



# 2023/2024 State Fire Capacity Grant Award Training

Presented By:

Morgan Galliano, Senior Grant Specialist

Christopher Lozano, Senior Grant Specialist

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# Funding Program Acknowledgement



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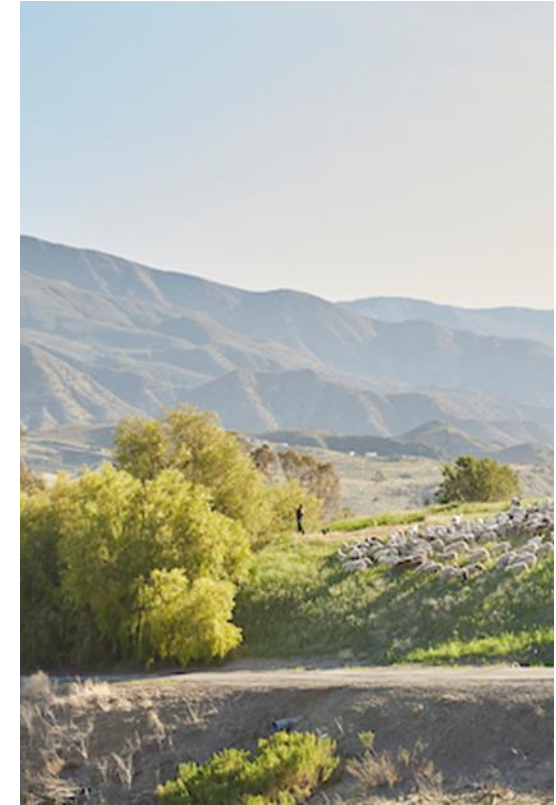
# Meeting Process

- Please remain on mute during the presentation
- Please type your questions in the chat or save them for the Q&A at the end
- **Fabiola Garcia Lopez** will be placing some links in the chat as we go. Those links are also available in the grant guide which will be provided to you after the training.
- **Becca Joyner** will answer questions in the chat. You can message Becca individually if you don't want your question displayed to the group.



# Award Training Agenda

1. Funded Projects and Introductions
2. The Grant Subaward
3. Federal Grant Process Requirements
4. Payments
5. Progress Reporting
6. Closeout
7. Resources
8. Q&A

