



**SPRING 2025**  
**CHESAPEAKE BAY STEWARDSHIP FUND**

FieldDoc Applicant Webinar  
*April 1, 2025*

# AGENDA

1. NFWF – FieldDoc Requirements
2. Using FieldDoc – R. John Dawes, The Commons



R. John Dawes,  
Executive Director/  
Co-Founder



Jake Reilly,  
Program Director



Oleksandr Faryga  
Program Manager



Tori Sullens  
Program Manager



Rose Keyathe  
Program Coordinator



## 2025 SPRING REQUESTS FOR PROPOSALS

- **Small Watershed Grants** aimed at promoting voluntary, community-based efforts to protect and restore the diverse and vital habitats of the Chesapeake Bay and its tributary rivers and streams
  - **Proposals due May 13<sup>th</sup>, 12:00 PM (Noon) ET**
- **Chesapeake WILD Grants** targeting projects that enhance conservation, stewardship, and enhancements of fish and wildlife habitats and related conservation values in the Chesapeake Bay watershed
  - **Proposals due May 13<sup>th</sup>, 12:00 PM (Noon) ET**

## USING FIELDDOC FOR NFWF APPLICATIONS

- FieldDoc provides for comprehensive spatial tracking of proposed and implemented conservation practices
- Currently limited largely to water quality improvement practices under the Chesapeake Bay TMDL
- NFWF expects applicants proposing nutrient and sediment loads reduction activities to use FieldDoc in generating load reduction totals
  - Reductions calculated outside FieldDoc require supporting documentation

# USING FIELDDOC FOR NFWF APPLICATIONS

- All successful SWG and WILD applicants should expect requirements to utilize improved functionality to track all relevant on-the-ground conservation and restoration actions
- For applicants, however, FieldDoc is only required for those proposing water quality improvement outcomes

# USING FIELDDOC FOR NFWF APPLICATIONS

1. Set up project in FieldDoc
2. Upload FieldDoc summary PDF to NFWF proposal in Easygrants
3. Grantees will update FieldDoc to show project progress prior to each Interim and Final Programmatic Report
4. Upload FieldDoc summary PDF to Interim and Final Programmatic Reports in Easygrants

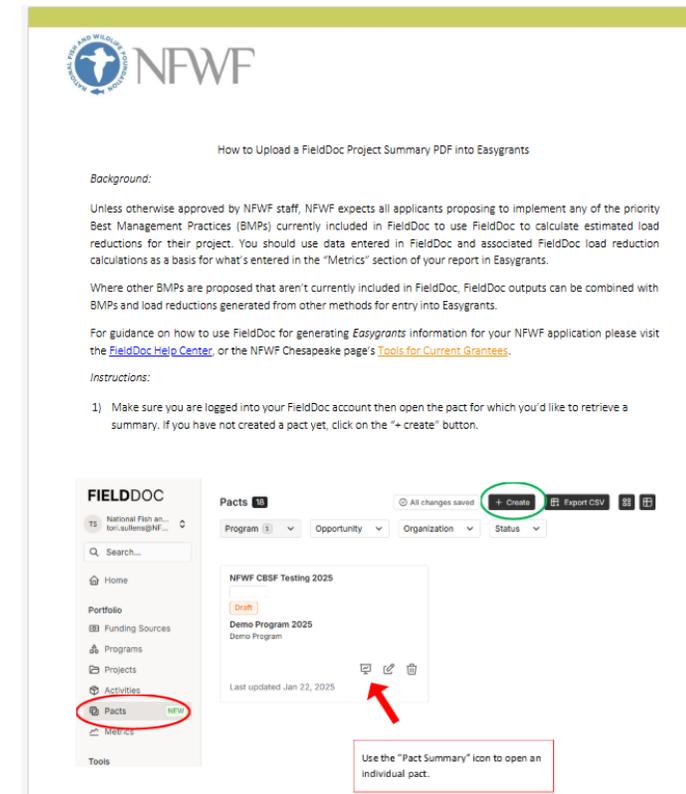
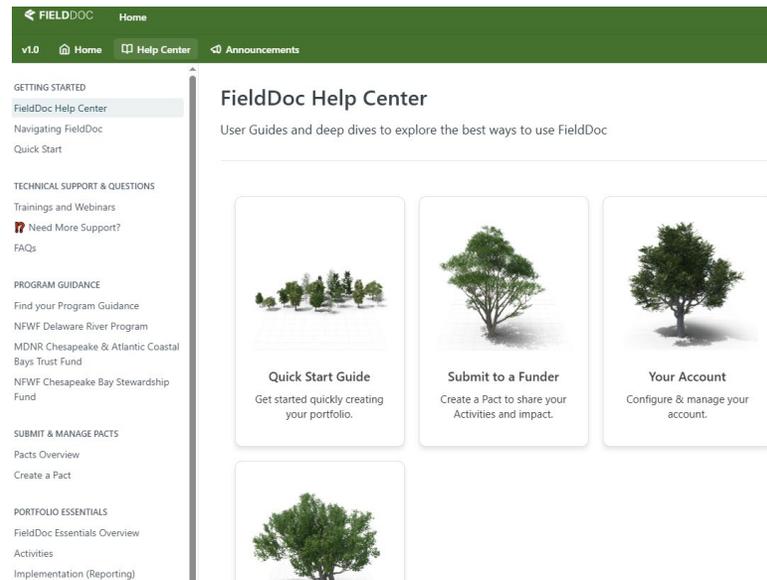
# FIELDDOC+EASYGRANTS

- Please include your project's Easygrants # in your FieldDoc Pact Title
- Easygrants metrics should be consistent with data entered into and/or derived from FieldDoc
- See Appendix A in the SWG and Appendix B in the WILD RFP for more information on applicable project metrics



# FIELDDOC HELP

- FieldDoc Help: <https://help.fielddoc.org/docs/national-fish-and-wildlife-foundation>
- FieldDoc FAQs: <https://help.fielddoc.org/docs/faqs>



# QUESTIONS?

## NFWF Chesapeake Staff:

Jake Reilly, Program Director, [Jake.Reilly@nfwf.org](mailto:Jake.Reilly@nfwf.org)

Tori Sullens, Program Manager, [Tori.Sullens@nfwf.org](mailto:Tori.Sullens@nfwf.org)

Oleksandr Faryga, Program Manager, [Oleksandr.Faryga@nfwf.org](mailto:Oleksandr.Faryga@nfwf.org)

Rose Keyathe, Regional Coordinator, [Rose.Keyathe@nfwf.org](mailto:Rose.Keyathe@nfwf.org)

[www.nfwf.org/chesapeake](http://www.nfwf.org/chesapeake)

FieldDoc Support:

[support@fielddoc.org](mailto:support@fielddoc.org)





# FIELDDOC

## SWG & WILD Application Webinar

April 1, 2025

*Presented by*  
Erin Hofmann, Strategy & Application Lead



Webinar will be recorded.

Please stay on mute!

We will save time for questions at the end.





# Today's Goals

By the end of this training, grant applicants should have a firm understanding of how to use the FieldDoc system to meet their grant application reporting requirements.

## **01. FieldDoc's role in the application process**

Pacts share activity data to funders and give you access to their programmatic metrics list.

## **02. Preparing to use FieldDoc**

Applicants can prepare themselves to build their FieldDoc proposal.

## **03. Submit a Pact:**

Use multiple features to input different data into your FieldDoc activity records.

- Track on-the-ground location information
- Assign standard activity types
- Measure environmental outcomes

## **04. FAQs & Codes**

Tips and guidelines specific to these funding opportunities.

# 01

# FieldDoc's Role

FieldDoc allows restoration practitioners to share critical implementation data through standard data structure with funders as part of their application process that answers key questions.

Grant recipients **report progress** towards implementation and **share the impact** towards environmental goals.



## Location

Delineate the activity location with points, lines, and polygons.



