SEA GRANT 90-2 PROJECT SUMMARY FORM INSTRUCTIONS

OMB Control No: 0648-0362 Exp 02/28/2021

USAGE. The 90-2 Project Summary Form is used to report all new Sea Grant projects being proposed for funding and execution to the National Sea Grant Office. A filled copy of the 90-2 form should accompany each application to a Sea Grant funding opportunity (both competitive and non-competitive). In addition, a 90-2 form should accompany any Award Action Request to Grants Online that is requesting an action involving new projects (for example, requesting approval to initiate newly selected research projects funded by Future Competed Research placeholder project.)

The 90-2 form is also sometimes required by state Sea Grant Programs (for example, when they are accepting applications for a national Sea Grant competition). If you are a PI preparing a 90-2 form for submission to a state Sea Grant Program, please contact that state Program for any additional instructions or requirements they might have.

AVAILABILITY. This form is available online at *https://seagrant.noaa.gov/insideseagrant/Implementation*. Because the form is periodically updated, it is always best to get a new blank form from online before starting.

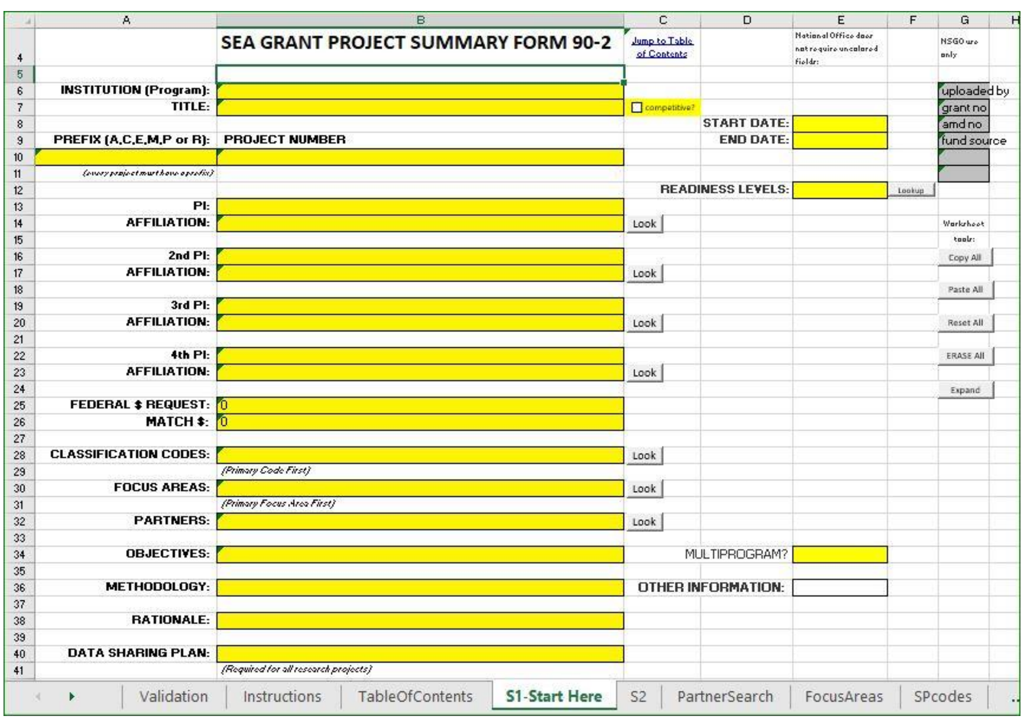
FILE FORMAT. The 90-2 form is a macro-enabled Excel spreadsheet. When the form is required, it must be submitted as an Excel spreadsheet in its original file format—a PDF printout of that spreadsheet is not acceptable. The only format changes you may make before submitting is that you may convert the Excel file into a Macro-*disabled* Excel spreadsheet, or into a Zip file. Most application preparation software will now accept an Excel file attachment. Consult your software administrator if you have trouble attaching it, and if they cannot help check with the National Office.