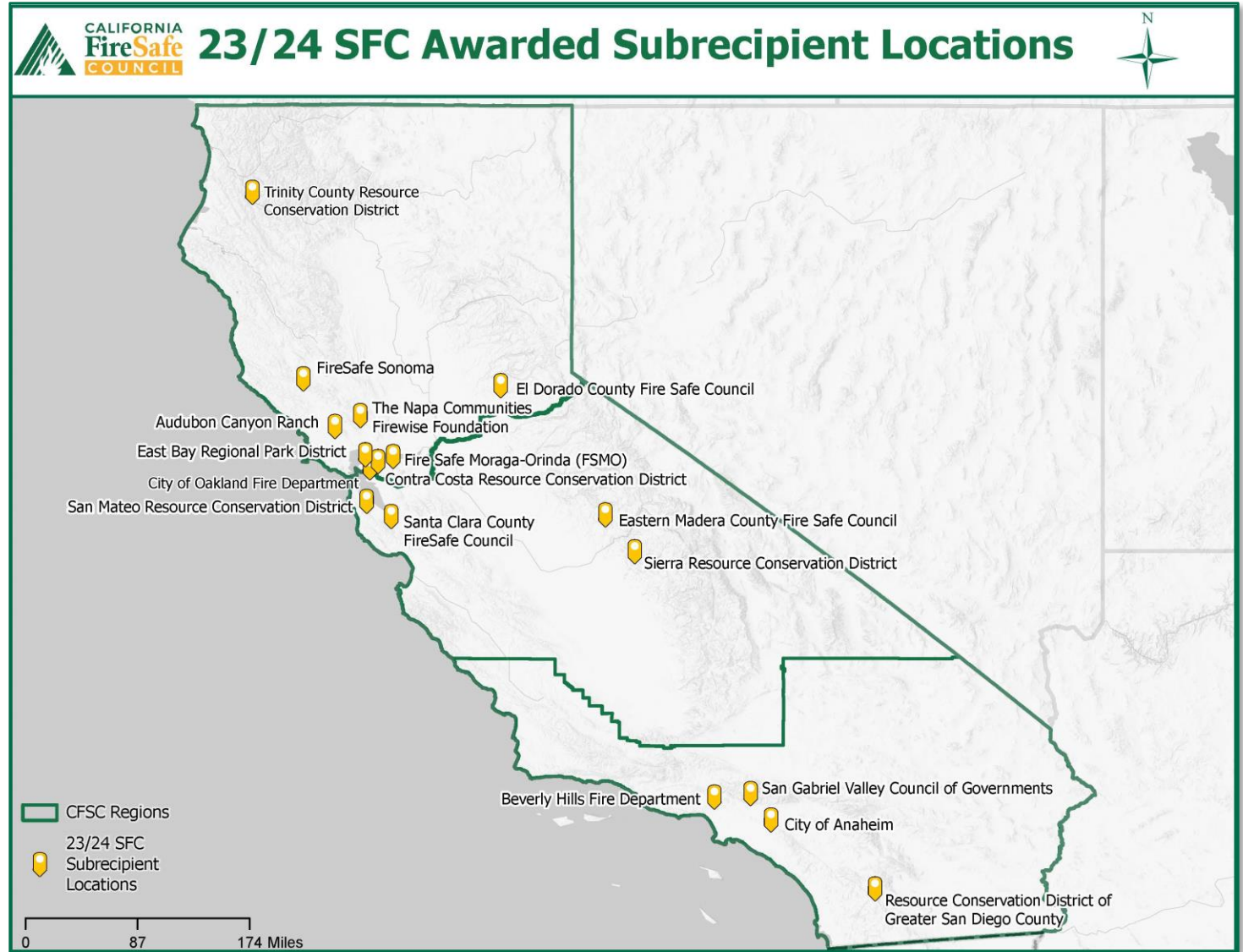




# SFC Grant Cycle:

\$1,575,000 awarded to 17 recipients

Projects include wildfire prevention planning, education, and fuels reduction in USDA Forest Service region 5



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# Please Introduce: Yourself, Your organization, Your project

## 2023 SFC

- Trinity County Resource Conservation District
- City of Oakland Fire Department
- Santa Clara County Fire Safe Council
- Sierra Resource Conservation District
- City of Anaheim
- Beverly Hills Fire Department
- Resource Conservation District of Greater San Diego County
- Audubon Canyon Ranch
- San Gabriel Valley Council of Governments
- Eastern Madera County Fire Safe Council

## 2024 SFC

- San Mateo Resource Conservation District
- East Bay Regional Park District
- El Dorado County Fire Safe Council
- The Napa Communities Firewise Foundation
- Fire Safe Sonoma/CERT
- Contra Costa Resource Conservation District
- Fire Safe Moraga-Orinda (FSMO)

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## CFSC Grants Grants Team

### **Julia Marsili**

Interim Clearinghouse Manager

Phone: (279) 599-2162

Email: [jmarsili@cafiresafecouncil.org](mailto:jmarsili@cafiresafecouncil.org)

### **Liron Morgan Galliano**

Senior Grant Specialist, USFS Grant Lead

Phone: (279) 599-2509

Email: [lgalliano@cafiresafecouncil.org](mailto:lgalliano@cafiresafecouncil.org)

### **Dave Farley**

Senior Grant Specialist

Phone: (279) 599-1523

Email: [dfarley@cafiresafecouncil.org](mailto:dfarley@cafiresafecouncil.org)

### **Christopher Lozano**

Senior Grant Specialist

Phone: (279) 246-2267

Email: [clozano@cafiresafecouncil.org](mailto:clozano@cafiresafecouncil.org)

### **Becky DeForest**

Staff Grant Specialist

Phone: (279) 599-0671

Email: [bdeforest@cafiresafecouncil.org](mailto:bdeforest@cafiresafecouncil.org)

### **Nina Evans**

Staff Grant Specialist

Phone: (279) 599-0926

Email: [nevans@cafiresafecouncil.org](mailto:nevans@cafiresafecouncil.org)