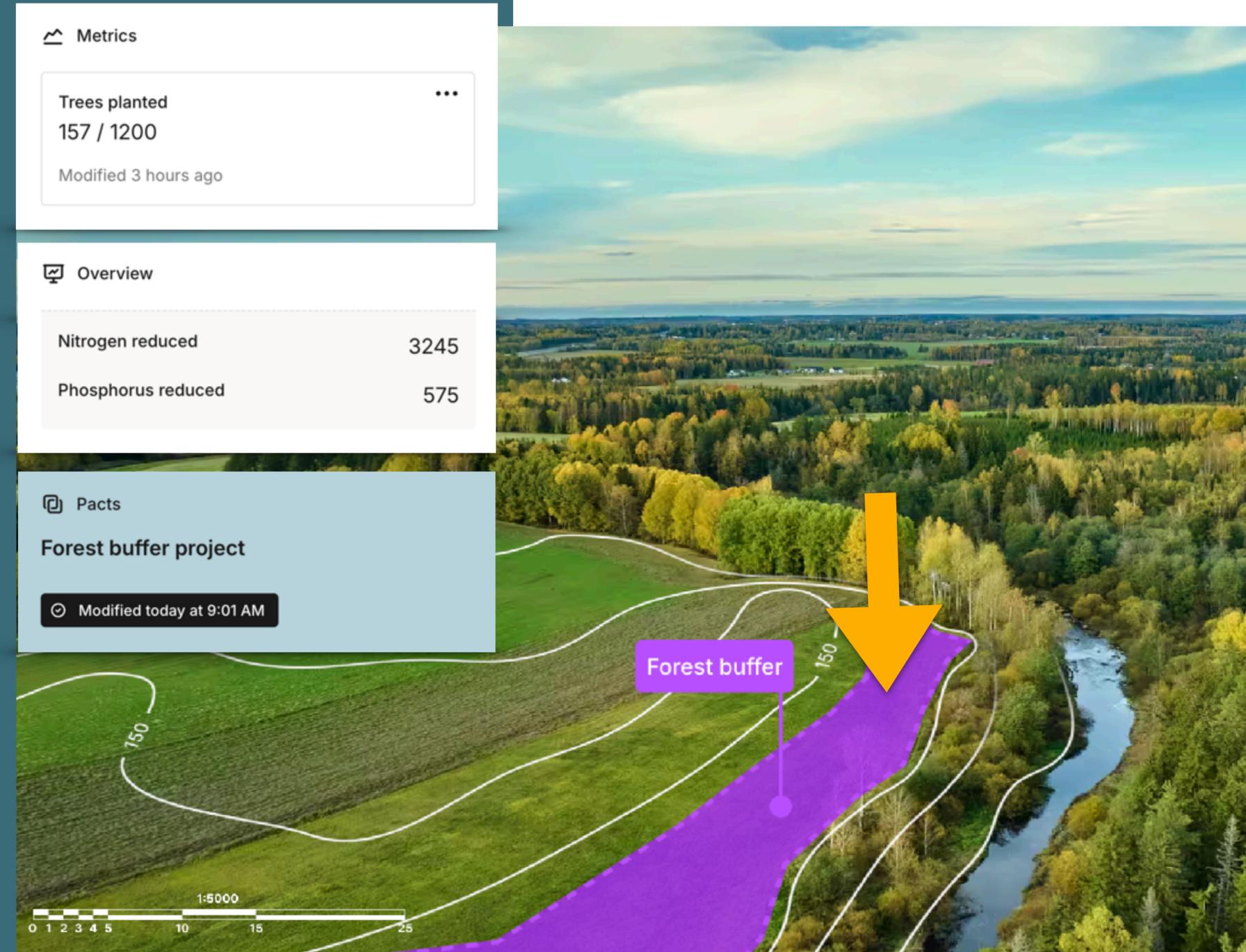
## Activity

Choose from standard lists of activity types



## Impact

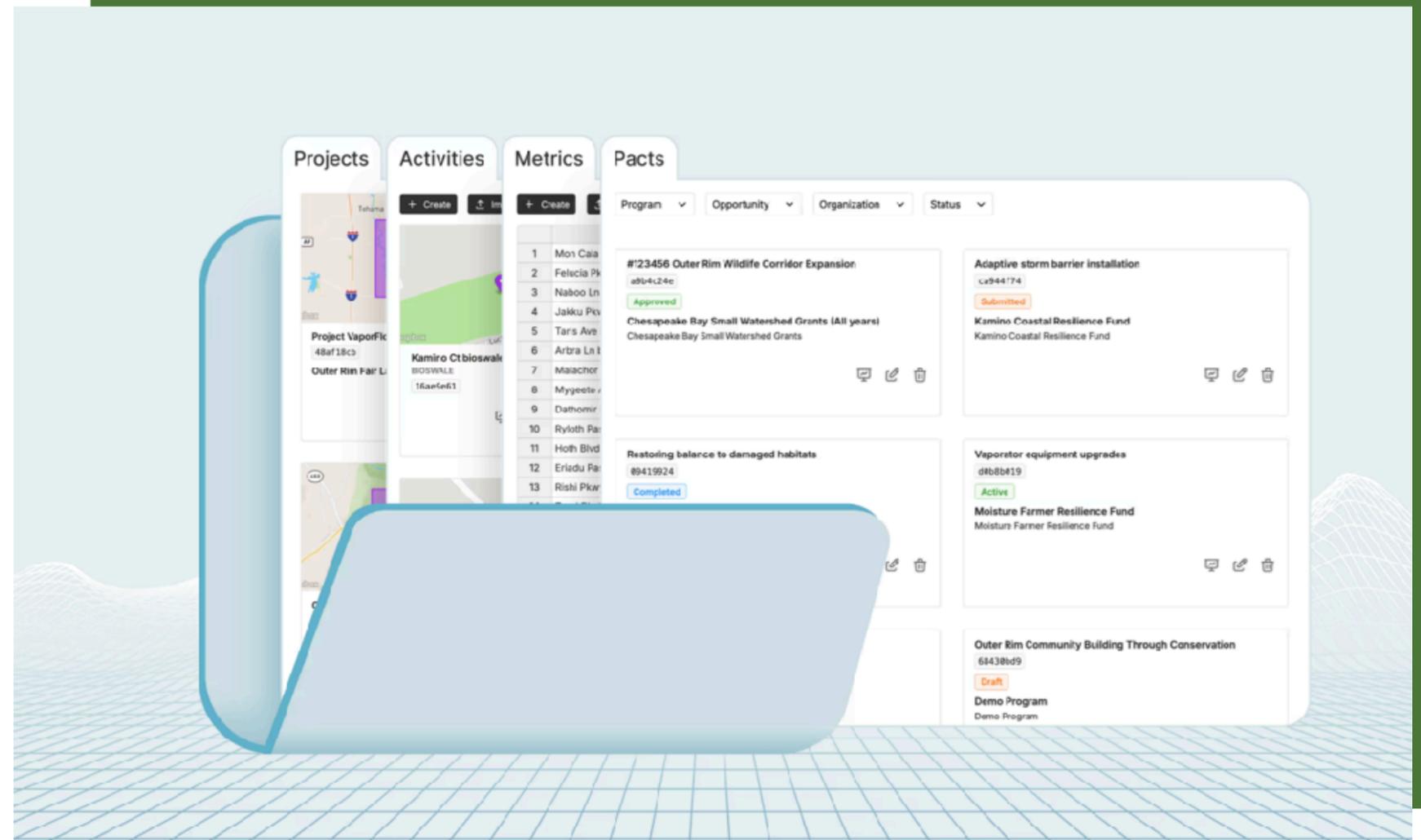
Use models and metrics to estimate environmental benefits.



# Tracking nature-based data with purpose

Built for **collaboration** and **transparency** on your restoration and land preservation projects.

Connect restoration activities with environmental goals, enabling seamless progress tracking and transparent reporting to stakeholders in just minutes.



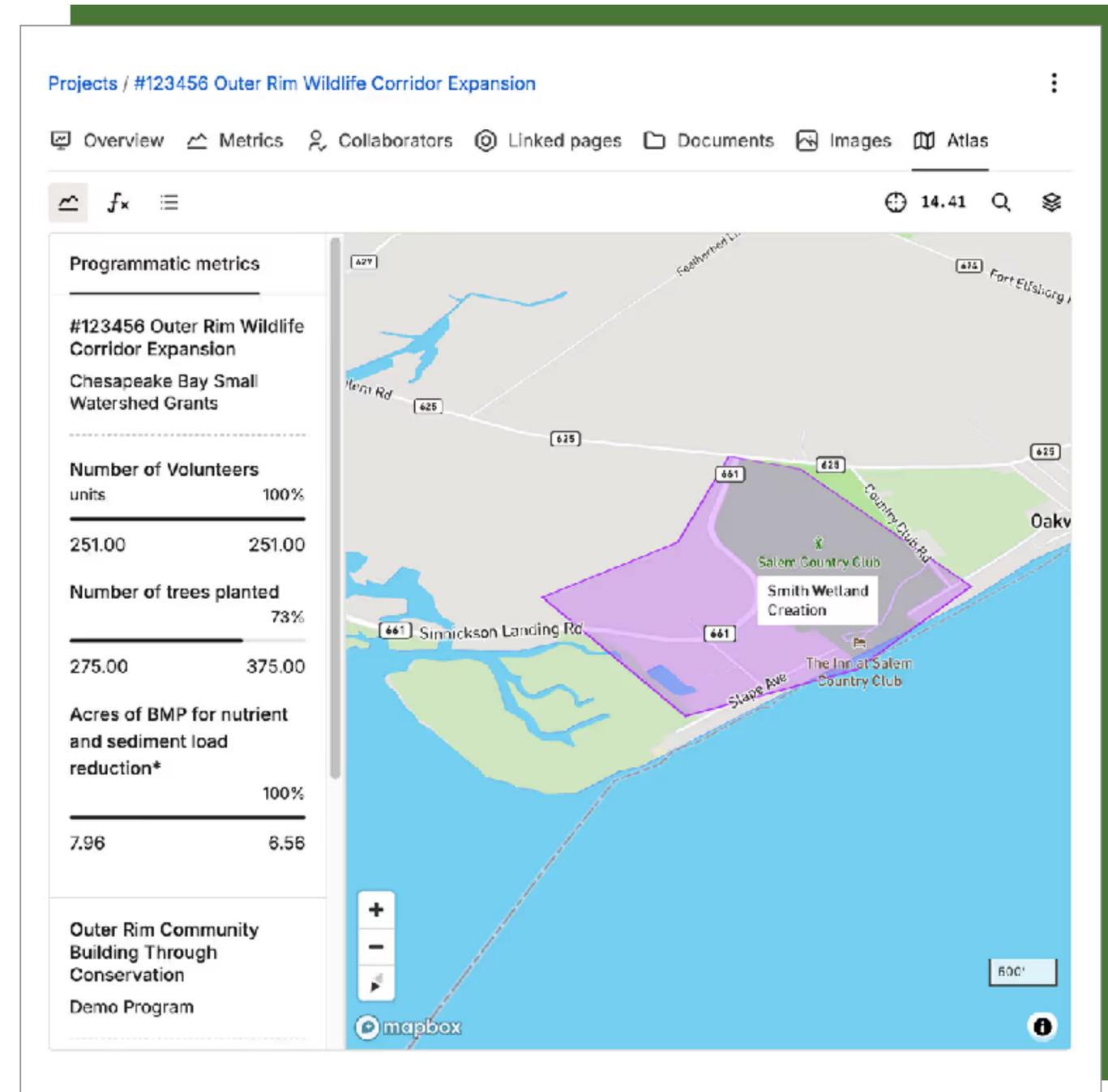
# Direct benefits to users

## Build and manage a digital portfolio of nature-based work.

- Map locations where work occurs.
- Model environmental benefits
- Track progress toward organization and program target outcomes.