LONG AND SHORT FORMS. The 90-2 form comes in two versions, the “Long Form” and the “Short Form”. The Long Form has space for up to 50 different projects to be entered on a single form. The Short Form is designed to be used for reporting one (or at most, two) projects on a single form. Older versions of the Short Form had a few formatting differences from the Long Form, which in the most recent versions have been removed. The two forms are now identical except for the number of projects that the forms can accommodate. Unless the specific submission instructions you are following say otherwise, is it acceptable to use the Short Form for any submission involving only one or two projects, and it is always acceptable to use the Long Form.

E-SEAGRANT. Many state Sea Grant Programs make use of the e-SeaGrant program to track and accept data on new projects. e-SeaGrant has the ability to export project data onto a 90-2 form. Consult e-SeaGrant instructions for the steps needed in e-SeaGrant to prepare the data for exporting to the 90-2 form.

ENTERING PROJECT SUMMARY DATA: THE FIRST PROJECT.

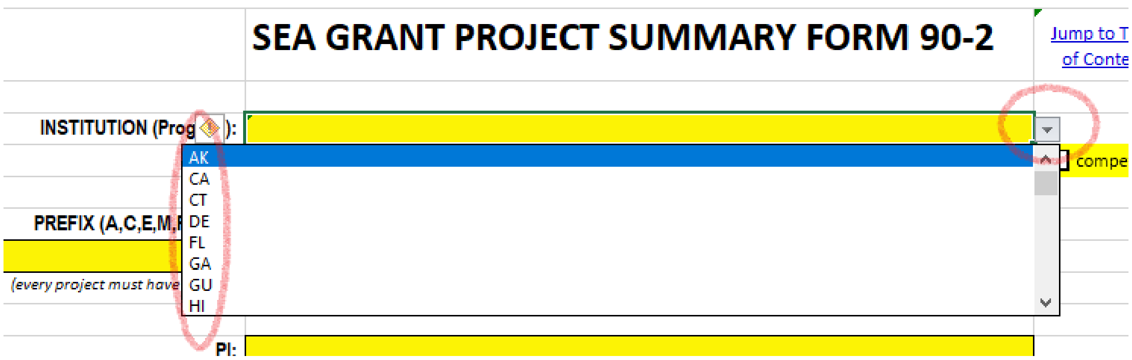
Go to the tab on the 90-2 form labeled “S1-Start Here”. This is where summary data for the first project is entered. If you are starting with a new 90-2 form, all of the fields you need to enter should be blank, as shown below. If you imported data from e-SeaGrant, some or all of the fields may have information in them, and you can now correct this information by typing over it, or add additional information.



Fill in your project information in the Yellow cells. You may type text or data directly into these cells, or copy and paste from another source.

Note that if you are pasting a large amount of text into one of these cells, you may have to double-click the cell to put it in "Text" mode before pasting. Any other time, you should single-click the cell to select it. This is a vagary of Excel.

For "INSTITUTION (PROGRAM)", select a standard Sea Grant Program abbreviation from the drop-down menu. Click on the cell, and a small downward triangle appears to the immediate right. Click on that triangle, and a menu of Sea Grant Program abbreviations appear from which you may pick.



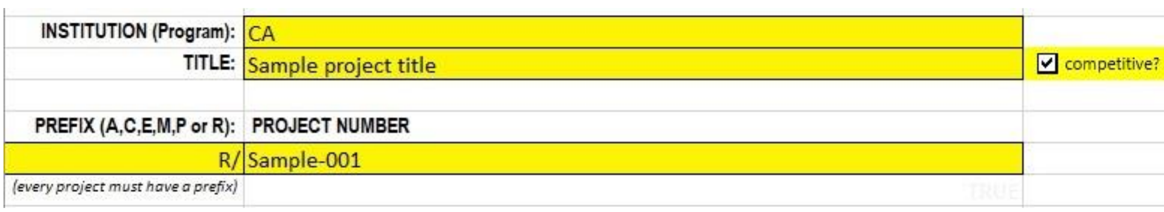
Please do not write in a version of the Program name or abbreviation that is different from what is in the drop-down menu. If your project is not associated with any Sea Grant Program, select "other" from the very bottom of the drop-down menu.

