**San Diego Association of Governments**

**Project Title**

**Organization Name**

**Annual Report**

**Project Period: Date –Date**

**SANDAG Contract Number: 500XXXX**

# Executive Summary

Include a brief introduction describing the grant project, methodology for completing the project’s annual project goals and objectives. Summarize any applicable results and successes, as well as any significant conclusions that can be made from the project over the past year.

**Annual Report Overview**

PLEASE DO NOT CHANGE OR ALTER THE FORMATTING OF THIS DOCUMENT! SANDAG has developed a standardized grant monitoring and tracking program for the Environmental Mitigation Program (EMP) Land Management Grant Program. The purpose is to collect information on individual projects and the grant program as a whole for reporting to the Regional Habitat Conservation Taskforce, SANDAG policy advisory committees, and the SANDAG Board of Directors. SANDAG monitors grantees through invoices, progress reports, performance measures, and designated photograph points. These standardized reporting templates and instructions for submittal are included below.

**Table of Contents Instructions**

To use the automatic **Table of Contents**:

First add all of your data to the *Project Tasks, Conclusions, Geographic Information System (GIS), Photographs, Figures, and Appendices* sections.

When you are finished adding, removing, or editing *Work Performed by Task, Conclusions, GIS, Photographs, Figures, and Appendices* sections, simply click once on the **Table of Contents**.

Then click *Update the Table* in the upper left-hand corner of the Table.

A window will open for you to choose to update just the page numbers or the entire table, choose to **update the entire table**.

The Table will automatically update the headers and page numbers from the information you inputted in the rest of the report.

*\*Each header will be hyperlinked to the corresponding page for easier access.*

*Please do not update the Table of Contents. It will automatically update when you add, remove, or edit the Work Performed by Task templates below on page 4.*

Table of Contents

[Executive Summary 1](#_Toc85707440)

[Project Background 4](#_Toc85707441)

[Project Goals 4](#_Toc85707442)

[Work Performed by Task 4](#_Toc85707443)

[Task 1- Task Name 4](#_Toc85707444)

[Task 2-Task Name 4](#_Toc85707445)

[Task 3-Task Name 4](#_Toc85707446)

[Annual Conclusions 5](#_Toc85707447)

[Geographical Information Systems Data 5](#_Toc85707448)

[SDMMP Project Page 6](#_Toc85707449)

[Performance Measures 6](#_Toc85707450)

[Appendices 6](#_Toc85707451)

[State of Preserve Monitoring 7](#_Toc85707452)

# Project Background

Provide an in-depth background on the project including:

* Project Setting: Project Site Size, Preserve Name, Preserve Location.
* The need and how the project pertains to the goals specified in the MSP.
* Project location and site description.
* How does the project anticipate addressing the issue(s) identified (methods/approach to be used)?

*\*Use sub-headings as necessary to organize this section.*

# Project Goals

What are the objectives of the project/expected results? Were the project annual goals achieved, if not, explain why the project goals were not achieved or partially achieved?

# Work Performed by Task

## Task 1- Task Name

*Budget: $XX,XXX (from grant agreement)*

*Spent: $XX,XXX (to date)*

*Match for Task: $XX,XXX (to date)*

Provide the exact start date(s), detailed the work completed for each task during the course of the year, any issues encountered, steps taken to address the issue(s), and percentage complete. Include your assessment per the Performance Measures outlined.

## Task 2-Task Name

*Budget: $XX,XXX (from grant agreement)*

*Spent: $XX,XXX*

*Match for Task: $XX,XXX*

Provide summary as described in Task 1.

## Task 3-Task Name

*Budget: $XX,XXX (from grant)*

*Spent: $XX,XXX*

*Match for Task: $XX,XXX*

Provide summary as described in Task 1.

*\*Add additional tasks as necessary outlined in the grant agreement by coping the formatting of Tasks 1-3 and paste to edit and represent additional tasks. If tasks include multiple locations, use sub-headers to separate work performed.*

**Photographs & Figures**

**Photographs and figures are invaluable!** Please include photos/videos in the annual report and any figures (if applicable). Both photos and figures may be included throughout the document under corresponding tasks or at the end following the Discussion/Conclusion section and are required to be submitted as separate files from the Word/PDF document. Photographs taken at the same place or photographic points (photo-points) throughout the grant period assist SANDAG staff in tracking the project’s progress over time.

It is required that **Photographs include**:

* A before and after comparison sequence from the start to the completion of the project for photo points.
* A brief description of the corresponding tasks, date, and activity in the photograph.
* **A copy of each photograph included in the report submitted in a .jpeg or .png file format.**

It is required that **Figures include**:

* A caption with a brief description.

# Annual Conclusions

Provide yearly conclusion for the project.

* Has it been successful, and has it accomplished the specified goals?
* What can be executed differently to improve the project outcome?
* How have the results so far contributed to the conservation of MSP species and has it enhanced recovery/prevented further decline?
* What work still needs to be done?

