Grantee Manual

Introduction

Congratulations on your Coastal Conservancy grant award! This Grantee Manual tells you, the grant recipient, what to expect as you manage your Conservancy grant. It also provides links to key documents we, the Coastal Conservancy, may require as part of your grant. The Grantee Manual is arranged by chapters that address key questions you may have about your Conservancy grant.

The rules and processes described in this manual are designed to help your grant-funded project be a success, ensure timely payments to you, and help your grant pass an audit without problems (all Coastal Conservancy grants can be audited by the State's Department of Finance, either during or after the completion of the grant-funded project). An overview of the grant process is provided on the following page.
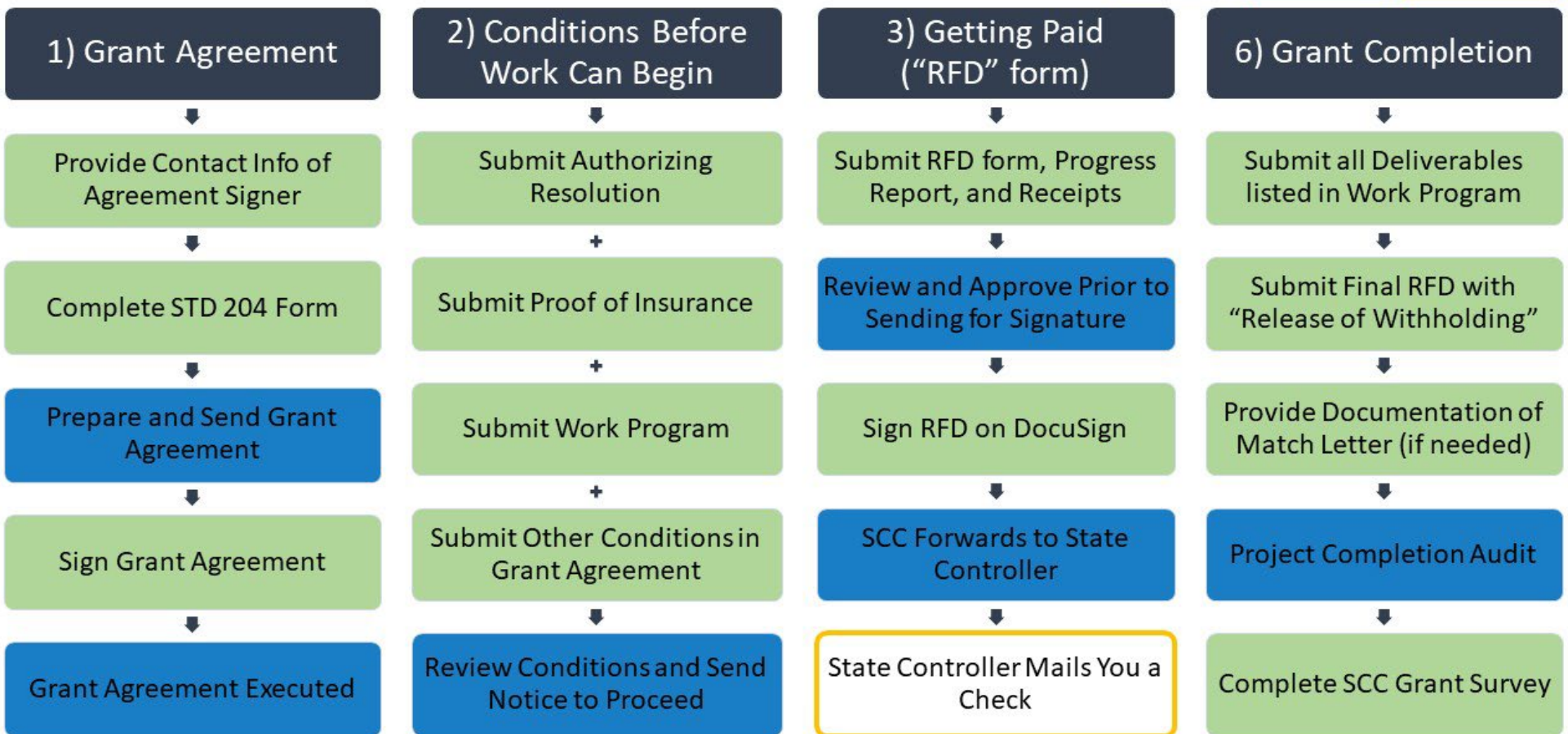
Contact your Conservancy Project Manager if you have questions about your Conservancy grant. We are here to help you and make sure your project is a success!