### **Gabriela Erazo Smith**

Staff Grant Specialist

Phone: (279) 246-2312

Email: [gerazo@cafiresafecouncil.org](mailto:gerazo@cafiresafecouncil.org)

### **Fabiola Garcia Lopez**

Programs Administrative Assistant

Phone: (279) 599-2179

Email: [fgarcialopez@cafiresafecouncil.org](mailto:fgarcialopez@cafiresafecouncil.org)

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## CFSC Programs and Outreach Team

### **Jessica Martinez**

Program Director

Phone: (279) 599-4726

Email: [jmartinez@cafiresafecouncil.org](mailto:jmartinez@cafiresafecouncil.org)

### **Becca Joyner**

Programs & Outreach Manager

Phone: (279) 599-0335

Email: [bjoyner@cafiresafecouncil.org](mailto:bjoyner@cafiresafecouncil.org)

### **Britney Munoz**

Regional Coordinator – All Regions

Phone: (279) 599-3082

Email: [bmunoz@cafiresafecouncil.org](mailto:bmunoz@cafiresafecouncil.org)

### **Megan Katich**

Communications & Outreach Specialist

Phone: (279) 599-4315

Email: [mkatich@cafiresafecouncil.org](mailto:mkatich@cafiresafecouncil.org)

### **General Outreach**

Email: [info@cafiresafecouncil.org](mailto:info@cafiresafecouncil.org)





## Able Forestry- Contracted Forester for Environmental Compliance

**Eric Taft**, RPF

James L. Able Forestry Consultants, Inc.

Email: [ETaft@ableforestry.com](mailto:ETaft@ableforestry.com)

**Ben Cohoon**, RPF

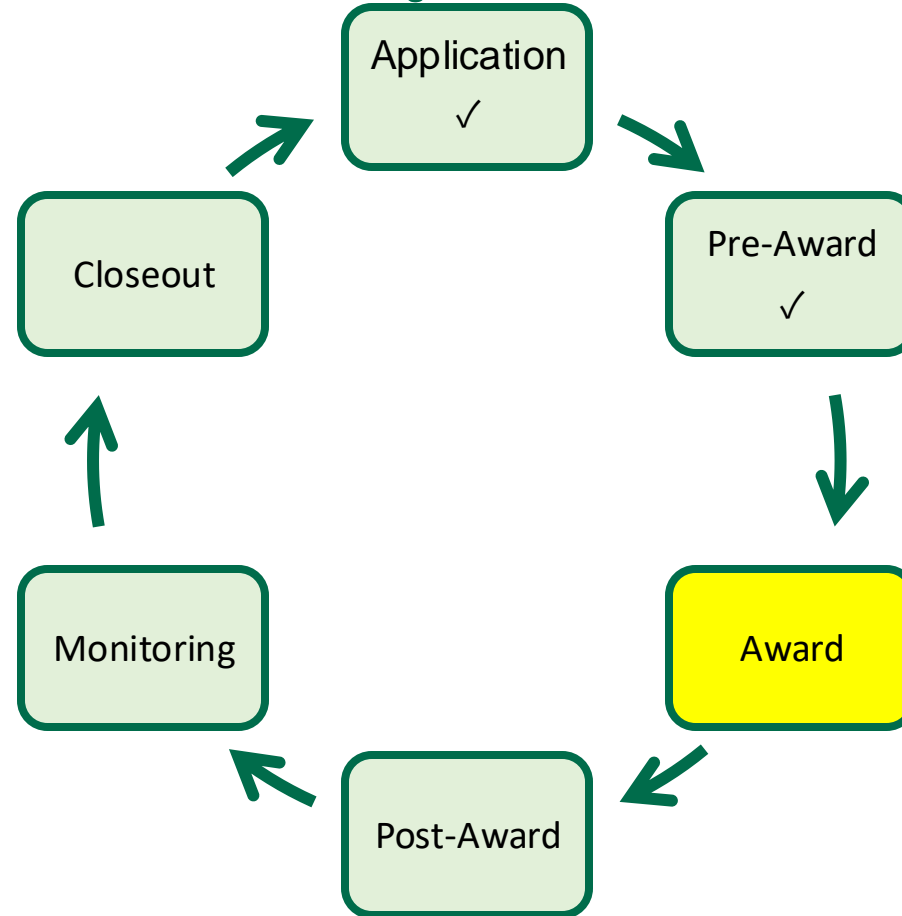
James L. Able Forestry Consultants, Inc.

