Goal Implementation Team Award Program

Status Report Narrative Questions

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Complete the status report narrative questions below. After completing your narrative questions, save this document on your computer and then submit the document via your Chesapeake Bay Trust Online System account.

1. Awardee Information

Organization Name: **Alliance for the Chesapeake Bay**
Project Leader: **Jennifer Starr**
Project Title: **Finance and Investment Forum**
Date: **April 15, 2020**

2. Project Summary

The Alliance worked in concert with Budget and Finance Work Group (BFWG) chair, coordinator and staffer ("planning team"), to flawlessly execute a one-day Finance Forum ('meeting") during this reporting period (January 1, 2020-March 31, 2020). The Forum successfully took place on March 11, 2020 with over 80 in attendance. Here is a summary of the effort:

Task 1 - Meeting Planning
The Alliance met with the planning team to gain a better understanding of the event and clarify expectations regarding preferred meeting locations; potential meeting dates; anticipated number of attendees (including participants, speakers, and staff) and any other details required to complete logistical arrangements. The Alliance identified a range of suitable locations with appropriate-sized meeting space taking into account drivability for participants, parking, reasonable facility rental cost and convenience. Following the initial meeting, the Alliance was available for weekly meetings with the planning team to review progress and obtain any additional direction needed to perform the additional tasks outlined below.

Completed Deliverables:

1. Meeting Summary outlining logistics requirements agreed to during meeting with planning team and any outstanding decisions to be made by the planning team
2. Timeline to ensure completion of the statement of work outcomes
3. Draft Procurement documentation for the meeting facility/ies for review and approval by the planning team to include three to five ideal Forum dates and locations.

Task 2 - Secure Meeting Facility
Upon receiving clear direction from the planning team, including general approval of the procurement solicitation, the Alliance conducted a procurement for meeting facilities in accordance with federal requirements. This included soliciting responses from three to five respondents that meet the requirements of the planning team. The responses were presented to the planning team along with a recommendation for their consideration and approval. The Alliance then secured the meeting facility and all necessary IT and phone conferencing equipment.

Completed Deliverables:

1. Responses to Procurement for review and selection by the planning team

2. Documentation confirming the facility has been reserved and outlining the specifics e.g. description of meeting spaces reserved, A/V equipment to be provided, room set-up, parking etc.

Task 3 - Coordinate Participant Invitations and Responses

The Alliance drafted an invitation for approval by the planning team. Upon approval by the planning team and after obtaining invitee list from the planning team, the Alliance emailed invitations and managed responses. The Alliance provide the planning team with access to monitor the invite list and responses and conducted additional outreach to invitees to confirm participation and parking permit needs. The Alliance also invited and confirmed meeting presenters identified by the planning team.

Completed Deliverables:

1. Draft participant and presenter invitations for review and approval by the planning team
2. Web based registration site
3. List of confirmed participants (once weekly)
4. Final list of confirmed participants

Task 4 - Finance Forum Preparation

In consultation with the planning team, the Alliance compiled and distributed meeting materials electronically in advance of the meeting (including agenda, logistical information, and reading materials). The Alliance loaded meeting materials onto the Chesapeake.net meeting webpage and maintained this page as information was added and/or updated.

Completed Deliverables:

1. Meeting material packet for distribution to participants and posting on meeting website

Task 5 - Execute Finance Forum

The Alliance worked with the selected facility to ensure that the one-day meeting was executed in accordance with the expectations of the planning team as outlined in Task 1. This included coordinating setup of the meeting space, providing meeting materials including tent cards, flip charts, easels, markers and pens, registering participants and breaking down the meeting space and returning any equipment after the meeting ends.

Completed Deliverables:

1. One-day meeting of approximately 80 participants
2. Meeting materials, including handouts, tent cards, flip charts and markers

Optional Service planning team requested

Task 5B - Travel Reimbursement for Participants

Some participants required assistance with travel costs. The Alliance, at the direction of the planning team, reimbursed participants for travel costs associated with attending the one-day meeting. Reimbursement will be was limited to the allowable federal per diem rate for the region and included mileage, meals and/or lodging.

Completed Task 5B Deliverables:

1. List of participants reimbursed by the Alliance and total amount of reimbursement

3. **Program Narrative Questions**
   a. Provide updates for any pieces of your project that were proposed to be developed during this reporting period. For example, if you needed a Quality Assurance Plan, provide updates on this or if you proposed to gather and analyze datasets, provide updates on the process.
   b. Did you provide presentations and/or trainings? Yes
      i. If yes:
         1. Include the meeting location, title, date/time, agenda, notes, and number of people that attended.
            The Finance and Investment Forum took place at the University of Maryland STAMP Student Union on March 11, 2020 from 9:00a.m. – 4:30 p.m. with approximately 80 in attendance.
            Finance and Investment Forum Final Agenda.pdf
         2. Provide sign in sheets and photos, if available.
            Finance and Investment Forum Final Attendee List - Alphabetical by first name.pdf
         3. What were the action items and next steps?
            Finance coaches are available to the attendees for continued application of learning over the next few months.
   c. Did your project have any significant changes to the scope of work, methods, or outcomes? No
   d. Do you have any substantial timeline or budget changes? Yes - The original timeframe had to be redone as there was no planning team for a period of time. Also, per approval we changed the amount of reimbursements allocated for speakers to attend.

   If you answered yes to c and/or d describe the changes here and contact the Trust program manager at 410-974-2941**.** Contacted prior to budget allocation change for approval

4. **Project Evaluation and Lessons Learned**
   a. Provide a written evaluation of this phase of the project and the method(s) used .Evaluation for Grant.pdf
   b. Discuss major changes that have occurred in the project and how those changes will impact the next project phase(s). The project is finished
   c. Briefly describe any lessons learned, including challenges or potential roadblocks to future progress. As with anything, good team work and open communication are vital.
   d. How will you overcome these challenges during the next phase of the project? Project is completed

For questions about your project or status report, contact the Trust program manager at 410-974-2941.

Directions to submit your status report online:

1. Sign into your account using this link *https://www.GrantRequest.com/SID_1520* and the same username and password as when you applied.
2. Once signed in click on the Requirements tab.
3. If you do not see your requirement, use the dropdown to shift between “Show: New” and “Show: In Progress.”
4. Click on the Status Report link and follow the instructions. **Upload your status report, invoices, and expense documentation into one requirement**.
5. Once complete, click Submit & Review and make sure you have uploaded and entered all of the necessary information.
6. If so, click Submit.

To confirm your requirement was successfully submitted use the dropdown to shift between “Show: In Progress” and “Show: Submitted Requirements.” You will also receive a confirmation email.

Photos: Upload any photos, digital images, newsletter articles, or press clippings to supplement your written description. These supplemental files can be uploaded into your status report's narrative section under "additional attachments," located on your Chesapeake Bay Trust Online System account.

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