

# Tackle Your First Quarter Grant Reporting

New Grant Recipient Series  
January 9, 2023

# Meet Our Team



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# WVU TAB

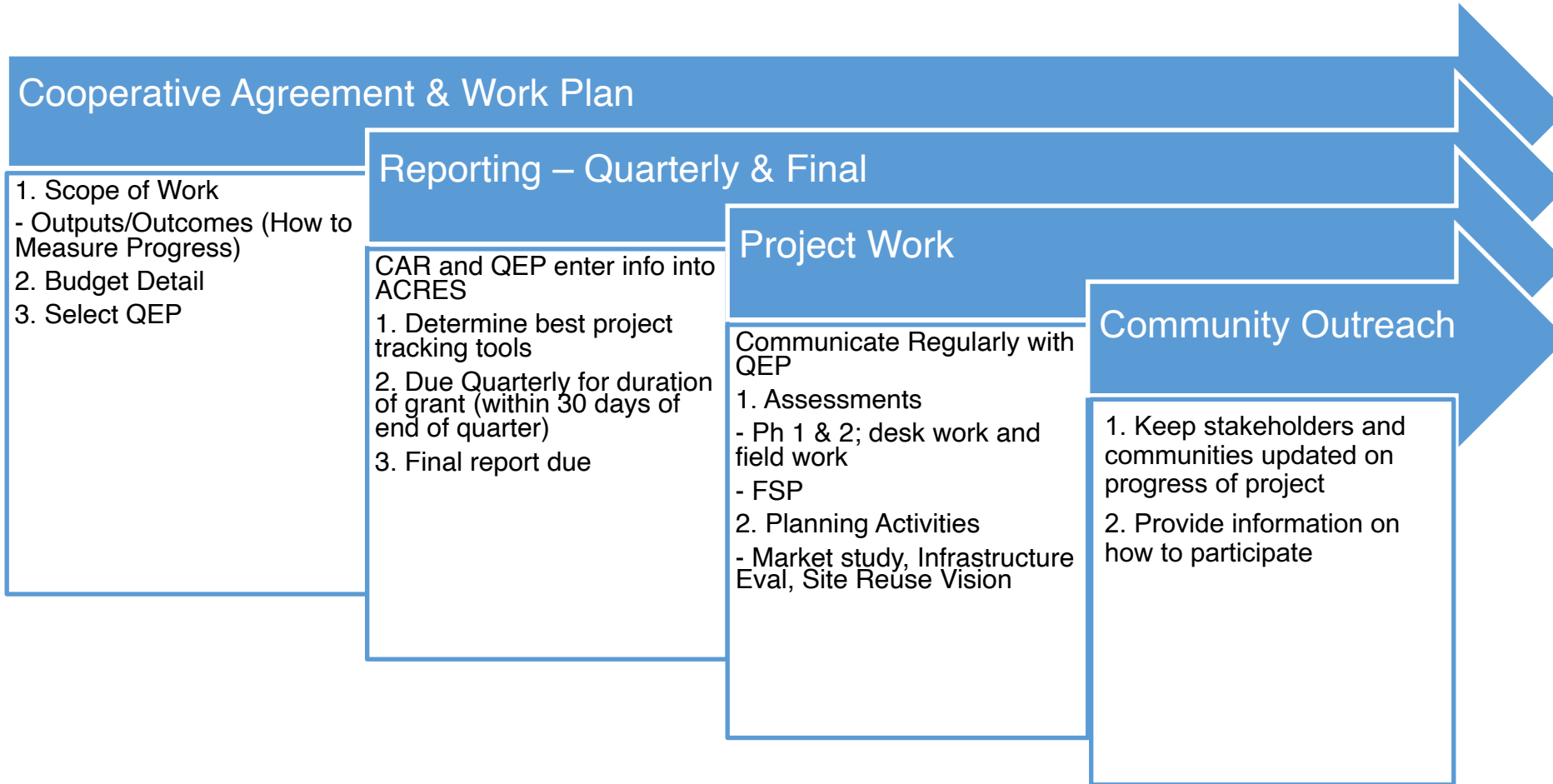
EPA Region 3 Technical Assistance to Brownfields (TAB) provider

Resources we offer include **Brownfield Education**

- Including today's webinar!



