



# California Fire Safe Council

## 2022 CAL FIRE Evacuation Route Planning and Development Grant Program Handbook



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# 2022 CAL FIRE Evacuation Route Planning and Development Grant Program

## Purpose and Endorsements

Congratulations on your selection as a California Fire Safe Council (CFSC) Evacuation Route Planning and Development Grant Program subrecipient! The CFSC launched the Evacuation Route Planning and Development Grant Program, with funding from CAL FIRE in 2022, to support counties with evacuation route identification and planning, fuel reduction, maintenance and signage for use during emergencies.

We look forward to working with you to enhance your county’s wildfire resilience through evacuation planning. This handbook is intended to give you the resources you need to successfully manage and complete your grant. All information contained herein is incorporated 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

This grant program and publication are funded in full by the California Department of Forestry and Fire Protection (CAL FIRE) as part of the California Climate Investment Program, under the terms of grant numbers 5GG21100. The opinions expressed are those of the authors and do not necessarily reflect the views of CAL FIRE.

The Evacuation Route Planning and Development Grant Program is part of California Climate Investments, a statewide program that puts billions of Cap-and-Trade dollars to work reducing

GHG emissions, strengthening the economy, and improving public health and the environment-- particularly in disadvantaged communities. For more information, visit the California Climate Investments website at: <http://www.caclimateinvestments.ca.gov>.



### **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 [outreach@cafiresafecouncil.org](mailto:outreach@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.

### **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 CAL FIRE or the State of California. Mention of trade names or commercial products does not constitute their endorsement by the California Fire Safe Council or the State of California. 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 Grant Program Acknowledgement section of this handbook.

## **Grant Requirements**

In alignment with the terms of your subaward agreement, Section 7, *Quarterly Meeting Requirements*, as well as Section 13, *Site Visits*, the subrecipient agrees to maintain a schedule of quarterly and in-person communication with the CFSC Grant Specialist and their assigned CFSC Regional Coordinator. The two types of quarterly meetings are outlined below.

### **Grant Award Workshop**

CFSC staff will conduct an online Grant Award Workshop. Attendance at the award workshop is mandatory. The date and time of the workshop will be announced in advance.

### **Quarterly Grant Check-Ins**

The grant check-ins will be scheduled via Zoom or phone call each quarter with your CFSC Grant Specialist, Regional Coordinator and County Coordinator if applicable. This is a time to

discuss project questions, concerns, and modifications. These meetings are intended to serve as a source of support and will take an hour or less once per quarter.

In addition, the subrecipient and your Grant Specialist will work together to develop metrics to gauge your Project's progress. These metrics will be discussed and evaluated at each quarterly check-in appointment. Metrics may include but are not limited to:

- Number of evacuation plans developed
- Number of evacuation routes identified
- Number of evacuation route best practices and standards identified
- Evacuation standards drafted and adopted
- Number of miles of evacuation routes maintained (fuel reduction)
- Number of acres treated
- Number of signs erected along evacuation routes
- Educational products created
- Workshops, training sessions, educational programs conducted
- Audiences reached (e.g. number of engagements and which zip codes did your products/workshops/communications "touch")

### **Quarterly Progress Reports**

Progress reports are required of each grantee, and due 30 days following the end of each quarter. Reports are submitted via ZoomGrants. See page 11 for more information on quarterly reports and key deadlines.

### **Site Visits**

CFSC staff will conduct a minimum of one monitoring visit/desk review and may schedule additional visits during the Term of the Agreement, to ensure program compliance and that work is in accordance with the approved Scope of Work. The CFSC Grant Specialist will contact the Subrecipient to schedule the visit(s) and inform the Subrecipient of any items to be reviewed. Site visits are also an opportunity for you to educate your Grant Specialist about your project.

The subrecipient may be notified that additional CFSC staff, or a CAL FIRE representative, would like to participate in the site visit. This will always be done in coordination with Subrecipient.

### **Prevailing Wage Requirements**

CAL FIRE provides no opinion as to whether projects may be subject to prevailing wages. For determination for prevailing wages, please contact the Department of Industrial Relations (DIR) at DIR Prevailing Wage. It is the applicant's responsibility to budget for prevailing wages in their project cost when applicable.

## Additional Grant Resources

CFSC intends to assist subrecipients throughout the life cycle of their grant and help to ensure successful grant outcomes. As part of this support, CFSC will be on hand to help with a variety of projects and tools.

