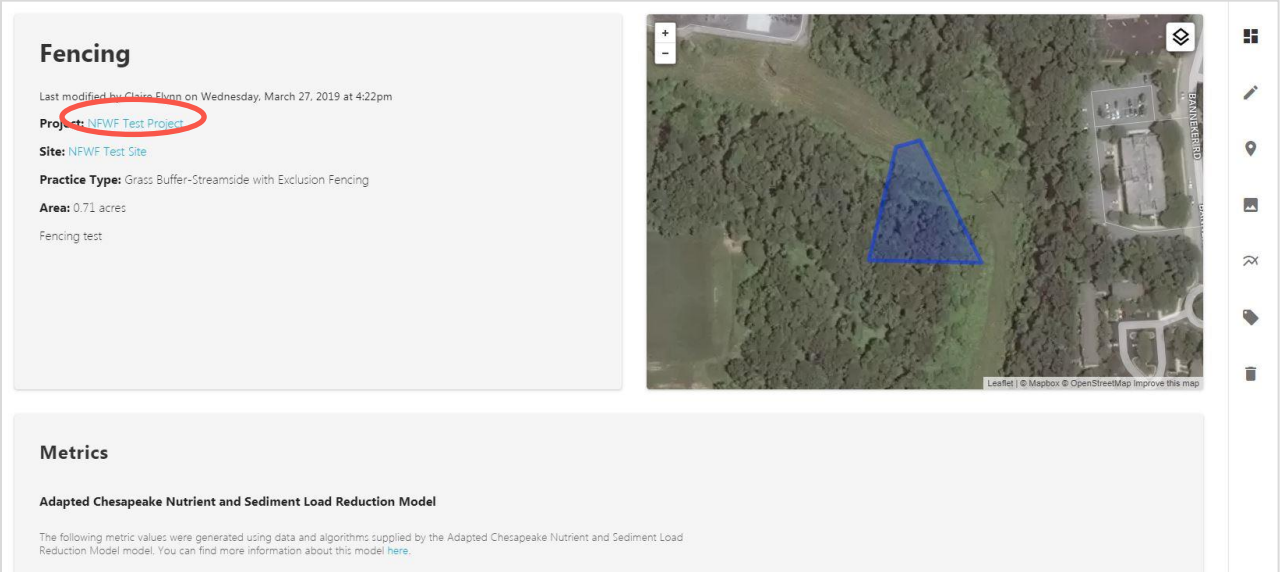


Use the box on the right end of the metric line to update the number/progress you've made towards your metric. Add any notes relevant to the work that's been done.



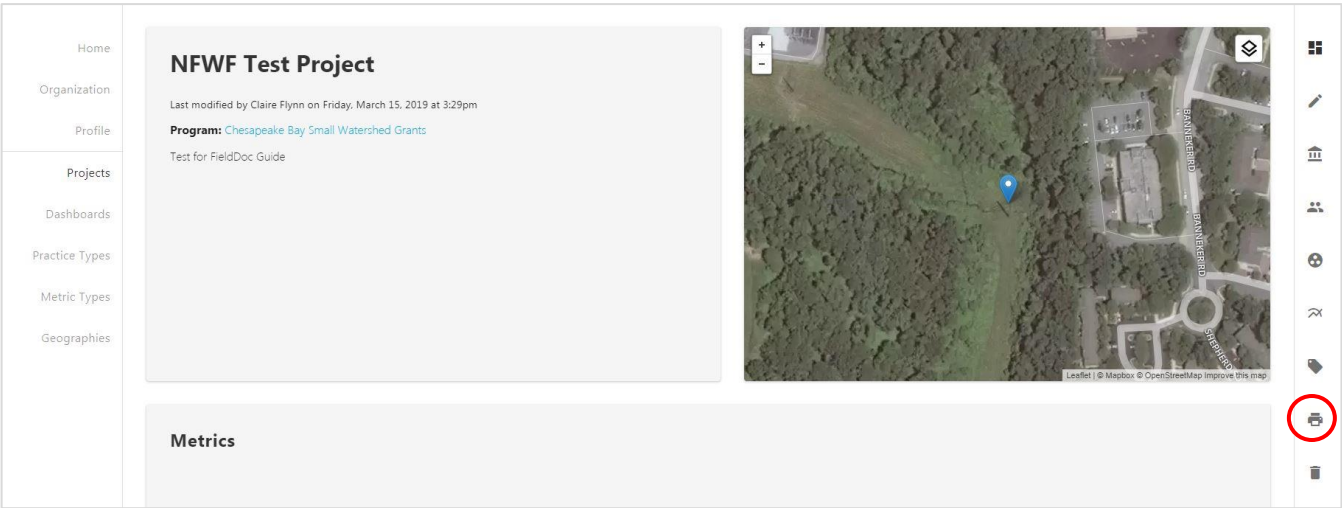
Step 12. Generate metrics for entry into Easygrants

Once you've entered planning data for each BMP (and additional installation data for the Enhanced Nutrient Management BMP) at each site and clicked "**Save Changes**", navigate the "Practice Overview" page for the entire project by clicking on the project title. This page captures both pre-project nutrient and sediment load data for the site, as well as planned annual nutrient and sediment reductions based on the information you've entered.