## Participate in collaborative, data-based conservation and restoration

- Align with the prioritization and planning goals of conveners & funders
- Meet grant reporting requirements
- Structure data for participatory decision-making.



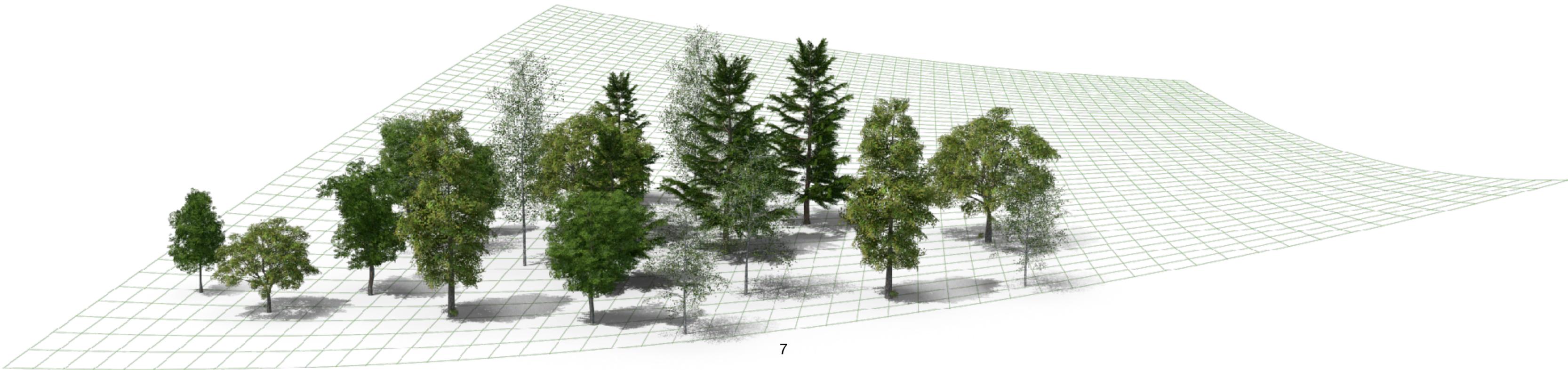
# Collective benefits to users

Increase the value and scale of your nature-based work. Your FieldDoc hosted data is:

**Shareable**

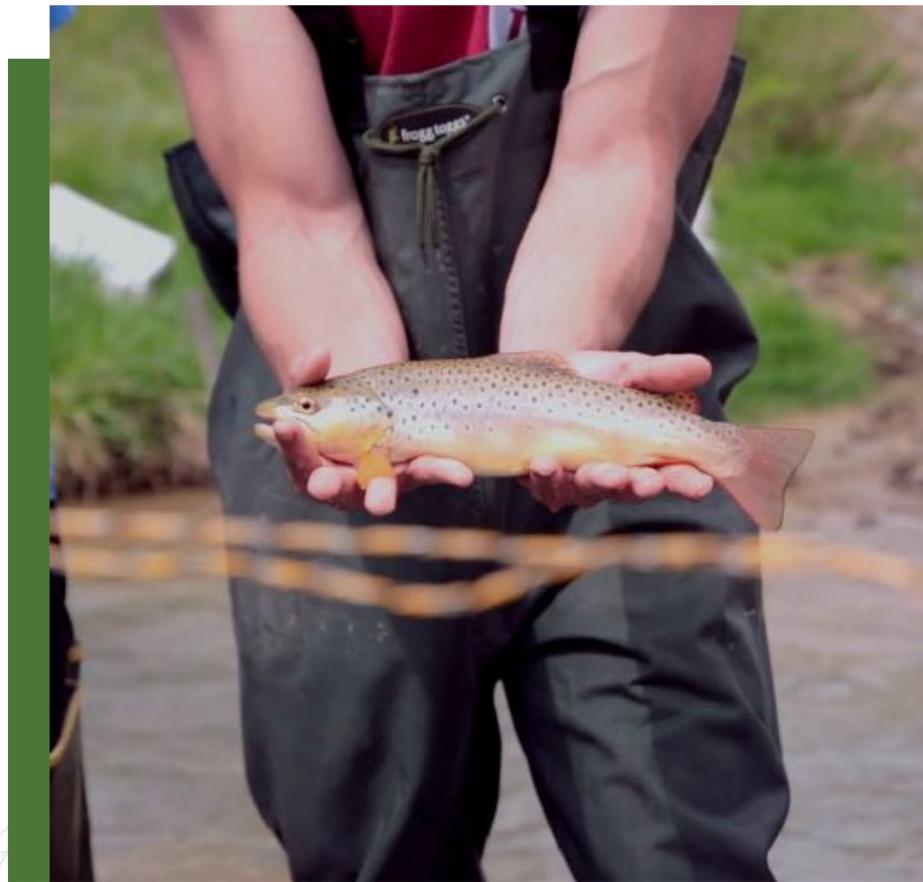
**Interoperable**

**Verifiable**

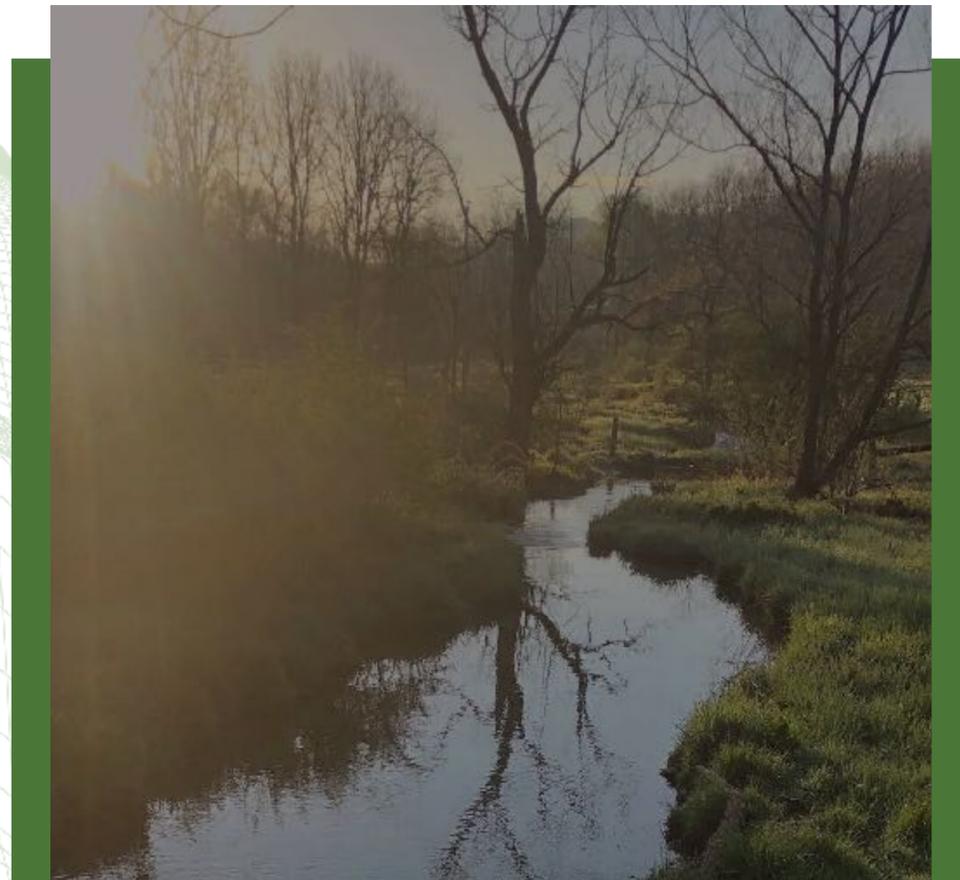
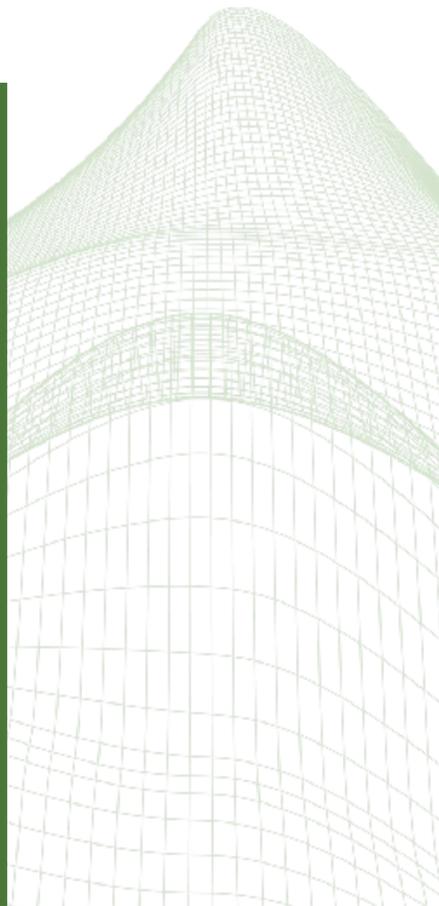


# Long-term value

Stewarding your digital assets is a valuable investment in your long-term mission and goals.