Email: [Bcohoon@ableforestry.com](mailto:Bcohoon@ableforestry.com)

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# The Grant Lifecycle



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# The Grant Subaward

- The project funding and scope of work
- The payment process
- Reporting, closeout and record retention requirements
- Implementation standards for procurement and insurance
- Requirements for use of logos and funder acknowledgement language
- Site Visit Description
- Grant Modification Procedures
- Environmental Compliance Requirements
- Non-compliance remedies or termination procedures

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# Grant Management Handbook

The 23/24 SFC Grant Management Handbook is a detailed extension of the information found in your subaward agreement.

This workshop gives an overview of the information found in the handbook and resources provided by CFSC.





# Subrecipient Activities

- Complete your project as described in your grant application
- Comply with federal grant regulations
- Document all expenses and matching contributions
- Participate in site visits
- Report accomplishments accurately, completely, and on time
- Take photo documentation throughout the grant term
- Develop an Impact Story about your project
- Complete closeout report and provide project maps



# CA Fire Safe Council (Pass Through) Activities

- Managing and reporting on the master grant award
- Processing payment requests
- Evaluating progress reports and source documentation
- Answering questions about grant compliance
- Highlighting or sharing project accomplishments on social media or the statewide outreach meetings
- Making site visits to projects



# Subaward and Federal Regulations

The requirements for managing federal grants are found in:

- Code of Federal Regulations (CFR) & Office of Management and Budget (OMB)

eCFR website: 2 CFR 200 → <https://www.ecfr.gov/current/title-2>

Grant regulations include:

- Administrative Requirements
- Cost Principles
- Audit Requirements



# Order of Precedence

Any inconsistency in the sub-award agreement will be resolved by giving precedence in the following order:

1. Any national policy requirement and administrative management standards
2. Requirements of the applicable Office of Management and Budget (OMB) Circulars and Treasury regulations
3. 2 CFR 200
4. Special terms and conditions
5. All Agreement sections, documents, exhibits, and attachments





# Written Policies

**Financial and Accounting:** protect the grant funds; maintain accurate documentation

**Personnel:** proper time and effort reporting if you have direct employees

**Procurement/Purchasing:** solicitation of services and goods; avoid unnecessary purchasing

**Property Management:** safeguard equipment if any is owned

**Travel:** reimbursement/approval of travel if travel is charged by the organization

**Conflict of Interest:** procedure for handling conflicts



# Insurance

Subrecipient and/or Fiscal Sponsor must carry insurance that is sufficient to protect the agreement assets from:

- Loss, misuse, theft, fraud, misappropriation, negligence, and undue physical damage or harm

Grant funds can be used to purchase insurance and proof of current insurance to must be provided to CFSC

- You cannot receive payments without current proof of insurance

Contractors working on your project must carry their own insurance and furnish proof of coverage to you.

- Keep proof of coverage in your grant file



# Termination of Subaward

Failure to comply with the award provisions and grant requirements may result in termination of your sub-award.

Termination of the grant can result from a variety of reasons including (but not limited to):

- Misuse of funds
- Lack of capacity
- Falsification of data
- Nonperformance
- Misrepresentation
- Non-adherence to grant terms
- Inability to perform
- Fraud



# Notification and Non-Liability

Grantees must notify CFSC immediately of significant changes impacting activities of the sub-award

- Written notice of change in key contact information, problems, delays or adverse conditions impacting the ability to meet the objectives
- Include statement of action taken or contemplated

CFSC does not assume liability for any third-party claims for damages arising out of this sub-award



# Civil Rights Act

If your organization has an office, you must post information on Title VI compliance.

- “And Justice for All” posters and brochures are available from CFSC
- Must post in a visible location
- The poster and brochure are available in ZoomGrants Library

## Civil Rights Compliance Questionnaire

- Review of compliance at Pre-Award and Closeout



# Environmental Compliance

ALL projects will be reviewed to meet federal environmental requirements by a registered professional forester under a contract with CFSC.

