

## What to Expect as a CARE Project Officer

### CARE Project Officer Training 2011

#### In the beginning

- After your CARE project's workplan is final, (see the CARE document: *"Negotiating a CARE Workplan"*) the real work starts. Some CARE grantees may not need much of your time/help, others will. Be open and willing to help them (both Level 1 and Level 2 Project Officers)
- Understand what the CARE program expects of them. To do this, you too must understand the CARE Program. To best familiarize yourself with CARE, consider:
  - Reading the 2011 RFP
  - Go to the CARE website located at [www.epa.gov/care](http://www.epa.gov/care) and familiarize yourself with what is offered there. Suggested documents to read are located there at the publications page. They include: Promising Practices Report and the Sustainability Checklist documents.
  - Go to the CARE Region 7 website located at <http://www.epa.gov/region07/citizens/care/index.htm>
  - Go to the Environmental Science Connector (ESC) for examples of the different reports available there to review; Identify resources here which may be useful to you.
- There are many helpful resources for communities working on environmental issues listed here. (Examples?)XXXXX

#### Helpful Hints for new Project Officers

- Speak with your CARE Regional Coordinator (RC) on a regular basis. Speak to the RC early on in your project period. Make an appointment with the RC to go over your workplan and next steps.
- Understand from your RC what your travel budget is for this project. Plan your project site visits according to your budget.

- Use your CARE travel budget wisely. Often there are limited trips for project visits. Go to the CARE community when the Grantee needs your help the most.
- Use a Regional or CARE designated conference call line for project conference calls as often as needed.
- Ask the RC if you can meet on a regular basis with them to update them on your project and share/gain insight.
- Consider meeting as needed with your other Regional CARE POs to gain insight from them.
- Help your grantee with their meetings if there is a need.
- Create an agenda for your project's meetings (the in-person ones and the conference calls you have with your grantees) - these planned agendas will help you and the CARE grantee best manage the grant throughout the grant period.
- Always refer back to your workplan and ensure that the grantee is on track to what they have committed to.
- Consider using a logic model to help keep track of the work committed to by the grantee.
- Monitor the grant expenditures in relationship to the Workplan. Help to ensure that the money spent matches the planned work.
- Hold as many telephone conference calls with your Grantee as they may need (e.g. consider weekly, bimonthly, or monthly conference calls.) Consider hosting these calls at the same time and day of each week/month/quarter.
- Use your conference calls and face-to-face meetings to go over the workplan. Ask for updates regarding each goal/objective/action. Take notes at each call/meeting and document what was said and committed to and/or changed. Use these notes to keep you and the Grantee on track. Keep these notes in your project officer grant file.
- Keep in mind that your task as the CARE PO is to help the grantee stay on track, deliver what they have committed to do and deliver the best CARE results possible.

### **Helpful Resources for the CARE Project Officer**

- Participate on the CARE Project Officer's telephone conference calls, held every month. See the CARE PO Conference Call schedule (handout).

- If you are facing a particular issue/concern/problem, ask to have that issue discussed on the CARE PO call ---that is what the calls are there for – to help CARE POs effectively manage their CARE Level 1 or Level 2 projects.
- Keep your Regional Coordinator updated on any issues/concerns. Remember that your RC will be aware of issues which have been raised in other Regions. Also feel free to contact any CARE PO who might have experience with your concerns.

## CARE Level 1 Project Officer Tips

- Help your CARE Grantee understand the CARE Roadmap and (if appropriate) the PACE-EH methodology, or whatever process they have selected to engage their community in a holistic environmental assessment. Walk through HOW they will deliver each stage of their process
- Remember these tools are on the CARE website at:  
<http://www.epa.gov/care/publications.htm>
- If you get stuck in HOW to help them proceed, ask your RC, your other regional CARE POs, or any of the trainers here today. Ask your questions on the CARE PO conference call, or call any another CARE Project Officer - we are all there to help one another.
- **Quik Reports Tool** - The Quik Reports tool is designed for managers, grants specialist and project officers who need access to reports to base decisions. The tool features prompts that allow users to tailor reports for specific information needs (e.g. a specific project officer's workload.) The tool includes both Pre-Award and Post Award reports.

The tool features include the ability to assess and view workload and prioritize work. Other features include a link page which allows users to hotlink to various parts of the IGMS and to other IT resources needed in the award and management of grants. Finally, Quik Reports tracks grant specialist progress in conducting ULO reviews.