Coastal Conservancy Processes for Grantees

Legend: YOU (green) · SCC (blue) · STATE (white/outline)

1) Grant Agreement
- Provide Contact Info of Agreement Signer
- Complete STD 204 Form
- Prepare and Send Grant Agreement
- Sign Grant Agreement
- Grant Agreement Executed

2) Conditions Before Work Can Begin
- Submit Authorizing Resolution
- Submit Proof of Insurance
- Submit Work Program
- Submit Other Conditions in Grant Agreement
- Review Conditions and Send Notice to Proceed

3) Getting Paid ("RFD" form)
- Submit RFD form, Progress Report, and Receipts
- Review and Approve Prior to Sending for Signature
- Sign RFD on DocuSign
- SCC Forwards to State Controller
- State Controller Mails You a Check

6) Grant Completion
- Submit all Deliverables listed in Work Program
- Submit Final RFD with "Release of Withholding"
- Provide Documentation of Match Letter (if needed)
- Project Completion Audit
- Complete SCC Grant Survey

Note: Numbers correspond to sections in the Grantee Manual. Not all processes depicted are linear and can occur simultaneously.

Revised: 1/13/26

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1) Grant Agreement

After the Conservancy Board approves your grant, we need you to complete an **STD-204 form**. Your project manager will send you the form through DocuSign for you to fill out and sign. We use the information on this form to set up your grant agreement and create a payment pathway to your organization. Be sure the information you enter on this form exactly matches your organization's legal name and mailing address for receiving payments.

Once you have provided the STD-204 form, we will prepare a grant agreement for you to review and sign. To prepare the grant agreement, we also need the name, title, mailing address, phone number and email address of the person who will sign the grant agreement. The grant agreement includes various requirements that come with public funding. Some of the most common requirements are explained in our **Typical Grant Agreement Terms** document. Additional project-specific requirements may also be set by the Conservancy Board and can be included in your grant agreement. Please note that finalizing the grant agreement may take several weeks or longer.

You must review the grant agreement closely. When you sign the grant agreement, you are legally agreeing to meet all the requirements in the agreement. This is your main responsibility as a grantee.

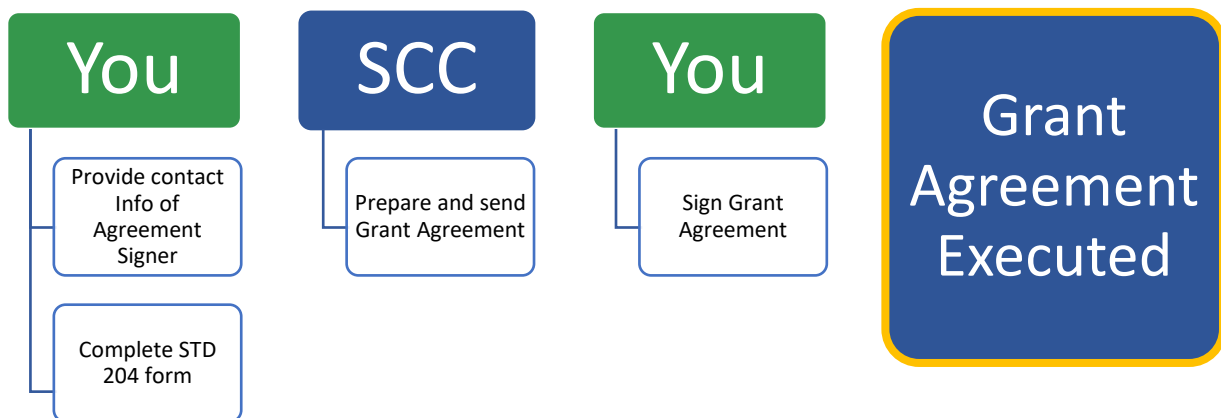The grant agreement lists three important dates. You should track these closely:

> **Work Completion Date:** last day of work that you can bill to your grant.
> **Final Request for Disbursement submittal date:** due date for your final grant billing.
> **Grant Termination Date**: day your grant legally expires.

If the Conservancy will fund any part of your grant with Federal grant funds the Conservancy has received, you must also complete a **Federal Sub-Awardee Questionnaire**. Your Conservancy Project Manager will let you know if this is the case with your grant.

