

Grant Management Handbook



2023 & 2024 State Fire Capacity Grant Program Fire Prevention Grants for Non-Federal Lands



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2024 Grants Clearinghouse: Grant Management Handbook

Purpose

Congratulations on your California Fire Safe Council (CFSC) grant award. The staff of CFSC are looking forward to working with you to successfully complete your project. You will be assigned a CFSC Grant Specialist to coordinate with you throughout the term of your project.

This handbook is a supplement to the subaward agreement for the 2023 & 2024 SFC Grant Clearinghouse programs, providing guidance and addressing key questions concerning the implementation of your grant. All information contained herein is incorporated by reference in the subaward agreement. It is the responsibility of the subrecipient to understand and comply with the information and requirements contained in this handbook.

Funding Source Acknowledgement

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Equal Opportunity Statement

In accordance with federal law and USDA policy, CFSC is prohibited from discriminating based on race, color, national origin, sex, age, or disability. The CFSC is an equal opportunity provider.

Program Access Concerns

California Fire Safe Council is committed to making its materials and programs accessible to all customers and employees. If you experience any difficulty accessing information provided by CFSC, please contact us at info@cafiresafecouncil.org or (916) 648-3600. We will try to assist you as best we can. This may include providing the information to you in an alternate format.

To file a complaint of discrimination: Write to USDA, Director, Office of Civil Rights, Room 326-W, Whitten Building, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410, or call (202) 720-5964 (voice and TDD). USDA is an equal opportunity provider and employer.

Endorsement Statement

The views and conclusions contained in this document are those of the authors and should not be interpreted as representing the opinions or policies of the U.S. Forest Service or the U.S. Government. Mention of trade names or commercial products does not constitute their endorsement by the California Fire Safe Council or the U.S. Government.

Subrecipients must comply with requirements regarding nondiscrimination, accessibility, endorsement statements and funding source acknowledgements. Compliance includes using

the above verbiage in printed materials, media messages, and public notices. More information about compliance requirements is found in the Modifications section of this handbook.

CFSC Contact Information (August 2024)

This section provides contact information for CFSC grant staff, regional outreach coordinators, and links to websites for grant-related information.

CFSC Grants Clearinghouse Team	
<p>Julia Marsili – Interim Clearinghouse Manager Phone: (279) 599-2162 Email: jmarsili@cafiresafecouncil.org</p>	<p>Liron Morgan Galliano Senior Grant Specialist, USFS Grant Lead Phone: (279) 599-2509 Email: lgalliano@cafiresafecouncil.org</p>
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<p>Gabriela Erazo Smith Staff Grant Specialist Phone: (279) 246-2312 Email: gerazo@cafiresafecouncil.org</p>	<p>Fabiola Garcia Lopez Programs Administrative Assistant Phone: (279) 599-2179 Email: fgarcialopez@cafiresafecouncil.org</p>
<p>Environmental Compliance Consultant – James L. Able Forestry Consultants, Inc. Eric Taft Email: ETaft@ableforestry.com 1410 Second Street Eureka, CA 95501 (707) 445-4130</p>	
CFSC Programs and Outreach Team	
<p>Jessica Martinez – Program Director Phone: (279) 599-4726 Email: jmartinez@cafiresafecouncil.org</p>	
<p>Becca Joyner Programs & Outreach Manager Phone: (279) 599-0335 Email: bjoyner@cafiresafecouncil.org</p>	<p>Britney Munoz Regional Coordinator – All Regions Phone: (279) 599-3082 Email: bmunoz@cafiresafecouncil.org</p>
<p>Megan Katich Communications & Outreach Specialist Phone: (279) 599-4315 Email: mkatich@cafiresafecouncil.org</p>	<p>General Outreach Email: outreach@cafiresafecouncil.org</p>

Subrecipient Roles and Responsibilities

This section provides information about the process of grant making and the roles of the parties involved. Grant relationships are based on the flow of funding and requirements that accompany the use of federal funds on a project.

Master Grants and Subgrants

Master Grant: Congress appropriates funds for specific federal agencies. These agencies then disperse available awards as grants based on a competitive application and evaluation process. In this case, USFS has awarded a “master grant” which CFSC manages to make subawards following federal grant policies and regulations. The CFSC submits periodic reports to the USFS on progress of the subawards. USFS in turn presents these accomplishments to Congress. This documents the positive impact of the grant program on public beneficiaries and helps to determine future appropriations.

Subgrants: As a “pass-through” organization, CFSC makes subgrants from its master grant. Subgrants are awarded to eligible organizations (“subrecipients”) for projects that meet the goals of the master grant. All applicable federal grant requirements from the master grant are also passed to the subrecipients. The federal government requires that CFSC monitor subgrants throughout the grant process – from application through closeout – to ensure compliance with federal grant regulations and completion of each project. As a federally sourced grant, the federal government expects the same level of accountability from the CFSC for its multi-million-dollar grant as it expects from the subgrantees. The grant funds don’t lose their “federal quality” once they pass through CFSC.

Terminology

The terms below may be used interchangeably:

- Award = Grant
- Recipient = Grantee
- Subrecipient = Subgrantee
- Subaward = Subgrant (*“subaward” also refers to the documents that your organization signs to accept the grant funding and acknowledge the associated requirements.*)

The Role of the Subrecipient

The subrecipient is the organization that carries out the subgrant project with the funding from the pass-through entity. In this case, the pass-through entity is CFSC and your organization is the subrecipient. Consider your organization as a team member among a group of subgrantees. It is essential that you complete your project as described in your grant application, spend grant funds correctly, maintain documentation of all expenses and matching contributions, and report accomplishments accurately, completely, and on time, so that the master grant payment process can function properly.

It is useful to think of the completion of a grant-funded project as a balance between project implementation and grant management. The subrecipient is responsible for both factors, as these are equally vital for determining success of the subgrant. Think of “project implementation” as the content of the activity (measurable results), and “grant management” as the structure under which the activity happens, with the focus on documentation and processes (complete documentation).

Components of Project Implementation and Grant Management	
Project Implementation	Proper Grant Management
<ul style="list-style-type: none"> • Finalize project plans • Complete Environmental Compliance requirements, as applicable • Follow your written procedures and the federal standards for project management • Select and work with any necessary contractors and participants, ensuring contracts are clear as to scope of work and are compliant in accordance with 2 CFR 200 requirements and provisions guidelines • Implement the project as approved • Track the accomplishments of the project • Monitor the project progress through metrics and photo documentation • Ensure that the project meets the objectives and accomplishments • Maintain clear communication and coordination with CFSC. 	<ul style="list-style-type: none"> • Understand and comply with all federal and CFSC grant requirements • Maintain proper accounting of expenses and matching contributions • Provide accurate and complete reports on time to CFSC • Spend grant funds in accordance with federal requirements • Submit payment requests and documentation required for modifications • Maintain documentation regarding all grant processes, expenses, and matching contributions.

As a recipient of federal grant funds, your organization is spending U.S. tax dollars and therefore taking on the expectation of accountability and transparency that comes with any government spending. Accountability includes spending the funds in accordance with the subaward agreement, environmental compliance requirements, and federal grant regulations.

Grant Cycle Phases

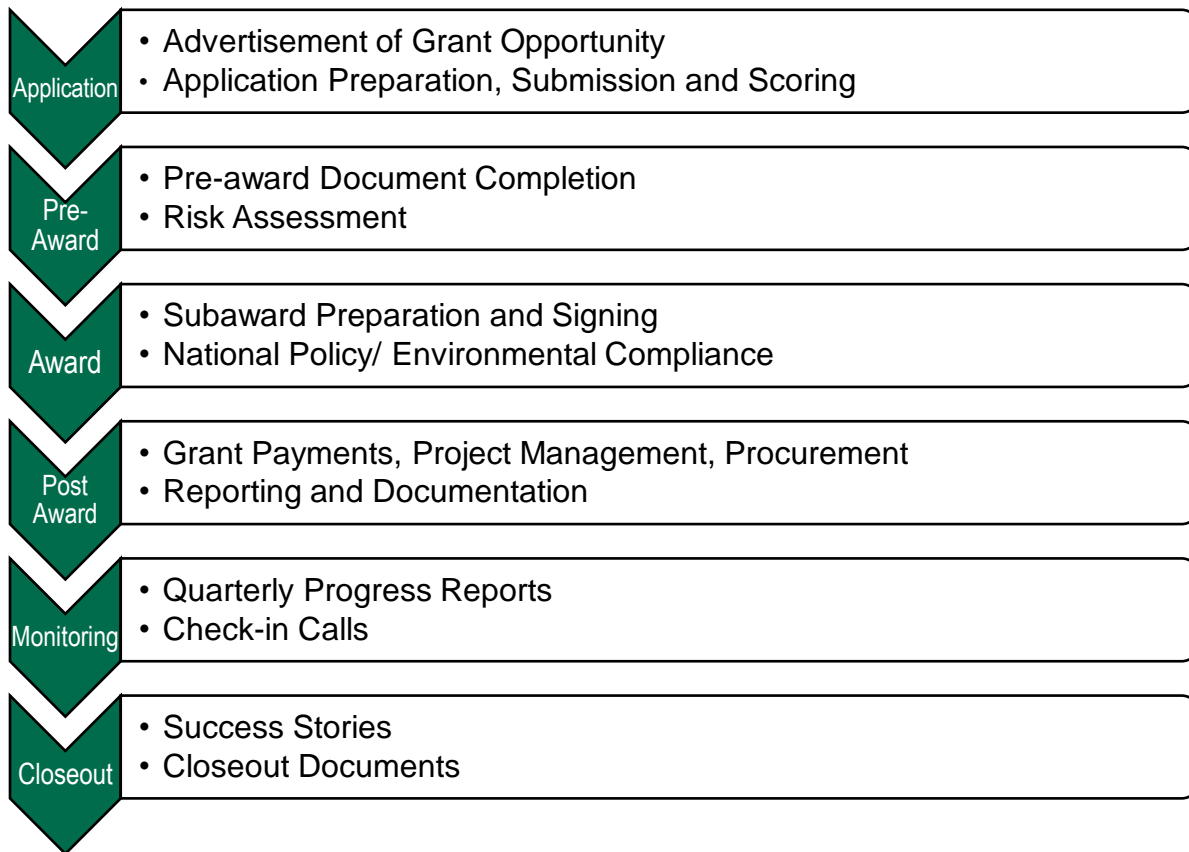
The following phases are specifically described in the Code of Federal Regulations for Grants and Agreements. The CFR topics are organized based on where they occur during the following four phases:

Application: The Application is the beginning step in the process that accompanies the use of federal funds. The grant funding opportunity is announced through a request for applications, and the application period is opened for submissions. Applications that meet the criteria for completeness and conform to the program objectives are reviewed and scored by a review committee. Scoring is considered, in addition to program impact, reasonableness, and allocability of proposed activities and budget. Final awardee selections are then made and announced.