Better investments in reaching nature-based goals



Healthier communities and natural world



# Built for collaboration

## Restoration Practitioners

Entities receiving grants and overseeing implementation of on the ground restoration, conservation, and nature-based work.

## Technical Service Providers

Working collaboration with restoration practitioners to receive funding and complete the life cycle of all nature based work.

## Funding Programs

Collecting critical data on their investment strategy that answers: What work is being funded? Where will the work take place? What impact will it have?

## 02

# Preparing to use FieldDoc

With some preparation, entering your application data into FieldDoc is a straightforward process.

### ✔ Review the RFP for application requirements

You will need to structure your application in FieldDoc to meet the requirements of the RFP.

### ✔ Prepare your proposed activities

Create a list, such as in a spreadsheet, of the work that you will be inputting into FieldDoc.



### ✔ Browser Compatibility & Account Setup

- Is FieldDoc on my Network's "Approved" list of websites?
- Do I have a FieldDoc account?
- Have I added my technical service providers to my workspace?

# Create your account

Follow the FieldDoc user account requirements.



## ✔ Use your real name

Please do not share or use a generic email address with a generic name.

## ✔ Use your professional email account

Your log-in should be assigned to your professional email account and your organization of employment.

## ✔ All accounts are assigned to the organization of employment

All accounts must be assigned to an organization. Use **workspaces** to share organization access.

## ✔ Workspaces

This new FieldDoc feature allows technical service providers and partners to create, edit, and delete data on behalf of another organization.

# Create your account

FIELDDOC

### Log in

Don't have an account? [Sign up for FieldDoc.](#)

Email  
...

Password  
...

Forgot your password? [Reset it here.](#)

Log in

© 2025 The Commons. All rights reserved.  
All map imagery and underlying data © [Mapbox](#) © [OpenStreetMap](#).

[Terms](#) · [Privacy](#)



Register

# Create your account

## Verify your email address

**TS** The Commons Support  
Welcome to FieldDoc  
To:

Hi Forest,

Welcome to FieldDoc! To get started, please confirm your email by clicking the link below:

[Confirm your email address](#)

Once verified, you'll be able to join a FieldDoc organization or request help to create one.

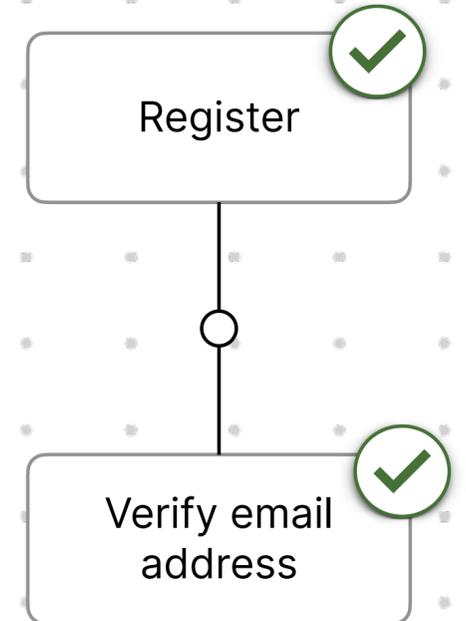
We built FieldDoc for nonprofit organizations, government agencies, and other stakeholders working to protect and restore our nation's natural resources. FieldDoc integrates with investment programs and industry-accepted models to track progress toward environmental restoration goals.

FieldDoc provides a home for your restoration project data. Documenting work in FieldDoc ensures that your organization's on-the-ground progress can be measured and shared with colleagues and funding partners. Our dedicated team puts data stewardship first so you can stay focused on your mission.

Sincerely,  
The FieldDoc Team

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200 Massachusetts Ave NW  
Washington, DC 20001



# Create your account

## Link account to organization

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Logged in as: erinhofmann1+skywalker@gmail.com [Logout](#)

Create an organization.

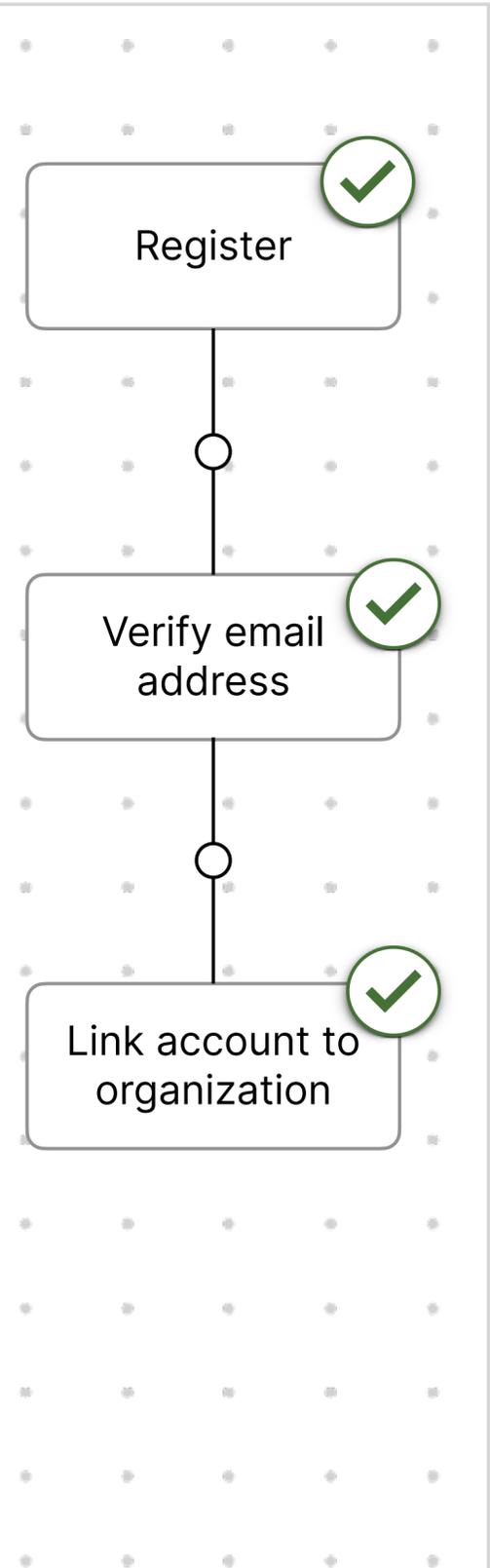
**Name**  
Your organization name

Create with example data  
Start with sample records to get a feel for what's possible.

Continue

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# Add collaborators to your organization

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FS Eco Sabers

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Create project

Create activity

Create pact

Create metric

Import file

**Recent**

Type Workspace Modified

Name	Modified	Type	Workspace
Demo Pact	today	Pact	Eco Sabers
Demo Project	yesterday	Project	Eco Sabers
Demo Stream Restoration	one month ago	Activity	Eco Sabers

Open your Account Settings

Select your workspace

Select Members

Invite member via email

Select permission level.

Send invitation



# 03

## Create your FieldDoc Application

FieldDoc makes it easy to share digital records of your proposed work with your application. Records include location information, standard activity type names, modeled sediment and nutrient load reductions, and programmatic metrics.

To share this data with your funder, you must create a FieldDoc Pact. Each Pact Opportunities has a unique ID!

1

### Create a Pact

Pacts share activity data to funders and give you access to their programmatic metrics list.

**New Feature!**

2

### Link Activities

Activity records include attribute data including:

- Activity Type
- Location
- Modeled outputs

3

### Assign Program Metrics

Set your planned target values for all of the programmatic metrics you will report to the funder.

4

### Submit

Your funder can only see Pact data after it is submitted!