It is your responsibility to ensure that your project complies with state and local environmental requirements.



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# Environmental Compliance

Federal Environmental Acts that are triggered by grant funding:

- Endangered Species Act
- Migratory Bird Treaty Act
- National Historic Preservation Act
- Bald and Golden Eagle Protection Act
- Able Forestry, CFSC's environmental review contractor, will complete the review of projects for compliance with these acts
- **Able Forestry may contact you directly for project information**



# Environmental Compliance

Before you receive your compliance determination you may request funds for:

- Purchasing insurance
- Preparing survey documents
- Marking treatment areas
- Education/outreach
- Other administrative costs

*Do not begin fuel reduction work until you receive notification that the compliance review is complete*





# Procurement

Policies should accomplish these things:

- Avoid unnecessary purchases
- Evaluate lease vs. purchase options
- Maintain a consistent selection process
- Document procurement decisions
- Avoid conflicts of interest
- Identify excluded parties
- Address disputes or protests
- Ensure getting best value on purchases



# Types of Purchases

Micro Purchases = \$10,000 or less  
*(reasonable based on history and experience)*

Small Purchases = \$10,000+ to \$250,000  
*(quotations or rate from an “adequate number” of sources)*

Sealed Bids/Competitive Proposals = over \$250,000  
*(must be publicly advertised and follow formal bid or proposal process)*

Non-Competitive Proposals: Grantee **must prove** that sole source is needed and include a cost analysis.



# Competition

Competition = is “open, free, and full”

- Those preparing the advertisement do not bid
- Advertise clearly and widely
- No restrictive requirements
- If price is not competitive - do not award

What the CFR says about vendor selection:

- 2 CFR 200. 320 b.1.ii(D) states a firm fixed price contract award will be made in writing to the lowest responsive and responsible bidder



# Contracts

Written policies required for contract administration are listed in Appendix II to 2 CFR 200

- Ensure contractor monitoring and performance
- Different clauses are required based on:
  - contract award amount
  - Award type (construction, research, service)
  - Type of organization



# Conflict of Interest

Conflict of interest = a situation in which an individual has competing interests or loyalties.

Common conflicts of interest include:

- When a board or staff member directly benefits from a program activity, such as receiving services or being awarded a contract
- With a person has a position of authority in one organization that conflicts with their interests in another organization
- When a person has a personal relationship with another organization member.



# Break

## 10 minutes

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# Award Training Agenda

1. Introductions and contact information ✓
2. The Grant Subaward ✓
3. Federal Grant Process Requirements ✓
4. Payments
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# Payment Requests

- Payments are made by advance (do not request more than half the funding)
- Aim to spend down funds in the quarter you receive them.
- Requests can be made at the beginning of the grant term and with quarterly progress reports after that.
- Subgrantees should request approximately 3-4 or more payment requests throughout the grant cycle.
- Payments occur by an electronic direct deposit (ACH) into your bank account once master grant funds arrive.





# Payment Request Steps

## ZoomGrants:

- Payment Tab
- Select “Create New Payment Request”
- Complete form and submit

*( Payments to subrecipients are dependent upon CFSC’s receipt of funds from the federal awarding agency)*

### Payment Request

Date Submitted: auto-generated

Payment Request Number: Their number

Requested Amount: \$

Payment Request Contact Name:

Payment Request Contact Phone:

Payment Request Contact Email:

Payment Instructions: Their Payment Instructions

Internal Research Questions and Answers can/will be inserted here on the live Payment Request.

### Payment Request Questions

1. Enter the amount of grant funds spent to date  
Their Answer: [input] Edit
2. Enter the total match reported to date (on most recently submitted progress report)  
Their Answer: [input] Edit
3. Enter the estimated match amount to be accrued during the next 30 days  
Their Answer: [input] Edit
4. Enter the total match accumulated since last progress report  
Their Answer: [input] Edit
5. Enter the workplan activities covered by this request  
Their Answer: [input] Edit
6. Are the most recent progress report, expense and match forms and source documentation complete?  
 Yes  No Edit
7. Enter the new expiration date for your organization's CAGE code.  
Their Answer: [input] CAGE Code: [input] Expiration Date (mm/dd/yyyy): [input] Edit
8. Enter the new expiration date for your organization's insurance. Ensure proof of insurance is uploaded into your account.  
Their Answer: [input] Expiration Date: [input] Edit
9. Is this your final payment request?  
 Yes  No Edit
10. Edit

