

Legacy Resource Management Program Guidelines for Applicants

The following list contains notable recommendations that applicants should follow to ensure the Legacy Tracker (Tracker) information entry and proposal submission process goes smoothly.

Proposals Tab

- Login to the Tracker, select the proper fiscal year from the pull-down list, and select the title you used on the pre-proposal.
- Ensure that all information currently included in the pre-proposal is accurate.
- Carefully read all Legacy Program staff feedback and incorporate it into your full proposal.
 - Check the notes section of the Action & Review tab for feedback.
 - Check any notification emails from Legacy Program staff.
 - *Note:* emails sent by the Tracker sometimes end up in spam or junk folders.
- **Ensure text contains no formatting** when copying and pasting it into the Tracker.
 - If you're using Microsoft Word, highlight all of the text, copy it, and paste it into the Notepad program which is preloaded on most Windows based computers.
 - Once you're satisfied with the text in Notepad, choose Edit, Select All, and then select Edit, Copy. Next, go to the Tracker; put the cursor in the desired field, and hit Ctrl + V to paste the unformatted text into that section.
- Abide by character limits described in each section on the Tracker.
 - Failure to remain within these limits will prohibit applicants from properly completing and submitting proposals, which can ultimately result in a lower chance of receiving funding.
- After making modifications to any portion of text in the Tracker, hit the Save button **before** proceeding to a new tab.
- Clicking the Next button without clicking the Save button may result in the loss of data.
- Complete all new fields added to the full proposal form.
 - Required fields are denoted with a red asterisk (*).
- **Verify Full Proposal Submittal**
 - After you have completed all required fields (described below) and submitted your proposal, ensure that the full proposal title is listed and its status reads "In Review" under the "Status" column.
 - If your proposal is not listed, please contact Legacy Program staff immediately.

Admin Tab

- ***Author and Co-Author:*** enter the project author and, if applicable, co-author.
 - The Author is the primary proposal author, the main point of contact for the overall scope of work, and the project's lead investigator and coordinator. This individual is not necessarily the entity requesting the largest amount of funding.
 - A Co-Author is an individual from a partnering organization who will not be the main point of contact for the overall scope of work, but who will also request funding.
- ***Project Title:*** the project title should already appear in this field. This is the title given to the project at the time of creation or updated during applicant drafting, prior to submission. Project Titles should not be changed by the applicant after submission without Legacy Program coordination.

- Sponsor: use the pull-down list to select the proper sponsor for the project. The sponsor is the Military Service that has agreed to sponsor and is coordinating the proposal. This field can have a value of one specific Military Service name **or** DoD. Some projects are more appropriately coordinated at the OSD level, and are therefore “sponsored” by DoD and not one specific Military Service.
- Have you already made contact with the abovementioned sponsor: select yes or no to answer this question.
 - **IMPORTANT**: applicants must contact the sponsor by the time of the full proposal submission.
- CMD Division: use the pull-down list to select the proper division or headquarters. This is the Military Service Command responsible for project oversight. If you are unsure of what CMD Division applies, if any, contact the appropriate Military Service representative or Legacy Program staff for assistance. Use the *Contact Us* link on the Legacy Program website homepage to access Military Service representative contact information.
- State: enter the state in which the primary installation is located. If the project is national, then enter the state in which the majority of the work will take place.
- Country: enter the country in which the primary installation is located.
- Continuation Project: select yes or no to indicate if this is a continuation project or not.
 - Provide the previous Legacy project number if the current proposal is considered a continuation of a previously funded Legacy project.
- To the best of your knowledge, is your work original and not duplicative of existing efforts: select yes or no to indicate if this is an original project or not.
- Will you need to access a DoD installation, its personnel, or its resources/ data: select yes or no to indicate whether you will need to access a DoD installation, its personnel, or its resources/data.
- Installations: enter the installation at which the project will take place.
- Expected Completion Date: enter the expected completion date for the project, including all FINAL deliverables.
- Field Location: enter the location(s) where the project will be executed. This could be a site location, state name, region, or the primary installation name. This field is visible only to the project owner and to Legacy Program staff.
- Requesting Organization #1: enter the name of the organization requesting funding for the project.
 - If necessary, enter additional organizations requesting funding. Please note that applicants must explain why additional organizations must receive funding directly from Legacy vs. sub-allocating to any additional partners.
- Primary Theme: use the pull-down list to select the primary theme of the project.
- Secondary Theme: use the pull-down list to select the secondary theme of the project.
- Project Category: use the pull-down list to select the project category.
- Other Funds Available: is the project currently funded or intended to be funded by sources other than the Legacy Program? This applies to direct funding from outside sources and also in-kind support. “In-kind” support is the value of non-cash contributions provided by non-Federal third parties. Third party in-kind contributions may be in the

form of real property, equipment, supplies, and the value of goods and services directly benefiting and specifically identifiable to the project or program.