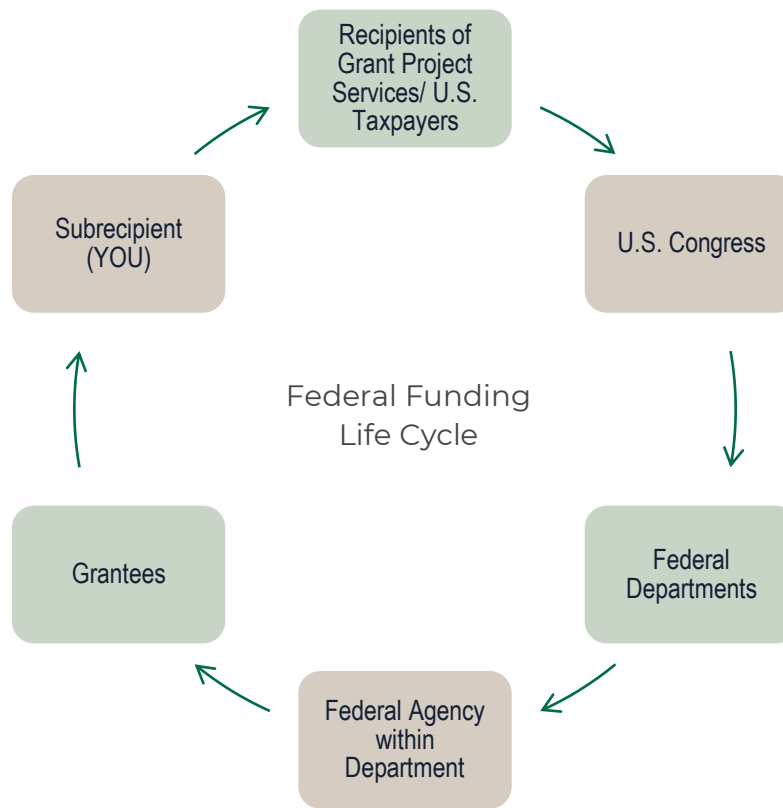
Pre-award: During the Pre-award phase the selected recipient organizations begin the environmental compliance process and are evaluated for eligibility, risk, and organizational capacity.

Post-award: The Post-award phase coincides with the grant period as defined in the Subaward agreement. During the Post-award phase, the project environmental review is completed, project work commences, grant payments are made to the grantee, the grantee makes payments to vendors and contractors, project matching contributions are received from cooperators, and quarterly progress reports are submitted.

Closeout: The Closeout phase occurs during the 90 days following the end of the grant term. During this phase, final bills for costs incurred during the grant period are paid, final matching contributions are tallied, and the final quarterly and closeout reports are completed.



Federal Funding Life Cycle



Recipients of Grant Project Service/ U.S. Taxpayers: They want to know where their tax dollars are going and how are they being spent. They want accountability.

U.S. Congress: Allocates and disperses funding to federal agencies and departments.

Federal Departments: (Department of Agriculture, Interior, etc.) Receives and disperses federal funding provided from Congress, determining priorities and allocability.

Federal Agency within Department: (Forest Service, Bureau of Land Management, etc.) Agencies often disperse funds through grant programs, providing funds to nonprofits, local and state governments, and other entities that must show how and why they spent the money in accordance with federal regulations and codes.

Grantees: Organizations across U.S., including CFSC. Grantees must spend the grant funds for the purpose identified in the master grant, document how the funds were spent, and report how the project was implemented, including its successes, challenges, and beneficiaries.

Subrecipient: **This is your role in the grant process.** You carry out the projects and tell us **who, what, where, when, and how** you spent the grant funds and met your matching contribution obligation. This is done through the quarterly progress reports and the quarterly expense and match reports, and their supporting documents.

Key Components of the Subaward Agreement

This section describes the subaward contract and explains the federal grant regulations applicable to CFSC subgrants.

Subaward Contract

The subaward contract (the “subaward”) is a *legally binding contract* between the California Fire Safe Council and the subrecipient, which includes the *applicant organization* and its *fiscal sponsor* (if applicable). The subaward outlines the requirements and expectations for the subrecipient. By signing the subaward contract, the subrecipient acknowledges that the organization will abide by all the applicable grant regulations, terms, and conditions.

The subaward contract was sent to the subrecipient through DocuSign and the contract requires electronic signatures. Once the CFSC Executive Officer signs the agreement, it has been executed and grant funds can be expended. This fully-executed agreement will be uploaded and stored in “ZoomGrants”, the online grant management system, accessible by the subrecipient.

The subrecipient **shall not** begin any work on the project until the signed subaward agreement has been fully executed. Activities carried out without a signed subaward **will not be reimbursed**.

This handbook is an attachment to the subaward contract. All information contained herein is incorporated by reference in the subaward contract. It is the subrecipient's responsibility to understand and comply with the information and requirements in the handbook. Any questions about handbook contents should be directed to your assigned Grant Specialist.

The first page of the subaward lists the basic grant award information including:

<u>Grant Number:</u>	A unique code assigned by CFSC to each grant. This assigned 6-digit number (e.g., 46XXXX) should be referenced in all correspondence, documentation, and reports related to the grant.
<u>Grant Amount:</u>	Total amount of federal grant funding for the project.
<u>Match Commitment:</u>	Total value of non-federal matching contributions that subrecipient has agreed to provide.
<u>Subaward Period:</u>	Start and end dates for the grant term during which all grant activities must be completed. Expenses incurred outside this term are unallowable.
<u>Source of Funding:</u>	The federal funding agency providing the grant funds for the project, the legislation under which the grant is made possible, and the Catalog of Federal Domestic Assistance (CFDA) number for the grant program.

Privity of Contract

The relationship concerning the Subaward is strictly between CFSC and the Subrecipient. The subrecipient must understand and agree that neither USFS, nor the United States shall be, or are intended to be, a party to this Subaward, any contract with the Subrecipient, any solicitations, request for proposals, or disputes on the execution, interpretation, or enforcement of any contract, including this Subaward, between CFSC and the Subrecipient.

Federal Grant Regulations

Since the grant funds awarded through the Grants Clearinghouse originate from the federal government, all subgrantees are required to comply with federal grant regulations. These federal regulations include a wide variety of topics, and define the expectations applied to the subrecipient organization. The regulations specify how to properly implement the grant project and manage the grant funds.

Subrecipients have a legal responsibility to comply with the federal grant regulations and ensure that federal grant funds are used properly. *Penalties for noncompliance* may include termination of the grant, disallowance of costs, and repayment of the grant funds (even if they have already been spent).

The federal grant regulations are contained in the Code of Federal Regulations (CFR). Subrecipients are subject to the OMB guidance in subparts A through F of 2 CFR 200 as adopted. USDA Forest Service subgrants are also subject to U.S. Department of Agriculture guidance found in [2 CFR Part 400](#).

Administrative Requirements: These regulations establish consistency and uniformity in the administration of those grants and agreements. Topics found under the administrative requirements include standards for financial management systems, equipment, cost sharing/match, and revision of budget and program plans. The Administrative Requirements can be found in Parts A through D of [2 CFR 200](#).

Cost Principles: These regulations establish standards for determining what costs are allowable under federal awards carried out through grants, cost reimbursement contracts, and other agreements. Topics include allowability of costs, direct versus indirect costs, and a list of selected items of cost with details on how to properly evaluate and document the cost. The Cost Principles can be found in [Part E of 2 CFR 200](#).

Audit Requirement: Grant recipients are subject to the “single audit” requirements defined in [Part F of 2 CFR 200](#), if the applicant organization or fiscal sponsor spends \$750,000 or more in federal funds in its fiscal year. The single audit is an examination by an independent auditor of an organization’s financial records, internal controls and compliance with regulations governing federal awards. An organization that undergoes single audits should provide a copy of the audit report to CFSC during the pre-award phase, and annually thereafter.

Many organizations undergo standard (non-federal) audits annually to evaluate their procedures, accounting practices and internal controls. Copies of these audits should be provided to CFSC each year during the grant term.

Written Policies and Procedures

Federal grantees and subrecipients must have their own organizational written policies that comply with [2 CFR 200](#) to ensure proper handling of the funds. These policies must demonstrate that the organization has the internal controls needed to protect, spend, and manage the grant funds accurately and in compliance with the grant requirements.