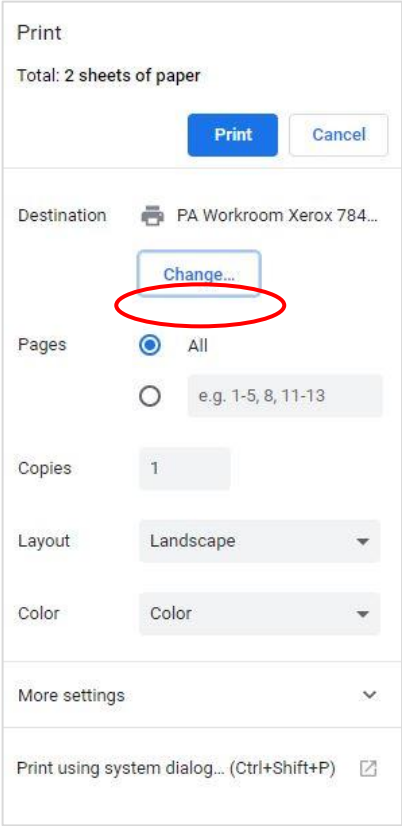


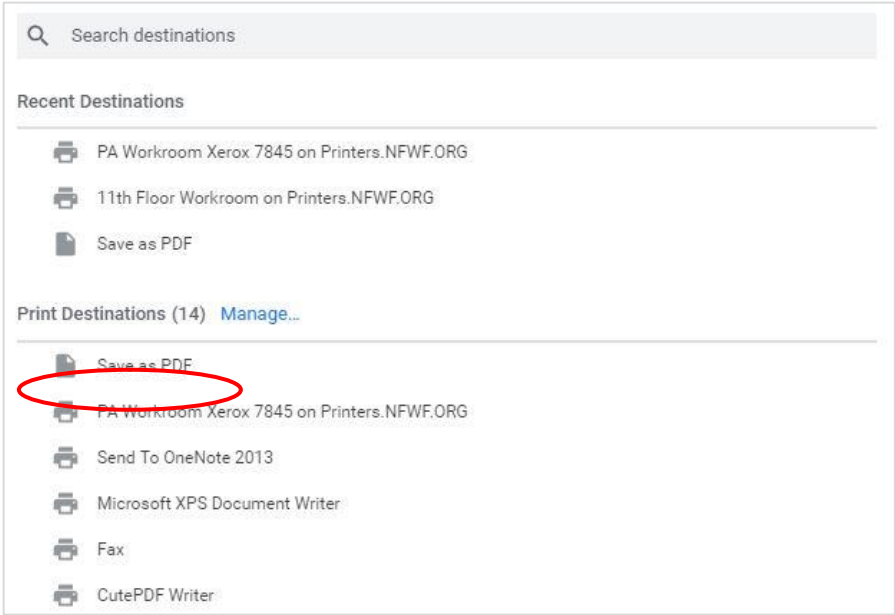
The planned load reductions from each BMP at each site are automatically summed on the Project page under "Metrics". This information should be entered into the Easygrants "Metrics" section for Lbs of nitrogen/phosphorus/sediment avoided (annually).

Additionally, a PDF version of this page should be uploaded to the Easygrants "Downloads" section for "FieldDoc Project Summary". To save this page as a PDF, on the project summary page, click the Print/Printer icon.

