

Project Expenditure Survey

Instructions for Reviewers

The **project expenditure survey** is one of two surveys associated with DOI's study on the economic contribution of restoration (the other survey is the project summary survey).

The purpose of the project expenditure survey is to gather data that can be used by the DOI Restoration Program to track restoration costs by restoration action, restoration phase, and by year. Data collected in this survey will also provide sufficient data for economic impact analyses.

This survey is formatted as an Excel workbook (ExpenditureSurvey_20160901.xlsx). Lists used for questions with dropdown lists are included in the "Lists" tab in the workbook.

In response to question 2 in Supporting Statement Part A, we have justified survey questions in this document.

Expenditure Survey Question Justification

- Columns A and B ask the project manager to provide a written description of the restoration action or expenditure and to classify each action based on a drop-down menu of possible restoration action classifications. The restoration action classification drop-down list was developed by merging the restoration actions listed in questions 22, 24, and 26 of the project summary survey, restoration actions identified in the previous case studies and listed in Appendix 4 of "Estimating the Economic Impacts of Ecosystem Restoration—Methods and Case Studies", and additional IMPLAN sectors that may be applicable. This information will be used to calculate total project costs by restoration action.
- Column C asks the project manager to identify the project phase (planning/project management/compliance activities, implementation, monitoring) for the restoration action. This information will be used to calculate total project costs by project phase.
- Columns D and E collect the cost for the restoration action and the year(s) that the action was completed. Ideally the expenditures could be broken down by year, but in some cases it could be most appropriate for respondents to provide a date range. In the instructions, the project manager is asked to provide the most detailed data available. Date data will be used to calculate total project costs by year and to inflate all dollar values to a common year.
- Column F asks if the restoration action was done in-house or contracted.
 - For restoration actions that were completed in-house, columns G through I collect information on labor hours and labor costs. Projects are often managed by government agencies and nongovernmental organizations. There are no good IMPLAN sectors to match these organizations, so the data provided in columns G through I can be used to estimate direct labor and labor income impacts associated with in-house work. If applicable, the NAICS code for the project manager will have been collected in the project summary survey.
 - For restoration actions that were contracted, columns J and K collect NAICS codes describing the service provided. These codes can be used to bridge contracted

expenditures to IMPLAN sectors. Columns L and M ask the location of the contractor. Location data will be used to determine if the expenditures impacted the local economy surrounding the project site.

- Column N only applies to restoration actions that are identified to be materials purchases. The project manager is asked if the material was purchased direct from the manufacturer, from a wholesaler, or from a retailer. This information will be used to determine if the material purchase needs to be margined in the impact analysis.
- Columns O and P ask if any labor, services, or supplies were donated to the restoration action. This information is important because volunteer labor and donations can be common in restoration projects and will reduce total project expenditures. Information about volunteers and donations will provide information about unaccounted for costs.
- Columns Q and R ask for the quantity restored. This is an optional question and will only be applicable to some restoration actions. These values can be used to report per/acre or per/stream mile unit costs.

Introduction Letter and Instructions for Respondents

Introduction

Thank you for participating in our study of the economic contributions of restoration. The project expenditure survey asks you to provide project costs split by restoration actions. Restoration actions are discrete components of the project for which you can assign costs. For example, restoration actions could include aerial seeding, invasive weed treatment, road repair, or project management. Actions could have been completed in-house by your organization or they could have been contracted to another organization or individual. Please break the restoration project into as many specific restoration actions as you can based on your available expenditure data. Instructions for each field are provided below.

Responses to this survey are not confidential; however, all data will be reported in terms of the project as a whole, and we will not report data specific to individual contractors.

If you have any questions about the survey or the case study, please contact me at 970-226-9164 or ccullinanethomas@usgs.gov. Please email the survey to ccullinanethomas@usgs.gov when it is complete.