Policy	Purpose
<u>Financial and Accounting</u>	Protect the grant funds, determine allowability, allocability and reasonableness, maintain accurate documentation
<u>Personnel</u>	Provide for proper time and effort reporting, describe consistent, allowable and allocable charges
<u>Procurement/Purchasing</u>	Solicitation of services and goods, avoiding unnecessary purchasing, allowability and reasonableness of costs
<u>Property Management</u>	Safeguard equipment, how to acquire/dispose of property
<u>Travel</u>	Reimbursement/approval of travel expenses and mileage according to internal policies or GSA rates .
<u>Conflict of Interest</u>	Procedure for handling conflicts, address Board and Staff

When drafting or revising your organization’s written policies, refer to the federal grant regulations. These regulations will help you decide the limits you want to include in your own policies. Please note federal regulations may be more restrictive than desired for local policies and procedures. Also note that your local policies may not exceed the limits of federal grant regulations. If you want to receive federal grant funds, your federal grant management policies must meet the federal standards.

Subaward Provisions

This section highlights and explains the provisions applicable to your subaward. By signing the subaward contract, the subrecipient (you) agree to comply with all applicable federal, state, and local laws, regulations, and policies governing the funds provided under the contract. Any failure to comply with the provisions of the subaward, including the provisions of this handbook, may result in denial of grant funds.

Insurance

The subrecipient and fiscal sponsor, if applicable, are responsible for all grant funds received through the California Fire Safe Council Grants Clearinghouse and for all assets purchased with grant funds. This responsibility extends to any loss of grant funds attributable to fraud and/or misappropriation by third persons and to any expenditure not allowed by this Contract. Should any loss of grant funds or improper expenditure of grant funds occur, the Subrecipient and its

Fiscal Sponsor (if applicable), will be required to reimburse the awarding agency for those amounts.

The subrecipient and/or fiscal sponsor must carry insurance that is enough to protect the grant funds and all assets from any loss or misuse. Coverage should protect against theft, fraud, misappropriation, negligence, and undue physical damage or harm.

The subrecipient must provide CFSC with proof of appropriate insurance 1) during the pre-award phase and 2) prior to engaging in activities for which grant funds or matching contributions are provided. During the grant term, the subrecipient must send the CFSC current proof of insurance upon annual renewal.

Grant funds can be used to purchase appropriate insurance coverage. If the subrecipient is using grant funds to purchase insurance, then the subrecipient shall provide proof of insurance to the California Fire Safe Council **within 30 days** of obtaining the policy. Failure to maintain insurance coverage or to provide proof of insurance to CFSC, including upon annual renewal, will cause denial of grant payments and possible termination of the award.

Types of insurance coverage to consider:

Directors and Officers (D&O): Cover the directors and officers of an organization in the event they are sued in conjunction with the performance of their duties that relate to the company.

Workers Compensation: Provides medical care compensation for employees who are injured in the course of employment. All employers are required by state law to provide Worker's Compensation Insurance for their employees.

Liability: Provides protection from claims arising from injuries or damage to other people or property.

Equipment: Covers loss, theft, and physical damage, and more (if specified in the policy).

Errors and Omissions: Protects the organization against claims resulting from mistakes and things that your organization's officers and employees forgot to do.

Fidelity Bond: Covers policyholders for losses that they incur as a result of fraudulent acts.

Criminal Acts: Protects against damage or loss resulting from criminal acts of employees, officers, and contractors. Contact an insurance broker and discuss your potential liability, and the various types of insurance you may need to purchase to meet the requirement of our grant Contract.

Termination of Subaward

The subaward contract **may be terminated** in accordance with the provisions of the applicable federal grant regulations. Failure to comply with the award provisions and grant requirements may result in termination of your subaward. Termination of the grant can also result from misuse of funds, inability to perform, lack of capacity, falsification of data, nonperformance, misrepresentation, fraud, and nonadherence to grant terms.

A subrecipient that has encountered a problem with managing the subgrant or completing the project should contact the assigned CFSC grant specialist immediately. The grant specialist will assist in finding a solution. CFSC wants to work with you to find a solution to the setbacks you may experience. Termination is a last resort option that CFSC wants to avoid. CFSC would much rather work with you to find a successful solution.

Property Management and Disposition

Any property used or acquired under this contract is governed by the federal grant regulations. This may include real property, equipment, intangible property, and debt instruments. Subrecipients must have a written policy to ensure the safeguard of property and equipment against loss, damage, and theft.

Equipment

Under the federal grant regulations in [2 CFR 200.313](#) and [2 CFR 200.439](#), Equipment is defined as a tangible item with a unit price of \$5,000 or more and a useful life span of more than one year.

In order to purchase Equipment with grant funds, an organization is required at the time of application to provide a cost/benefit analysis that compares the cost of purchasing equipment versus leasing, borrowing, or other options.

Applicants are discouraged from purchasing Equipment with federal funds because of the strict rules governing how the Equipment must be properly insured, maintained, housed, and tracked in compliance with federal grant regulations. There are also specific rules for disposing or selling of equipment.

If an organization purchased Equipment under previous CFSC grants, it is subject to the federal regulations regarding equipment. The organization must contact CFSC prior to selling or disposing of the equipment as there are procedures that must be followed in accordance with grant regulations.

Notification

Subrecipients must notify CFSC immediately of any significant developments or changes impacting activities of the subaward. This notification shall be in writing if it involves problems, delays or adverse conditions impacting the ability to meet the grant objectives. Include a statement of action taken or contemplated, and any assistance needed to resolve the situation.

Non-Liability

CFSC does not assume liability for any third-party claims for damages arising out of this subaward. Each party agrees that it will be responsible for its own acts and the results thereof.

National Policy Requirements

The national policy requirements applicable to the subgrants are incorporated into the administrative requirements, included by reference, or mentioned directly in the subaward Contract. Some of these requirements include Civil Rights Act compliance, wearing seatbelts, and drug-free workplace requirements.

Members of Congress

Under the federal law, no member of, or delegate to, United States Congress may share or benefit from any part of the subaward, directly or indirectly.

Restrictions on Lobbying

Grant funds may not be used for expenses related to lobbying for proposed contracts or grant awards. This includes any activity, or the publication or distribution of literature, intended to promote support or opposition to any legislation. Certification and Disclosure of Lobbying Activities are required at the Pre-Award Phase and throughout the subgrant term.

Compliance with Title VI of the Civil Rights Act of 1964

Compliance with Title VI of the Civil Rights Act includes:

- Accessibility to programs
- Nondiscrimination
- Equal opportunity employment

If the subrecipient has a public office, it must post information from the Forest Service on Title VI compliance in a visible location. The “And Justice for All” posters and brochures are available from CFSC.

During the pre-award phase, each subrecipient completed the Civil Rights Compliance Review Form and phone interview. If the organization discovered areas in which civil rights compliance was insufficient or lacking, then it must implement solutions to improve its programs and outreach to ensure full compliance. As part of the Closeout phase, CFSC will review the form with each subrecipient again to determine if any improvements or changes were made regarding civil rights compliance.

Order of Precedence

Any inconsistency in the subaward Contract will be resolved by giving precedence in the following order:

1. Any national policy requirement and administrative management standards
2. Requirements of the applicable OMB Circulars and Treasury regulations
3. 2 CFR 200
4. 2 CFR 400
5. Special terms and conditions
6. All subaward Contract sections, documents, exhibits, and attachments

Trafficking in Persons

Subrecipient, contractors and employees of the subaward may not engage in forms of trafficking in persons, procure a commercial sex act, or use forced labor in the performance of the subaward during the subgrant term. If a violation is discovered, CFSC may unilaterally terminate the subaward. Subrecipient is required to notify CFSC immediately of any information from a source alleging such a violation of the above prohibitions.

Drug-Free Workplace

A subrecipient that is an employer must have a Drug-Free Workplace Statement that meets the requirements of U.S. Forest Service form AD-1049. The subrecipient agrees to publish a drug-free workplace statement in their policies and procedures and provide a copy to each employee. A copy of the policy must be submitted to CFSC before the subaward can begin.

Dispute Resolution Procedures- Mediation and Arbitration

Subrecipient agrees to have any dispute greater than \$7,500 arising out of the matters included in the "Arbitration of Disputes" provision in the subaward contract decided by neutral arbitration as provided by California Law and gives up any rights they might possess to have the dispute litigated in a court or jury trial.

Environmental Compliance for Grants

This section provides information on the federal environmental compliance review that applies to Clearinghouse Grants.

Federal Environmental Compliance Review Process

The California Fire Safe Council has contracted with a professional forestry consulting firm to review grantee documents relating to the environmental and cultural resource impacts of their proposed projects.

Federal environmental acts that are triggered by federal grant funding are:

- Endangered Species Act
- Migratory Bird Treaty Act
- National Historic Preservation Act
- Bald and Golden Eagle Protection Act

Our consulting firm will review the grant applications and project maps for compliance with applicable federal laws. If more information is needed for the review, the consultant will contact the grantees directly. Grantees may also need to conduct record searches or surveys as part of the federal environmental compliance review.

When the review is complete, CFSC will send an environmental compliance determination to the grantee. This determination will contain mitigation measures and additional requirements that must be followed during project implementation. Mitigation measures may include flagging certain areas for avoidance, conducting surveys for species, consulting a professional archaeologist or biologist prior to beginning the project, or making changes to the method or location of treatments.

Local and State Environmental Requirements

It is your organization's responsibility to comply with any local or state laws that apply. Subgrantees must complete the necessary work to be compliant with local laws *before* beginning project work for which compliance is required.