# Reporting Elements

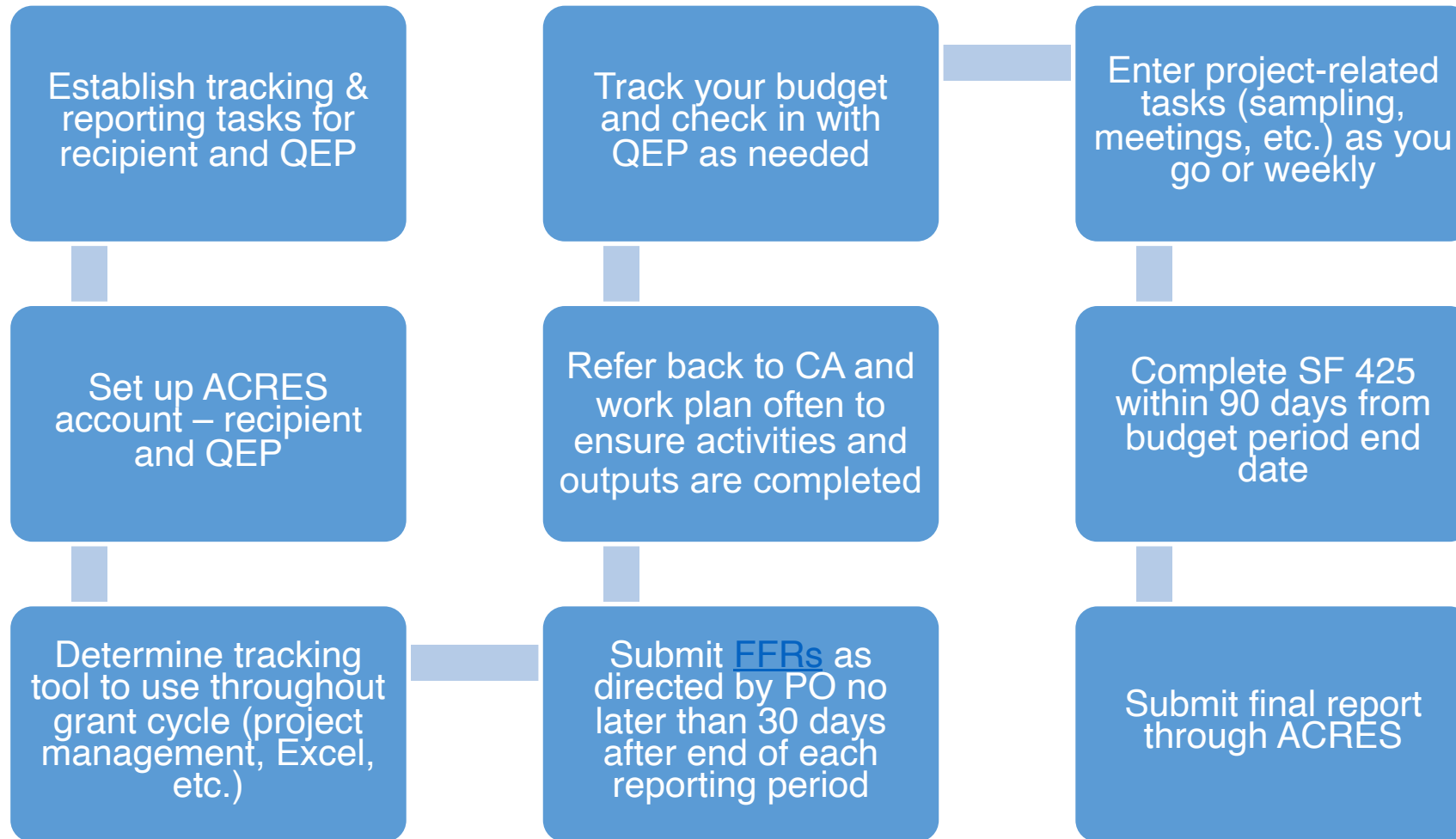


# Terms & Definitions

- **ACRES**
  - The **Assessment, Cleanup and Redevelopment Exchange System (ACRES)** is an online database for Brownfields Grantees to electronically submit data directly to EPA.
- **ASAP**
  - **Automated Standard Application for Payments (ASAP)**. The mandatory method of payment for EPA grantees. Unless a waiver has been approved by EPA, all recipients must be enrolled or enroll in ASAP to receive payments.
- **Cooperative Agreement (CA)**
  - Cooperative agreements permit the EPA Project Officer to be substantially involved in overseeing the work performed by the selected recipients.
- **Cooperative Agreement Recipient (CAR)**
  - Recipient of EPA Brownfield Grant who signed CA with EPA
- **Federal Financial Report (FFR) SF 425**
  - Used by grant recipients to submit reports on their grant's financial progress
- **Project Officer (PO)**
  - *Monitors recipient activities and project progress; reviews progress reports to ensure the recipient is performing work as agreed and approved in application; provides technical assistance to recipient; ensures completion of EPA's programmatic terms and conditions.*
- **Property Profile Form**
  - Must be submitted when the cooperative agreement recipient starts using EPA funds at an eligible property. *All CA recipients must develop and regularly maintain a Brownfields Property Profile Form in ACRES for **each property** benefiting from the EPA Brownfields cooperative agreement.*
- **Qualified Environmental Professional (QEP)**
  - *Someone who possesses the specific education, training and relevant experience necessary to exercise professional judgment to develop opinions and conclusions regarding conditions indicative of releases or threatened releases of hazardous substances on, at, in, or to a property*
- **Work Plan**
  - A work package is created when you click a link to "Edit data" to add/update information. This "package" moves through the data entry and approval process. Only one work package can exist at a time for a CA and associated property. Once approved, a new work package can be created to record new data.
  - An **open work package** is any package that you are currently working on that has not yet completed the review process. A **closed work package** is any package that has completed the data entry and subsequent approval.



# Reporting Process



# Work Plan Output Tracking

- Indicate outputs and activities within each quarterly report that have been accomplished in each reporting period
- Also track committed outputs separately to know how many have been completed and how many remain

| ATTACHMENT 1: OUTPUTS / OUTCOMES   |   |   |   |  |
|--|---|---|---|--|
| TASK 2: <i>Community Outreach</i>  |   |   |   |  |