If you are a non-profit organization, we will also need a copy of your IRS letter that confirms your organization's status as a 501(c)3.

You	SCC	You	Grant Agreement Executed
Provide contact Info of Agreement Signer	Prepare and send Grant Agreement	Sign Grant Agreement	
Complete STD 204 form			

2) Conditions Before Work Can Begin

A signed grant agreement does NOT allow you to start spending your grant. You CANNOT start work under your grant until you receive a written **Notice to Proceed** from your Conservancy Project Manager.

To get your Notice to Proceed, you must complete all the "Conditions Precedent to Commencement of Project and Disbursement" listed in your grant agreement and have them approved by your Conservancy Project Manager. "Conditions Precedent" means items you must provide us before any spending can begin under your grant. Please note: Completing all Conditions Precedent may take several weeks or longer.

All our grants require the following Conditions Precedent:

BOARD RESOLUTION

Your organization must pass a formal resolution, signed by your appropriate authorities, that a) agrees to accept Conservancy grant funds, and b) identifies the positions in your organization who are allowed to negotiate and execute agreements related to the Conservancy grant. This resolution can be passed:

- o **before your grant has been awarded**, or
- o **after your grant has been awarded**.

It is your decision whether you pass this resolution before or after we award your grant. Choose what works for your Board's schedule and needs.

WORK PROGRAM

The Work Program is a very important roadmap for what you will accomplish with your grant. It must detail the specific tasks, deliverables, project schedule, and a task-level budget for your funded project.

- o Our **Work Program Template** can help you organize all this information.
    - ▪ A **Work Program Template specifically for the Explore the Coast** program with guidance on allowable costs can be downloaded **here**.
- o Our **Budget Template** can help you build a task-level budget showing how your grant will be spent on the project. You can create this in the excel template and then copy it over into your Work Program.
- o Please read our **budget guidelines for non-profit organizations** or **budget guidelines for agencies and universities** to understand our budget requirements and spending rules. Read our **Explore the Coast Allowable Costs** to see examples of items that grantees commonly ask about for reimbursement by SCC's Explore the Coast grants

Your assigned Conservancy Project Manager is an important resource and will work with you to develop a successful Work Program for your project! The Work Program exists outside of your grant agreement, so it can be relatively easily amended over time if changes are needed (see Chapter 5: Project Changes and Staying in Touch with SCC).

INSURANCE DOCUMENTATION

Your grant agreement specifies types and levels of insurance your organization must carry while spending your Conservancy grant. To ensure these insurance requirements are being met, we require copies of your organization's **insurance policy certificate** that: a) show the required types and levels of insurance, b) lists State of California as an "Additional Insured", and c) references your Coastal Conservancy grant agreement number. Your insurance agent should be able to provide these certificates to you.

In addition to these universal conditions, your grant agreement may require additional Conditions Precedent based on project type or specific circumstances of your project. Below are the additional Conditions Precedent typically required for construction and acquisition projects.

CONSTRUCTION PROJECT DOCUMENTATION

"Construction" projects include any project where something will be built, removed, restored, planted, or will otherwise physically alter the environment. You will need to provide evidence that all permits and approvals required to implement the project have been obtained. Typically, this is done by simply emailing us a copy of the relevant permits, but you can instead submit written documentation outline the date each permit was obtained.
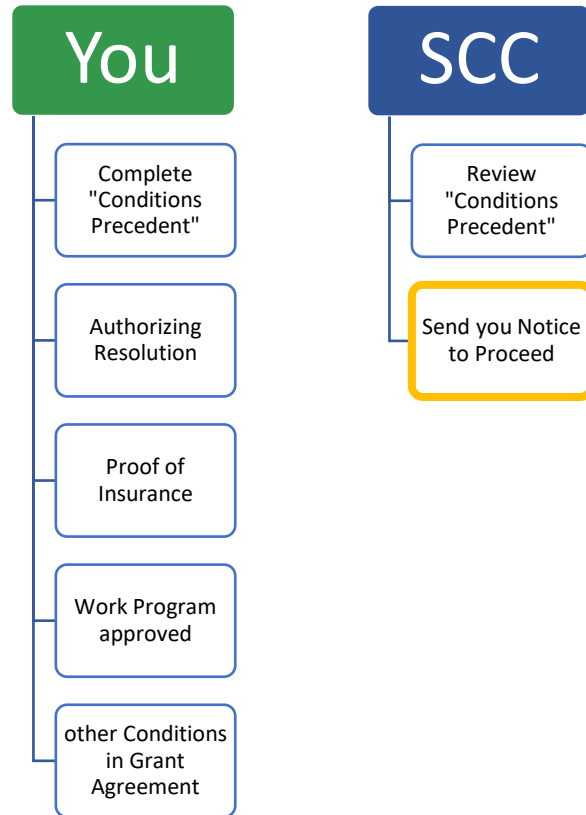
If your project will take place on land you do not directly own, you will also be required to provide evidence that you have written agreements with the landowner sufficient to enable you to implement, operate, and maintain the project. These agreements are required by Section 31116(d) of the Public Resources Code and are often referred to as a **31116(d) agreement.**