Thank you,

Cathy Cullinane Thomas
Economist
U.S. Geological Survey

Survey Instructions

This survey asks you to report total project expenditures split out by restoration actions. The combined costs for all of the restoration actions should sum to the total cost of the project. We define restoration actions as discrete components of the project for which you can assign costs. Restoration actions can include project management activities, planning and monitoring activities, implementation activities, and materials or land purchases, and include actions performed by your organization in-house as well as

actions that you contract out. Please break the project into as many restoration actions as you have available data. If you hired multiple contractors to complete similar work, please list them separately. For example, if you hired three different companies to do mechanical mulching, please list these mechanical mulching activities on three separate lines. Similarly, if part of an action was completed in-house and part was completed by a contractor, please split this action into two lines so that we can distinguish between the in-house expenditures and the contracted expenditures. If an action took place over multiple years and you have data on the cost of that action in each year, please list this action on multiple lines so that we can collect per-year expenditure data. If you do not have per-year expenditure data, then you can list the action on a single line and note the date range in the year(s) field. Please let me know if you have any questions about how to divide your project into restoration actions, or about any of the other fields asked in this survey. Specific instructions for each field are provided below.

Restoration Action Classification: Please pick the classification that *best* describes your restoration action. If none of the classifications fit, select 'other'.

Restoration Action / Expenditure Description: This is an open response question. Please provide a short description of the restoration action in the context of your restoration project.

Project Phase: Project phases include planning/project management/compliance activities, implementation, and monitoring. If you have sufficient data, please split restoration actions that span more than one project phase into separate actions for each project phase; otherwise, select the phase that best fits the project action. For example if you hired a company to do biological surveys as part of planning/compliance, and you also hired the company to do biological surveys as part of monitoring, please split these actions into two lines.

Year(s): Please list the year (YYYY) that this restoration action occurred. If an action took place over multiple years and you have data on the cost of the action in each year, please list this action on multiple lines so that we can collect per-year expenditure data. If you do not have per-year expenditure data, then you can list the action on a single line and note the date range (YYYY - YYYY).

Done in-house or contracted?: If the restoration action was completed by your organization, then mark "in-house". If you hired another organization or individual to complete the action, mark "contracted". If part of an action was completed in-house and part was completed by a contractor, please split this action into two lines so that we can distinguish between the in-house expenditures and the contracted expenditures.

Cost: Please indicate the total cost for this restoration action.

Total labor hours: Please quantify the total number of labor hours spent on this restoration action. Include labor hours for all persons in your organization who worked on this restoration action. If you do not have exact values, please estimate.

Total labor costs: Please quantify the total labor costs for the labor hours spent on this restoration action. Labor costs should include wages, salaries, benefits, and taxes. All other costs, including overhead, are considered non-labor costs and should not be included here. If you do not have exact values, please estimate.

Non-labor costs: Non-labor costs are calculated as the total cost of the restoration action minus labor costs. For example, for an in-house project management action, the non-labor costs might include overhead and travel. This field is auto-filled for you.

Primary NAICS code describing service provided: Please select the 6-digit 2012 NAICS code that best describes the work that was done for the restoration action. If the restoration action was a materials contract, please select the NAICS code that best represents the company from which the material was purchased. **NAICS codes can be found at** <http://www.census.gov/eos/www/naics/>.

Contractor State and County: Please list the state and county where the contractor is located. If the contractor has multiple offices, please list the location that was primarily responsible for the work done for this restoration project.

Type of business from which materials were purchased: If the restoration action was a materials contract, please indicate if the material was purchased directly from the manufacturer, from a wholesaler, or from a retailer. If the material was purchased from more than one type of business, then please split this material purchase onto multiple lines. For example, if part of the material purchase was from a retailer, and the rest was direct from the manufacturer, please split this material purchases onto two lines.

Were any labor, services, or supplies volunteered or donated for this restoration action? Please answer yes if all or a portion of the restoration action was completed using volunteer labor or donated services or supplies. If you answer yes to this question, please describe the volunteer activity or the services or supplies that were donated. If possible, please describe these quantitatively, for example, you could provide the approximate number of volunteer hours or the value of the work or materials that were donated.

Quantity and Unit of Measure: If applicable, please indicate the quantity of the restoration action. For example, if the restoration action was stream re-channeling, you could indicate the number of stream miles that were re-channeled. If the restoration action was planting, you could indicate the number of acres of plants that were planted, or you could indicate the number of plants that were planted. If the restoration action was a seed purchase, you could indicate how many pounds of seeds were purchased.