Your local CAL FIRE unit foresters may be able to tell you what laws apply to your project and who you can contact to learn more about them. You are encouraged to consult with a Registered Professional Forester (RPF) or other resource professional in your area to ensure that your treatment prescription is appropriate, and that you have met the requirements of local and state environmental laws.

Payments and Ground/Vegetation-Disturbing Work

Subrecipients may not begin any fuels treatment work prior to notification from CFSC that the federal environmental review is complete. *It is the responsibility of the subrecipient to ensure that all applicable state and local requirements are met before vegetation treatment begins.*

Payment requests for non-ground disturbing activities and costs may be submitted prior to receiving notification that the environmental review process is complete. These activities and costs may include hiring a consultant for environmental surveys, purchasing insurance and supplies, conducting educational workshops, etc.

However, if such payments are expected to exceed \$5,000, consult with your Grant Specialist before submitting the request.

Payments

This section presents the process for submitting requests for payment.

Grant payments shall only be in the form of electronic direct deposit through ACH processing to subrecipient's bank account. ACH processing is a safe form of a bank wire from CFSC's bank to subrecipient's bank. Payment requests (also referred to as an Invoice) must be made through your ZoomGrants account. Every effort will be made to send advance payments on a regular basis throughout the grant term; however, if CFSC does not have the funds available, payment will be delayed until CFSC receives the funds from the awarding agency.

Prior to submitting a payment request, please make certain these requisites are up to date:

1. Progress Reports up to date for this grant
2. Organization's CAGE registration and Unique Entity Identifier number (UEI)
3. Organization's proof of current insurance on file in ZoomGrants
4. Match commitment on track
5. Actual expenses and match supported with proper documentation
6. Reports for other CFSC grants (*i.e., progress reports, closeouts*)

How To Submit Payment Requests

Payment requests are accessed and submitted through the Payments Tab in your ZoomGrants account. Select the "Create a New Payment Request" button and a new window will open with the Payment Request Form. Answer all the questions on the form and, if applicable, upload a new insurance waiver.



How to Submit a Payment Request in ZoomGrants

California Fire Safe Council
23-24 SFC Grant Program

Payment Request Checklist Item	Completed in ZoomGrants
Requested Amount Enter the total dollar amount of your request. Use whole dollars only.	<input type="checkbox"/>
Payment Request Number Use the last 6 digits of your subgrant number, followed by a dash and the sequential request number. <i>(Example: The first request for subgrant # 23 USFS-SFC 123456 would be 123456-1, then 123456-2, then 123456-3, and so on.)</i>	<input type="checkbox"/>
Payment Request Contact Information Enter the name, phone, and email of the person who is fiscally responsible for the grant and able to certify this request on behalf of the organization.	<input type="checkbox"/>
Payment Instructions <i>(Use only if you have a Fiscal Sponsor)</i> Use this field to enter the contact information for the Fiscal Sponsor representative when applicable.	<input type="checkbox"/>
Enter the Estimated Match Amount to be Accrued During the Next 30 Days Enter the estimated amount of Matching Contributions that will be accrued in the next 30 days.	<input type="checkbox"/>
Enter the Total Match Accumulated and/or Estimated Since Last Progress Report List the activities from your Work Plan that you will accomplish using the requested funds. Consult the Work Plan in your application.	<input type="checkbox"/>
Enter Your Organization's CAGE Code OR Unique Entity Identifier (UEI) with their respective expiration date.	<input type="checkbox"/>
Enter the Expiration Date for Your Organization's Insurance <i>(Ensure Current Proof of Insurance is Uploaded into Your ZoomGrants Account)</i> If your organization's insurance was renewed since the last payment request, enter the new expiration date and ensure a copy of the proof of insurance is uploaded into ZoomGrants. If it has not been renewed, contact your insurance carrier.	<input type="checkbox"/>
Certification Type your name to certify that the information provided is accurate. Must be an authorized signer for the grant as indicated in your Pre-Award Report.	<input type="checkbox"/>

Then Click "Submit Payment Request"

*This checklist is **not** required to be completed or submitted. It is for individual use and tracking. All items must be completed and submitted through your 23-24 SFC ZoomGrants Account.*

Payment Request Status Definitions

- Pending: The request has been submitted and is being reviewed by the grant specialist and Finance team.
- Approved: The request has been approved by CFSC for payment. CFSC is awaiting receipt of funds from funding agency.
- 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 account the subrecipient provided.

Please note: It may take time to update your payment status in ZoomGrants from Pending to Approved, as this is done manually by CFSC's Finance and Accounting Department. If you have questions as to whether your payment has been processed, please contact your Grant Specialist.

Payments to subrecipients are dependent upon CFSC's receipt of funds from the federal awarding agency.

Procurement

This section provides guidance on major topics relating to the procurement of goods and services under your federal grant. Make sure that your organization's written procedures meet the standards in the Code of Federal Regulations and then follow them consistently.

Procurement Policy

All subrecipients are required to have a written policy that explains the procedures for procuring services or entering contracts. The policy should provide guidance on proper procedures to accomplish the following objectives:

- 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 achieving best value on purchases.

Subrecipients must maintain records that are sufficient to detail the history of procurement (i.e., rationale for method of procurement, selection of contract type, contractor selection or rejection, basis for contract type). Subrecipients must also maintain oversight to ensure that contractors perform in accordance with the terms and conditions of their contracts.

Types of Purchases

Micro-purchases: (\$10,000 or less) may be made without soliciting competitive quotations, if permitted by your own procurement policies, and if the grant recipient considers the price to be reasonable. 2 CFR 200 specifically points out that, to the extent practicable, grant recipients must distribute micro-purchases equitably among qualified suppliers.

Small purchases: (\$10,000+ to \$250,000) are made by comparing price, quality, evaluating competitive fairness, and ensuring opportunities for inclusion. Price quotations must be obtained "from an adequate number of qualified sources." These quotations can be in writing or verbally from the vendor and documented by you. They must be documented and included with the procurement document.

Sealed bids: are used for procurements over \$250,000. Vendors are chosen based on price and past performance. Evaluate contractor eligibility and clearly describe project activities and contract provisions that may impact costs, such as environmental constraints, and working with individual landowners.

Competitive proposals: (May also be used for procurements over \$250,000.) Vendors are chosen based on price and how well the proposal will meet the goals of the grant program. This might be a good option for a project that could be completed with quite different methods, or for a creative project like an outreach video, website, or printed materials, which could be expensive, depending on the quality of production.

Non-competitive proposals: are used only under certain conditions where items are only available from a sole source. The documentation of this process is important. One or more of the following must apply:

1. Available only through a sole source.
2. Public exigency or emergency will not permit delay required for completion.
3. USFS (United States Forest Service) or CFSC (California Fire Safe Council) has expressly authorized a noncompetitive process.
4. After solicitations of several sources, competition is deemed inadequate.

Intergovernmental agreements can include the use of grant funds, except that federal grant funds cannot be used to cover the costs of a federal agency.

Competition

There is no strict definition of what open competition looks like since it will depend on what resources are available in your area, but the Code of Federal Regulations standards call for free, open, and full competition.

Inclusion of small and minority-owned businesses, women's business enterprises, and labor surplus area firms: Subrecipients must take "all necessary affirmative steps" to assure these businesses are used when possible. Additionally, subrecipients must seek out these businesses for bid invitations and consider splitting large contracts. This should also be required of subcontractors.

Separation: [2 CFR 200.319](#) specifically disallows contractors from participating in procurements in which they were involved in the development or drafting of specifications, requirements, statements of work, or invitations or requests for bids. The purpose of this requirement is to allow for open competition whenever possible, and to provide reasonable justification for the selection of contractors based on a free, fair, and open competitive process.

Advertisement: Describe the technical requirements and the project conditions, such as environmental protection, so that potential contractors can clearly represent their costs. Be sure to target woman or minority owned businesses and small businesses.

Restrictions: Plan projects to minimize constraints, such as the type of equipment to be used, or the use of local versus out-of-town contractors.

Pricing: If perceived that enough proposals have been received to make a reasonable selection, there is an option to reject all. [2 CFR 200.400](#) requires that purchases be allowable, allocable, and reasonable, and that reasonableness may need to be demonstrated during an audit. When working with potential contractors it can be pointed out that costs must be clearly justified.

Award: Clearly communicate project requirements to help in making the best selection based on costs and getting the best value. Under 2 CFR 200 the standards allow consideration of "other factors" when awarding a contract. Ideally, technical requirements would be clearly stated in the RFP (Request for Proposals), therefore an award based on price would also make the most sense. When awarding a contract, 2 CFR 200 does allow considerations such as work

scheduling needs, past performance, and incorporating small, woman, or minority owned businesses according to your organization's policies.

Contracts

Subrecipients must have written policies for contract administration.

Written policy shall include methods for monitoring contractor performance and should describe the contract clauses that are required for contracts funded by federal grants. Contract clauses applicable to various organization types are found in this tab.

Contracts should address items such as:

- Environmental mitigation requirements
- Time of day constraints
- Contact information and documentation requirements
- Changes, termination, performance and workers compensation requirements and any other requirements needed

All contracts should specify that: Payment is contingent upon the receipt of funding by CFSC from the federal agency sponsoring the grant, and on receipt of funding by the subrecipient organization from CFSC.

See also [2 CFR 200, Appendix II](#), "Contract Provisions for Non-Federal Entity Contracts under Federal Awards". There are specific clauses that should be included in contracts awarded under your subgrant, as applicable. The clauses vary based on the cost, type of activity, and the type of organization (nonprofit or government). Include a statement in the contract that the requirements of the referenced statutes must be met.