# FieldDoc Data Model

## ✔ Workspaces contain Portfolios

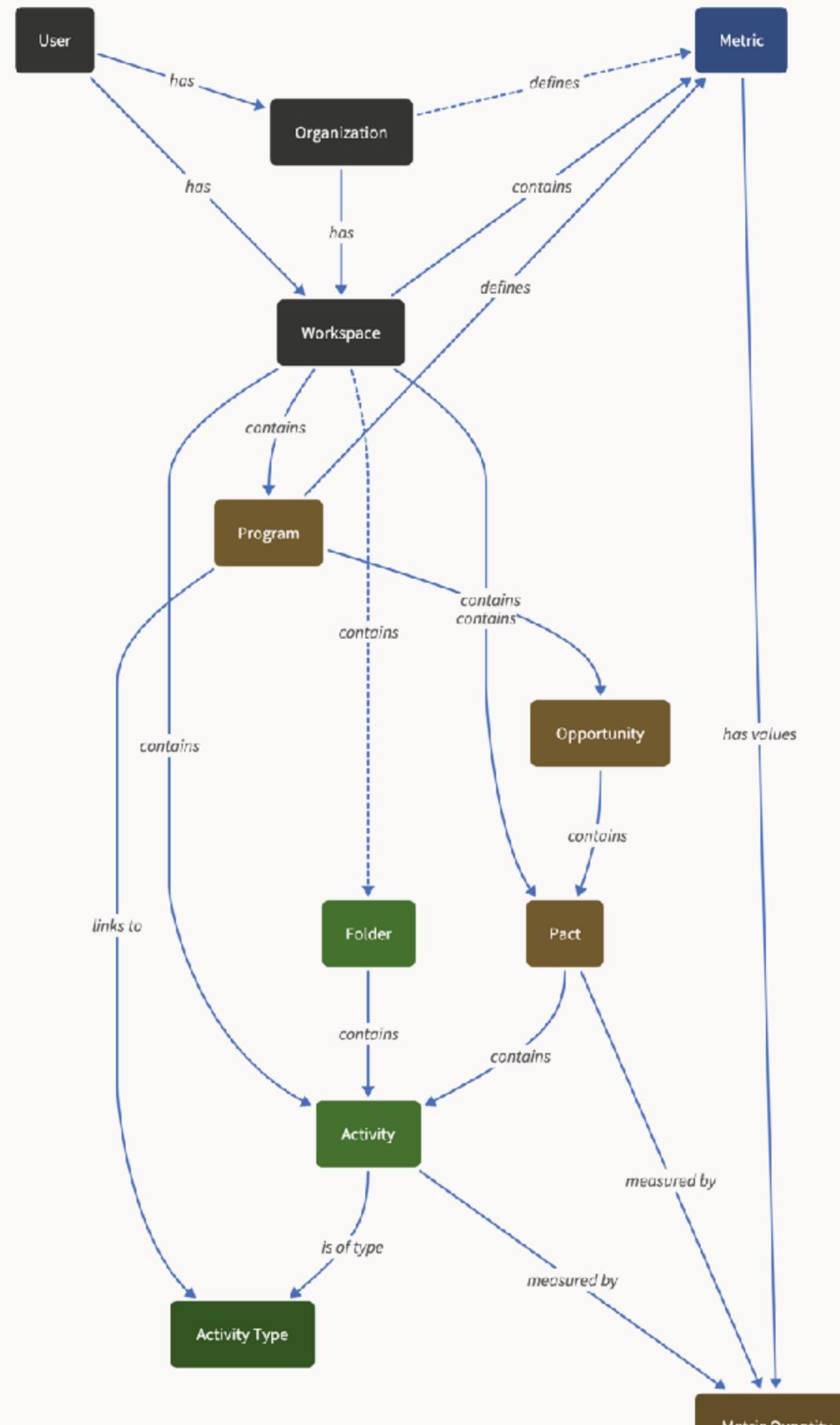
Organizations can create folders to organize their activity records and track organizational metrics.

## ✔ Pacts allow you to share activity records outside your workspace

Pacts, created by funding programs, include programmatic metrics and curated lists of activity types.

## ✔ Standardization is key

The different standard components allow users to collaborate and analyze the impact of activities at different scales.



# Create your Pact

Pacts allow FieldDoc users to connect to a funding opportunity. Funding opportunities have unique lists of programmatic metrics.

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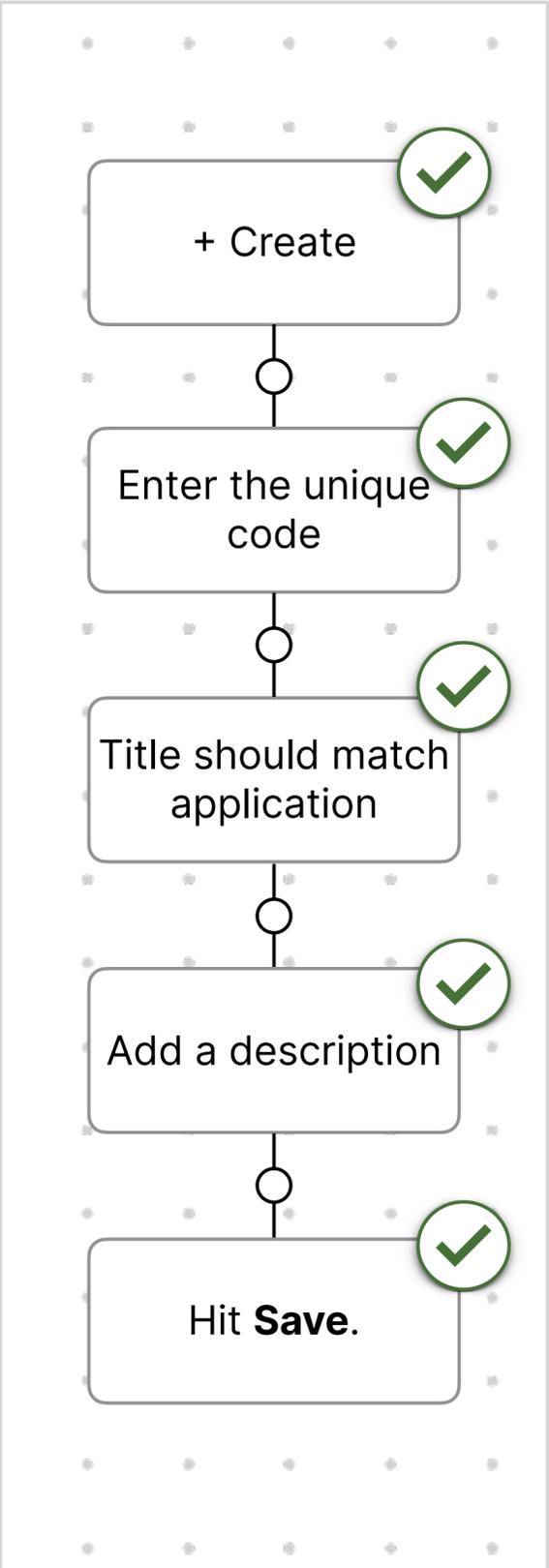
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## Pacts

All changes saved + Create Export CSV

Program Opportunity Organization Status

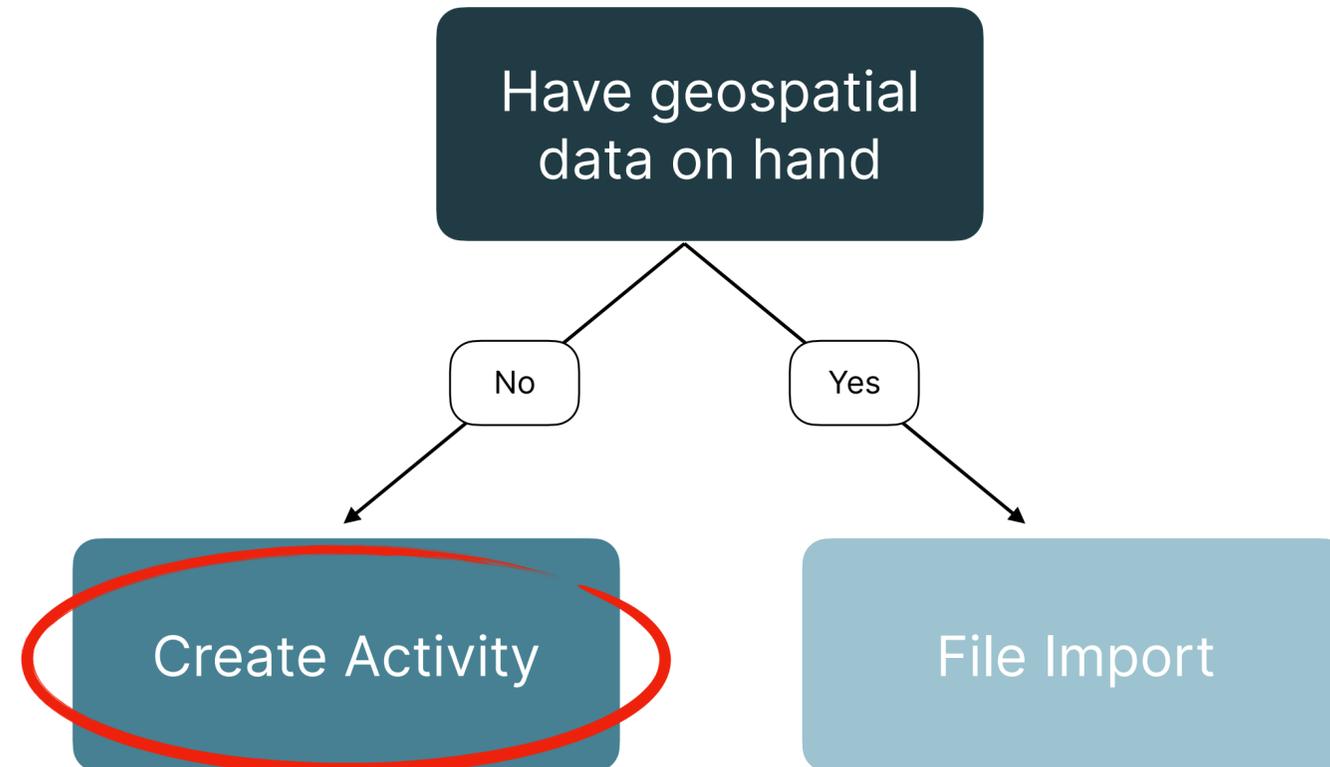
Your pact collection is empty.



## 2 Link Activity Records

FieldDoc makes it easy to share digital records of your proposed work with your application. Data fields include **location information**, standard **activity type** names, **modeled** sediment and nutrient load reductions, and **programmatic metrics**.

To share this data with your funder, you must create a FieldDoc Pact. Each Pact Opportunities has a unique ID!