### Grant Specialist

The Grant Specialist is the first line of contact for any grant-related questions and concerns. The Grant Specialist will assist with:

- Processing payments
- Grant reports
- Quarterly check ins
- Grant modification requests
- All questions/concerns

<b>CFSC Evacuation Route Planning and Development Grant Clearinghouse Team</b>	
<b>Amber Gardner</b> Clearinghouse Manager Email: <a href="mailto:agardner@cafiresafecouncil.org">agardner@cafiresafecouncil.org</a>	<b>Dave Farley</b> Senior Grant Specialist Evacuation Grant Programs Email: <a href="mailto:dfarley@cafiresafecouncil.org">dfarley@cafiresafecouncil.org</a>
<b>Becky DeForest</b> Staff Grant Specialist Evacuation Grant Programs Email: <a href="mailto:bdeforest@cafiresafecouncil.org">bdeforest@cafiresafecouncil.org</a>	<b>Sara Kniss</b> Administrative Assistant Email: <a href="mailto:skniss@cafiresafecouncil.org">skniss@cafiresafecouncil.org</a>

### Quarterly Grantee Roundtable Networking Meetings

Your CFSC Grant Specialists will be hosting quarterly “Grantee Roundtable” meetings to allow grantees to discuss successes, challenges, and share best practices. This will also be a forum to ask your Grant Specialists questions about upcoming quarterly reports and other grant requirements. Grantee Roundtables will be held on the following dates:

- Wednesday, January 18, 2023
- Wednesday, April 19, 2023
- Wednesday, July 19, 2023
- Wednesday, Oct. 18, 2023
- Wednesday, January 17, 2024
- Wednesday, March 20, 2024

Grantee Roundtable dates are subject to change. More details will be provided by your Grant Specialist.

## CFSC Regional Coordinator

In addition to the Grant Specialist, subrecipients will interact regularly with their assigned CFSC Regional Coordinator. The Regional Coordinator will:

- Assist the Grant Specialist and support subrecipients throughout the project period
- Host monthly regional meetings with wildfire mitigation groups to discuss topics of interest, events, and educational opportunities. Visit the CFSC Events Calendar at <https://cafiresafecouncil.org/resources/events/> for links to each Regional Meeting.

<b>CFSC Programs and Outreach Team</b>	
<b>Jessica Martinez – Programs Director</b> Email: <a href="mailto:jmartinez@cafiresafecouncil.org">jmartinez@cafiresafecouncil.org</a>	
<b>Becca Joyner – Programs and Outreach Manager</b> Email: <a href="mailto:bjoyner@cafiresafecouncil.org">bjoyner@cafiresafecouncil.org</a>	
<b>Brooke McAllister</b> Northern & Central CA Regional Coordinator Email: <a href="mailto:bmcallister@cafiresafecouncil.org">bmcallister@cafiresafecouncil.org</a>	<b>Lara Popyack</b> Communications & Outreach Coordinator Email: <a href="mailto:lpopyack@cafiresafecouncil.org">lpopyack@cafiresafecouncil.org</a>
<b>Britney Munoz</b> Southern CA Regional Coordinator Email: <a href="mailto:bmunoz@cafiresafecouncil.org">bmunoz@cafiresafecouncil.org</a>	<b>Megan Katich</b> Communications & Outreach Assistant Email: <a href="mailto:mkatich@cafiresafecouncil.org">mkatich@cafiresafecouncil.org</a>

\*Please see page 7 for a CFSC Regional Map.

## GIS Mapping

Subrecipients are required to maintain all GIS data files that are a product of the grant Scope of Work and submit these along with the final report. GIS data files may include projects maps, evacuation routes identified, treated, and maintained through this grant, and other items to be determined.

## 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 more specific assistance with ZoomGrants, contact your Grant Specialist.

# CFSC Regional Map





## Subaward Agreement

*This section provides guidance on managing and referencing the subaward agreement. Communicate with your Evacuation Route Planning and Development Grant Specialist about any questions regarding the subaward agreement terms.*

The subaward contract (the “subaward”) is a **legally binding contract** between the California Fire Safe Council and the subrecipient. 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 CFSC’s “ZoomGrants” online grant management system, and the contract requires electronic signatures.

The subrecipient **shall not** begin any work on the project until the signed subaward agreement has been returned to the CFSC. Activities carried out without a signed subaward **will not be reimbursed**, unless the subrecipient has received prior written approval from the CFSC.