### Payment Request Status

Payment Request Status: Pending

Approved Amount: \$

Approval Date: (mm/dd/yyyy)

Approved by:

Payment Request Decision Comments:

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### Payment

(for this Payment Request only)

Their payment number	\$
Pending	\$
Their payment number	\$
Pending	\$
Their payment number	\$
Pending	\$
Add	Total \$
Payment	

---

### Current Funding Snapshot

(for this full application only)

Payment Request	\$
Initial	
Award	
Amount	
Pending	(-) \$
Approved	(-) \$
Paid	(-) \$
This	(-) \$
Payment Request	
Still Available	\$

---

Payment	\$
Initial	
Award	
Amount	
Pending	(-) \$
Completed	(-) \$
Still Available	\$



# Payment Requests: Items Needed Before You Submit

- Progress Report up to date for this grant
- Organization's SAM registration: CAGE code and/or UEI
- Organization's proof of current insurance on file in ZoomGrants
- Match commitment on track
- Actual expenses and match supported with proper documentation
- Reports for other grants from CFSC  
*(i.e. closeouts and progress reports)*



# Payment Requests: Status

**Pending:** The request has been submitted and is being reviewed by the grant specialist.

**Approved:** The request has been approved by CFSC for payment. CFSC is awaiting receipt of funds from funding agency.

**Returned:** Something needs to be revised

**Denied:** The request was not approved, and funds will not be dispersed. Contact your grant specialist for more information.

**Paid:** The funds are scheduled for direct deposit into the grant account.



# Progress Report Due Dates

Report Period	Progress, Match and Expense Reports Quarter Dates	Due Date
1	September 1-November 30, 2024	December 31, 2024
2	December 1, 2024-February 28, 2025	March 31, 2025
3	March 1, 2025-May 30, 2025	June 30, 2025
4	June 1, 2025-August 30, 2025	September 30, 2025
5	September 1, 2025-November 30, 2025	December 31, 2025
6	December 1, 2025-February 28, 2026	March 31, 2026
7	March 1, 2026-May 30, 2026	June 30, 2026
8	June 1, 2026-August 26, 2026	September 30, 2026

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# Progress Reports Components

- Project Narrative
- Budget Information
- Deliverables
- Match and Expense Reports
- Source Documentation



# Project Narrative

- Current work plan activities
- Project tours or meetings
- Education & outreach
- Environmental compliance
- Impact or human-interest stories
- Media Coverage
- Challenges or Delays



# Budget Reporting

- Quarterly expenses
- These can include accrued expenses that you may be waiting for grant payments to cover.
- Please round to the nearest dollar.
- Only charge items to the grant that are allowable and have source documentation to support them.



# Project Deliverables

- Acres Prepped
- Acres treated
- Workshops conducted
- Products created
- CWPPs created
- Outreach programs





# Match and Expense Reports

- Match contributions
- Grant expenses
- Program income

CALIFORNIA FireSafe COUNCIL			
QUARTERLY EXPENSE REPORTING FORM			
Date:			
Quarter:			
Grant Number:			
Organization:			
Contact Name:			
Email Address:			
<b>TOTAL QUARTER EXPENSES</b>		\$	-
A. Date or Date Range	B. Payee/Vendor	C. Expense Amount (whole dollars only)	D. Payment Method Click on the cell and select the method in the drop-down menu
	Enter itemized costs under the appropriate category		
<b>PERSONNEL</b>			
	<b>a. Total Personnel:</b>	\$ -	
<b>FRINGE BENEFITS</b>			
	<b>b. Total Fringe Benefits:</b>	\$ -	
<b>TRAVEL</b>			
	<b>c. Total Travel:</b>	\$ -	
<b>EQUIPMENT</b>			
	<b>d. Total Equipment:</b>	\$ -	
<b>SUPPLIES</b>			
	<b>e. Total Supplies:</b>	\$ -	