Debarment Searches: Subrecipients must perform these searches before issuing any contracts of \$25,000 or more for goods or services associated with grant-funded projects. This requirement applies regardless of whether the actual funds to be used for payment come from the subgrant or from matching contributions. Debarment searches can be done at the SAM (System for Award Management) website: <https://www.sam.gov>. Type in the name of the organization or other identifiers, such as the UEI (Unique Entity ID) or CAGE (Commercial and Government Entity) number.

Note that when a search result is found, there may be instances where an individual or organization has the same or similar name as your search request but is a different party. Therefore, it is important to verify a potential match by checking other information on the record, such as the address.

Subgrantees also need to retain verification of all searches performed on contractors throughout the grant term. This documentation may be checked during a site visit or desk review.

If during the subgrant term a person or organization involved in this subgrant becomes debarred, excluded, or suspended, notify CFSC immediately.

Debit Cards

It is best to avoid the use of credit or debit cards, usage of these types of cards requires strict controls.

There must be a written policy for use of company credit cards limiting who can use them, a process for prompt reconciliation and repayment for mistakes or misuse of the card for personal expenses must be provided and a process for linking credit charges to specific cost objectives such as grants, or other projects must be included.

Organizations must give written approval for use of personal credit cards and have a policy and procedure for linking charges to cost categories and for reimbursement of the cardholder.

Credit and debit cards should be treated like cash. Grantee organizations should not have access to the credit or debit accounts of their fiscal sponsor since it is the fiscal sponsor's responsibility to maintain control over the funds of the grant.

- Have a comprehensive written policy for use of debit or credit cards.
- Cannot combine personal charges with business charges.
- Have a process for reimbursement in the case of accidental misuse of business cards for personal expenses.
- Fiscal Sponsors do not share credit or debit cards with sponsored organizations.

For a comprehensive list of expenses that are not allowed, please reference the following link:
<https://www.rfsuny.org/media/RFSUNY/Forms/excerpts-unallowable-costs.pdf>

Use of CAL FIRE Work Crews as Match

CAL FIRE Work Crew Programs

This section provides guidance on using CAL FIRE work crew programs as Match for your grant. This section will cover crew projects, costs, and matching contribution values.

The California Department of Forestry and Fire Protection (CAL FIRE) is currently authorized to operate and deploy work crews to assist with fuels reduction projects across the state.

Through cooperative efforts with the California Department of Corrections, the California Conservation Corps, the California Military Department, and CAL FIRE's Hand Crews, 149 crews are available for deployment. Also referred to as hand crews, they respond to all types of emergencies including wildfires, floods, search and rescue.

When not assigned to emergency response or pre-fire project work, crews conduct labor-intensive project work on public and private lands, such as critical hazard fuels reduction projects that support the state and federal fire plans. Additionally, fire crew projects include repair and maintenance of levies for flood prevention; maintenance of local, state, and federal park infrastructures; clearing debris from streams; removing roadside litter; constructing hiking trails; and providing many other important community services.

A typical crew consists of an experienced CAL FIRE Captain, Fire Apparatus Engineer and from 12 to 17 firefighters. They travel to and from project work sites equipped with firefighting tools and other items needed for project work assignments.

Projects:

These crews can be an important resource for state and local government agencies and non-profit organizations engaged in wildfire mitigation efforts. One of the most common types of project work is hazardous fuel reduction, including fuel break construction and chipping.

There is a high demand for the crews, so we encourage applicants to contact their local CAL FIRE unit staff early in their project planning process to determine if crews are available. Even if the project is approved, their ability to perform the work as scheduled is affected by weather, the availability of qualified crew leaders, and other firefighting activities.

Costs:

For California fiscal year 2024-25 the charge for crew work is \$225 per day, plus a 13.47% Indirect Cost Rate charge to State and Local government agencies and non-profit organizations, resulting in a total a daily crew cost to the project sponsor of \$255.31.

Direct payments to CAL FIRE can be adjusted if the project sponsor provides goods and services that will assist CAL FIRE in their recovery of operating costs for the project. Such goods and services could include fuel, tires, chainsaw parts and accessories, and similar items related to performing project work. This arrangement should be spelled out in the project "Letter of Understanding" described below.

If your project involves chipping, they may also be able to assist with that, but project sponsors must provide the chipper and any related items.

Matching Contribution Value:

For FY 24/25, the in-kind Matching Contribution Value of work by a CAL FIRE crew is \$2,069.89 per day.

Agreements: To inquire about the availability of a CAL FIRE hand crew to assist you with accomplishing your project, contact the staff of your local CAL FIRE unit and request a meeting to discuss your project. If CAL FIRE decides to consider your project, they will have you submit the appropriate forms based on the type of crew assigned. All required forms will be provided.

Billing for services will come to you on a "Projects Order Form" (FC-80).

Progress Reports

Progress reports are the method by which a grant-funded project is documented. They are a way to share impacts that result from a project, provide accountability for how funds are used, and communicate any changes or challenges that are encountered. Progress reports are very important. Failure to submit complete and accurate reports on time will result in the denial of advance payment requests. Continued failure to meet this requirement may result in termination of the subgrant. This section provides guidance on completing and submitting grant progress reports.

Progress Reporting Periods

Periodic reporting is a requirement of the subgrant. After every quarter, recipients will complete and submit reports with supporting source documentation. Reports are due thirty days after each reporting quarter.

Mark these quarter dates and reporting due dates to your calendar so that you can complete reports on time.

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

Progress Reports Overview

CFSC uses an online grant management system called ZoomGrants for subrecipient's grant reporting, document submission, payment requests and other grant-related functions. This site can be found at www.zoomgrants.com. Users must create a username (their email address) and password to access all progress report functions. Collaborators can be added to assist with reporting if necessary. However, the project contact is the only entity that can submit changes and reports.

The quarterly progress report consists of three parts:

1. Progress report narrative and tables
2. Match and expense report forms
3. Source documentation for all expenditures of grant funds and matching contributions

Information items that must be included in these reports are:

- A narrative description of the project's progress in the quarterly reporting period
- A comparison of actual accomplishments to the goals established for the period (review the workplan)
- A comparison of actual costs and deliverables for the period versus projected amounts
- Descriptions of delays and unanticipated occurrences and their impact on the project
- Match and Expense reporting forms
- Source documentation for all federally funded and match-funded expenses

Progress Report Narrative

The progress report narrative allows you to detail all activities that took place during the time period, whether grant-funded or completed through matching contributions. The progress report will tell the story of the subgrant, from early planning stages to project implementation, and to final completion. Be specific and descriptive. The narrative progress report descriptions are included in master grant reports to the funding organization so please write your narrative in a paragraph style that is easy to read and understand.

In ZoomGrants, the progress report narrative can be found in the progress report tab, labeled accordingly by quarters. By clicking on the quarter, the due date is displayed at the top and the narrative and table questions are found by scrolling down.

Progress Report Expense, Match and Deliverables Tables

The progress report also includes specific data on the number of accomplishments, expenses, match, and other deliverables. Make sure this information is accurate and reflects the match and expense form that you upload separately. Use quantifiable data. Progress reports with insufficient data will not be accepted.

Match and Expense Reports

Along with the quarterly progress reports, subrecipients will submit expense and matching contribution reporting forms each quarter. These reports are a detailed summary of all expenditures and in-kind/cash donations that occurred during that time period. They are called the 'expense reporting form' and the 'match reporting form,' and are available for download at the bottom of the page in each grant quarterly progress report in your ZoomGrants account.

All entries must be **whole dollars only**, using the standard rounding principle of less than .50 round down, and .50 or more round up.

The expense and match reporting forms will itemize each match and cost contribution spent or used during the quarter. All amounts must include the following:

- Date of the expenditure (date when the match was "used" and not accumulated)
- Budget category
- Dollar Amount
- Payment Method (Cash/Check/Automatic) for expenses
- Type of Match (In-kind /Cash) for matching

You may also choose to combine similar items on one line for certain situations. For example, you collect hundreds of chipping forms and do not want to list each individual form. These forms can be totaled on one line with a brief description. Only combine like items from the same business, or match contributions from the same individual or a group, that occurred in a single quarter and cost category. After the form is complete, you will certify at the bottom of the form that the information is true and accurate. Certification should be a signature or typed name using the symbol /s/.

Note: The amounts reported in the narrative **must** match the amounts reported in the online progress report. If the amounts do not match, the reports must be revised. Payments will be denied until all required reports are submitted correctly.

Recommendations:

1. Be sure to complete a progress report for each quarter covered by your grant agreement. In the event the project is completed early, make sure to communicate with CFSC staff and get approval to submit final documents. CFSC staff can close the remaining quarterly reports in ZoomGrants.
2. When you complete each quarterly report, be sure to click on the "Submit Progress Report #" button at the top of each page. If this step is not completed, the program will show an incomplete report for that quarter, even if it's been automatically saved.
3. Changes in key staff: Federal regulations require that changes in key staff must be approved in advance by the granting agency, in this case that would be CFSC. Key staff includes the project contact, administrative contact, CEO or board chair, and the fiscal

sponsor. There may be others. This is a situation of concern because it could result in problems with project management and fiscal accountability.

4. As you prepare your application or move through a grant that the CFSC has already awarded to you, keep in mind that expenses must match project deliverable costs exactly. Similarly, project match must be exactly reflected in match costs. Another way of understanding this is to refer to the progress report format found in ZoomGrants. Expressed in those terms, question 10 must be balanced dollar for dollar with question 11; and question 13 must match with question 14. For help with this issue, please contact your grant specialist who will help you find ways to make sure that everything balances out correctly.

ZoomGrants Assistance

To access additional help or frequently asked questions about ZoomGrants, please visit ZoomGrants University (ZGU) at <http://help.zoomgrants.com/>. This site provides general help on ZoomGrants such as logging in, transferring accounts, saving/changing passwords, and inviting collaborators. For issues that cannot be resolved, email questions@zoomgrants.com.