The term of this Agreement is from September 1, 2022 – February 29, 2024 (the “Term”). Subrecipient shall not receive funding for portions of the Project completed outside of the Term. Subrecipient agrees to comply with all applicable state and local laws governing the funds provided under this Agreement; in addition, subrecipient will follow generally accepted accounting principles and their organization’s written policies and procedures related to financial and program management.

### Accessing your Subaward Contract in ZoomGrants

Steps to access your subaward contract and uploaded documents:

1. Log into ZoomGrants account: <https://www.zoomgrants.com/login/>
2. Select 21 & 22 CALFIRE Evacuation Route Planning and Development Grant Program
3. Navigate to the Subaward Agreement Tab
4. Here you will find your signed subaward agreement and its required documents:
  - W-9: Completed & uploaded under subaward tab OR documents tab
  - ACH authorization form & voided check: Completed and uploaded under subaward or documents tab

Copies of a blank W-9 form, W-9 instructions, and a blank ACH authorization form are located in Subaward Tab in ZoomGrants. Items are DUE by November 30, 2022.

## Payments and Reimbursements

Payments for work conducted under this Agreement will be made on a reimbursement basis and are contingent upon the receipt by CFSC of sufficient funds from CAL FIRE pursuant to the Master Award. Grant reimbursements 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 the subrecipient's bank. Reimbursements shall be made upon receipt and approval of a Reimbursements Request Form and a financial report detailing current charges and total-to-date charges by major budget categories. (If your county does not accept ACH payments, please notify your Grant Specialist.)

Payment request fulfillment may take up to 90 days depending on funding availability. CFSC is not liable for any damages or expenses incurred due to delay in payment for any cause whatsoever.

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

- Required progress reports have been submitted by the due date
- Reports for other CFSC grants (if applicable) have been submitted
- The organization's proof of current insurance is on file in ZoomGrants and CFSC is named as additionally insured
- Current W9 and ACH Authorization forms are on-file in ZoomGrants

## How to Submit a Reimbursement Request

Reimbursement requests are accessed and submitted through the Reimbursement Tab in your ZoomGrants account. Select the “Add Reimbursement Request” button and a new window will open with the Payment Request Form. Follow the steps in the table below to submit your request:

Reimbursement Request Checklist Item:	Completed in ZoomGrants Payment Request Form
<b>Reimbursement Request Number</b> 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 # 22 CALFIRE Evac 37100 would be 37100-1, then 37100-2, and so on...).</i>	<input type="checkbox"/>
<b>Requested Amount</b> Enter the total dollar amount of your request. Use whole dollars only.	<input type="checkbox"/>
<b>Reimbursement Request Contact Information</b> 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"/>
<b>Enter the dates covered by this reimbursement request</b> Enter the grant period dates that this reimbursement request applies.	<input type="checkbox"/>
<b>Describe the work plan activities covered by this request</b> List the activities from your Work Plan that you accomplished using the requested funds. Consult the Work Plan in your application.	<input type="checkbox"/>
<b>Total grant funds spent during the period.</b> Enter the amount of grant funds spent during the time period in Question 1.	<input type="checkbox"/>
<b>Total grant funds spent to date.</b> Enter the amount of grant funds spent to date.	<input type="checkbox"/>
<b>Expense reconciliation and documentation report.</b> Include the expense reconciliation and documentation report (required). Template is included in ZoomGrants.	<input type="checkbox"/>
<b>Enter the expiration date for your organization’s Insurance.</b> <b>Ensure current proof of insurance is uploaded into ZoomGrants.</b> 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 before submitting your payment request.	<input type="checkbox"/>
<b>Then Click “Submit Reimbursement Request”</b>	

*This checklist is not required to be completed nor submitted, and is for individual use & tracking. All items must be completed and submitted through your 22 CALFIRE Evacuation ZoomGrants application.*

## Source Documentation

To submit a payment request, the subrecipient must submit the request in ZoomGrants and upload proof of expenditures for the invoice period into ZoomGrants. The documents required to show proof of expenditures include:

1. A summary sheet or a copy of your general ledger showing all Evacuation grant budget categories, including budgeted amount, requested amount, amount expended to date.
2. Detailed transaction ledgers by each budget category.
3. Contractor invoices (if applicable) must be included as source documentation and must show:
  - a. Hourly rate
  - b. Description of activity completed
  - c. Time spent completing activity
  - d. Name of individual completing activity

See Appendix C for examples of source documents, including the summary sheet, detailed transaction ledgers, and template contractor invoice.