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Pacts / Restoration in Progress #12345

- Overview
- Parties
- Collaborators
- Activities
- Metrics
- Implementation
- Partners
- Documents
- Images
- Atlas

### Restoration in Progress #12345

Recipient	Eco Sabers
Manager	FieldDoc Support
Program	<a href="#">Demo Program</a>
Opportunity	<a href="#">Demo Program 2025</a>
Opportunity Code	<a href="#">BAA40596</a>
Status	Draft <span>Submit for review</span>
Start date	<i>Start date not set.</i>
End date	<i>End date not set.</i>
Custom identifier	<i>Custom identifier not set.</i>

### Implementation progress



No metric progress available.

This means that the pact is not tracking any metrics or that progress calculations are being updated.



Name your activity

**FIELDDOC**

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Activities / Hoth Forest Buffer Exclusion Fencing

Overview Collaborators Pacts Metrics Implementation Linked pages Documents Images Atlas

### Hoth Forest Buffer Exclusion Fencing

Last modified by Duncan Idaho on Monday, March 24, 2025 at 6:36 PM

Activity type	No type assigned.
Geometric extent	No geometry assigned.
User-defined extent	User-defined extent not set.
Description	...
Completion status	<span>Mark activity as completed</span>
Custom identifier	Custom identifier not set.



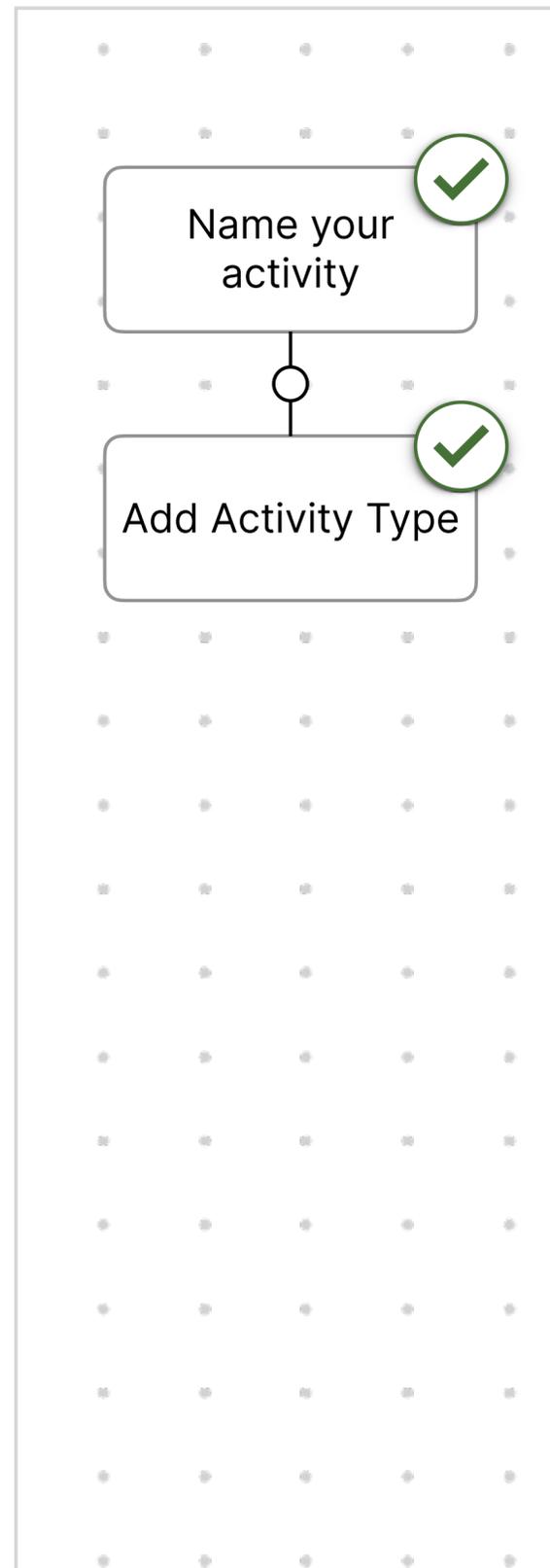
### Implementation progress



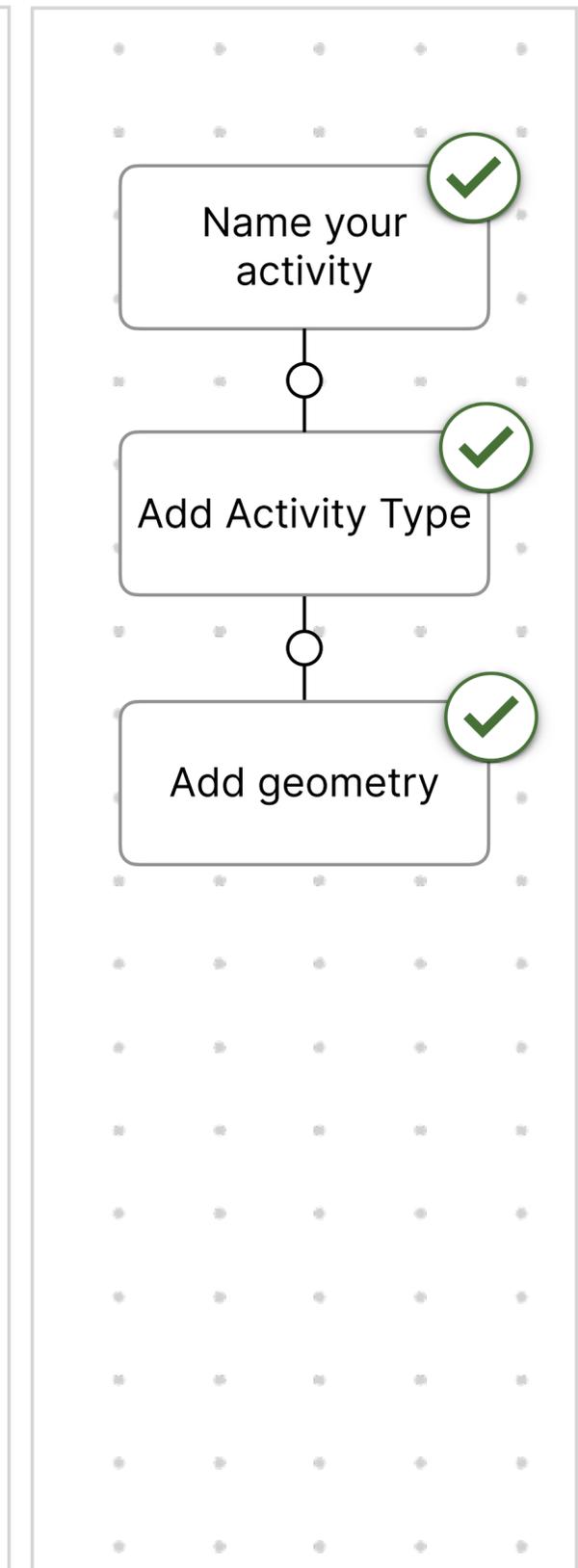
No metric progress available.

This may mean that the practice has not begun tracking practice implementation or that progress calculations are being updated.