For more specific assistance with your 23-24 SFC grant management in ZoomGrants, contact your grant specialist or Becca Joyner, Programs & Outreach Manager at bjoyner@cafiresafecouncil.org



Progress Report Checklist

California Fire Safe Council
23-24 SFC Grant Program

Progress Report Checklist Item	Completed in ZoomGrants
Under the Progress Report Tab in your ZoomGrants account, select the appropriate reporting quarter:	<input type="checkbox"/>
Fill out Project Activities Completed this Reporting Period <ul style="list-style-type: none"> <input type="checkbox"/> Identify progress towards project workplan activities detailed in the application workplan <input type="checkbox"/> Complete all questions thoroughly for the current report period and... <input type="checkbox"/> If applicable, submit a payment request through the payment request tab 	<input type="checkbox"/>
Describe Any Challenges or Delays in the Project (Question 2) <ul style="list-style-type: none"> <input type="checkbox"/> Detail impacts that affected the project <input type="checkbox"/> Relate the challenges back to items from the application workplan <input type="checkbox"/> If the challenges described warrant a modification to your original application project, identify the changes needed in questions 21 & 23 	<input type="checkbox"/>
Federal Deliverables Quantities and Costs (Questions 9-11) <ul style="list-style-type: none"> <input type="checkbox"/> Enter federal project deliverables quantities. Ensure project deliverables quantities are in line with the work plan and project deliverables tables <input type="checkbox"/> Enter project deliverables costs <input type="checkbox"/> Enter federal budget expenses <input type="checkbox"/> Ensure Question 10 total equals Question 11 total 	<input type="checkbox"/>
Match Deliverables Quantities and Costs (Questions 12-14) <ul style="list-style-type: none"> <input type="checkbox"/> Ensure project deliverables quantities are in line with the work plan and project deliverables tables <input type="checkbox"/> Enter match project deliverables quantities <input type="checkbox"/> Enter match project deliverables costs <input type="checkbox"/> Match budget expenses <input type="checkbox"/> Ensure Question 13 total equals Question 14 total 	<input type="checkbox"/>
Changes and Extension Requests (Questions 21 & 23) <ul style="list-style-type: none"> <input type="checkbox"/> Indicate if there are changes that need to be made to the original application project <input type="checkbox"/> Contact your CFSC Grant Specialist immediately for approval for project modifications (if applicable) <input type="checkbox"/> Modification request forms can be found under the Documents Tab 	<input type="checkbox"/>
Quarterly Source Documentation (Question 23) <ul style="list-style-type: none"> <input type="checkbox"/> Upload expense and match forms <input type="checkbox"/> Upload source documentation <input type="checkbox"/> Expense and match form totals should equal the source documentation totals <input type="checkbox"/> Upload photo documentation (optional) 	<input type="checkbox"/>
Submit the Progress Report	

This checklist is not required to be completed or submitted and is for individual use & tracking. All items must be completed and submitted through your 23-24 SFC ZoomGrants Account.

Please contact your Grant Specialist with any questions regarding progress report submissions.

Source Documentation

This section provides guidance on appropriate documentation of expenditures and matching contributions, and instructions for submitting source documentation to the CFSC (California Fire Safe Council).

In accordance with federal grant regulations under 2 CFR (Code of Federal Regulations) 200, all expenditures of grant funds and matching contributions related to the execution of grant-funded projects are required to be supported by documentation that demonstrates that the expenditure is allowable, verifiable, and necessary for that project.

CFSC needs this supporting documentation so that independent and federal auditors can verify that the expenditures were made in accordance with federal grant regulations and with the approved subgrant application. The “Generally Accepted Accounting Principles” (GAAP) used by auditors and certified professional accounting firms require that all such expenses be verifiable through such “source documentation”.

Lack of complete documentation may result in disallowance of costs and matching contributions. In addition, the grantee may be required to return funds already received.

Quarterly Source Documentation

At the end of each quarter, after the quarterly progress report has been completed, original copies of each document that supports the expenditure of grant funds and matching contributions shown in the progress report must be processed by the subrecipient as follows:

1. Receipts and other records must be sorted by Cost Category: Personnel, Fringe Benefits, Travel, Equipment (only for items over \$5,000 and with prior approval), Supplies, Contractual, Other, and Indirect Costs.
2. Assemble your receipts in the same order as listed in the Cost Categories shown on the Expense and Match/Cost Sharing Reporting forms.
3. Scan all documents into one or more .pdf files (not to exceed 4Mb in size) and label each file with a name that indicates the Cost Category of the files' contents, such as “Personnel 1”, “Personnel 2”, “Supplies 1”, etc.
4. Upload the completed quarterly Expense and Match/Cost Sharing Reporting forms and the source documentation files into your ZoomGrants account. All reports and supporting documents are to be uploaded by the progress report due date shown in the subaward agreement.

Source Documentation Requirements in Detail

Each piece of supporting documentation that supports the expenditure of grant funds or matching contributions must show the following information:

Expense Documentation must include the following:

1. Date(s) of purchase or work completed
2. CFSC grant number
3. Cost category
4. Approved by (initials and date)
5. Paid by (initials and date)
6. Check number
7. A clear description of items or services purchased that verifies relevance to the grant

Match Documentation must include the following:

1. Date(s) of the donation/contribution
2. CFSC grant number
3. Cost category
4. Name and contact information of the donor
5. Approved by (initials and date)
6. Detailed description of the item or service that verifies the relevance to the grant (add comments if necessary)
7. If a Matching Contribution is being split between several grants, a description of the cost allocation and the formula being used.
8. Value of the contribution, including how the value was determined and the basis for the determination

Additionally, a single cover page can be used for multi-page invoices, volunteer activity records, etc. that have the same information for items 1 – 8 above.

Administrative Costs

If the subrecipient is using the 10% “de minimis” rate for administrative (Indirect) costs ([2 CFR 200.414 \(f\)](#)), they do not need to provide source documentation for administrative costs. However, they are still required to report the administrative cost amount as an Expense or Matching Contribution in the Budget section of the quarterly Progress Reports.

Documentation of Personal Compensation ([2 CFR 200.430 and 431](#))

Compensation for personal services includes all compensation paid for services of employees rendered during the period of the award, including but not limited to wages, salaries, and fringe benefits. Fringe benefits include, but are not limited to, leave, insurance, pensions, and unemployment benefit plans.

Salaries and wages of employees used in meeting cost sharing or matching requirements of Federal awards must be supported in the same manner as those claimed as allowable expenses under Federal awards.

Compensation for personal services is allowable as a cost or match if:

1. Compensation is reasonable (consistent with that paid for similar work in the organization or in the labor market) for the services rendered,
2. Conforms to the established policy of the organization/agency consistently applied to both Federal and non-Federal activities,
3. It is supported with documentation as described by the applicable cost principles.
4. Staff salary can only be charged for the percentage of time spent on the grant. This percentage also applies for fringe benefits that may be charged to the grant.
5. Budget estimates or other distribution percentages determined before the services are performed do not qualify as support for charges or match to Federal awards

Timesheet Requirements:

1. Timesheets must give an after-the-fact distribution of the actual activity of each employee
2. Must be recorded at least monthly, coinciding with pay periods
3. Must display the dates and all hours that the employee worked – not just the hours charged to the grant
4. All blocks of hours must be clearly labeled, i.e., 23-24 SFC (STATE FIRE CAPACITY) 1234, admin, name of project, etc.
5. The timesheet/log must include a brief description of each task performed
6. The timesheet/log must be signed

GOVERNMENTS ONLY: Employees working solely on a single Federal award may prepare periodic certifications that declare that the employees worked solely on the single award. Certifications must be prepared at least semi-annually and be signed by the employee or supervisory official with firsthand knowledge of the employee's work.

Sample Stamp, Label, or Cover Page

Subrecipients should use a rubber-stamp, a printed label, or printed cover sheet to attach to the individual or grouped documents, so that their documentation includes a description of how the files are organized in relationship to the Match and Expense reports.

The information in the following sample is required, per “Generally Accepted Accounting Principles”:

MARK:	Expense _____	Matching Contribution _____
Date(s):		
Grant #		
Cost Category:		
Vendor Name:		
Donor Name:		
Expend. Approved By: (typed/printed)		Date:
Paid By: (typed/printed)		Date:
Total Amount:		
Check / credit / receipt #:		
Description of items or services and how they relate to project objectives:		
Allocation formula (if applicable):		
Value of match/in-kind:		

Determining Allowability of Expenses and Matching Contributions

In previous reviews by California Fire Safe Council staff, grant recipient documentation for expenditures and match contributions did not meet the federal grant regulation standards. Documentation lacked key elements that are required for the expenditures and match to be allowed. Due to the lack of proper documentation, some amounts were deemed unallowable, causing some subrecipients to fall short of their approved match requirement or have unallowed expenses.

This guidance is to highlight the requirements for documenting expenditures and cash/in-kind match towards a grant. The information below is excerpted from the uniform administrative requirements governing the administration of federal grants. Additional emphasis and descriptions have been provided to further explain the regulations.

Expenses are grant expenses paid with federal funds. Expenses can come in three forms:

1. Cash
2. Check
3. Automatic payment/debit/credit card

All expenditures should be listed in the detailed budget and easily linked to a budget Cost Category. Matching Contributions can come in two forms:

Cash contributions may include donations, non-federal grants, and state/local appropriations.

In-kind contributions may include the value of donated goods and services provided by the grantee organization or third-party contributors.