| Activity<br>(Commitment)   | Expected<br>Timeframe<br>(Month & Year) | Outputs<br>(projected activities,<br>deliverables, reports)                                     | Outcomes<br>(projected results,<br>effects, improvements)   | Actual<br>Accomplishments this<br>Quarter  |
| <b>All Aboard Brownfield Redevelopment Task Force:</b> <ul style="list-style-type: none"> <li>• Establish the <u>AllAboard</u> Brownfields Initiative Task Force</li> <li>• Ensure that commitments made by CBOs in proposal are implemented.</li> </ul>                                       | Jan 2021                                | Bi-monthly meetings, meeting agendas, attendance lists and meeting notes. Commitments from CBOs | An active and motivated workgroup driving <u>Brownfields</u> initiatives  | Activity Completed   |
| <b>Develop Marketing Material:</b> <ul style="list-style-type: none"> <li>• Create brochure targeting private &amp; public property owners, <u>lenders</u> and developers</li> <li>• Create FAQ fact sheet</li> <li>• Update website</li> </ul>  | Summer 2020                             | 1 Color brochure; 1 FAQ insert; 1 easy to navigate attractive webpage                           | Up to date marketing tools to promote project work and disseminate information  | Webpage continues to be updated with latest information.   |
| <b>Implement outreach strategy in target areas:</b> <ul style="list-style-type: none"> <li>• Meet w/ local community organizations and/or attend local town council meetings</li> <li>• Publish program info in local papers and post notices in town halls &amp; community centers</li> </ul> | Initiated April 2020                    | Give BF presentations at 3 meetings, minimum 1 round of ads/postings in local target areas      | Improve community knowledge on BF issues and identify potential BF sites<br><br>Encourage public participation and support of BF project(s) going forward | Prepared for Grafton 1 <sup>st</sup> Friday 10-7-22<br>-Promoted NBAC attendance at 1 <sup>st</sup> Friday |

# ACRES Resources

## EPA ACRES Guides

- How to Use ACRES [Homepage](#)
  - No later than two weeks before the application is submitted
- Property Profile Form [Instructions](#)

## 2023 ACRES Online Training

Getting Started [Sessions](#)

All begin at 2:00 pm (ET)

- February 23
- April 11
- June 13



# ACRES Dashboard



[Help](#) | [Logout](#)

[Home](#) [Quick Start](#) [Work Packages](#) [Reports](#) [My Account](#)

Property ▾

Type property name or ID

[Advanced Search](#)

Welcome, Katie See

## WHERE DO I START?

- [+ Add a new property](#)
- [+ Add a CA to my list](#)
- [✎ Edit an existing property](#)

[What is a CA and a property? >](#)

## WORK PACKAGES

[0 Open Work Packages](#)

### Actions for PO

[What is a work package? >](#)

## QUARTERLY REPORTS

[0 Open Quarterly Reports](#)

[Due 01/31/2023](#) (40 days)

### Actions for Me

### Actions for PO

View all: [Manage my Quarterly Reports](#)