Type in the project title in the next yellow cell. If this project was selected in a competition, or if you are submitting this proposed project to a competition, check the small "competitive" box next to the project title cell.

Next enter your project number. Use the project number convention (if any) from the specific submission instructions you are following.

All project numbers must begin with a standardized prefix letter that describes the functional area of the project: A/ = Advisory Services (Extension), C/ = Communication, E/ = Education, M/ = Management, or R/ = Research. A sixth prefix P/ is only used for placeholder projects—projects that define a competition or other activity that will result in projects to be selected in the future. A “program development” project gets the M/ prefix.

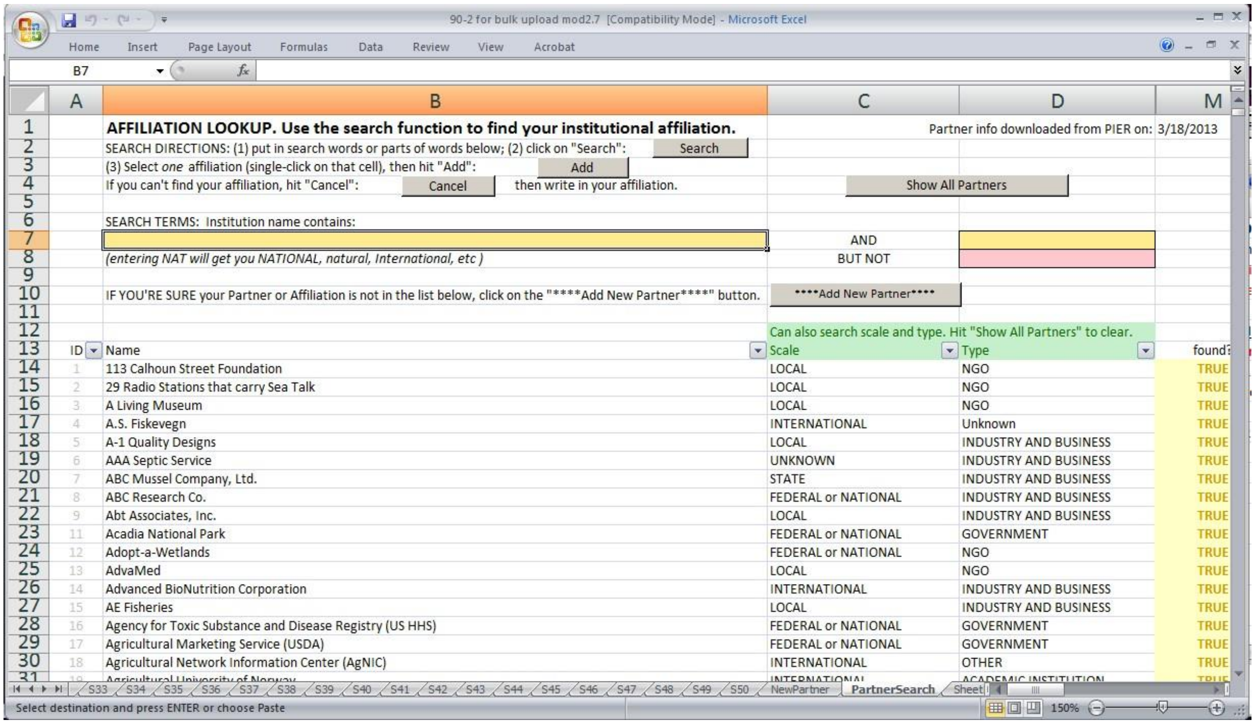
Use the dropdown menu next to the Prefix cell to select the prefix for your project number, then type in your project number in the adjacent cell. Do not leave the prefix cell blank, and do not type in any letter other than the ones provided in the dropdown menu.