All contributions, whether cash or in-kind, must meet ALL of the following criteria in order to be allowable:

Necessary means that the goods and/or services are essential to the project and meeting the program objectives. The matching contributions must be included in the grant application as part of the budget and work plan. Goods and/or services that are not specifically tied to accomplishing the grant objectives may not be used as match.

Reasonable means that a cost or value would withstand public scrutiny (objective individuals would agree that the cost is appropriate). For matching contributions, subrecipients should use cost amounts or values that are consistent with the fair market value and similar work, goods or services based on the labor market.

Allowable means that the costs must conform to any limitations or exclusions set forth in the grant agreement and in the applicable Federal Cost Principles.

Verifiable means that the grantee has adequate documentation to support the amounts claimed as match and expense.

Are not included as contributions for any other federally assisted project or program.

Are not paid by the Federal Government under another award, except where authorized by Federal statute to be used for cost sharing or matching.

Administrative Costs

If the subrecipient is using the 10% “de minimis” rate, or a rate approved with a negotiated indirect cost rate agreement for administrative (Indirect) costs ([2 CFR 200.414 \(f\)](#)), they **do not** need to provide source documentation for administrative costs. However, they are still required to report the administrative cost amount as an Expense or Matching Contribution in the Budget section of the quarterly Progress Reports.

Sample Stamp, Label, or Cover Page

It is suggested that subrecipients use a rubber-stamp, a printed label, or printed cover sheet to attach to the individual or grouped source documents, so that their documentation includes a description of how the files are organized. This is not required but it may be helpful. The information in the following sample is required, per “Generally Accepted Accounting Principles”:

Expense _____ Matching Contribution _____	
Date(s): 11/15 – 11/17/24	
Grant # 23-24 SFC 444444	
Cost Category: Contractual	
Vendor Name: Trees, Inc.	
Donor Name: none	
Approved By:	Date: 11/20/24
Paid By:	Date: 11/25/24
Total Amount: \$630.00	
<u>Check</u> / credit / receipt #: 6456	
Description of items or services and how they relate to project objectives:	Hazardous fuel removal in Mapoint.
Allocation formula (if applicable): 100% contractual expense	
Value of match/in-kind contribution: n/a	

Grant Modifications & Public Statements

Modifications to your original project which require prior approval include changes to your original budget, project location, treatment types, projected deliverables, and subgrant term extensions. Approval is also required for publications relating to grant funded activities.

How to Submit Modification Requests

You may submit requests for changes using the Modification Request Form provided in your ZoomGrants account. Be sure to consult with your CFSC Grant Specialist if you are unsure whether a change requires prior approval. Failure to seek and receive prior written approval may result in the disallowance of costs. If federal funds were spent on disallowed costs, you may be required to pay them back.

Types of Modification Requests

Extensions of reporting periods are the most common types of modifications requested. Requests for extension must be submitted at least one quarter prior to the end of the grant term. Typically, if an extension is approved, it is for one quarter at a time. On some occasions, extensions are given due to delays in payment, weather, or other factors out of the grantee's control. CFSC reserves the right to deny extension requests. This may be due to delays in grantee reporting or there not being enough time available to offer an extension. Time is a regular constraint faced with any federally funded grant.

Changes to the project activities or objectives, such as fuel treatment activity, outreach method or area, education products or activities created, and CWPP or risk assessment plans. Please note, a change of this type will likely result in a change to reported project accomplishments as well.

Changes to the project accomplishments, such as the number or location of acres treated or treatment method (resulting from a change in treatment activity), or type or number of education or planning products created.

Changes in key personnel listed in the application or award document, such as the project coordinator, board president, or signatory.

Key personnel absence for greater than three months or a 25% reduction in their time associated with the project. Key personnel include executive directors and project directors.

Addition of third-party involvement not included in the original application, such as involvement of a cooperator or contractor that will have a major influence on the project.

Budget Changes include changes such as a reduction of match commitment, or a request for augmented funds or movement of funds between budget categories. For projects with **a federal share over \$250,000**, prior approval is required if > 10% of the budget will be moved between categories cumulatively. ([2 CFR 200.308\(c1\)](#), [308 \(f\)](#), and [OMB Management Memo M-18-18](#))

Other changes that affect the project but do not fit into the above categories also may require prior approval. Please reach out to your CFSC grant specialist, if you have any questions about submitting Modification Requests.

Modifications and Corrections in ZoomGrants

With approval from your grant specialist, modifications and corrections to Progress Reports and other documents submitted in previous quarters can be made via your ZoomGrants account. If you feel that such a correction is needed, discuss it with your grant specialist and they will provide you with technical assistance. Modifications needed as a result of entries made in previous quarters will be made in the current open quarter.

Public Statements and Notices for Grant Related Activities

You must submit copies of all notices and announcements to CFSC for review as far in advance of release as possible. Thirty (30) days is the minimum time required for your grant specialist to review the draft.

The funding source acknowledgement, equal opportunity statement and endorsement statement below **must** be included in all grant-related publications. These include press releases, public notices, printed or electronic media.

Funding Source Acknowledgement

“Funding provided by a grant from the Cooperative Fire Program of the U.S. Forest Service, Department of Agriculture, Pacific Southwest Region, through the California Fire Safe Council.”

Equal Opportunity Statement

“In accordance with federal law and USDA policy, this institution is prohibited from discriminating based on race, color, national origin, sex, age or disability. Not all prohibited basis apply to all programs.”

If the material is too small to permit the full statement to be included, the material must at a minimum include the following statement:

“This institution is an equal opportunity provider.”

Non-Endorsement Statement

“The views and conclusions contained in this document are those of the authors and should not be interpreted as representing the opinions or policies of the California Fire Safe Council, U.S Forest Service or the U.S. Government. Mention of trade names or commercial products does not constitute their endorsement by the California Fire Safe Council or the U.S. Government.”

Program Access Complaints

The following information is about how to submit complaints of program discrimination must be provided along with advertisement of services available through the grant funded project.

“To file a complaint of discrimination: write USDA, Director, Office of Civil Rights, Room 326-W, Whitten Building, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410 or call (202) 720-5964 (voice and TDD). USDA is an equal opportunity provider and employer.”

Use of Logos

If you want to use the U.S. Forest Service Insignia or the CFSC Logo on any media or material, you must contact your grant specialist to seek permission prior to any such use. The insignias and logos may not be used on any published media including webpages, printed publications, road signs or audiovisual productions, without prior written approval.

Site Visits and Desk Reviews

As a pass-through organization and your grantor, CFSC is required to monitor the progress of your subgrant throughout the subgrant term.

Site visits and desk reviews allow CFSC to examine the subgrant documentation, subgrantee policies and procedures, and the execution and completion of the approved project, to ensure compliance with the subaward agreement and federal grant regulations.

Both site visits and desk reviews may produce corrective actions that your organization must take to comply with the grant agreement and federal grant regulations. Serious deficiencies may result in the denial of payments until the issue has been properly resolved.

Site Visits

Site visits are in-person events that may include both touring the project area and reviewing your subgrant documentation. Your grant specialist will contact you to arrange a time that is mutually convenient for the site visit and provide an outline of the administrative topics that will be reviewed during the visit. Site visits are a good opportunity to develop success stories about your project.

Desk Reviews

Desk reviews ensure that subgrantees are meeting the standards for management of federal grant funds. Desk reviews allow CFSC to examine items such as procurement policies, conflict of interest policies, and cost allocation systems in addition to the source documentation that is submitted with progress reports related to the subgrant. When your grant is selected for a desk review, you must comply with the request for documentation by the stipulated date. You should be able to readily produce all invoices, receipts, match forms, time sheets, and other documents related to the grant that support the expenses and match for the specified quarter(s). When sending documentation to CFSC, be sure it is organized to make it easy to match up specific source documents with line items in the match and expense report.

Grant Closeout

The Closeout Phase begins immediately following the end of the grant term. All grants must be properly closed out in accordance with the grant requirements. All financial, performance and other reports are due during Closeout. The closeout period is typically 90 days but may be longer or shorter depending on the terms of specific agreements.

Due BEFORE the grant period ends:

Project work: All project work that will be billed to the grant or applied as match must be completed.

Extension Requests: The Federal awarding agency or pass-through entity may approve extensions when requested by the non-Federal entity.

Due 30 days after the end of the grant period:

- Final ZoomGrants progress report, match & expense reports, and source documentation.
- Photos showing the project area before and after treatment uploaded to ZoomGrants.
- Education/outreach products (developed with the grant) uploaded to ZoomGrants.
- Documentation regarding disposition of equipment, if applicable.

Due 90 days after the end of the grant period:

Final payment of costs can be made within 90 days after the grant period closes. Final source documentation on these costs must be uploaded at or before submission of the Closeout Report.

Any unused surplus funds must be returned via a check made payable to the California Fire Safe Council. Interest earned on deposited grant funds in excess of \$500 must be returned via a check payable to California Fire Safe Council (2CFR 200.305 (b)(9)). The closeout report will be submitted via ZoomGrants.

Record Retention

All grantee files relating to the subgrant must be stored until 3 years after the close of CFSC's master grant with the funding agency. However, in some cases you might be required to keep your files longer than that, due to a pending legal action, audit, etc. If you are notified by CFSC or the federal government to retain your records past the retention period, you must keep them until further notified. Therefore, if there is a change in the contact person for your organization, notify CFSC immediately.

Access to Records

CFSC and USFS are permitted access to your subgrant records. CFSC may review your subgrant records during a site visit, fiscal review or at any time during or after the grant term.

The rights of access are not limited to the required retention period but shall last as long as records are retained.