[When should I submit a Quarterly Report? >](#)

## MY ACCOUNT

Email: katie.see@mail.wvu.edu

### Notifications:

[My email preferences](#)

**1** [Total Cooperative Agreements](#)

**10** [Total Properties](#)

## MESSAGE CENTER

### New Releases

- ACRES is updated every 4 weeks. View a summary of the most recent changes in the [Release Notes](#) [EXIT](#)

### Quick Reference

- [Instructions for completing a Property Profile Form](#) [EXIT](#)
- [Instructions for completing the PALs Form](#) [EXIT](#)
- [ACRES Bulletins](#) [EXIT](#)
- [Brownfields Grant Reporting in ACRES](#) [EXIT](#)

## UPCOMING TRAINING

- Online training classes are offered the second Tuesday of each month, and alternate between helping users new to ACRES and providing more details for those already familiar with the system.
- Training for Job Training Recipients is offered quarterly.
- [Access Online Training](#) [EXIT](#)

# ACRES Cooperative Agreement

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## Cooperative Agreement (CA) Detail for West Virginia University Research Corporation

[Print Page](#)

**PLEASE NOTE:** Information shown is the most current in ACRES and may include draft and approved data

### Basic Info

CA Number: BF 96379101  
State: WV  
Congressional Districts: WV-1  
CA Type: Assessment  
Announcement Year: FY20

### Actions

[View CA Fact Sheet](#) [EXIT](#)  
[View CA Submission Archive](#)

### Dates & Statuses

Award Date: 08/13/2020  
Initial Project Period: 10/01/2020 to 09/30/2023  
Current POP End Date:  
Status: ● Open

### CA Contact

Primary Reviewer/Contact: [Nowak, Joseph](#)  
[EPA Regional Brownfields Team](#)  
[Nowak.Joseph@epa.gov](#) 215-814-3303

### Funding

Funding Source: Regionally Funded  
Total Funded: \$300,000.00  
Funding Type:

### Pre-POP Authorization

This CA does not have Pre-POP authorization

### Properties Addressed by this Cooperative Agreement

| Property Name                                 | Action                     | Status   | Current Owner |
|---|----------------------------|----------|---------------|
| <a href="#">102 Buffalo Street</a>            | <a href="#">Enter data</a> | Approved | None          |
| <a href="#">107 Market Street</a>             | <a href="#">Enter data</a> | Approved | None          |
| <a href="#">123 Buffalo Street</a>            | <a href="#">Enter data</a> | Approved | None          |
| <a href="#">164 Court Street</a>              | <a href="#">Enter data</a> | Approved | None          |
| <a href="#">193 Main Street</a>               | <a href="#">Enter data</a> | Approved | None          |
| <a href="#">2 West Main Street</a>            | <a href="#">Enter data</a> | Approved | None          |
| <a href="#">619 14th Street West Property</a> | <a href="#">Enter data</a> | Approved | None          |
| <a href="#">Cowen B&amp;O Pond</a>            | <a href="#">Enter data</a> | Approved | None          |
| <a href="#">Manos Theater</a>                 | <a href="#">Enter data</a> | Approved | None          |
| <a href="#">Tygart Hotel</a>                  | <a href="#">Enter data</a> | Approved | None          |

[Add a Property to this Cooperative Agreement](#)

# Quarterly Report Management



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Property  [Advanced Search](#)

## Manage Quarterly Reports

Automated Quarterly Reports are available for Cooperative Agreements (CAs) that are:

- Associated to your account; AND
- One of the following CA types: Cleanup, Assessment, or Brownfields Cleanup Revolving Loan Fund (BCRLF)

- [When is my Quarterly Report Due?](#) [+ Expand](#)
- [What should I do if I miss a Quarterly Report?](#) [+ Expand](#)

[Narrow Results](#)