Type in the name of the Principal Investigator (PI) in the next cell. In the cell below that, enter the organizational affiliation of the PI. *Do not just type a name in:* you must select the name of the affiliation from a lookup table that has these names in standardized formats.

To access the table of allowable affiliation names, push the Look button next to the cell for affiliation name. (In general, any cell with such a Lookup button next to it means you must select the value for that cell from a lookup table. Push the Look button to get to that table.)

When you look up the affiliation of your PI, you will be taken to the table of all organizations in the PIER database.

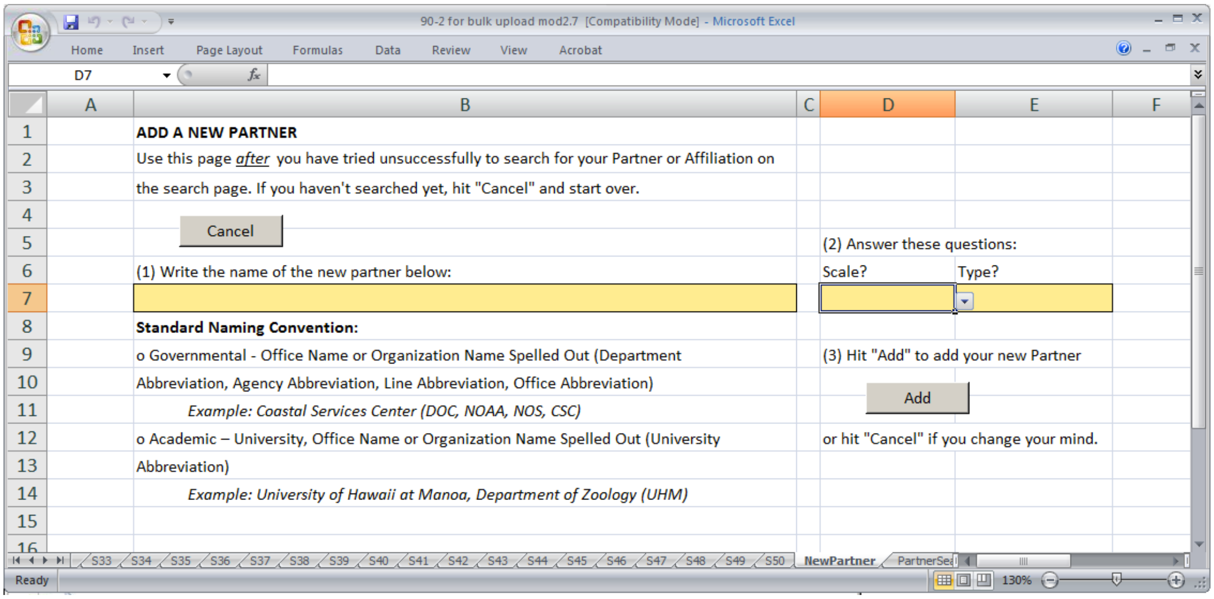


This list is used to identify both PI affiliations, and project partners. Search for your affiliation or partner using words or parts of words in the organization's name. For example, if you put "univers" in the yellow Search Term cell and push the Search button, the list will show organizations with "University", "Universidad", or "Universal" in their names. You can further refine your search by adding an optional second search term in the AND cell, or a term you want to exclude in the BUT NOT cell.

