

# Project Expenditure Survey

## Instructions for Reviewers

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 (RestorationCostForm\_20190619.xlsx). Lists used for questions with dropdown lists are included as workbook sheets; these include restoration action classifications, North American Industry Classification System (NAICS) codes<sup>1</sup> associated with restoration activities (Subcontractor NAICS), and NAICS codes associated with materials purchases (Materials NAICS).

The economic impacts associated with project expenditures will be estimated using the IMPLAN input/output model and data system<sup>2</sup>.

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 from 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 through consultation with the Office of Resource and Damage Assessment.
- Column C asks the project manager to identify the project phase (planning, 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 for the type of expenditure (in-house, contracted, or material purchase). Conditional on the answer to this question, the respondent will then be asked a series of follow-up questions specific to that type of expenditure located in columns H through W:
  - For restoration actions that were completed in-house, columns H through N collect information on labor hours, labor costs, travel costs, and other non-labor costs. Since projects are often managed by government agencies and nongovernmental organizations, there are no appropriate IMPLAN sectors to match expenditures to these

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<sup>1</sup> <https://www.census.gov/eos/www/naics/>

<sup>2</sup> <http://www.implan.com/>

types of organizations. The data provided in columns H through K can be used to estimate direct labor and labor income impacts associated with in-house work, and column N provides additional detail that can be used to match expenditures to the best IMPLAN sector. Location data will be used to determine if the expenditures impacted the local economy surrounding the project site (columns L and M).

- For restoration actions that were contracted or subcontracted, columns O and P collect NAICS codes describing the contractor/service provided. These codes can be used to bridge contracted expenditures to IMPLAN sectors. Location data will be used to determine if the expenditures impacted the local economy surrounding the project site (columns Q and R).
- Columns S through W only apply to restoration actions that are identified to be materials purchases. The project manager is asked for the best NAICS code to describe the material purchased (columns S and T) so the purchase can be bridged to an IMPLAN sector; the state and county where the purchase was made (columns W and V) can be used to determine if the purchase impacted the local economy surrounding the project site; and the type of business from which materials were purchased (direct from the manufacturer, from a wholesaler, or from a retailer in column W) to determine if the material purchase needs to be margined in the impact analysis.
- Columns X and Y ask if any labor, services, or supplies were donated to the restoration action. This information is necessary because volunteer labor and donations can be common in restoration projects and will reduce total project expenditures. This information on volunteers and donations will help explain unaccounted costs within a project.
- Columns Z and AA ask for the quantity restored. These are optional questions 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

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 different 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 by one or more leading organization, or they could have been subcontracted to another organization or individual. Please break the restoration project into as many specific restoration actions as you can based on your available expenditure information. 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.

You can email your complete spreadsheet to [ccullinanethomas@usgs.gov](mailto:ccullinanethomas@usgs.gov). Please contact me if you have any questions.

Thank you,

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## 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 the different 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 the leading organization as well as actions that subcontract out. Please break the project into as many restoration actions as you have available data. If multiple subcontractors were hired to complete similar work, please list them separately. For example, if three different companies were hired to do mechanical mulching, please list these mechanical mulching activities on three separate rows in the spreadsheet. Similarly, if part of an action was completed by the leading organization and part was completed by a subcontractor, please split this action into two rows so that we can distinguish between the leading organization expenditures and the subcontracted 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 in multiple rows so that we can collect per-year expenditure data. If you do not have per-year expenditure data, then you can list the action in a single row 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 the 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 the restoration project.

**Project Phase:** Project phases include planning, 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 a company was hired to do biological surveys as part of planning, and the company was also hired to do biological surveys as part of monitoring, please split these actions into two rows.

**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 in multiple rows 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 row and note the date range (YYYY - YYYY).

**Total Cost for Restoration Action:** Please indicate the total cost for this restoration action.

**Type of Expenditure:** If the restoration action was completed by the leading organization, then mark "leading organization expenditure." If another organization or individual was hired to complete the action, mark "subcontracted expenditure". If part of an action was completed by the leading organization and part was completed by a subcontractor, please split this action into two rows so that we can distinguish between the leading organization's expenditures and the subcontracted expenditures. If you made a large direct material purchase or materials contract (for example, if you directly purchased a large supply of seeds or nursery products), please list this purchase as its own restoration action and mark "direct material purchase or material contract".

**Who performed this action? Or, from whom were these materials purchased?:** Please select the type of organization who completed the action or from whom you purchased the material from.

#### Questions applicable only for the leading organization's expenditures:

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

**Labor costs:** Please report 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.

**Travel costs:** Include all non-labor total travel costs for this restoration action.

**Other non-labor costs:** This should include all other non-labor costs.

**Note:** For the leading organization's restoration actions, labor costs + travel costs + other non-labor costs should equal the total cost for the restoration action.

### Questions applicable only for subcontracted expenditures:

**Primary NAICS code describing service provided:** Please select the NAICS code that best describes the work that was done for the restoration action. **Subcontractor NAICS codes are listed in the 'SubcontractorNAICS' tab.**

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

### Questions applicable only for materials purchases or materials contracts:

**Primary NAICS code describing material purchased:** Please select the NAICS code that best describes the material that was purchased. **Material NAICS codes are listed in the 'MaterialNAICS' tab.**

**State and County where purchase was made:** Please list the state and county where the purchase was made.

**Type of business from which materials were purchased:** If the restoration action was a materials purchase or 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 rows. 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 into two rows.

**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.