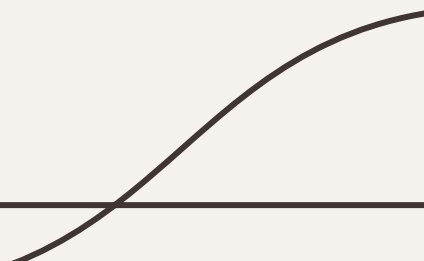




Measuring Sea Grant's Leveraged Funds and Level of Effort

An overview for the Sea Grant Best Practices in Reporting Workshop

Brooke Carney, National Sea Grant Office
February 2022



Annual Report Review Tasks

Measures and Metrics

Susan Holmes,
Evaluation Lead

Impacts and Accomplishments

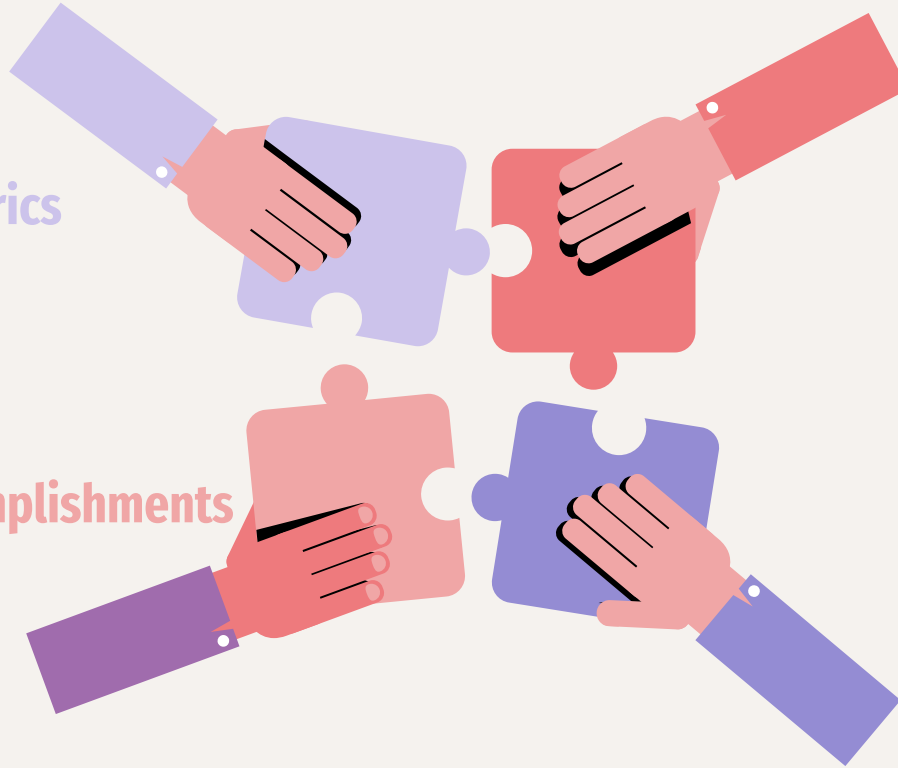
Brooke Carney,
Communications Lead

Leveraged Funds

Your Program Officer

Level of Effort

Your Program Officer



At a Glance

1

Leveraged Funds: Policy and Review

2

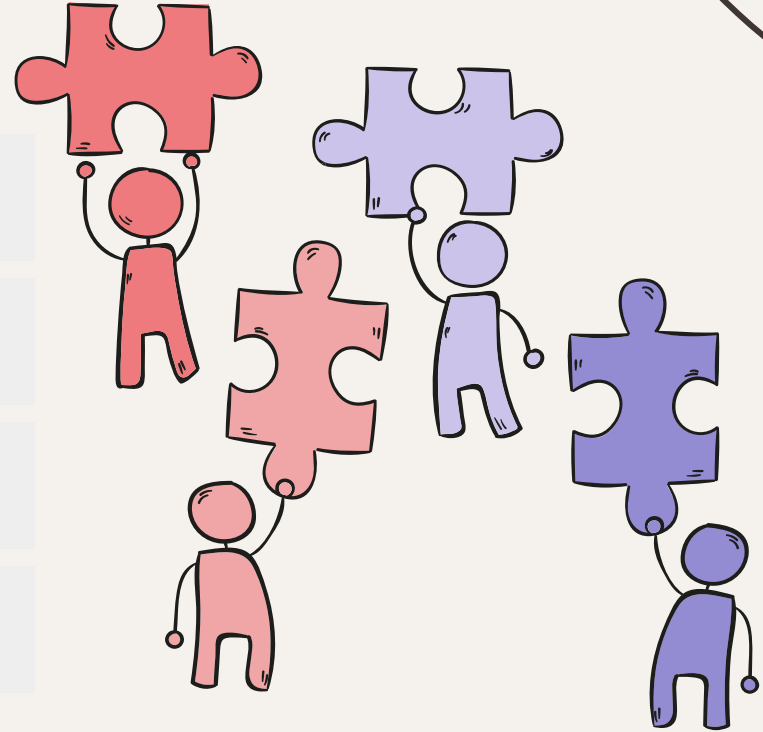
Leveraged Funds: Examples

3

Level of Effort: Policy and Review

4

Level of Effort: Examples

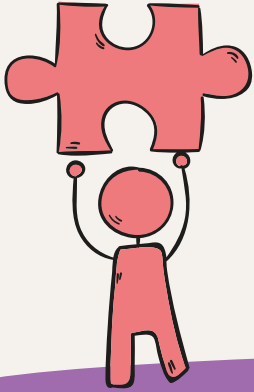


Leveraged Funds: Policy

Federal Sea Grant funds are all funds that pass through the NSGO.

Matching or cost-share funds are required for all Sea Grant awards.

Leveraged funds come from outside sources and can be managed or influenced.

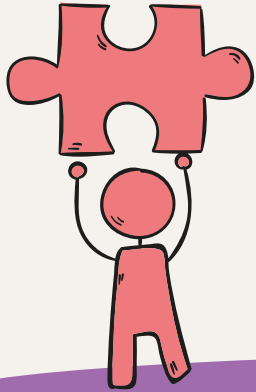


Leveraged Funds: Policy

Leveraged funds are the external funds your program secures in order to carry out its mission.