*\*CFSC reserves the right to cancel or stop payments if there are serious compliance or programmatic issues. Subrecipients must keep copies of receipts for three years. CFSC may request receipts showing Project expenditures at any time.*

## Progress Reports

This section provides guidance on completing and submitting progress reports. Effective communication with CFSC is one of the most important ingredients of a successful grant project. Communicate any setbacks or problems that affect your project or share any special success stories that result from your project.

Failure to submit complete and accurate reports on time will result in the denial of payment requests. Continued failure to meet this requirement may result in termination of the subgrant.

### **Reporting Process**

Progress reports are submitted through your applicant ZoomGrants portal. The project contact is the only individual who may submit progress reports.

Information that must be included in these reports:

1. A narrative description of the project's key actions taken in the reporting period. Include work plan progress updates as well as narrative regarding successes, challenges, and unanticipated occurrences and their impact on the project.
2. Quantitative data for program outputs, including evacuation route treatments, signage, systems, best practices, and public relations activities.
3. Update on quarterly expenses and matching contributions (if applicable).

## Reporting Periods

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

\*See the reporting deadlines table for progress and closeout report due dates.

### Evacuation Grant Reporting Deadlines

Report Period	Progress and Expense Reports Due Dates	Due Date
1	September 1, 2022 – December 31, 2022	1/31/2023
2	January 1, 2023 – March 31, 2023	4/30/2023
3	April 1, 2023 – June 30, 2023	7/31/2023
4	July 1, 2023 – September 30, 2023	10/31/2023
5	October 1, 2023 – December 31, 2023	1/31/2024
6	January 1, 2024 – February 29, 2024	3/31/2024
<b>Closeout Report</b>	September 1, 2022 – February 29, 2024 Final report for entirety of Project period	March 31, 2024, at 5 p.m. (Note: this report is due in addition to the final quarterly report)

### Progress Report Narrative

The progress report narrative allows you to detail all activities that took place during the reporting period. 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. Use quantifiable data where possible. Progress reports with insufficient data will not be accepted.

### Navigating to the Progress Report

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.

When you complete each 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 has been automatically saved.

## Modification Requests

Modifications to your original project which require prior approval include changes to your original budget, project location, projected deliverables, and subgrant term extensions.

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.

### Types of Modification Requests

Extensions of reporting periods are the most common types of modifications requested. Requests for extensions 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. At this time, CFSC cannot honor any requests for extensions of time past the stated deadline of February 29, 2024; you will be notified if extensions become available along with instructions on how to request an extension.

Change 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 request for augmented funds or movement of funds between budget categories. Prior written approval from the CFSC is required when the cumulative total of budget reallocations will exceed ten percent (10%) of the total grant amount. Any increase or decrease of an expense category of more than ten percent (10%) of the total grant amount must be approved in writing by the CFSC before any such increase or decrease is made.

The dollar amount of a budget expense category may be increased or decreased by up to ten percent (10%) of the total grant amount through reallocation of funds from another expense category(ies) without approval by the CSFC; however, Subrecipient shall notify the CFSC in writing in project progress reports when any such reallocation is made and shall identify both the expense category(ies) being increased and those being decreased.

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.

## Grant Closeout

### Closeout Report

By March 31, 2024, at 5:00 PM Pacific Time, subrecipient agrees to submit a final report, including all required documents, through ZoomGrants.

The final report should include:

1. A final Closeout Report Narrative
2. A final Budget Report on Actual Costs
3. A final success story of the Project.
4. Confidential Program Evaluation Form
5. One (1) digital version of products, publications, flyers, communications and/or educational materials, best practice guides, newspaper clippings and other materials developed using grant funds over the entirety of the Project.
6. Photos: High Resolution digital photos showing the project's outcomes and events.
7. GIS Project data files, which may include projects maps, evacuation routes identified, treated, and maintained through this grant and other items to be determined.

Failure to comply with all reporting and closeout procedures by the deadlines will be considered noncompliance with the terms of the Subaward. Such noncompliance may be considered in the evaluation of organizational capacity for future Subawards.

## Success Stories

### Success Stories

CFSC requires that all subrecipients submit at least one (1) success story throughout the grant award. Success stories may be submitted alongside quarterly progress reports. If you have questions about success story requirements, please reach out to CFSC Staff for further assistance.

Please see [Appendix D](#) for guidance on success story requirements. The document will outline the reporting requirements and go into depth on what resources and tools are available for writing and submitting success stories.