In addition, a grant for a construction project may require compliance with **Prevailing Wage rules**, Performance and Payment Bonds, or other types of documentation.

If your construction project grant is for a wetland or riparian restoration project, you may need to complete certain types of project monitoring. One type of monitoring we commonly require is called a California Rapid Assessment Method (CRAM) habitat assessment (see Chapter 7: What else will help make my project a success?)

ACQUISITION PROJECT DOCUMENTATION

If your grant is for acquisition of property (either in fee or an easement), you will need to submit numerous documents to us for review and approve before proceeding with the property purchase. Our **Acquisition Checklist** identifies and explains the types of documents we typically need to review. Your project manager will work with you to identify any necessary additional documents for your acquisition project.

You

- Complete "Conditions Precedent"
- Authorizing Resolution
- Proof of Insurance
- Work Program approved
- other Conditions in Grant Agreement

SCC

- Review "Conditions Precedent"
- Send you Notice to Proceed

3) Getting Paid ("RFD" form)

For most grants, you should bill us at least quarterly, and no more frequently than monthly.

To get paid, you must bill the Conservancy using our **Request for Disbursement Form** (also available in **Excel format**). Detailed **Request for Disbursement Form Instructions** explain how to complete the RFD form, backup documentation requirements, and how to submit your invoice package. If your approved grant budget includes project-related travel costs, the **Travel Reimbursement Guidance** details specific rules and rates for billing those expenses.

Please note that an invoice billing period must be within the same Conservancy fiscal year, which runs from July 1st to June 30th of the following year. Grantees should submit invoices covering work up to June 30. A new invoice will be required for work performed on and after July 1.

Be aware that for most of our grants, we will withhold the last 5% or $100,000 (whichever is less) of your grant and will pay you that money at the end of the project when you have completed all of the grant close-out steps (See Chapter 6. Project Completion). This 5% is referred to as the "Withholding".
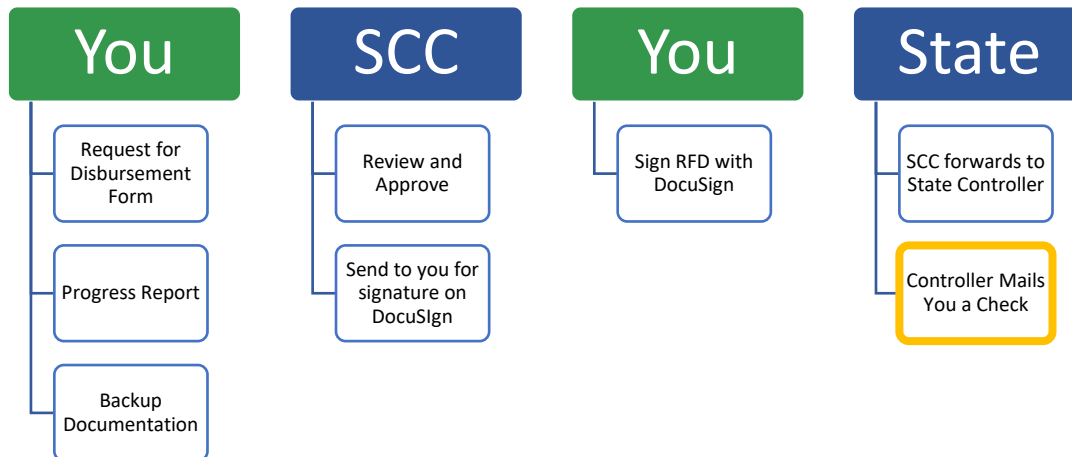
1. Prepare a **single PDF** file with:

    o The **Request For Disbursement (RFD)** The RFD form is also **available as a downloadable spreadsheet** here. Either version is fine to use, but please do not modify the format. (See **RFD instructions** for more information.)

    o Backup documentation

    o **Progress Report (Word download)**

    o **Explore the Coast Progress Report (Word download)**

    All combined into one file, in that order.