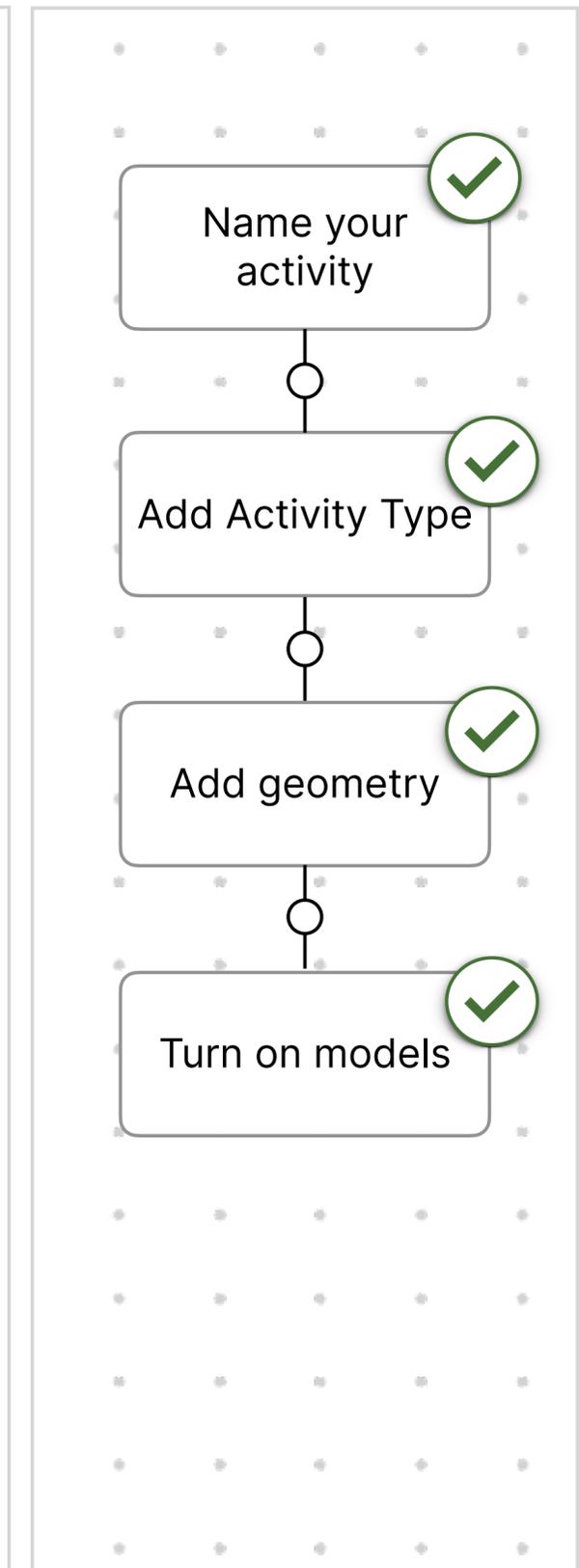
### Organizational



# Link Activity Records: Create New



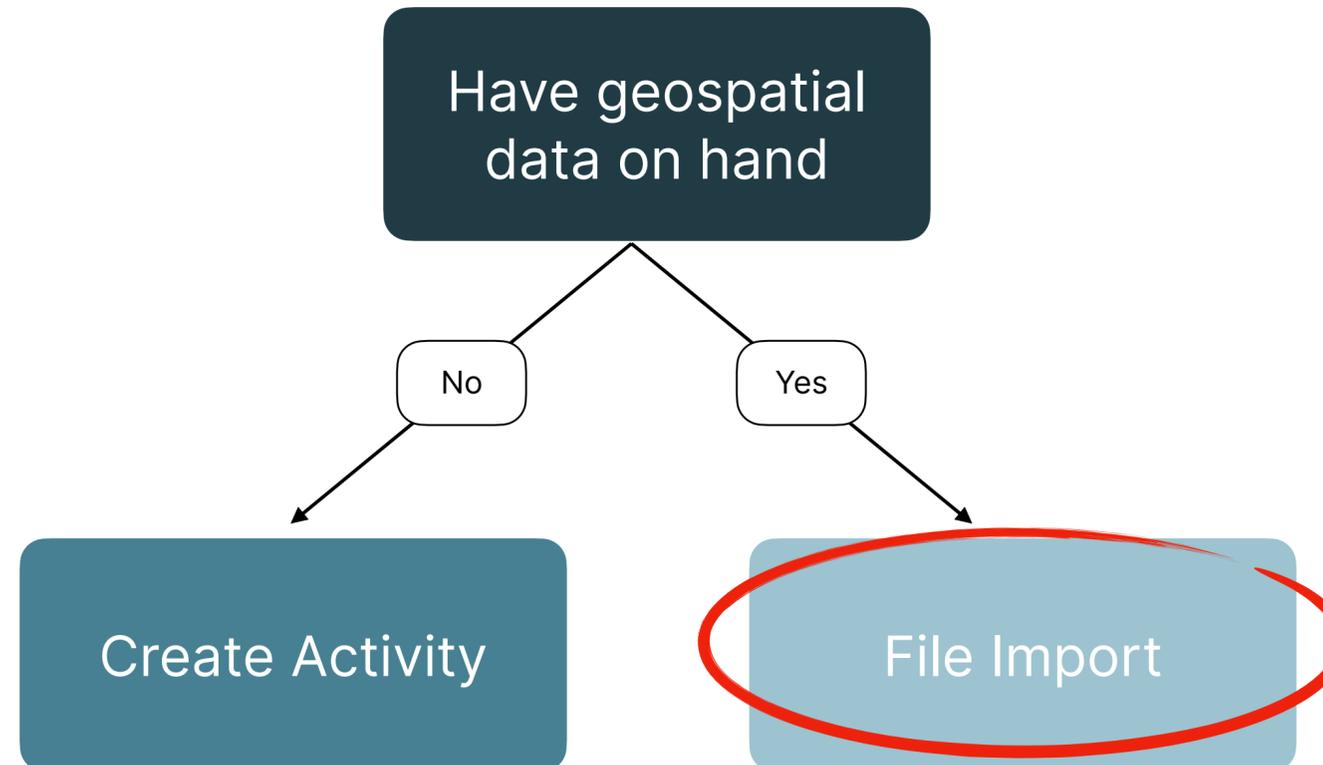
# Link Activity Records: Create New



## 2 Link Activity Records

FieldDoc makes it easy to share digital records of your proposed work with your application. Data fields include **location information**, standard **activity type** names, **modeled** sediment and nutrient load reductions, and **programmatic metrics**.

To share this data with your funder, you must create a FieldDoc Pact. Each Pact Opportunities has a unique ID!





Prepare your file

FieldDoc.Activity.Demo.Import										
Search Sheet										
Share										
A	B	C	D	E	F	G	H	I	J	
1	<b>Activity Name</b>	<b>Project Name</b>	<b>Section Name</b>	<b>Activity Type Name</b>	<b>Activity Description</b>	<b>latitude</b>	<b>longitude</b>	<b>Extent</b>	<b>Extent Unit</b>	<b>Completed_On</b>
2	Demonstration Activity 1 - Urban Tree Planting	Demonstration Project	Restoration Sites	Tree Planting	This work will plant trees	39.457	-77.9639	2.5	Acres	
3	Demonstration Activity 2- Grass buffer at airfield	Demonstration Project	Restoration Sites	Grass Buffer	This work will install a grass	39.4012	-77.9847	7	Acres	
4	Demonstration Activity 3 - Community Convening	Demonstration Project	Community Engagement	Community Convening	Seven meetings will be held	39.46	-77.964			
5										
6										
7										

# Link Activity Records: Import File

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**Pacts / Restoration In Progress #12345**

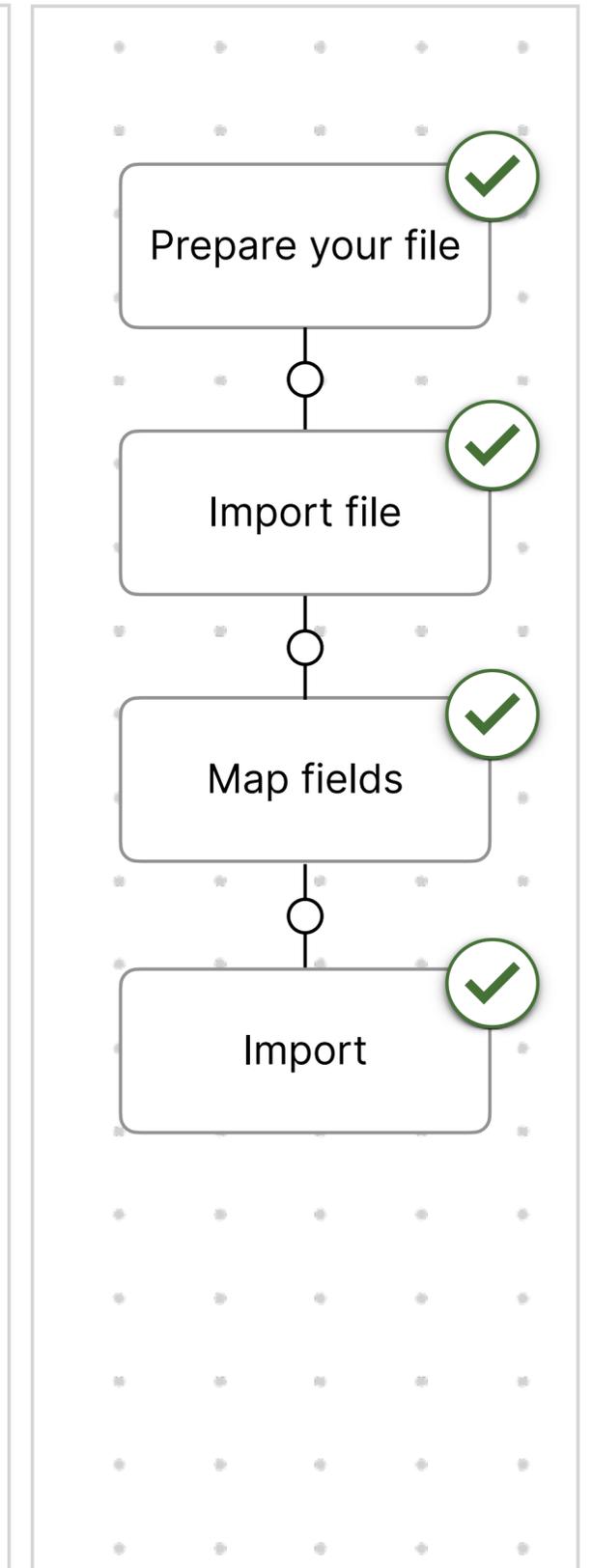
Overview Parties Collaborators **Activities** Metrics Implementation Partners Documents Images Atlas