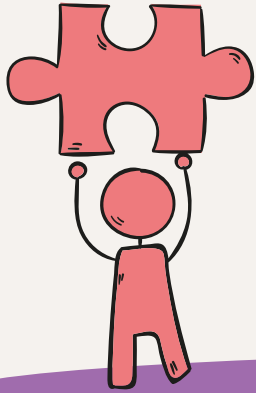
Managed leveraged funds are outside funds that are administered by Sea Grant, such as a grant from a non-profit foundation.

Influenced funds are not managed by Sea Grant, such as collaborating with a City on a grant and then having the City manage the grant.



Leveraged Funds: Policy

Leveraged funds are not required but are a routine and expected component of Sea Grant programs given the heavy emphasis of partnerships by our program.

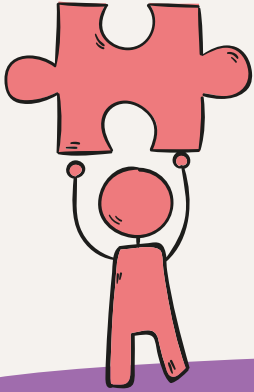


Leveraged funds help tell your Sea Grant programs and contribute to evaluative processes for each program.

Leveraged Funds: Review

Program officers review leveraged funds to ensure

- 1) Connection to one or more projects
- 2) Specific funding source identified
- 3) Source of funds is not NSGO or match



Leveraged Funds: Examples

Alaska Sea Grant example

Report year: 2020

Project name: COVID-19 Rapid Response

Focus area: Resilient Communities and Economies

Funding source: National Science Foundation (NSF)