2. Email the invoice PDF from Step 1 to invoice@scc.ca.gov and cc your Conservancy Project Manager. Please include the following information in your email: **the project name, your Conservancy Project Manager's name, and the name and email address of the person who will sign the invoice in DocuSign**.

3. We are signing invoices using DocuSign. The approved invoice will be routed in DocuSign by your Conservancy Project Manager for digital signature. Please keep an eye out for that email and respond quickly. You do not need to download any software to be able to sign via DocuSign. It typically takes at least three weeks after we approve your invoice for the State Controller to pay you.

An **invoice tracking spreadsheet** that shows each of your submitted invoices can be a helpful internal project management tool over the lifetime of your grant.

ADVANCE PAYMENTS

Grantees that have been approved to use the Conservancy's receive Advanced Payment Program of Conservancy funds must adhere to the **Advance Payment Program Guidelines.** After receiving payments, grantees must document use of those funds at least quarterly. Prior to submitting the **Documentation of Advanced Funds (DAF) form** (also available as an **Excel download**), please consult the language of the guidelines (linked above) and your grant agreement in the section "Cost and Disbursements" for directions on allowed costs. If you have questions, please email your Conservancy Project Manager.

Information on how to document Advance Payments can be found in the **Documenting Advance Payments Instructions.**

You	SCC	You	State
Request for Disbursement Form	Review and Approve	Sign RFD with DocuSign	SCC forwards to State Controller
Progress Report	Send to you for signature on DocuSIgn		Controller Mails You a Check
Backup Documentation			

4) Signs and Funder Acknowledgement Requirements

As part of your grant agreement, we require that you publicly acknowledge Coastal Conservancy funding for your project and/or program. Prior to beginning your project, you must submit a Signage and Acknowledgement Plan to your Conservancy Project Manager. For construction projects, this includes a plan for installing signs that contain our logo at the project site. Use of the Coastal Conservancy name and logo on signs must be approved in advance by your Conservancy Project Manager.

Our **Guidance Plan for Signage and Acknowledgement** can help you develop this plan. It details our requirements and suggestions around acknowledging Coastal Conservancy funding. Our **Logo and Signage Guidance** provides basic design guidelines for using the Coastal Conservancy logo.

Interpretive signage and materials can reinforce the message that all visitors and their safe uses of outdoor spaces are welcome and respected and that the full story of the California coast comes from multifold perspectives. Working with communities to develop these messages is typically an allowable grant expense. When developing interpretive materials, the Coastal Conservancy encourages grantees to create inclusive interpretive materials using the tips contained in the **Guidance Plan for Signage and Acknowledgement**.

5) Project Changes and Staying in Touch with SCC

Clear, open communication makes for more successful projects. If you experience a problem or challenge on your project, please contact your Conservancy Project Manager as early as possible. For example, if you are unsure whether a project cost can be paid for by your grant, please contact your Conservancy Project Manager before you spend the funds. As project partners, we are here to help navigate challenges and co-develop solutions.

We understand the unexpected can happen: projects get delayed, budget needs shift, deliverables evolve. Some of these things can be resolved by amending your Work Program, which you can do via emailed approval from your Conservancy Project Manager.

Other issues may require an amendment to your grant agreement. To request a change to your grant agreement, you should first discuss the issue with your Conservancy Project Manager. Then, email them a written request that specifies the desired change, justifies the change, and if necessary, includes a copy of your Work Program showing requested changes in track-changes. Please note that grant agreement amendments must be completed prior to your grant agreement's Termination Date.

Questions? Ask us - we are here to help!

6) Grant Completion

To close your grant, first check that you provided your Conservancy Project Manager with all deliverables listed in your Work Program. Additionally, for construction projects, your Conservancy Project Manager will need to do a final site inspection.

Once all deliverables have been provided and accepted by your Conservancy Project Manager, you are ready to submit any final billing and **Request for Disbursement of Withholding**. To request withholding, use the Request for Disbursement Form, and fill out the "Release of Withholding" to request the funds we previously withheld from your invoices.

