Quarterly Reports

Do’s and Don’ts
Quarterly Reports

Brownfields Tribal Response Program
Quarterly Progress Report: #

Reporting Period: January 1 – March 31, 2014

Submitted on: April 30, 2014
Prepared by:
Preparer’s name
Street address
City/town, State Zip-Code
Phone number
Email address

Cooperative Agreement No. RP-___________
Project Period: October 1, 2013—September 30, 2014
Quarterly Reports

- **Quarter 1 Summary**
- DO: tell a complete story about the general program activities that have occurred.
- DO: list accomplishments, milestones met, and deliverables completed.
- DO: list Issues, delays or problems and their impacts
  - Were these resolved?
  - If they were not resolved, what needs to be done to resolve?
- DO: discuss major activities planned for upcoming quarter.
Quarterly Reports

- Don’t: use the same narrative each quarter-UPDATE
- Don’t: assume that the reader knows all the details about your program. The PO is not the only one who reads these reports.
- Do include attachments, such as meeting announcements & sign in sheets, meeting notes, copies of assessment reports, etc.
Quarterly Reports

- Status of Tasks
- DO provide a description of activities under each task:
  - Project Management: managing the cooperative agreement, financial management, quarterly reports
  - Program Enhancement: building your program, community outreach, public record
  - Site Specific: Has your PO “okayed” this? Eligibility outline? Is it included in your workplan?
- DO provide details. We like to know what you are doing!
# Quarterly Expenditure Report

**DO NOT IGNORE THIS TABLE!!!**

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<thead>
<tr>
<th>Task 1</th>
<th>Task 2</th>
<th>Task 3</th>
<th>Total Quarter</th>
<th>Total to Date</th>
<th>Remaining</th>
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Quarterly Reports

- DO track your budget
- It is important to know if you have overspent or underspent your budget!
- DON’T wait until the end of the grant to figure this out!
- Do provide details about your expenditures for:
  - travel
  - training
  - equipment
  - contracts
Why do you have to do this?

- Secure future funding
- Accountability
- New TRP staff & New EPA POs
- Audits