- *Describe Funds*: describe outside funding sources, funding amounts, and the specific objectives (including deliverables) to be executed using outside funding. While other funding is not required for a successful proposal, it is a plus and should be quantified during the proposal phase.

Resources Tab

- *Resource Type*: use the pull-down list to select Natural Resources, Cultural Resources, or Integrated to indicate which resource type best describes the project.
- *Area of Emphasis*: select the single most relevant area of emphasis from the list provided on the Tracker.

Purposes Tab

- *Purpose*: select at least one of the options available to indicate which pertain to the current proposed work.

Federal Regulations Tab

- *Federal Regulations*: select at least one of the options available to indicate which regulations the project best supports.

Budget Details Tab

- This section indicates how the applicant intends to allocate funding for the project. (ENTER BUDGET ITEMS ONLY FOR THE CURRENT FISCAL YEAR. Address future budget items in the *Describe Follow-on* field in the Follow-on Work tab.)
- Project Authors must indicate the type of award they hope to receive (e.g., Military Interdepartmental Purchase Request [MIPR], Purchase Order, Cooperative Agreement).
- If more than one organization is receiving funds, the Legacy Program strongly prefers that all funds go to one (DoD) source, which can then sub-allocate to the other organizations.
- **NOTE: no profit or fee may be included in the budget.**
- The fields to be populated are:
 - *Item*: choose the most appropriate budget item listed in the given pull-down list:
 - **Equipment** – equipment to be purchased for the proposed project.
 - **Materials/Supplies** – materials and/or supplies required for the proposed project.
 - **Salary** – salary, including number of hours and rate per hour for each performer.
 - **Other Labor** – for sub-allocated or contracted labor.
 - **Overhead/Admin** – indirect or general expenses (e.g., administrative and utility costs).
 - **IMPORTANT**: Unless your organization negotiated a special DoD rate, the Legacy Program federally-approved maximum rate for overhead/administrative costs is **17.5%**.
 - **Travel** – all travel costs associated with the proposed project (airfare, lodging, per diem, car rental, parking, mileage, etc.).

- **NOTE: travel is severely restricted. Applicants need to include a strong justification for any travel.**
 - **Other** – costs that don't fall under any of the other categories.
 - **Description:** a detailed description of the budget item, including specific information on each subtotal's calculation.
 - For Salary, include position, a brief summary of duties, the total number of hours, and rate.
 - For Equipment, include what's being purchased, the quantity, and unit cost as applicable.
 - For Travel, include all details associated with the cost, such as reason for trip, number of travelers, what type of cost (lodging, airfare, parking, car rental, etc.), and rate(s).
 - If funding is needed for laboratory testing, please include a detailed materials and labor breakdown if that analysis is being conducted by you or your staff.
 - If the work is being sent to a laboratory, please include the laboratory name, a description of the analysis being performed, per sample cost, and total.
 - **Cost:** requested total amount for each budget line item.
- The following is an example of a detailed proposal budget field. Note the rates shown below are only examples for illustration purposes.

Item	Description	Cost
Salary	Researcher/Project Manager – to oversee project research and documentation, and develop report (\$80/hour for 100 hours)	\$8,000
Salary	Research Assistant to support and assist the Researcher for 3 months @ \$30/hour for 300 hours	\$9,000
Travel	Lodging for 2 people at the Kodiak Days Inn, 30 days at \$50/ person per day	\$3,000
Travel	Airfare for 2 people from Washington, D.C. to Fairbanks, Alaska at \$500/ person	\$1,000
Equipment	1 GPS tracking receiver	\$200
Materials/ Supplies	5 tracking collars at \$20 each	\$100
Other Labor	Guide/Bear tracking expert for 2 weeks @ \$40/hour for 80 hours	\$3,200
Other	Grizzly Nature Reserve - research fee of \$25 (x 2 researchers)	\$50
Total		\$24,550