### Photo Documentation and Submissions

Please document photos of your project throughout the duration of the grant term to submit with the quarterly Progress Reports and the Closeout Report. Examples of documentation could be pictures from outreach events, conferences, staff collaboration, roadside maintenance, updated websites, etc.

## Grant Program Acknowledgement/Recognition

You are encouraged to develop a press release to announce your grant award across wider networks, including funders, donors, constituents, and the media. To assist you, please visit <https://cafiresafecouncil.org/media/> for examples of press releases and logos.

This section of the handbook will provide guidance on specific language required by program funders. All projects must clearly display, identify, and label themselves as being part of the “California Climate Investments” program. The acknowledgement must contain the California Climate Investments and CAL FIRE logos:

*“Funding for this project provided by a grant from the California Department of Forestry and Fire Protection as part of the California Climate Investments Program, through the California Fire Safe Council.”*

Items such as press releases or other public notices shall include a statement as follows:

*“The 2022 Evacuation Route Planning and Development grant, a program of the Community Wildfire Preparedness Project, is part of California Climate Investments, a statewide program that puts billions of Cap-and-Trade dollars to work reducing GHG emissions, strengthening the economy, and improving public health and the environment— particularly in disadvantaged communities. The Cap-and- Trade program also creates a financial incentive for industries to invest in clean technologies and develop innovative ways to reduce pollution. California Climate Investments projects include affordable housing, renewable energy, public transportation, zero-emission vehicles, environmental restoration, more sustainable agriculture, recycling, and much more. At least 35 percent of these investments are located within and benefiting residents of disadvantaged communities, low-income communities, and low-income households across California. For more information, visit the California Climate Investment website at: [www.caclimateinvestments.ca.gov](http://www.caclimateinvestments.ca.gov).”*



## Appendix A – ZoomGrants Information



### 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.

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### Navigating Tabs in ZoomGrants

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

# Appendix B – Reimbursement Request Example

### Reimbursement Request

Date Submitted *auto-generated*

Reimbursement Request Number  Their number

Requested Amount  \$

Reimbursement Request Contact Name

Reimbursement Request Contact Phone

Reimbursement Request Contact Email

Reimbursement Instructions

Their Reimbursement instructions

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

### Reimbursement Request Questions

- Enter the dates covered by this reimbursement request. Edit
- Describe the work plan activities completed during the time period in question 1. Edit
- Enter the total amount of grant funds spent during the time period in question 1. Edit
- Enter the total amount of grant funds spent to date. Edit
- Have you prepared your expense reconciliation and documentation report? (Template below) Edit
- Yes
- No
- Edit
- Edit
- Edit
- Edit
- Edit

### Reimbursement Request Status

Reimbursement Request Status Pending

Approved by

Approved Amount \$

Approval Date (mm/dd/yyyy)

Reimbursement Request Decision Comments

### Reimbursement

*(for this Reimbursement Request only)*

Their payment number <i>Pending</i>	\$
Their payment number <i>Pending</i>	\$
Their payment number <i>Pending</i>	\$
Add Reimbursement	<b>Total \$</b>

### Current Funding Snapshot

*(for this full application only)*

Reimbursement Request	
Initial Award Amount	\$
Pending	(-) \$
Approved	(-) \$
Paid	(-) \$
This Reimbursement Request	(-) \$
<b>Still Available</b>	<b>\$</b>

  

Reimbursement	
Initial Award Amount	\$
Pending	(-) \$
Completed	(-) \$
<b>Still Available</b>	<b>\$</b>

## Appendix C – Reimbursement Request Source Documentation Example

Attached to every payment request submitted to the California Fire Safe Council, sub-recipients must provide a summary of expenses incurred since the previous payment request along with their source documentation.

Expenses must be summarized by cost categories (e.g., personnel, travel, supplies, contractual, etc.) and source documentation should include, at a minimum, a report of your organization's General Ledger (or similar report) for the time period covered in the previous payment request.

An expense summary and source documentation example are provided on the following pages. Your ledger and expense report may look different from the example provided, but it will give you an idea of the format we prefer and the information we require to process your payment request. All amounts in the example are fictitious.

Based on the sample provided, your report should include:

- A cover page, similar to the one provided, summarizing expenses (by cost category) incurred in the previous request(s), your current payment request, and your total expenses from inception to date.
- A summary table of expenses incurred in each cost category along with a ledger report from your accounting system documenting all expenses incurred in your previous payment request.
- If work is completed by a contractor, a contractor invoice must be included with your source documentation. See the template provided below. The invoice should include:
  - Hourly rate
  - Description of activity completed
  - Time spent completing activity
  - Name of individual completing activity

Sensitive information such as individual employee names and bank account numbers should be redacted. Vendor/contractor company names must be visible.