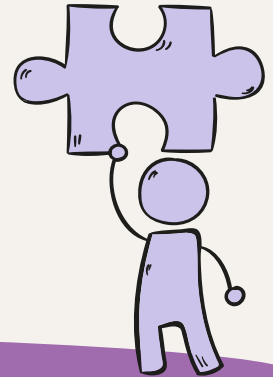
Associated project: A/152-32

Duration: 7/1/2020 to 5/10/2021

Functional area: Extension

Influenced or managed: Managed

Amount: \$67,431



Leveraged Funds: Examples

Hawaii Sea Grant example

Report year: 2020

Entry name: Visualizing Sea-level Rise at Pu'uuhonua O Honaunau National Historic Park with Interactive, Virtual Technology

Focus area: Resilient Communities and Economies

Funding source: U.S. Geological Survey

Associated project: M/PM-1

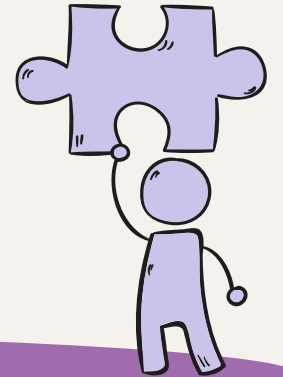
Duration: 6/1/2020 to 5/31/2021

Functional area: Research

Influenced or managed: Influenced

Amount: \$47,522

Note: PI: Lerner Research PI: Thompson

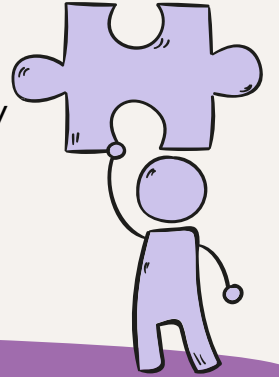


Leveraged Funds

Funding source must be included

If your funding source is another program in NOAA for a grant that did not touch NSGO, specify the NOAA grant opportunity and office.

Influenced funds are more difficult to track because they will not be in your accounting systems.

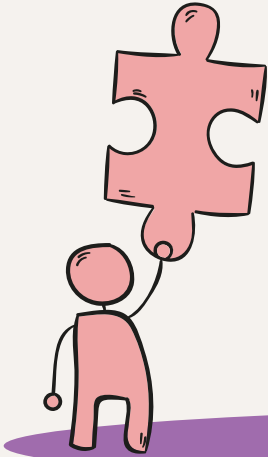


Estimated Level of Effort: Policy

Each Sea Grant program estimates their level of effort for each of the four national focus areas when they upload their strategic plan.

This is the amount of effort the NSGO expects to see from the program each year.

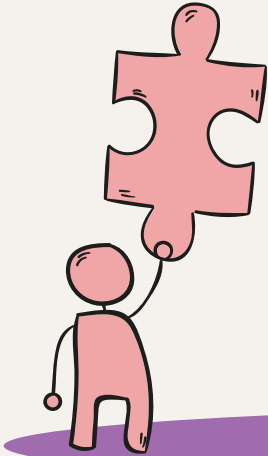
It can be adjusted each year.



Estimated Level of Effort: Policy

Projects, including leveraged funds, contribute to the estimated level of effort in each of the four focus areas.

The estimated level of effort page in PIER provides an overview dashboard of the program's activities and investments.



Estimated Level of Effort: Example

Estimated Level of Effort per Focus Area

The estimated proportion of effort (\$) devoted to each Program Focus Area will be used in weighting scores from the Performance Review Panel.

Estimated Level of Effort by Focus Area for:

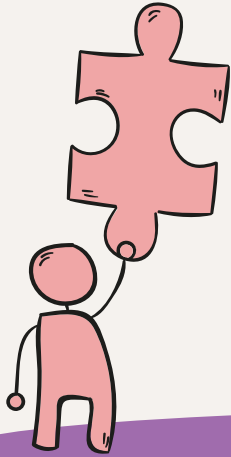
[Export Summary Table](#)