# Source Documentation



## Source Documentation MUST:

- Indicate if the item is Match or an Expense
- Include subgrant number
- Be documented after-the-fact to reflect actuals and must include the **date of contribution/expense**
- Include the vendor or donor name
- Indicate who approves and pays the expense/match and a date
- Include a **description** of the service or item
- Include total amount paid with federal dollars
- Include **value** of the item or the rate and hours of service
- Be **signed** by the individual contributor (for match items)



# Modifications

## Possible Modification Requests:

- Programmatic Changes: scope or objectives of the approved project, key personnel, project location, or transfer of programmatic work to another party
- Budget Revisions: Cumulative change of 10% or more in any cost category
- Extension of Subgrant Term: only when situations beyond control impact project completion

*Prior written approval is required from a Grant Specialist before making changes to the project or subaward*



# Extensions

- Extensions (typically 1 or 2 quarters) can be requested using the modification form.
- Extensions will not be possible for the 2023 batch of grants due to the master grant closeout date.
- Extensions are awarded at the discretion of CFSC
  - An extension can be requested based on seasonal constraints, or other factors that result in the need for more project time.
  - An extension request may be denied if the recipient has not made a good faith effort to move the project forward in the existing grant term.



# Non-Compliance

The usual suspects...

- Late or missing reports
- Deliverables costs do not match budget costs
- Incomplete Source Documentation
- Conflicts of Interest
- Incomplete personal time documentation
- Incomplete match documentation
- Not completing the closeout report



# Site Visits and Desk Reviews

Site visits are used to monitor project progress. These events may include touring the project area and reviewing subgrant documentation.

Desk reviews are completed to ensure that subgrantees are meeting the standards for management of federal grant funds. Subgrantees should be able to readily produce match and expense documentation.



# Grant Closeout

- Closeout within 90 days of the end of the grant term
- Work on impact report and submit before/after pictures of the project
- Determine final costs and match
- Return any unspent funds
- Pay final bills incurred during the grant term
- Complete Closeout Report
- Provide Feedback to CFSC
- Notify CFSC if closing out before the final quarter



# Reminders

- Stay familiar with your sub-award agreement and original application
- Begin tracking match and expenses
- Prepare to submit payment requests
- Submit project information for environmental review if requested
- Submit reports on time each quarter
- Communicate questions or challenges
- Create impact reports and before/after photos





# Resources

- The Grant Guidebook (will be sent to you following this training)
- ZoomGrants (ZoomGrants university tutorials)
- Your Grant Specialist
  - Regular check-in calls
- Important Websites in the Handbook
  - Including the CFSC Website where you can find the Newsletter Signup
- CFSC Outreach Monthly Meetings
  - Found on the CFSC Events page
  - Opportunity to share resources directly with other organizations



# Newsletters & E-blasts

Get notified of CFSC funding opportunities

## NEWSLETTER SIGNUP FORM

Enter Email \*

SUBMIT



### ANNOUNCEMENT SERIES CFSC Bulletin

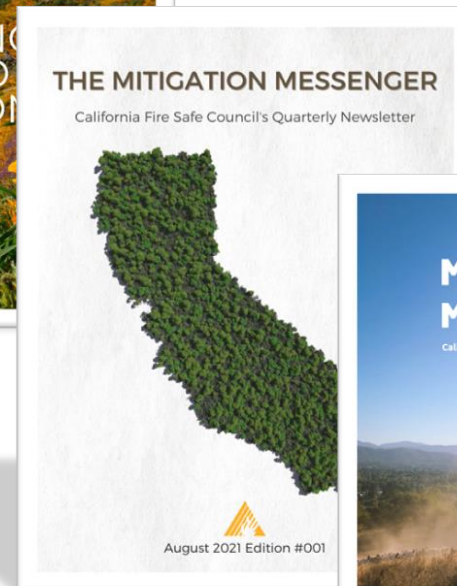
## Outreach & Communications Workshop November 2021

### About The Workshops

Some collaborate and learn with your fellow community members how to build and maintain a Communications Plan for your organization.

CFSC Communications Team & Staff share ideas to effectively build communities, provide outreach opportunities, and create a robust and sustainable communications plan centered around community wildfire mitigation and resiliency.