Contributing Partners Tab

- Document the dollar value of partner contributions to the project, if applicable. If you add a Contributing Partner, all fields are required for entry. In the case of multiple Contributing Partners, at least one budget item is required per funding recipient. The Item Cost should be rounded to the nearest dollar.
 - The required fields are:

- *New Contributing Partner*: name of the Contributing Partner.
 - *Item*: items/services being contributed (i.e., donated property, equipment, volunteer services).
 - *Description*: description of items/services being contributed.
 - *Value*: dollar value of items/services being contributed.
- ***IMPORTANT***: provide enough detail to allow the proposal reviewers to understand exactly how you derived the total for each budget line item.

Project Details Tab

- *Project Synopsis*: provide a few sentences, not to exceed 1,024 characters (including spaces), that succinctly describe what the project will do, what the results will be, and how those results will benefit DoD and/or the Military Services.
 - ***IMPORTANT***: this is generally the only explanatory information that is sent up the DoD chain for final approval, so applicants should spend an appropriate amount of time writing the *Project Synopsis*.
- *Abstract & Work Plan*: enter text that is comparable to an executive summary of the proposed work. This should break out and completely detail the *Project Synopsis*.
 - The Abstract portion must clearly state the need for the proposed work and the objectives. Cover the WHY question here. Remember, the proposed work must address a current DoD need. Describe the need and how the proposed work relates. Describe how the need was determined. Discuss all conversations you may have had with DoD personnel that contribute to illustrating the necessity and value of the proposed work. Also, describe the overall effort planned and its objectives. **Be specific in what is to be done and addressed, tying it back to the need and the military mission. Describe the expected products or deliverables of the proposed work here.**
 - The Work Plan portion should contain a numbered list of overall planned work phases and methodology (include planning, execution, and analyses phases). Cover the WHAT and WHERE description here. Fully correlate the production of expected products within the Work Plan's phases. If this is a continuation project, discuss the phases and products so far achieved in past funding years. (Note that an expansion of the *Abstract & Work Plan* is expected in the full proposal, if applicants are invited to submit a full proposal. This expansion will be written in the *Approach* field found in the *Scope of Work* tab of the full proposal.)
- *Background*: explain if the proposed work relates to any other projects conducted by DoD or another agency, organization, or firm, including projects that the Legacy Program has already funded.
 - For continuation projects, you must include what work you (or another entity) completed during the previous funding year(s).
- *Military Mission Benefits*: concisely articulate how this project benefits the military mission. The proposed project *must* support military readiness and training. You must correlate your proposed work with cultural resource preservation and/or natural resource conservation and specifics of current military mission objectives. Applicants should detail exactly how and where their project will benefit the military. Clearly define the benefit to the military mission, indicating Military Service benefit, regional benefit and/or DoD-wide significance. Also, list all known installations or specific regions that would

directly benefit from the proposed work. Discuss all conversations you've had with installation contacts that contribute to illustrating the necessity and value of the proposed work and how it benefits the mission. If this is a continuation project, discuss the military benefit so far achieved in past funding years.

- DO NOT provide an overview of the entire project in the *Military Mission Benefits* section.
- *Primary Personnel*: list the name, company, and position for each of the primary personnel that are involved in completing the project.
- *Will you be uploading a map or figure*: select Yes or No to indicate whether you will upload a map or figure.
- **IMPORTANT**: ensure you populate all fields and remain within the specified character limits.

Scope of Work Tab

- *Approach*: list the activities for each funding recipient organization. Specify whether each funding recipient organization has a lead or supporting role for any joint efforts. Discuss how the proposed work will be carried out, who will be carrying it out, and how funds are proposed to be obligated for each funding recipient organization as applicable.
 - Within the *Approach* field, the applicant must expand upon each step listed within the Work Plan for **each** of the Funding Recipient Organizations listed in the Pre-Proposal; detail all planning, execution, and analyses phases here for each organization.