# Geographical Information Systems Data

Please provide GIS data or mapping if applicable to the project. If GIS data or maps are included:

* Spatial data should accompany all Performance Measures as either a point, line, polygon, or list of coordinates.
* Spatial data should be attached to San Diego Management and Monitoring Program’s (SDMMP’s) website project page and shared publicly except when it absolutely necessary to keep private. *If the data needs to private, please reach out to (**smccutcheon@usgs.gov**) or Emily Perkins (**eperkins@usgs.gov**).*
* Spatial data should be provided as either a shapefile, KML/KMZ, or spreadsheet of coordinates.
	+ Treated or planted areas should be tracked as points or polygons.
	+ Fencing or trails should be tracked as lines.
* Spatial data should have the following attributes:
	+ Date of Activity,
	+ Type of Activity,
	+ Area of Length Completed,
	+ Goal Area or Length, and
	+ Any notes specific to the activity

# SDMMP Project Page

To receive reimbursement for work conducted within the quarter, submission of Quarterly Progress, Annual, and Final Reports must be added to your project’s Project Page on the SDMMP website. Add any necessary photographs to the photo carousal and fill out the photograph information. *Please contact Sarah McCutcheon (**smccutcheon@usgs.gov**) or Emily Perkins (**eperkins@usgs.gov**) if you are having trouble accessing or editing your project page.*

**Performance Measures Instructions**

Grantee’s performance will be measured against the Performance Measures (Exhibit D) during the term of the project. More details on Performance Measures and Grant Recovery Plans are outlined in the Call for Projects and Grant Agreement.

To transfer the **Project Performance Measures Excel Spreadsheet** to the Annual Report:

* Copy the Excel icon located under the *Project Performance Measures* section in your Quarterly Progress Report.
* Open the Annual Report Template and under the *Project Performance Measures* section, paste the Excel Icon.
	+ The excel spreadsheet icon will appear and when double-clicked, will open the most up-to-date version of the *Project Performance Measures*.

# Performance Measures

Please include the Project’s Performance Measures with the cumulative data from over the past year of the project to complete the grant requirements.

*\*Insert Excel Icon Spreadsheet here\**

# Appendices

As necessary, please include any additional materials as separate appendices and reference them in the report as needed. Examples may include outreach materials, management plans, data sets, etc.

# State of Preserve Monitoring

SDMMP and SANDAG will be collecting specific data from each grant project in order to update the *Status of the Regional Preserve System in Western San Diego County*. Information collected will become available on SDMMP’s Dashboard.

To access the **State of Preserve Monitoring Excel Spreadsheet:**

* Please fill out the spreadsheet by simply double-clicking the *State of Preserve Monitoring* chart.
	+ The excel sheet will open up and allow you to input data.
* ****Once you are finished inputting the data into the excel sheet, scroll the excel sheet to the top with the headers displayed.
* Then simply click once on the grey space to the right of the excel sheet to return to the Word document to resume editing.

**Definitions**

* **Management Strategic Plan (MSP):** [The Management and Monitoring Strategic Plan for Conserved Lands in Western San Diego County: A Strategic Habitat Conservation Roadmap](https://sdmmp.com/msp_doc.php) (or simply "MSP Roadmap" or "MSP") is a comprehensive, landscape-scale adaptive management and monitoring framework for prioritized species and vegetation communities in western San Diego County.
* **Habitat Type:** Please select from one of the MSP listed habitats. If the habitat type is not listed, please do not select from the dropdown and manually type in the habitat type name. Provide acreage by specific habitat types, do not combine multiple habitat types with one acreage calculation.
* **Habitat Enhancement through Invasive Species Control (acres):** removing invasive plant or animal species to improve ecological function.
* **Habitat Created/Restored (acres):** Establishing habitat where it did not exist before; returning a damaged site to a natural or native state.
* **Fencing (feet):** fencing installed for grant purposes to lessen a threat or stressor to habitat
* **Acres Requiring Management:** activities such as vegetation thinning, invasive plant treatment, etc. that are necessary for maintaining previous enhancement, restoration, or creation efforts.
* **Acres Requiring Monitoring:** any regular monitoring conducted to establish baseline and/or determine success of grant project.
* **Sensitive Species[[1]](#footnote-2):** [Species outlined in the MSP](https://sdmmp.com/images/MSP/Table%201-1.pdf) that are unlikely that managing the vegetation community or habitat alone would ensure the species persists over the long-term on Conserved Lands in the Management Strategic Plan Area.
* **Sensitive Species Planted:** List any sensitive plant species that were seeded/planted for this project
* **Sensitive Species Benefitted:** List any sensitive species that will or already have directly benefitted from the project.
1. Refer to SDMMP website for complete list of identified MSP Sensitive Plant or Animal species. The link will direct to the webpage. [↑](#footnote-ref-2)