

New Process: Fund Request – Work Plan Tasks

20 November 2024

Every year as a Tribal Response Program (TRP) Coordinator, I am faced with the task of writing out all the work for the following fiscal year in the Funding Request. This is difficult for a couple of reasons:

- The EPA wants to see “programmatic expansion” every year.
 - This is difficult because I am by myself running the TRP – how much can I reasonably expand every year?
- You can’t just copy and paste all the tasks from one year to the next.
 - They want to see a variety of tasks from year to year.

So to meet both of those bullet points, I have created a new Excel spreadsheet to hopefully facilitate the process.

1. To start: I put in all the work tasks from each work plan from FY2019 when I took over. I made sure that each element from the work plan documents had their own section in the spreadsheet:

- | | |
|---------------------------------|----------------------|
| • General Management Activities | • Element 4 |
| • Element 1 | • Public Record |
| • Element 2 | • Site-Specific Work |
| • Element 3 | • Other |

To make sure all the data went into the correct place:

- I transversed copy and pasted so that I could have all the information in rows instead of in columns.
 - Part of the trouble is that the work plans are different from year to year, so the cells are not going to line up (which is ok).
 - Colors:
 - i. Tasks that are the same from year to year and **required elements** (e.g. Writing Funding Requests, QPRs, etc.) are colored: green.
 - ii. Tasks that don’t exist in all versions of the work plan are colored: orange
 - iii. Orange tasks that are carried down at least twice are colored green the third time they’re carried down. (This way I’ll know to add them to the most recent version of the work plan.)
 - iv. Tasks that were in a work plan that I don’t want to do again have: red font.
 - v. Tasks that were miscategorized (i.e. they go under a separate element) are colored: purple
 - vi. Tasks that are duplicates (even “different words but same meaning) are colored: yellow
2. I started with FY2019 and then tried to make the cells in FY2020 underneath align with FY2019 above it. This required inserting cells, cut and pasting cells, etc. Once FY2020 lined up as well as possible with FY2019, I did the same, for FY2021: making it align as best as possible with FY2020 above it. This meant that orange tasks had to be carried down each time. Some cells were combined to have continuity from previous years (i.e. They were the same task, they were just worded slightly different). Some cells were split because new versions of the Fund Request Template tried to combine too many separate tasks together (i.e. QPR#4, Success Story, PALs form – QPR#4 & Success Story are fine to have together, but submitting the PALs form annually is a separate task.
 3. Now I have a bunch of green and orange cells in the most recent Work Plan Task line. So what I did was shuffle them around in the spreadsheet like colored tiles: keeping green with green and orange with orange. Green cells to the left; orange cells on the right.

4. The green cells are what I want to include in my Draft Funding Request for the next year. The orange cells are options to include in that Draft Funding Request. The REQUIRED elements that are from the template the EPA Sends out every year are **bolded** and kept all the way on the left.
5. What you want to do is this:
 - Keep the **bolded** green cells all the way on the left.
 - The green cells of tasks you will be including in the Draft Funding Request go next.
 - The orange cells on the right are options that you can include in the Draft Funding Request. Try to think of new activities that you can use as orange cells and add them into the mix of the previous year. (Now that the spreadsheet exists, this could be something that's done during the year to make the Funding Request Process easier.)
 - Use the "Four-Elements Summary Sheet" to add applicable orange cells.
6. Once you get all the tasks for each of the headings put into the spreadsheet and color coded and arranged, go ahead and rotate the text up so that it's all visible in the cell (for printing purposes).