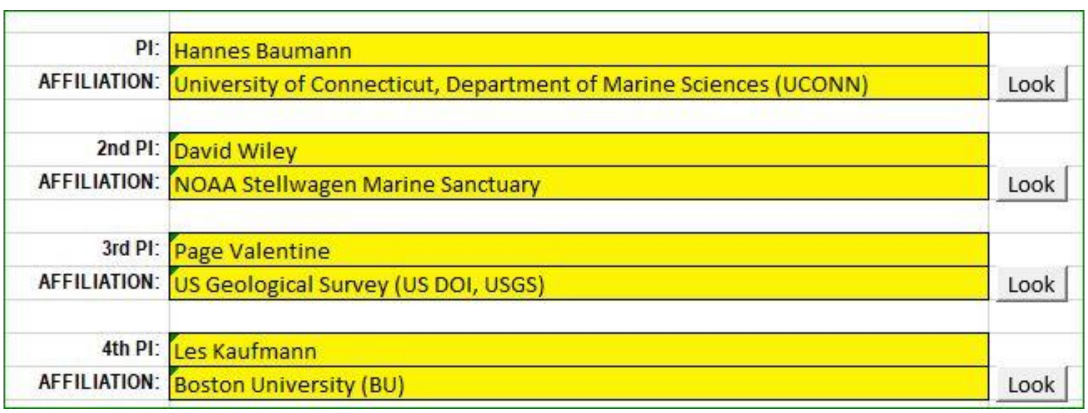
When you have found the PI's affiliation in the list, single-click on the cell with that organization's name in it, then push the Add button. That name will be added to the cell on the 90-2 you have been working on. Push the Cancel button to go back to the project tab without adding any names.

Because new organizations are added to the PIER database all the time, the partner list in the 90-2 Form will eventually go out of date. For this reason, the spreadsheet has a "don't use after" date. We ask you to get an updated spreadsheet from our website after that date, rather than use on out-of-date form that might not have the latest organizations included.

If you are sure that your PI's affiliation organization does not appear in the list (check for alternate spellings or abbreviations!), you can use the 90-2 form to request addition of that organization to PIER. *__Only__ __after__* you have searched the list for your organization, if it's not there, click the ****Add New Partner**** button, and provide the requested information.



Add additional PIs and their Affiliations, up to four total. Use the lookup table for all PI affiliations. The first listed PI will be recorded in PIER as the project's Principal Investigator, and the remaining ones will be recorded as co-PIs.



If your project has more than four PIs, describe the remainder of them in the "Methodology" section below, with a sentence like "Additional PIs: (name), (affiliation)".

After filling in the PIs and their affiliations, fill in the total Federal Request (all years) for this project, and the total Matching Funds pledged (all years).

FEDERAL $ REQUEST:	180,000
MATCH $:	99,538

Next, provide one or more Classification Codes that describe the project. When you press the Look button next to the Classification Codes cell, you are sent to a list of those Codes.

There are about a hundred of these Classification Codes. You can search them all by scrolling down the list, or if you wish you can shorten the list by entering a search term in the box and hitting the Search button.

Select the single most appropriate classification code for your project from the list by clicking on the cell containing that text. Then hit the Add button to add that code to your 90-2 form. Push the Cancel button to go back to the project tab without adding any names.

You may have more than one classification code for a project. If you want to add additional codes, hit the Look button again and repeat the procedure. Just make sure the most important code is listed first—this will become the project's *primary* classification code.

To help organize projects in the database, please make sure you assign the following codes to these kinds of projects. It needn't be the primary code:

<u>Project</u>	<u>Code to add</u>
Research assistantships	144 - Education - Research Assistantships
Fellowships	145 - Education - Fellowships
Future Competed Projects placeholder	171 - Future Selected Projects
Program Development	180 - Program Development

Next, fill the Focus Area cell with the most appropriate Program Focus Area from your state Sea Grant program's Strategic Plan.

Hitting the Look button next to the Focus Area cell takes you to a listing of your Program Focus Areas. Only the focus areas from the state Sea Grant

Program you selected will show up on the list. *But!* If you forget to enter your Program on the 90-2 form before pushing the Focus Area Lookup button, you'll see an error message, *"Did you fill out the 'Institution' field on the 90-2 form?"* and no focus areas.

If you see this error message, hit Cancel to go back to the project tab, enter your state Sea Grant program in the INSTITUTION (Program) cell near the top of the form, and try again.

