

## **Steps for Processing Projects through Grants.Gov under the Cooperative Agreement for the Californian Cooperative Ecosystems Studies Unit (CESU)**

1. Field office/State office/Washington office funding unit initiates project with a Statement of Programmatic Involvement (SPI), using the template provided. The Program Officer (lead for the funding unit) writes a short statement of work summarizing what the project entails and submits the statement of work and completed SPI to the Grants Management Officer (GMO). The GMO for California-BLM is Traci Thaler (916-978-4529 [Traci\\_Thaler@ca.blm.gov](mailto:Traci_Thaler@ca.blm.gov)).

2. The GMO reads the statement of work and SPI and decides whether the project is an agreement (agency substantially involved) or a contract and writes the Instrument Selection Determination (ISD). For projects over 100K, the GMO submits the SPI/ISD to the Washington Office, which communicates its approval or otherwise of the SPI/ISD to the GMO.

The GMO communicates the ISD decision to the Program Officer and supplies information as to the format for project specification. For projects that can be carried out under a CESU Cooperative Agreement, the GMO copies the ISD decision to the CESU Coordinator. The CESU Coordinator for the Californian CESU is Ed Lorentzen (916-978-4646 [elorentz@ca.blm.gov](mailto:elorentz@ca.blm.gov)).

3. The specifics of the project, what BLM wants, what BLM will provide, the amount of funding, what the cooperator is to provide and perform, how responses to the project posting will be evaluated, and any questions to which the cooperator must respond are drafted by the Program Officer on the template provided (OMB mandated standard format). The CESU Coordinator assists the Program Officer as needed.

The Program Officer submits the project specification to the GMO and CESU Coordinator for review. Edits are coordinated among the Program Officer, GMO, and CESU Coordinator.

4. The Program Officer ensures that a requisition is entered in IDEAS for the project and that the requisition amount matches the total funding identified in the project specification.

5. The GMO finalizes the project specification as a Request for Application (RFA). Chief of Contracting will review and approve the RFA and the GMO will post on Grants.Gov. Although CESU projects must be posted on Grants.Gov per current BLM policy, the following statement can be placed in the “other” category of the Grants.Gov posting, which limits eligibility to the CESU program: “This financial assistance opportunity is being issued under a Cooperative Ecosystem Studies Unit (CESU) program. CESUs are partnerships that provide research, technical assistance, and education.”

6. The Program Officer, GMO, CESU Coordinator and additional subject matter expert, if necessary, evaluate applications based on the criteria established in the solicitation and select recipient.

7. If changes are needed to the selected proposal, the Program Officer or CESU Coordinator will communicate with the Principal Investigator of the intended recipient to finalize the proposal. The CESU Coordinator forwards the final proposal to the GMO for review and approval.

8. The GMO communicates notice of award to recipient, awards the agreement via Form 1511, and upon executed return, obligates the funds, countersigns, and returns. The GMO reports the action in FAADS no later than 10 days after award.

The GMO finalizes all paperwork with the recipient, copies the Program Officer and CESU Coordinator on final project and budget forms. The Program Officer communicates and copies forms to the recipient's Principal Investigator.

9. The CESU Coordinator enters relevant information for the project into the appropriate CESU reporting database and copies the Host University with the signed agreement for the project.

10. The Program Officer monitors project activity, reviews requests for reimbursement or quarterly fund drawdowns in ASAP, whichever is applicable. The Program Officer advises the GMO and CESU Coordinator of any issues arising in performance of the project.

11. In the event that a CESU agreement is to be modified, the Program Officer and the cooperator agree on the desired action and forward Forms 1511-2, 424 and 424a if relevant to the CESU Coordinator. The CESU Coordinator reviews the documents and either (1) concurs with the content as presented, (2) requests edits from the Program Officer, or (3) disagrees with the proposed modification and states the reason(s) for disagreement to the Program Officer. The CESU Coordinator also communicates this review to the GMO. The GMO decides final wording and budget for the modification and copies the resulting 1511-2 and 424a to the CESU Coordinator and Program Officer.

12. The Program Officer notifies the GMO and CESU Coordinator of project completion, and certifies completion, receipt of deliverables, and final invoice. The GMO authorizes final payment and closes out the agreement. The GMO notifies the Program Officer and CESU Coordinator of closeout.