Post-Closeout Adjustments

During Closeout, CFSC may review the project to confirm all costs have been properly documented and submitted as part of the required reports. Costs may be disallowed, and funds may need to be recovered if discrepancies or disallowed costs are determined.

Appendix A. Important Websites

California Fire Safe Council

<https://cafiresafecouncil.org/>

The California Fire Safe Council website contains contact information, notices about funding sources, meetings and events that may be beneficial to your project or other fire protection and prevention activities.

ZoomGrants

<https://www.zoomgrants.com/>

ZoomGrants houses the CFSC Grants Clearinghouse grant application and progress reporting system, and it is the location for downloading and submitting payment request and grant modification forms. You will access ZoomGrants at least quarterly when you fill out grant progress reports and submit source documentation. Important notices will be sent through the ZoomGrants email system, so be sure to keep your account contacts up to date. Please list at least two contact persons for your grant.

US General Services Administration System for Award Management (SAM)

<https://sam.gov/content/home>

The SAM website is used to establish or annually-renew your Unique Entity ID and CAGE codes. SAM accounts and renewals are free of charge, so be sure to renew directly through SAM.gov. Other sites may offer to create or update accounts *for a fee but that is not necessary*. The “debarred and suspended” database on SAM.gov can be used to check the status of project managers, those with project oversight responsibilities, and contractors providing \$25,000 more worth of goods or services.

Code of Federal Regulations

<https://www.ecfr.gov/current/title-2/subtitle-A/chapter-II/part-200?toc=1>

The federal grant regulation sections relating to California Fire Safe Council grants are found in Title 2, Part 200 of the Code of Federal Regulations. The most recent and complete version of these regulations available at the time of printing is located at the back of this handbook.

To access the on-line text of the Code of Federal Regulations for grants, find the section reference numbers in your sub award agreement relating to Administrative Regulations, Cost Principles, or Audit requirements and search for them by clicking on the Code of Federal Regulations link at the website address above.

USDA Program Discrimination Complaint Process

<https://www.usda.gov/oascr/complaint-resolution>

As part of the grant agreement, recipients are required to provide information to anyone who requests it on how to file a complaint of program discrimination with the USDA. The website above describes the process for filing such a complaint.

US General Services Administration (GSA) Allowable Mileage Rates

<https://www.gsa.gov/travel/plan-book/transportation-airfare-rates-pov-rates-etc>

This website shows the mileage rates grant recipients can claim as reimbursement for travel related to performance of work necessary for completion of the terms a federal grant.

Appendix B. ZoomGrants Overview



ZOOMGRANTS OVERVIEW

Purpose of ZoomGrants

The California Fire Safe Council utilizes the ZoomGrants website for grant maintenance and management. This platform allows subgrantees to submit applications for open grant programs and necessary documents during the post-decision award phase.

Navigating Tabs in ZoomGrants

Application Summary	Overview of grantee organization contacts and information
Organization Information	Organization application questions
Project Information	Application project questions
Tables	Work Plan, Project Deliverables, Budget, and Match tables located here
Document Upload	Requested documents during the Application, Pre-Award, and Monitoring grant term phases are uploaded here
Subaward Agreement	Where you will sign the subaward and access the document during the grant term
Payments	Where you will submit and access payment requests
Progress Report	Where you will submit quarterly reports and source documentation

Appendix C. Payment requests

Payment Request		Payment Request Status	
Date Submitted	auto-generated	Payment Request Status	Pending -
Payment Request Number	Their number	Approved Amount	\$
Requested Amount		Approval Date	(mm/dd/yyyy)
Payment Request Contact Name		Approved by	
Payment Request Contact Phone		Payment Request Decision Comments	
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		Payment (for this Payment Request only)	
1. Enter the amount of grant funds spent to date	Their Answer	Edit	Their payment number Pending \$
2. Enter the total match reported to date (on most recently submitted progress report)	Their Answer	Edit	Their payment number Pending \$
3. Enter the estimated match amount to be accrued during the next 30 days	Their Answer	Edit	Their payment number Pending \$
4. Enter the total match accumulated since last progress report	Their Answer	Edit	Add Payment Total \$
5. Enter the workplan activities covered by this request	Their Answer	Edit	Current Funding Snapshot (for this full application only)
6. Are the most recent progress report, expense and match forms and source documentation complete?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Edit	Payment Request Initial Award Amount Pending Approved Paid This Payment Request Still Available \$
7. Enter the new expiration date for your organization's CAGE code.	Their Answer CAGE Code Their Answer Expiration Date (mm/dd/yyyy)	Edit	Initial Award Amount Pending Approved Paid This Payment Request Still Available \$
8. Enter the new expiration date for your organization's insurance. Ensure proof of insurance is uploaded into your account.	Their Answer Expiration Date	Edit	Initial Award Amount Pending Approved Paid This Payment Request Still Available \$
9. Is this your final payment request?	<input type="checkbox"/> Yes <input type="checkbox"/> No	Edit	Initial Award Amount Pending Approved Paid This Payment Request Still Available \$
10.		Edit	Initial Award Amount Pending Approved Paid This Payment Request Still Available \$

Appendix D. Progress reports

Progress Report 1 due **11/16/2024**

Work Plan Progress

1. Describe the key workplan tasks and activities addressed this quarter:

Describe in detail all major accomplishments, defensible space work, outreach/education, materials developed, new partnerships, data collected, etc.

2. Please share any success stories, anecdotes, observations, lessons learned, unexpected beneficial outcomes, etc. this quarter that are unique to your project.

3. What challenges or setbacks occurred this quarter, if any?

List any major barriers experienced and how you dealt with them or any assistance you need from CFSC. Refer to specific work plan activities impacted by delays.

Project Revisions

4. Are you projecting any changes from your original application?

You must have prior written approval before modifying your work plan or budget.

Yes

No

5. Please describe the change(s)—scope change and/or budget change—and what activities will be involved.

If you don't anticipate any changes, please enter N/A.

Defensible Space Assistance

6. Number of home assessments completed this quarter.


Number of home assessments

7. Number of defensible space assistance requests this quarter.

Number of defensible space requests by property owners

Number of referrals from CAL FIRE DSI, local fire agency or code enforcement

Appendix E. Modification requests



CALIFORNIA FIRE SAFE COUNCIL
(CFSC) Grant Modification Request Form

Grant funds must be used for the budgeted amounts and items described in the grant application, and spent within the grant period described in the grant sub-award agreement. Changes to either the project activities, budget or time frame require approval by the funder. Approval of a scope, budget, or grant period change request must be given by the California Fire Safe Council prior to implementing the proposed change.

Contact Information

Date:

Organization name:

Fiscal sponsor (if applicable):

Person Completing this report:

Email:

Phone:

Grant Number:

Project Name:

These changes can trigger the requirement of funder approval under 2 CFR 200.308 (Revision of budget and program plans). Select all changes that apply. Use the box that follows the list to describe all changes or extension requests.

- Change to Project Activities**
Examples are changes to the project area, fuel treatment type, outreach method, education products produced, and CWPP or risk assessment changes. NOTE: A change here will likely result in a change to reported project accomplishments as well.
- Change to Project Accomplishments**
Examples are changes to the number of acres treated, treatment method, and number of education or planning products created.
- Change in Key Personnel**
Examples are changes to the contacts listed in the application or award document, such as the contacts for project coordinator and fiscal sponsor.
- Director Absence or Time Reduction**
An absence for greater than three months of the project director or a 25% reduction in their time associated with the project.
- Change of Third-Party Involvement**
Addition of a cooperator or contractor with a major influence on the project. This may require an update to the Excluded Parties Listing Service search that was completed during the Pre-Award.

- Change To Project Budget**
Examples are a reduction of match commitment, request for augmented funds and movement of funds between budget categories. For projects with a federal share over \$250,000, prior approval is required if > 10% of the budget will be moved between categories cumulatively). If you are moving funds between budget categories, describe the items that will be purchased.
- Other Change**
Please describe the change and how it will impact the project.
- Grant Period Extension**
Extensions are typically requested in increments of three months.

Describe Changes Here:

Appendix F. Closeout report packet



CALIFORNIA FIRE SAFE COUNCIL (CFSC) GRANT CLOSEOUT REPORT

Please complete this closeout report accurately and entirely. Data reported here must be consistent with information provided on Progress Reports, Match and Expense Forms, and other grant documentation. This report and the supplemental documentation required by this report are due 30 days following the end of your grant, unless otherwise notified by CFSC.

Please refer to your Subaward Agreement for your Record Retention timeline. Contact your Grant Specialist if you have any questions.

Organization Name:	
Fiscal Sponsor (if applicable):	
Person completing this report:	
Email:	
Phone #:	
Grant #:	
Project Name:	
Date:	

CONTENTS

SECTION 1: MATCHING CONTRIBUTIONS	2
SECTION 2: GRANT DOCUMENTATION AND REPORT COMPLETION	3
SECTION 3: FUEL REDUCTION PROJECT- IF APPLICABLE	4
SECTION 4: GRANT PROJECT DISCUSSION.....	4
SECTION 5: CERTIFICATION.....	7

**If you are reporting on a grant with match, please complete Section 1;
otherwise, please skip to Section 2.**

Appendix G. Project Materials/ Photo guide

It is important to keep and maintain completed work or materials developed for the project such as pamphlets and videos.

For defensible space work, you should take high quality before and after photographs. Recommended specifications are a minimum of 300 dpi with a maximum file size of 10 MB.

Need another sample: Perhaps from [Lassen FSC \(def. Space\)](#) and/or [Ojai Valley FSC project \(Mitigoats\)](#)?

*Eucalyptus and Pine Tree with
dead branches against
wooden fence*



*Eucalyptus and Pine Trees
Removed*