Select the single most appropriate Focus Area first. This will be your project's *primary* Focus Area. Then, as with classification codes, you can add additional Focus Areas if you wish, by repeating the Lookup process.

The next cell asks for project Partners. If you have any, enter them here. Use the lookup button next to the cell. The Partner list is the same list from which you found your PI Affiliations. You can add as many Partners as you want, in whatever order you want. Add them one at a time.

Fill the next three cells with your project's "Objectives", "Methodology" and "Rationale". If your project summary description is not organized by objectives, methodology and rationale, then you may put the entire project summary in the "Objectives" cell, and leave the "Methodology" and "Rationale" cells blank.

All research projects are required to have a Data Sharing plan. Enter a short summary of the research project's data sharing plan in the next cell. The summary must include at a minimum where the full data sharing plan can be found, and the name of a point of contact about your data. If your data sharing plan is very short, you may copy it in its entirety in this cell. If your research project will not generate any data, all that is needed to be entered is a statement like "This project will not generate any data".

If your project is not a research project, you may leave this cell blank.

Move to the second column of cells on the tab. Near the top of the form are cells for the project's planned Start Date and End Date. Fill these out using a standard date format, such as "2/1/2019".

Below this is a cell to describe the project's Readiness Levels. Unless the specific submission instructions you are using tell you otherwise, you may leave this field blank. If you do need to enter readiness levels, use the Look button to access the allowable values.

Lower down in this second column is a cell labeled "Multiprogram?". This refers specifically to projects that are being conducted or funded jointly by multiple Sea Grant programs. If the project you are describing falls into this category, fill out this cell using the dropdown menu. Regional projects being conducted or funded jointly by Sea Grant programs in the same region should be labeled "regional". Any other type of jointly conducted or funded Sea Grant projects should be labeled "multiprogram". If your project is not being jointly conducted or funded, answer "No", or simply leave it blank.

Below the Multiprogram cell is one more cell into which information can be added, labeled "Other Information". You may add whatever information or comments you like here. The National Office does not load the contents of this cell into its database or use it in any way. It is provided for the convenience of the applicant. It may be used to store information that the applicant might find useful to have on his or her own archival copy of the 90-2 Excel file, for example.

Once all the project information has been entered into the 90-2 form, click the button near the top labeled Rename Worksheet to Project. The name on the tab will change from "S1-Start Here" to the Project Number you provided for that project. This will facilitate navigating directly to the desired project when the worksheet is filled with many 90-2s for many projects.

YEARLY BUDGET.

The final information you need to enter for this project, the budget by year, is not on the project tab, but rather on the Table of Contents tab, one of the first tabs on the spreadsheet.

Program:	PA				NSGO use only:	uploaded by	grant no	amd no	fund source					**OVERALL FEDERAL**	**OVERALL MATCH**	PRINT T.O.C.
Table of Contents					Totals:	0	40,625	0	40,625	0	0	0		0	81,250	PRINT 90-2
Start Date:	02/01/18		contact for questions on this form:	Patty Lanich 814-898-7596 or pal16@psu.edu REVISED 2.6.2018		cum. Match								**overall % match:**		
End Date:	01/31/21			Reset Yearly Fund Amounts and Comments and Dates		Year 1		Year 2		Year 3		Year 4				
						2018	**2018**	**2019**	**2019**	**2020**	**2020**	**2021**	**2021**	**All**	**Years**	
Project ID: (prefix)	(click on blue text to jump to that 90-2) (id no)	Type of project	Principle Investigator	Title	Pg	Federal	Match	Federal	Match	Federal	Match	Federal	Match	**Federal**	**Match**	Comments (Optional)
R/	0.2018	**Research**	Sean Rafferty	Sample proejct	PA	0	40,625	0	40,625	0	0	0		**0**	**81,250**	
														0	**0**	

This tab will show the project number, PI, and title of the project you just entered. Fill out the total budget by year for each year that your project is active in the yellow cells.