The expense summaries and ledger reports must be uploaded as a single .pdf file along with your payment request in ZoomGrants.

Payment requests cannot be processed until the reconciliation documentation is submitted and approved.

## Source Documentation Example

### COVER PAGE

#### Revenue

Advance Request #: \$150,000

Dated July 7, 2021

For performance period ending:

#### Expenses

Expense Category	Previous Request(s)	Current Payment Request	Cumulative Expenses Inception to date
Personnel	\$8,200.00	\$10,000.00	\$8,200.00
Fringe	1,259.24	1,000.00	1,259.24
Travel	395.50	500.00	395.50
Supplies	1,400.00	1,000.00	1,400.00
Contractual	118,464.92	137,500.00	118,464.92
Other	1,645.00	0.00	1,645.00
Indirect*	0.00	0.00	0.00
<b>Total</b>	<b>\$131,364.66</b>	<b>\$150,000.00</b>	<b>\$131,364.66</b>

\*If applicable

**SUMMARY TABLES + LEDGER REPORTS**

**Personnel (Salaries & Wages) Expenses**

1001	Salaries and Wages	\$8,200.00
	<b>Total</b>	<b>\$8,200.00</b>

**ABC Organization  
Actual Ledger for Period Ending 9/30/2021**

Account	Date	Source	JE	Reference	Description	Debit	Credit	Balance
1001 Salaries and Wages Beginning Balance								0.00
	8/15/2021	A/P			[ADP Business Payroll Services] ADP Business Payroll Services 1st August 2021 wages	2,050.00		2,050.00
	8/31/2021	A/P			[ADP Business Payroll Services] ADP Business Payroll Services 2nd August 2021 wages	2,050.00		4,100.00
	9/15/2021	A/P			[ADP Business Payroll Services] ADP Business Payroll Services 1st September 2021 wages	2,050.00		6,150.00
	9/30/2021	A/P			[ADP Business Payroll Services] ADP Business Payroll Services 2nd September 2021 wages	2,050.00		8,200.00
1001 Salaries and Wages Ending Balance						8,200.00	0.00	8,200.00
<b>Report Total</b>						<b>8,200.00</b>	<b>0.00</b>	<b>8,200.00</b>

**Fringe (Employee Benefits) Expenses**

2001	Payroll Taxes	\$834.24
2002	Health Insurance	\$250.00
2003	Retirement Expenses	\$175.00
	<b>Total</b>	<b>\$1,259.24</b>

**ABC Organization  
Actual Ledger for Period Ending 9/30/2021**

Account	Date	Source	JE	Reference	Description	Debit	Credit	Balance
2001 Payroll Taxes Beginning Balance								0.00
	8/15/2021	A/P			[ADP Business Payroll Services] ADP Business Payroll Services 1st August 2021 Payroll Taxes Withheld	208.56		208.56
	8/31/2021	A/P			[ADP Business Payroll Services] ADP Business Payroll Services 2nd August 2021 Payroll Taxes Withheld	208.56		417.12
	9/15/2021	A/P			[ADP Business Payroll Services] ADP Business Payroll Services 1st September 2021 Payroll Taxes Withheld	208.56		625.68
	9/30/2021	A/P			[ADP Business Payroll Services] ADP Business Payroll Services 2nd September 2021 Payroll Taxes Withheld	208.56		834.24
2001 Payroll Taxes Ending Balance						834.24	0.00	834.24
<b>Report Total</b>						<b>834.24</b>	<b>0.00</b>	<b>834.24</b>

Account	Date	Source	JE	Reference	Description	Debit	Credit	Balance
2002 Health Insurance Beginning Balance								0.00
	8/15/2021	A/P			[KAISER PERMANENTE] Kaiser Permanente	62.50		62.50
	8/31/2021	A/P			[KAISER PERMANENTE] Kaiser Permanente	62.50		125.00
	9/15/2021	A/P			[KAISER PERMANENTE] Kaiser Permanente	62.50		187.50
	9/30/2021	A/P			[KAISER PERMANENTE] Kaiser Permanente	62.50		250.00
2002 Health Insurance Ending Balance						250.00	0.00	250.00
<b>Report Total</b>						<b>250.00</b>	<b>0.00</b>	<b>250.00</b>