**Please Note: Quik Reports will utilize the same URL as Post Award Baseline Tracking.**

Once you click on the URL the following three tabs appear:

Tab 1 - **Quik Report**

Tab 2 - **Post Award Baseline Tracking**

Tab 3 - **ULO Metrics.**

URL: <http://cfint.rtpnc.epa.gov/baseline/>

Work with your Grant Specialist to learn about Quik Reports Tool for your use so that you can better manage your CARE projects.

- Monitor through Quik Reports Tool how your grantee is drawing down their grant funds. Headquarters and Regional Finance Offices want each PO and RC to keep an eye on the efficient use of the funds (i.e. your grantee should not be a

year into their grant without yet drawing down any funding.) As a PO you should be monitoring their budget withdrawals on at least a quarterly basis.

- Help your CARE Grantee focus on the Sustainability of their project and the work which follows after the grant is closed. See the “**CARE Sustainability Checklist**” handout and use it as a guide throughout your project.

### **CARE Level 1 Project Officer Tips**

Frequently Asked Questions and Challenges occurring during a CARE Level 1 process that your Grantee may have:

- How best can we collect initial environmental concerns?
- How should we perform the Risk, Ranking, and Prioritization phase of a CARE Level 1?
- How can we best build the community partnership?
- How can we best engage businesses? The State agencies? Local government agencies?
- Give us examples on how best to engage youth in the project?
- How can we keep our volunteers coming back?
- How should we deal with difficult volunteers/partners?
- How should we deal with volunteers/partners that want to “take over” or those that don’t attend the process meetings?
- How should we keep those informed of our progress - those that have missed our planning meetings?
- Should we use an 18 or 24 month grant period? (This is a workplan negotiation issue.)
- How can we best work with diverse communities that have many different languages?
- Is there a cultural competency or other similar training available?
- Should we use a neutral facilitator for our public meetings or our leadership meetings OR should we facilitate the meetings ourselves (note: this may be a workplan and budget line item negotiation item.)
- Does our budget support our plan? If it doesn’t how can we work out changes in our budget and workplan so that the funds match the work?

- What are the procedures for budget reprogramming?
- What is involved in requesting an extension to the workplan and project?
- What amount of involvement is expected of the CARE Project Officer? How involved will the Project Officer be in the grant process?
- How should the grantee handle political difficulties?
- How will the grantee collect information from the community without paying for a survey?
- How can we appropriately celebrate our successes!
- Other questions?

### **CARE Level 1 Deliverables**

- A local partnership focused on the environment
- Identify the communities concerns
- Educate the community about their concerns
- Rank and Prioritize the community's concerns
- Deliver a partnership, a prioritized list of the communities concerns and possibly some of the local solutions to reduce risks
- Work on how the community group can work toward sustaining their efforts

### **CARE Level 2 Project Officer Tips**

**See the CARE Level 1 Project Officer Tips too!**

- Help your grantee understand their workplan and how they will best deliver their work.
- Find out what CARE and Programmatic resources are available to your CARE Level 2 grantee and host a meeting with those staff members and your grantee. Help both sides understand what that their roles/responsibilities are under the workplan. Staff availability will be based on available resources/travel funds.
- Identify and check with other CARE Level 2 projects (from the past or that are current) that may have taken on similar risk reduction projects. The CARE PO from that project or with their help, their particular CARE grantee, may be able to help you and your Grantee work through similar issues or obstacles.
- Work with your CARE Grantee on the Sustainability of their project. See the Sustainability Checklist handout and use it as a guide throughout your project.

- Your CARE Level 2 workplan should include many measures of success; refer back to these measures throughout the project. Consider how the Grantee will deliver those measures and document them.
- Help them appropriately celebrate their successes!

### **Frequently Asked Questions and Challenges Occurring during a CARE Level 2 process**

- How do we keep existing partners and engage additional partners?
- How will the grantee keep the public and their partners involved during the CARE L2 process?
- Who should be involved that are not yet involved? How can we engage them?
- How can the PO best engage other staff members from their Region to help on a CARE Level 2 project?
  - What happens if there is problem with the Grantee's staff or subgrantees/contractors which are problematic (e.g. under-skilled, not productive)?
  - What do you do if the site's politics get in the way of moving forward?
  - It happens that there is some type of uncontrollable stoppage (i.e. a delay due to an ill staff member) in the Grantee's work – What are you supposed to do?
  - Others?

### **CARE Level 2 Deliverables**

- Keep the local partnership going and growing.
- Keep the community engaged.
- Inform the community of the Level 1 results and the Level 2 actions and next steps.
- Deliver risk reduction actions.
- Announce your successes (e.g. through newspaper articles, radio interviews, Promising Practices EPA articles, web stories on your EPA or outside websites, etc.)
- The community should also hold a celebration to showcase their successes.

- Plan for the sustainability of all of your efforts/actions.