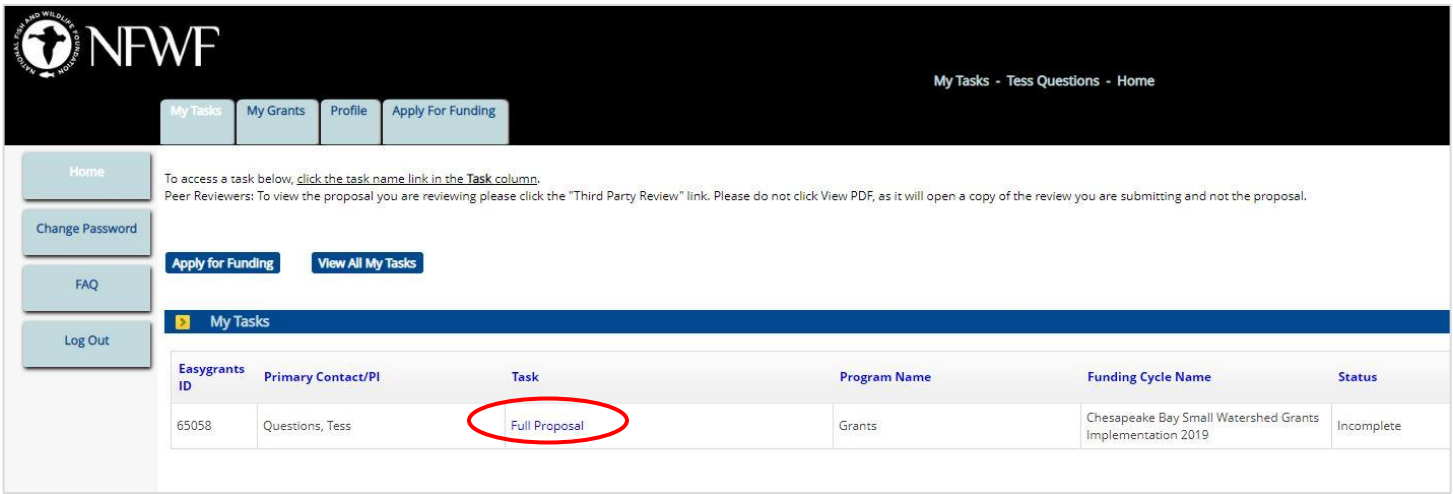


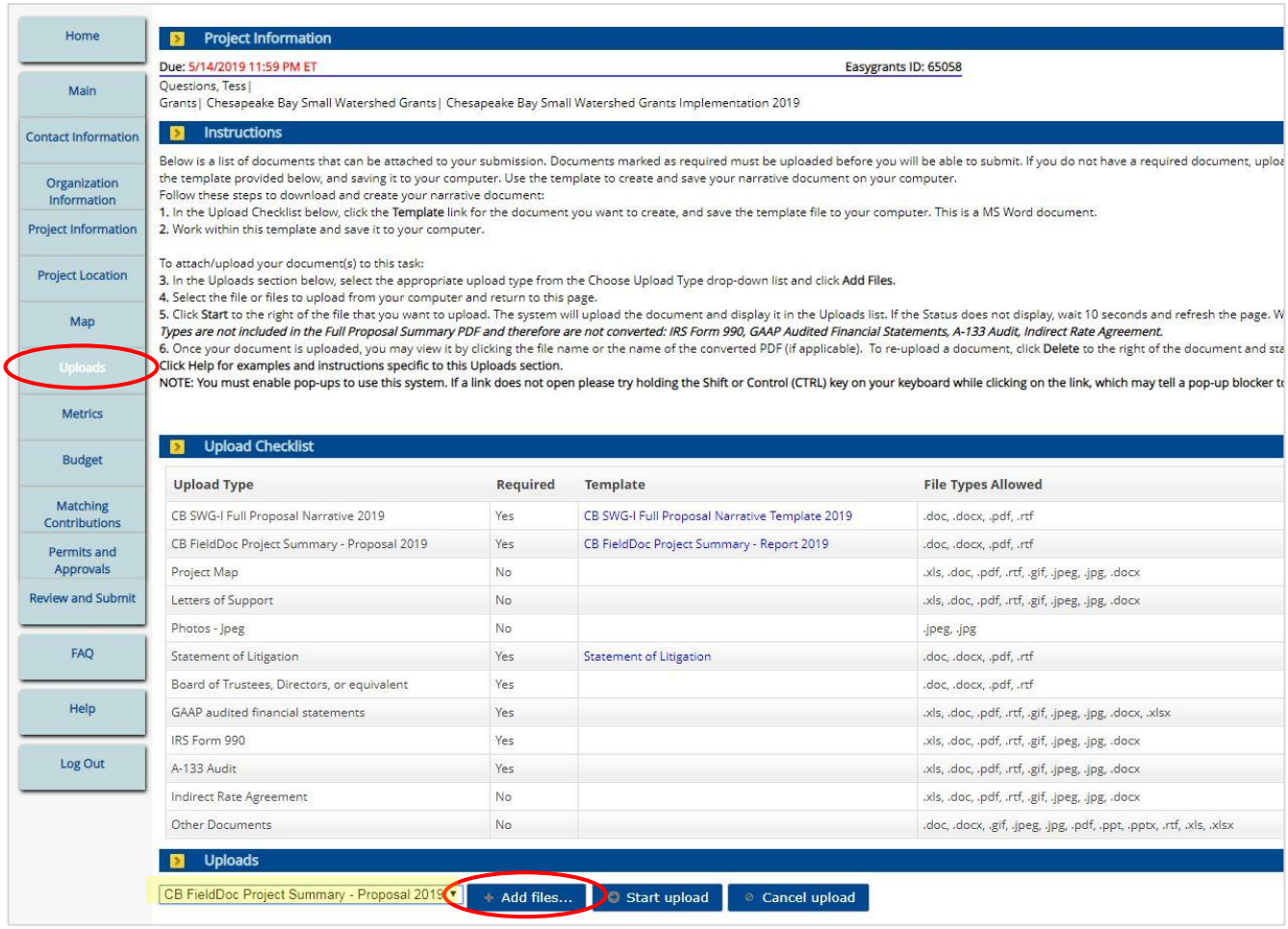
In the Print pop-up function, change the Destination to “Save to PDF.” Choose a folder on your computer to save the FieldDoc project PDF to – you will revisit this folder when uploading the PDF to Easygrants.