National Focus Area Name	SG Federal	Match	Pass Thru	Federal + Match + Pass Thru	LOE without Leverage (%)	Leveraged (Managed)	LOE with Leverage (%)
Healthy Coastal Ecosystems	\$1,368,990	\$679,226	\$70,466	\$2,118,682	30 %	\$427,546	30 %
Sustainable Fisheries and Aquaculture	\$1,431,278	\$763,058	\$93,012	\$2,287,348	33 %	\$268,631	30 %
Resilient Communities and Economies	\$724,279	\$380,918	\$45,391	\$1,150,587	17 %	\$542,817	20 %
Environmental Literacy and Workforce Development	\$859,355	\$374,961	\$158,375	\$1,392,711	20 %	\$435,619	21 %
Unclassified	\$0	\$0	\$0	\$0	0 %	\$0	0 %
TOTAL INCLUDING UNCLASSIFIED:	\$4,383,902	\$2,198,183	\$367,242	\$6,949,328	100 %	\$1,684,613	100 %

Distribution of Effort across Focus Areas by Project

[Export Project Distribution](#)

Program	Project ID	Project Title	Federal + Match + Pass Thru	Leveraged (Managed)	HCE	SEA	ELWD	RCE	User	Update Time
EdU	A/ACE-1	2018 - 2022 Washington Sea Grant Outreach Program: Communications, Education, Advisory Services	\$1,990,080	\$1,673,277	26 %	16 %	26 %	32 %	KATE.LITTLE	06/08/21 22:23
EdU	A/ACE/COVID-1	2018-2022 Washington Sea Grant Outreach Program: COVID-19 Rapid Response - Securing Adaptable and Resilient Coastal Food Systems in Washington	\$150,079	\$0	0 %	50 %	0 %	50 %	KATE.LITTLE	06/08/21 22:23
EdU	A/ACE/DEI-1	Washington Sea Grant Network Visioning - Diversity, Equity and Inclusion	\$30,496	\$0	25 %	25 %	25 %	25 %	KATE.LITTLE	06/08/21 22:23
EdU	A/HCE-1	2017-2021 Northwest Fisheries Science Center Support For A Social Science Liaison With Washington Sea Grant	\$49,516	\$0	45 %	20 %	5 %	30 %	KATE.LITTLE	06/08/21 22:24
EdU	A/HCE-2	C-CAN: Establishing Biological Core Principles	\$15,000	\$0	50 %	50 %	0 %	0 %	KATE.LITTLE	06/08/21 22:24
EdU	A/RCE-2	Washington Sea Grant 2020 - 2024 Liaisons with Pacific Marine Environmental Laboratory	\$140,934	\$11,336	22 %	8 %	5 %	65 %	KATE.LITTLE	06/08/21 22:24
EdU	A/SFA/N-5	Seaweed lines of change: Laying the groundwork to advance the practice of sustainable seaweed farming in the Pacific Northwest	\$23,454	\$0	0 %	60 %	20 %	20 %	KATE.LITTLE	06/08/21 22:25
EdU	A/SFA/N-6	Catalyzing a Cross-Pacific Regional Collaborative Hub to Advance Indigenous Aquaculture Practices and Enhance Marine Food Production for Cultural-Ecological Benefits	\$605,734	\$0	20 %	60 %	0 %	20 %	KATE.LITTLE	06/08/21 22:25
EdU	A/SFA/N-7	West Coast Aquaculture Collaborative	\$1,021,292	\$0	25 %	75 %	0 %	0 %	KATE.LITTLE	06/08/21 22:26
EdU	E/1-1	2020 Krause-Pellouquin (Katieja Chizolay Moore)	\$59,000	\$0	0 %	0 %	100 %	0 %	system2	06/07/21 23:38



Take Away Messages



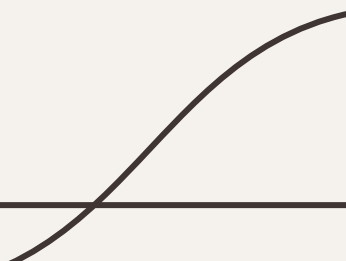
Track your program's leveraged funds; managed and influenced require different approaches for tracking



Monitor your program's level of effort across years and projects; work with your PO to adjust as needed



If you are unsure about policies or procedures, please reach out to your PO. It is their job to work with your program on these issues.

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Questions and Discussion