+ Create Import file Export CSV NEIEN Link activities All changes saved

**Hoth Forest Buffer Exclusion Fencing**  
FOREST BUFFER-NARROW WITH EXCLUSION FENCING  
53b10712

Last updated today

FIELDDOC logo



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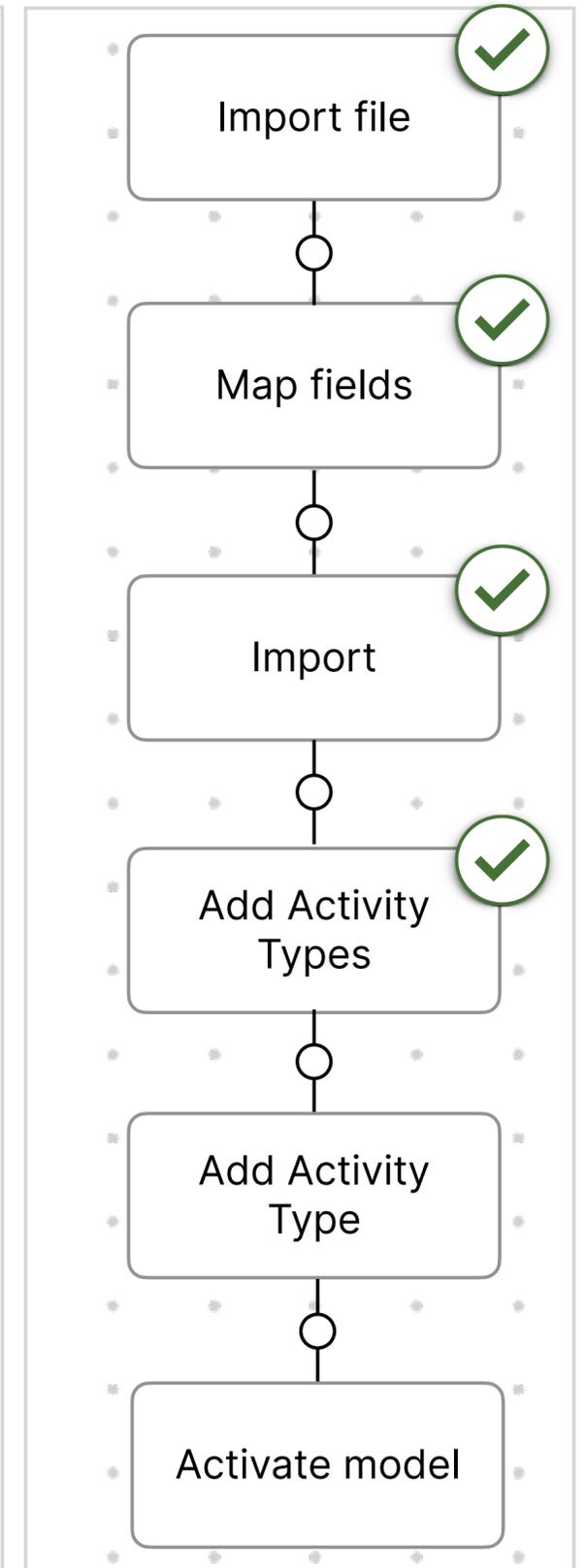
+ Create Import file Export CSV NEIEN Link activities All changes saved

**Demonstration Activity 1 - Urban Tree Planting**  
NO ACTIVITY TYPE ASSIGNED  
11be55c5  
Last updated today

**Demonstration Activity 2- Grass buffer at airfield**  
NO ACTIVITY TYPE ASSIGNED  
349a83ab  
Last updated today

**Demonstration Activity 3 - Community Convening**  
NO ACTIVITY TYPE ASSIGNED  
4597846c  
Last updated today

**Hoth Forest Buffer Exclusion Fencing**  
FOREST BUFFER-NARROW WITH EXCLUSION FENCING  
53b10712  
Last updated yesterday



# Assign programmatic metrics

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**Pacts / Restoration In Progress #12345**

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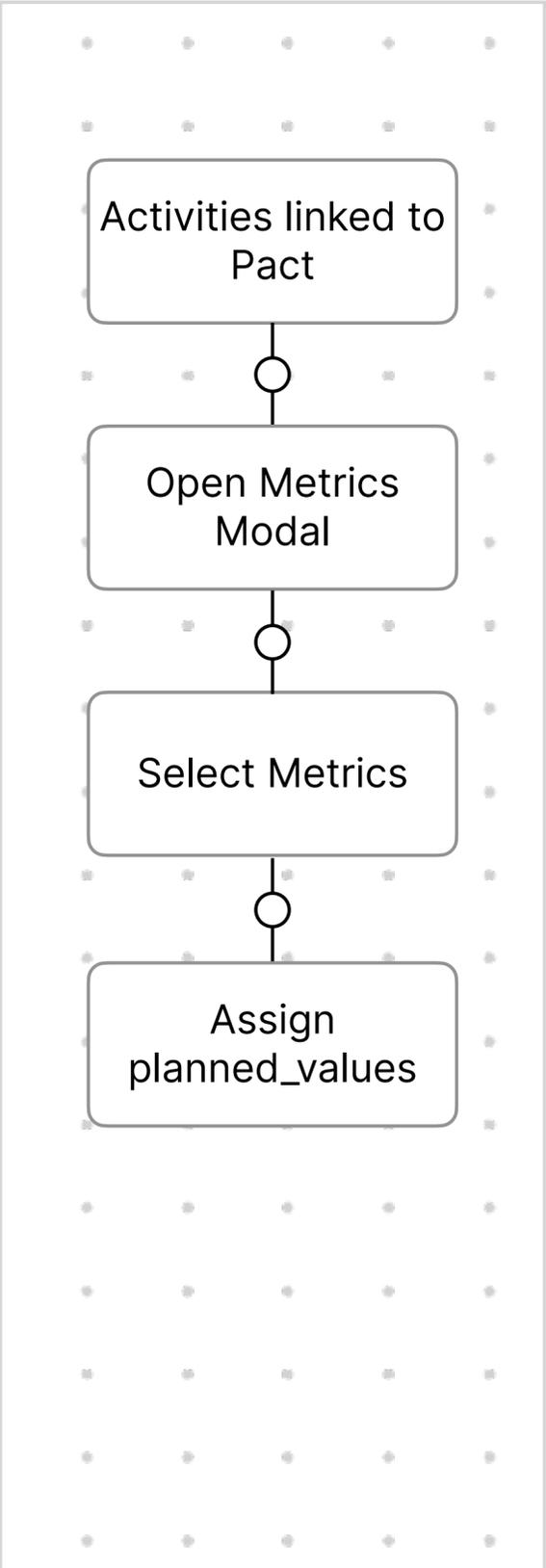
+ Create Import file Export CSV NEIEN Link activities All changes saved

**Demonstration Activity 2 - Grass buffer at airfield**  
GRASS BUFFER  
349a83ab  
Last updated today

**Demonstration Activity 1 - Urban Tree Planting**  
TREE PLANTING - URBAN CANOPY  
11be55c5  
Last updated today

**Demonstration Activity 3 - Community Convening**  
NO ACTIVITY TYPE ASSIGNED  
4597846c  
Last updated today

**Hoth Forest Buffer Exclusion Fencing**  
FOREST BUFFER-NARROW WITH EXCLUSION FENCING  
53b10712  
Last updated yesterday



## FieldDoc Submission Checklist

---

- Pact** is assigned to the correct funding opportunity
- The **organization** matches the lead organization on the application.
- Activity records** represent your proposed work.
  - Geometries** delineated
  - Activity Type** selected
  - Sediment & Nutrient Load **Models** activated
- Programmatic metrics**
  - Programmatic metrics assigned and planned values match the proposed work in your application.

## FIELDDOC

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### Restoration In Progress #12345

Recipient	Eco Sabers
Manager	FieldDoc Support
Program	<a href="#">Demo Program</a>
Opportunity	<a href="#">Demo Program 2025</a>
Opportunity Code	<a href="#">8AA40598</a>
Status	Draft <span>Submit for review</span>
Start date	<i>Start date not set.</i>
End date	<i>End date not set.</i>
Custom Identifier	<i>Custom Identifier not set.</i>

### Implementation progress

#### Modeled

##### Adapted Chesapeake Nutrient and Sediment Load Reduction Model

The following metric values were generated using data and algorithms supplied by the Adapted Chesapeake Nutrient and Sediment Load Reduction Model model. You can find more information about this model [here](#).

	Estimated value
> Pounds of total nitrogen reduced	<b>582.98</b> pounds per year
> Pounds of total phosphorus reduced	<b>128.55</b> pounds per year
> Pounds of total suspended solids reduced	<b>3099,780.76</b> pounds per year



# 04

## Level up with these power skills



1

### **Batch imports**

Try batch importing your records in .GeoJSON or Shapefile format. Make sure to follow our import file specifications!

2

### **Table Views**

Make edits to Activity Types and Metrics via table views. Access drop down lists and use keyboard functions to copy and paste fields.

3

### **Link Activities to multiple Pacts**

Already have the activity records in your Portfolio? Link them to a new Pact rather than creating a duplicate record.

4

### **Refresh!**

Refresh your browser if something is not loading. And if you have outdated activity records, refresh those by clearing modeled metrics.

# 05

## Chesapeake SWG and WILD FAQs

### What if I don't have locations yet?

At the application stage, you can enter in a demonstration location and use an estimated total acreage to calculate the sediment and nutrient load reductions.

### I disagree with the model outputs

You can use the custom programmatic metrics to share alternative TN, TP, and TSS values. Clear the models if you are not using the CAST reductions.

### The models have changed

No, they have not changed. No calculations were re-run in the migration for FieldDoc 2.0.

### What Activity Type should I use?

Check with the CAST BMP guide or your Program leads.

# Pact Opportunity Codes

Chesapeake WILD (2025)

2015D514

Chesapeake SWG (2025)

674F734A

# Where to go for technical support



## Help Center

Articles

Guided tutorials

On-demand webinars

Trainings



## Email Support

[support@fielddoc.org](mailto:support@fielddoc.org)

Monday - Friday 9:00 - 5:00

Expect a 24 hour response time

# Thank you



## Help Center

Articles

Guided tutorials

On-demand webinars

Trainings



## Email Support

[support@fielddoc.org](mailto:support@fielddoc.org)

Monday - Friday 9:00 - 5:00

Expect a 24 hour response time