| CA Name                                       | CA Status | CA #       | Announcement Year | CA Type    | State | Funding Type(s) | Previous Quarterly Reports   | Action |        |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |  |
|---|-----------|------------|-------------------|------------|-------|-----------------|--|--------|--------|-----------------------------------|----------|-----------------------------------|----------|-----------------------------------|----------|-----------------------------------|----------|-----------------------------------|----------|-----------------------------------|----------|-----------------------------------|----------|-----------------------------------|----------|--|
| West Virginia University Research Corporation | Open      | BF96379101 | 2020              | Assessment | WV    |                 | <div>8 Quarterly Reports   <a href="#">Hide Details</a></div> <table><tr><th>Report</th><th>Status</th></tr><tr><td><a href="#">FY2022 Qtr4 (PDF)</a></td><td>Approved</td></tr><tr><td><a href="#">FY2022 Qtr3 (PDF)</a></td><td>Approved</td></tr><tr><td><a href="#">FY2022 Qtr2 (PDF)</a></td><td>Approved</td></tr><tr><td><a href="#">FY2021 Qtr4 (PDF)</a></td><td>Approved</td></tr><tr><td><a href="#">FY2022 Qtr1 (PDF)</a></td><td>Approved</td></tr><tr><td><a href="#">FY2021 Qtr3 (PDF)</a></td><td>Approved</td></tr><tr><td><a href="#">FY2021 Qtr2 (PDF)</a></td><td>Approved</td></tr><tr><td><a href="#">FY2021 Qtr1 (PDF)</a></td><td>Approved</td></tr></table> | Report | Status | <a href="#">FY2022 Qtr4 (PDF)</a> | Approved | <a href="#">FY2022 Qtr3 (PDF)</a> | Approved | <a href="#">FY2022 Qtr2 (PDF)</a> | Approved | <a href="#">FY2021 Qtr4 (PDF)</a> | Approved | <a href="#">FY2022 Qtr1 (PDF)</a> | Approved | <a href="#">FY2021 Qtr3 (PDF)</a> | Approved | <a href="#">FY2021 Qtr2 (PDF)</a> | Approved | <a href="#">FY2021 Qtr1 (PDF)</a> | Approved |  |
| Report  | Status    |            |                   |            |       |                 |  |        |        |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |  |
| <a href="#">FY2022 Qtr4 (PDF)</a>             | Approved  |            |                   |            |       |                 |  |        |        |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |  |
| <a href="#">FY2022 Qtr3 (PDF)</a>             | Approved  |            |                   |            |       |                 |  |        |        |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |  |
| <a href="#">FY2022 Qtr2 (PDF)</a>             | Approved  |            |                   |            |       |                 |  |        |        |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |  |
| <a href="#">FY2021 Qtr4 (PDF)</a>             | Approved  |            |                   |            |       |                 |  |        |        |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |  |
| <a href="#">FY2022 Qtr1 (PDF)</a>             | Approved  |            |                   |            |       |                 |  |        |        |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |  |
| <a href="#">FY2021 Qtr3 (PDF)</a>             | Approved  |            |                   |            |       |                 |  |        |        |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |  |
| <a href="#">FY2021 Qtr2 (PDF)</a>             | Approved  |            |                   |            |       |                 |  |        |        |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |  |
| <a href="#">FY2021 Qtr1 (PDF)</a>             | Approved  |            |                   |            |       |                 |  |        |        |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |                                   |          |  |

Showing 1 to 1 of 1 entries

# Take Away Information

## General

- Coordinate with QEP to determine how to divide tracking and reporting tasks
- Do not wait until the end of each quarter!
  - Track tasks, meetings, budget as you go
- Use project management method to track along the way
  - Project management software (AirTable, etc.)
  - Excel
- Refer back to CA and work plan often to check off what has been completed
- Reporting financials
  - Actual expenses incurred may be from previous reporting period – may not match when actual activity occurred. State which month expense is for in current reporting period.

# Take Away Information

## ACRES

- ACRES Work Package
  - Packages can become **locked for editing** if it remains in your ACRES dashboard with no review. If that happens, contact PO.
  - Packages are used for 1 property or multiple properties
- ACRES View – NOTE: CAR and QEP have different views within ACRES. CAR is owner and “shares” with QEP
- Attachments cannot be uploaded to ACRES
  - They can be emailed separately to PO
- When entering new property into ACRES, search for property first to ensure there are no redundancies



# Questions



# WVU TAB Can Help!

# WVU TAB

## Technical Assistance to Brownfields (TAB)

Additional resources for communities completely free

Key resources include:

- **Brownfield Education**
  - Trainings, webinars, events
- **Resource Identification**
  - Grant writing assistance, grant review, resource road maps
- **Local Brownfield Program Support**
  - Brownfield inventory development, questions on sites, technical support
- **Project Development & Design Assistance**
  - Site-specific assistance, design support from WVU Davis College

# Upcoming Events

## Webinars

### ***Brownfields/Grants 101***

January 30, 2023 at 12 pm (ET)

Register [here](#)

### ***Hot Topics***

#### **Public Health – Part 1**

March 23, 2023 at 12 pm (ET)

#### **Public Health – Part 2**

April 13, 2023 at 12 pm (ET)

Check back [here](#) to register





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