Project Logistics Tracker

An internal document that clarifies important information about a project and how it will be coproduced. Intended for key staff, including funders and project leads.

We suggest that the project leads from the resource management agency and science agency/organization begin to fill out this information together soon after a project receives funding. Reviewing and discussing this information together with the entire project team and other core project staff will help to clarify roles, responsibilities, and expectations for the entire partnership in a proactive, transparent way. Some information and sections may be unknown or not applicable to the project; leave those sections blank. We suggest that the project team store this document in a location that is easily accessible to all and revisit the information periodically to keep it up to date.

Title	
Working project title	
Date last updated (and by whom)	
Interagency Agreement (IAA)	
Title on IAA and/or statement of work for the project	
IAA number	
IAA start and end dates	
Notes (e.g., funding authority, whether the IAA is severable or nonseverable, any modifications to the IAA and the date they were signed)	
Funding	
Management agency, program, and position/person who provided the funding	
Science provider, program, and position/person who authorized IAA and/or receipt of funds	
Original funding amount and date awarded	
Any additional funding amounts and sources for the project and date(s) awarded	
Science provider's in-kind contributions or leveraged funds	

Overall project cost (e.g., project funding + in kind support + other contributions)	
Science provider's account number(s) and name(s)	
Current net available balance in account (include date of balance)	
Start and end date(s) for account(s)	
Notes (e.g., funding code(s), no-year funds)	

Coproduction

Level of coproduction
Check the box with the intended coproduction level (low, medium, high).

Please see "Tool 2: What Level of Coproduction Makes Sense for My Project?" for more information on different levels of coproduction that may be best suited for different types of projects, and what those levels of coproduction involve.

Levels of coproduction:

Coproduction level →	Low	Medium	High

Management agency offices/parties involved in coproduction (include topic/component of project, if applicable)	
Position/person from the management agency who authorized the project to be conducted using a coproduction approach	

Data Sharing and Project Approvals

Notes Include any data sharing agreements, permits needed, animal care approvals, etc.	

People

Resource management lead (This is the day-to-day decision-maker for regular project work who is also responsible for communicating with the research lead and with the management agency Contracting Officer's Representative (COR).)	
Management agency COR (This is the formal decision-maker for the funding and for any major project redirection, who is also responsible for communicating with the funder, resource management lead, and research lead.)	

Research lead (This person is responsible for communicating with the resource management lead and COR and with the position/person who authorized and oversees funding to the researcher.)	
Project team members (Includes those responsible for attending project meetings, participating in project discussions, and being current on project activities; members advise project leads on project decisions.)	
Core work team (Includes staff who conduct day-to-day work on the project, including collecting and analyzing data.)	
Additional technical experts (Includes people outside of the project and core work teams (e.g., other field biologists) who provide expertise on a specific topic.)	
Others who would like to receive information about the project (Includes people who might be invited to project briefings and encouraged to share ideas or concerns with the project leads or COR. Identify who on the project team will keep them informed about the project, how, and how often. Typically, team members take responsibility for communicating with others in their agency with an interest in the project.)	

Project Goals, Activities, and Deliverables

Overarching goal from the IAA (or modification), if applicable	
Project goal and management need (This is usually drawn from the project statement of work.)	
Anticipated project deliverables (e.g., manuscripts, datasets, tools)	
Target users of project products	
Project communication materials List and include links to project website, project briefing sheets, and other communication materials. Store copies of all materials in a location accessible to all project team members. This is a running list to be updated over time.	

Project communication plan and responsible parties
Briefly describe who will share project updates and deliverables with interested parties and when and how that sharing will happen.

Project briefings
List the date, target audience, and presenter for each briefing, along with the presentation title and link. This is a running list to be updated over time.

Project deliverables
List citations and links to conference abstracts and presentations, journal publications, and other project deliverables. Note that this transitions from a list of planned deliverables to a list of completed deliverables over time, and may evolve based on project direction, progress, and decisions.

Notes