If your organization provided required match as part of the grant, you need to provide a **Documentation of Match Letter**. This letter details what your organization provided as match, when it was provided, and how you calculated the value of that match contribution. Your Conservancy Project Manager will let you know if this is required for your grant.

If you have an Explore the Coast Grant, you must also complete and submit an **Explore the Coast Final Progress Report** for your project.

Finally, we ask that you complete an **anonymous survey** about your experience managing your Conservancy grant. This feedback will help us improve our systems and communication to better serve you and other grantees in the future.

7) What else will help make my project a success?

Our **Tips for Meaningful Community Engagement** handout provides important considerations and strategy ideas for designing and cultivating robust, inclusive community engagement as part of your project efforts.
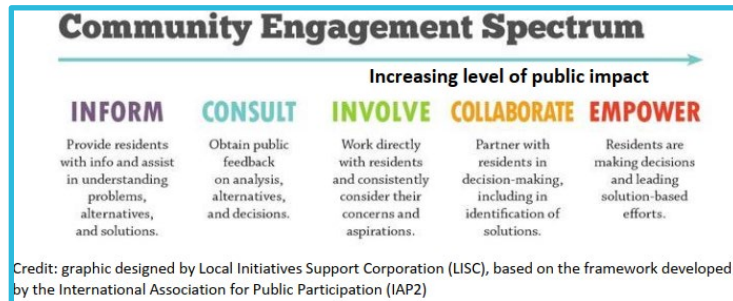
Interpretive signage at project sites can be an opportunity to tell new stories about the California coast and reinforce the message that all visitors and their safe uses of outdoor spaces are welcome. We encourage grantees to explore ways to tell inclusive narratives about their project and history of their site. Working with communities to develop these messages is typically an allowable grant expense. Please review our **Tips for Creating Inclusive Interpretive Materials** and talk to your Grant Manager about incorporating this approach into your project.

Our **Tips for Equitable Workforce Development** in Environmental Conservation Projects outlines a variety of workforce development practices that will help organizations advance equity goals and benefit local and systematically excluded communities. Including workforce development in your project increases the project benefit making it more competitive for funding and helping us to maximize the benefits of public money. Several of the suggested workforce development practices can be included in your Coastal Conservancy grant's project budget. Please see **this document** to learn more about Prevailing Wage laws.

In 2023, the San Francisco Estuary Wetlands Regional Monitoring Program lead the development of **Best Practices for Tribal Engagement. This document** aims to give helpful guidance to meaningfully engage with Tribes.

Our **Guidance for Wetland Monitoring** details specific requirements for wetland and riparian restoration projects. This includes how to contract and conduct California Rapid Assessment Method (CRAM) wetland assessments that may be required under your grant agreement.

8) Index of Forms, Guidance and Sample documents

Forms

- Acquisition Checklist (Word download)
- Budget Template (Excel download)
- Federal Sub-Awardee Questionnaire (Word download)
- Progress Report Template (Word download)
- Progress Report Template - Explore the Coast Projects (Word download)
- Project Report Template - Explore the Coast Final Report (Word download)
- Request for Disbursement Form (Excel download)
- Request for Disbursement Form – in pdf
- Documentation of Advanced Funds (DAF) form – in pdf
- Documentation of Advanced Funds (DAF) form (Excel download)
- RFD/Invoice tracking spreadsheet (Excel download)
- STD-204 form (Word download)
- Work Program Template (Word download)
- Explore the Coast Work Program Template (Word download)

Guidance & Sample Documents

- Budget guidelines for agencies and universities
- Budget guidelines for non-profit organizations
- Explore the Coast Allowable Costs
- Guidance for Wetland Monitoring
- Guidance Plan for Signage and Acknowledgement
- Logo and Signage Guidance
- Prevailing Wage rules
- Request for Disbursement Form Instructions
- Advance Payment Program Guidelines
- Documenting Advance Payments Instructions
- Tips for Meaningful Community Engagement
- Tips for Equitable Workforce Development
- Tips for Creating Inclusive Interpretive Materials
- Travel Reimbursement Guidance
- Typical Grant Agreement Terms

Sample Documents

- 31116(d) agreement
- Board Resolution - before your grant has been awarded
- Board Resolution - after your grant has been awarded
- Documentation of Match Letter
- Insurance policy certificate
- Notice to Proceed
- Request for Disbursement of Withholding