Upload this PDF into *Easygrants* as part of your Full Proposal or programmatic task by logging into *Easygrants*, selecting the appropriate task your task list, navigating to the Downloads tab, and following the instructions there to upload the previously saved PDF as the FieldDoc Project Summary.





Home
Main
Contact Information
Organization Information
Project Information
Project Location
Map
Uploads
Metrics
Budget
Matching Contributions
Permits and Approvals
Review and Submit
FAQ
Help
Log Out

Project Information

Due: 5/14/2019 11:59 PM ET Easygrants ID: 65058

Questions, Tess|

Grants| Chesapeake Bay Small Watershed Grants| Chesapeake Bay Small Watershed Grants Implementation 2019

Instructions

Below is a list of documents that can be attached to your submission. Documents marked as required must be uploaded before you will be able to submit. If you do not have a required document, uploa
the template provided below, and saving it to your computer. Use the template to create and save your narrative document on your computer.
Follow these steps to download and create your narrative document:
1. In the Upload Checklist below, click the **Template** link for the document you want to create, and save the template file to your computer. This is a MS Word document.
2. Work within this template and save it to your computer.

To attach/upload your document(s) to this task:
3. In the Uploads section below, select the appropriate upload type from the Choose Upload Type drop-down list and click **Add Files**.
4. Select the file or files to upload from your computer and return to this page.
5. Click **Start** to the right of the file that you want to upload. The system will upload the document and display it in the Uploads list. If the Status does not display, wait 10 seconds and refresh the page. W
Types are not included in the Full Proposal Summary PDF and therefore are not converted: IRS Form 990, GAAP Audited Financial Statements, A-133 Audit, Indirect Rate Agreement.
6. Once your document is uploaded, you may view it by clicking the file name or the name of the converted PDF (if applicable). To re-upload a document, click **Delete** to the right of the document and sta
Click Help for examples and instructions specific to this Uploads section.
NOTE: You must enable pop-ups to use this system. If a link does not open please try holding the Shift or Control (CTRL) key on your keyboard while clicking on the link, which may tell a pop-up blocker t

Upload Checklist

Upload Type	Required	Template	File Types Allowed
CB SWG-I Full Proposal Narrative 2019	Yes	CB SWG-I Full Proposal Narrative Template 2019	.doc, .docx, .pdf, .rtf
CB FieldDoc Project Summary - Proposal 2019	Yes	CB FieldDoc Project Summary - Report 2019	.doc, .docx, .pdf, .rtf
Project Map	No		.xls, .doc, .pdf, .rtf, .gif, .jpeg, .jpg, .docx
Letters of Support	No		.xls, .doc, .pdf, .rtf, .gif, .jpeg, .jpg, .docx
Photos - Jpeg	No		.jpeg, .jpg
Statement of Litigation	Yes	Statement of Litigation	.doc, .docx, .pdf, .rtf
Board of Trustees, Directors, or equivalent	Yes		.doc, .docx, .pdf, .rtf
GAAP audited financial statements	Yes		.xls, .doc, .pdf, .rtf, .gif, .jpeg, .jpg, .docx, .xlsx
IRS Form 990	Yes		.xls, .doc, .pdf, .rtf, .gif, .jpeg, .jpg, .docx
A-133 Audit	Yes		.xls, .doc, .pdf, .rtf, .gif, .jpeg, .jpg, .docx
Indirect Rate Agreement	No		.xls, .doc, .pdf, .rtf, .gif, .jpeg, .jpg, .docx
Other Documents	No		.doc, .docx, .gif, .jpeg, .jpg, .pdf, .ppt, .pptx, .rtf, .xls, .xlsx

Uploads

CB FieldDoc Project Summary - Proposal 2019 | + Add files... | Start upload | Cancel upload