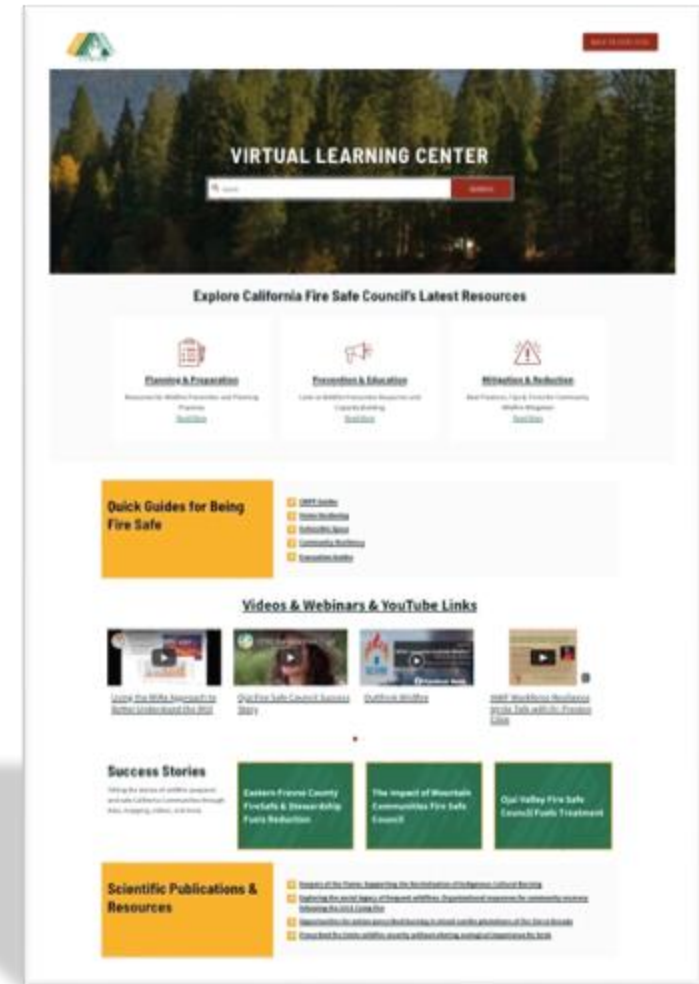
Planning on attending? Join the conversation! Let others know you're there and why you're going, using the #CFSCWorkshop. Head over to Facebook and Like and Follow [CFSC](#), [PG&E](#), and [SCE](#). On Twitter, tag [CFSC](#), [PG&E](#) or [SCE](#) in your post, and you'll be entered into a drawing to win [FREE](#) [tickets](#).



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# Virtual Learning Center



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# CFSC Events Calendar

**EVENTS**

September 2024

CFSC Events Local CFSC Events Partner Events Regional/Statewide

SUN	MON	TUE	WED	THU	FRI	SAT
1	2	3	4	5	6	7
8	9	10	11	12	13	14
			12:00 pm - 1:00 pm CFSC SOUTHERN CA REGIONAL MONTHLY MEETING			
15	16	17	18	19	20	21
			12:00 pm - 1:00 pm CFSC STATEWIDE MONTHLY MEETING	East Orange Cal... Los Angeles Cal...		
22	23	24	25	26	27	28
29	30	1	2	3	4	5

SUBSCRIBE TO CALENDAR

## CFSC Events Calendar Submission

To request an event be added to our calendar please complete the form below. Please be aware that submission of this form does not guarantee placement on the CFSC Calendar. Requests must be submitted at least 48 hours before the event occurs. If we have additional questions we will contact you via the email address provided.

\* Required

1. Event Name \*

Enter your answer

2. Event Time & Date \*

Enter your answer

3. Event Description \*

Enter your answer

## HAVE AN EVENT?

Do you have an event you'd like featured on our calendar?

SUBMIT YOUR EVENT

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# THANK YOU!

Christopher Lozano, [clozano@cafiresafecouncil.org](mailto:clozano@cafiresafecouncil.org)

Morgan Galliano, [lgalliano@cafiresafecouncil.org](mailto:lgalliano@cafiresafecouncil.org)

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