90,000	49,538	99,005	50,000	0	0	0	0	189,005	99,538
cum. Match	55.04%		52.66%		52.66%		52.66%	**overall % match:**	**52.66**
Year 1		Year 2		Year 3		Year 4			
2016	**2016**	**2017**	**2017**	**2018**	**2018**	**2019**	**2019**	**All**	**Years**
Federal	Match	Federal	Match	Federal	Match	Federal	Match	**Federal**	**Match**
90,000	49,538	99,005	50,000					**189,005**	**99,538**

If the Fiscal Years shown on the columns where the budget information is entered are not correct, try adjusting the start and end date values shown at the upper left of the Table of Contents tab. (The Table of Contents tab attempts to guess the overall start and end date of the Form from the start and end dates of the individual projects entered, but these can be overwritten if the guess is wrong.)

The Table of Contents tab adds up the total funding for each year and calculates the cumulative percent match of each year of the project. Consult the submission instructions for the specific opportunity you are applying for, to see that opportunity’s requirements (if any) for matching funds.

The Table of Contents tab will also add up the yearly totals you entered to give an “All Years” total of federal and match funds for each project. As a cross-check, if the All Years totals on this Table of Contents tab do not equal the federal and match budget you entered on the individual project summary tab, the cell will light up red, and you should double check your budget values.

In the cell labeled “contact for questions on this form”, enter the name and contact information of the individual who can be contacted if any questions arise about the data on this form.

You may optionally include brief comments about this project in the “Comments” cell; otherwise, your entry of data for this project is now complete.

ENTERING PROJECT SUMMARY DATA: SUBSEQUENT PROJECTS.

If you wish to enter information about more than one project onto this form, first consult your submission instructions to see if multiple projects may be submitted on a single form, or if each must have its own 90-2 form.

The 90-2 Form is provided in two versions, a “Short Form”, which is appropriate to use when you have only one or two projects to summarize, and a “Long Form” which can contain summary information on up to 50 projects.

After entry of information on your first project is complete, you can add a second project onto the blank tab, marked “S2”. The Long Form has additional tabs for additional projects, marked “S3”, “S4”, “S5”, etc.

Add each project summary in the same way that you added the first project’s information. Every new project gets its own tab which contains the full summary except the yearly budget.

The yearly budgets for all projects in the 90-2 form are entered on the single Table of Contents tab. This setup allows for rapid assessment of the totals and distribution of funding among projects for a multiproject application.

MANIPULATING DATA.

Each separate project tab has several buttons that can help with data manipulation:

The “Copy All” and “Paste All” buttons will copy and paste all of the data entered on a project tab, and paste it onto a different project tab, which is useful if you want to consolidate project information entered on two different 90-2 forms onto two tabs of the same 90-2 form, for example.

If at any time you change your mind about including a project, or mess up the entry so bad that you want to start completely over, just hit the “ERASE All” button on that tab, and all data entered on that tab of the 90-2 form will be erased.

The “Reset All” button resets the tab to its original configuration. It removes all manually entered data and restores e-SeaGrant data, if any was imported.

The “Expand” button will make certain cells bigger on the project tab, to make it easier to see all the text.

PLEASE DON’T!

- Don’t move or copy worksheets using Excel’s built-in “move or copy worksheet” feature. This messes up the internal formulas that allow us to upload this data into our database. Use the copy and paste buttons described above to move *worksheet data*, not the worksheets themselves.

- Don’t delete worksheets from the 90-2 form. If you mess one up bad enough that you don’t want to include it, use the “ERASE All” button to get rid of the data.

- Don’t write in your own values for any cell that is supposed to be filled in using a dropdown menu or a lookup table. This includes institutional (program) name, PI affiliations, and project partners.

- Don’t submit a screenshot or PDF of this form rather than an Excel file. Only the Excel file can be used to upload project summary data into the Sea Grant project database.

Questions on this form, or notifications of bugs you discover, should be emailed to oar.sg.info-admin@noaa.gov.