Follow-on Work Tab

- The Author must select one of the following three options that best describes applicable follow-on funding requirements for the project:
 - Project has no foreseen need to request funding for future years.
 - Project has follow-on work necessary to complete current proposed effort. (User has explicit intention to request more funding to complete current proposed project)
 - Potential proposal ideas that could be submitted as new projects in the future. (User would recommend this activity for furthering scope of proposed project in future)

Expected Products Tab

- Indicate all expected products/ deliverables which will accompany the project's completion as funded during the specific period of performance. List all expected products that will be delivered for the particular project.
- The Author must complete the following fields:
 - *Product Type*: choose the most appropriate product type from the pull-down menu list.
 - *Brief Description*: a single sentence describing the expected product.
 - *Date Due*: the intended delivery date of the expected product. This value must be the same or a date prior to the listed project's completion date.

- **IMPORTANT:** The itemized products list should include a six-month progress report, Legacy Program fact sheet (one-page summary of the overall effort), and any other deliverables associated with the completion and implementation of the proposed project.
- **For the six-month progress report, please select ‘Interim Report’ from the deliverables pull-down list.**
- The template for the Legacy Program fact sheet is located on the Tracker under the Info & Guidelines tab at the top of the page.
- Enter expected products separately for each organization requesting funding.
 - Click on the specific Requesting Organization at the top of the page to indicate deliverables for the proper organization.

Technical POC Tab

- This is the contact information for the person responsible for submitting the project proposal and ensuring its successful completion. This tab must be kept current throughout the project’s period of performance. Contact Legacy Program staff to update the name, phone, fax, email, etc. of the Technical POC.
- You must enter Technical POC information for each organization requesting funding.

Financial POC Tab

- This is the contact information for the person who is authorized by the recipient organization to sign the appropriate funding documents (MIPR, cooperative agreement, or project order). This tab must be kept current throughout the project’s period of performance. Contact Legacy Program staff to update the name, phone, fax, email, etc. of the Financial POC.
- You must enter Financial POC information for each organization requesting funding.

DoD Tab

- This section of Tracker is for internal Legacy Program staff use only.

Action & Review Tab

- To save the full proposal and return to complete it later, select “Save with no Action” from the Action pull-down list at the top of the page, and then select “Submit.”
- Check the notes section on this tab to find feedback from Legacy Program staff. Incorporate feedback into the appropriate sections and corresponding tabs on the Tracker.
- To submit a completed full proposal, select “Submit Proposal to OSD” from the Action pull-down list at the top of the page, and then select “Submit.”
- General announcements and requests are made in this section. Project authors must request for project extensions using the “Request No Cost Extension” option listed in the pull-down menu, and they must provide justifications in the “Comments” field just below the pull-down menu.

Letters of Support Tab

- There are two different types of letters that illustrate support of a proposal: one is the Electronic Letter of Support for DoD Installation Use, which is designed specifically to be replicated in format and is intended for DoD installation use; the other is the Letter of Endorsement, which is for all other parties. Note that Letters of Support and Letters of

Endorsement are uploaded by Legacy Program staff only; they also are only uploaded at the discretion of Legacy Program staff.

- If your proposal involves planned research, data collection, or contacting personnel for information on one or more DoD installations, an Electronic Installation Letter of Support is required.
 - *IMPORTANT*: it is not the Legacy Program's obligation to obtain proper authorization from or coordination with the appropriate Military Service point of contact(s).
- To upload a completed/signed Electronic Installation Letter of Support click the Browse button then select the file that you want to upload and click hit "Open."
 - Letters of Support and/or Letters of Endorsement must be signed, scanned, and emailed as an attachment to Legacy Program staff.

Generally, Successful Full Proposals Will:

- Clearly define the direct benefit to the military mission, indicating Military Service benefit, direct testing and training benefits, and any DoD-wide significance.
- Present a *Project Synopsis* that clearly defines the proposed project's objective and the need for the proposed work (i.e., what the project will do, why it's important, and how it will benefit the military's mission).
- Clearly outline the *Work Plan* and *Project Approach* to include planning, execution, and analysis phases.
- Clearly define any relationship between the proposed work and other related or similar work completed or currently underway.
- Define *Expected Products* that will result from the current proposed effort's period of performance.
- Define, in detail, an itemized budget as described in the *Budget Details* section.
- Include an *Electronic Installation Letter of Support*, if included during the pre-proposal stage.