Account	Date	Source	JE	Reference	Description	Debit	Credit	Balance
2003 Retirement Expenses Beginning Balance								0.00
	8/15/2021	A/P			[DFGlobalFinancial] DF Global Financial	43.75		43.75
	8/31/2021	A/P			[DFGlobalFinancial] DF Global Financial	43.75		87.50
	9/15/2021	A/P			[DFGlobalFinancial] DF Global Financial	43.75		131.25
	9/30/2021	A/P			[DFGlobalFinancial] DF Global Financial	43.75		175.00
2003 Retirement Expenses Ending Balance						175.00	0.00	175.00
<b>Report Total</b>						<b>175.00</b>	<b>0.00</b>	<b>175.00</b>

**Travel Expenses**

3001	Travel	\$395.50
	<b>Total</b>	<b>\$395.50</b>

<p><b>ABC Organization</b>  <b>Actual Ledger for Period Ending 9/30/2021</b></p>
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Account	Date	Source	JE	Reference	Description	Debit	Credit	Balance
3001 Travel Beginning Balance								0.00
	9/30/2021	A/P			Q3 program director mileage expense	395.50		395.50
3001 Travel Ending Balance						395.00	0.00	395.50
<b>Report Total</b>						<b>395.50</b>	<b>0.00</b>	<b>395.50</b>



## Supplies Expenses

4001	Supplies	\$1,200.00
4002	Postage and shipping	\$200.00
	<b>Total</b>	<b>\$1,400.00</b>

<b>ABC Organization</b> <b>Actual Ledger for Period Ending 9/30/2021</b>
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Account	Date	Source	JE	Reference	Description	Debit	Credit	Balance
4001 Supplies Beginning Balance								0.00
	8/12/2021	A/P			[Staples] Staples, Inc.	1,200.00		1,200.00
4001 Supplies Ending Balance						1,200.00	0.00	1,200.00
<b>Report Total</b>						<b>1,200.00</b>	<b>0.00</b>	<b>1,200.00</b>

Account	Date	Source	JE	Reference	Description	Debit	Credit	Balance
4002 Postage and shipping Beginning Balance								0.00
	9/7/2021	A/P			[FedEx] FedEx	200.00		200.00
4002 Postage and shipping Ending Balance						200.00	0.00	200.00
<b>Report Total</b>						<b>200.00</b>	<b>0.00</b>	<b>200.00</b>

**Contractual Expenses**

5001	Contracted labor	\$116,464.92
5002	Website	\$2,000.00
5003	Accounting/Bookkeeping Fees	\$0.00
	<b>Total</b>	<b>\$118,464.92</b>

**ABC Organization  
Actual Ledger for Period Ending 9/30/2021**

Account	Date	Source	JE	Reference	Description	Debit	Credit	Balance
5001 Contracted labor Beginning Balance								0.00
	8/15/2021	A/P			[GreenThumb] Green Thumb Defensible Space Landscaping, LLC Acct # 99999999	58,232.46		58,232.46
	9/15/2021	A/P			[GreenThumb] Green Thumb Defensible Space Landscaping, LLC Acct # 99999999	58,232.46		116,464.92
5001 Contracted labor Ending Balance						116,464.92	0.00	116,464.92
<b>Report Total</b>						<b>116,464.92</b>	<b>0.00</b>	<b>116,464.92</b>

Account	Date	Source	JE	Reference	Description	Debit	Credit	Balance
5002 Website Beginning Balance								0.00
	8/31/2021	A/P			[XYZTechCo] XYZ Technology Company	2,000.00		2,000.00
5002 Website Ending Balance						2,000.00	0.00	2,000.00
<b>Report Total</b>						<b>2,000.00</b>	<b>0.00</b>	<b>2,000.00</b>

## Other Expenses

6001	Telecommunications	\$295.00
6002	Insurance	\$1,200.00
6003	Utilities	\$150.00
6004	Bank Charges	\$0.00
	<b>Total</b>	<b>\$1,645.00</b>

<b>ABC Organization Actual Ledger for Period Ending 9/30/2021</b>
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Account	Date	Source	JE	Reference	Description	Debit	Credit	Balance
6001 Telecommunications Beginning Balance								0.00
	8/31/2021	A/P			[BigTelco] Big Telco Inc.	147.50		147.50
	9/30/2021	A/P			[BigTelco] Big Telco Inc.	147.50		147.50
6001 Telecommunications Ending Balance						295.00	0.00	295.00
<b>Report Total</b>						<b>295.00</b>	<b>0.00</b>	<b>295.00</b>

Account	Date	Source	JE	Reference	Description	Debit	Credit	Balance
6002 Insurance Beginning Balance								0.00
	9/30/2021	A/P			[BSure] B-Sure Insurance Co.	1,200.00		1,200.00
6002 Insurance Ending Balance						1,200.00	0.00	1,200.00
<b>Report Total</b>						<b>1,200.00</b>	<b>0.00</b>	<b>1,200.00</b>

Account	Date	Source	JE	Reference	Description	Debit	Credit	Balance
6003 Utilities Beginning Balance								0.00
	8/31/2021	A/P			[Zappy] Zappy NRG Gas & Electric	75.00		75.00
	9/30/2021	A/P			[Zappy] Zappy NRG Gas & Electric	75.00		75.00
6003 Utilities Ending Balance						150.00	0.00	150.00
<b>Report Total</b>						<b>150.00</b>	<b>0.00</b>	<b>150.00</b>

## Contractor Invoice Example

### Contractor Invoice

Manager Details:

Period Start Date    Period End Date

Total invoice this period

**\$1,477.50**

Date(s)	Contractor	Activity	Description	Quantity	Rate	Amount
Date	Name of contractor	Consulting	Meetings	4.00	\$65.00	\$260.00
Date	Name of contractor	Vehicle Mileage	Travel to workshop	500.00	\$0.625	\$312.50
Date	Name of contractor	Supplies	Office supplies	1.00	\$125.00	\$125.00
Date	Name of contractor	Consulting	Monthly FSC meeting	7.00	\$65.00	\$455.00
Date	Name of contractor	Consulting	Quarterly CFSC Call	2.00	\$65.00	\$130.00
Date	Name of contractor	Travel	Travel to CC workshop	3.00	\$65.00	\$195.00
						\$0.00
Total						\$1,477.50

## Appendix D – Success Story Template

Success stories demonstrate the impact of your project's efforts and are vital in creating a fire safe California. The California Fire Safe Council is dedicated to amplifying your impact and empowering communities around California to engage in your efforts. When we share success stories, we can show that together we are all able to make a difference and have a role in fire prevention. CFSC will provide tools and processes to ensure that you have what you need to tell the great stories of your projects.

This document will outline the reporting requirements and go into depth on what resources and tools are available for writing and submitting success stories. CFSC requires that all grantees submit **one (1) success story** throughout the grant award period (at least one per grant year). If you have questions about success story requirements, please reach out to your Grant Specialist for further assistance.

**Why:** Success stories help demonstrate the impacts of fire prevention throughout California. When we have stories to share, it enables us to be able to share our efforts with the communities we serve, partners, and funding organizations.

**When & Where:** Grantees can submit Success stories in ZoomGrants with any Quarterly Progress Report and/or your final report. Each project is required to submit at least one (1) success story throughout the grant cycle. It is a best practice, however, to submit a success story with each Progress Report.

**What:** Success stories should include a few key items. Describing not only what happened, but who was involved, any relevant data, the impact on the community project, individuals served, and/or how the event assisted in the future success of the project. The template below lays out what should be included in your success stories. Please refer to this template and upload it with your quarterly progress reports.

Photos are also a great way to share the successes of a project. Here are a few things to consider when selecting photos to submit with your success story:

- **Before & After or Progress Photos:** Demonstrates impact of work completed. Please include multiple photos and label accordingly. CFSC recommends that grantees use numbered location markers and note them on a hand-drawn map, so you can then take photos from the exact same location each time.
- **Meetings, Gatherings, or Workshops:** Ensure that you have photo release information from those in the photos.
- **Image type:**
  - Accepted File Types: JPG, PNG, or PDF
  - File Size:
    - Minimum Resolution: 480 X 640
    - Maximum File Size: 4 MG
- **Submission instructions:** Upload a completed Success Story Template and accompanying media in the *Documents Requested* section of the Quarterly Progress Report in ZoomGrants.

**Success Story Template:**

Project Name:	
Organization:	
Grant Number:	
Date:	
Link to website:	
Location where the story took place:	
Partners:	External: Internal:
Data associated with the story (individuals served, acres treated, workshops completed, etc.):	
Title of the success story:	

Please describe your story in 300-1000 words:

What, if any, are the ways you intend to share this story with your networks?	
Would you be open to an interview?	<input type="checkbox"/> Yes, our organization would be open to a video interview <input type="checkbox"/> Yes, our organization would be open to a phone interview <input type="checkbox"/> No, our organization is not ready to be interviewed at this time
Are there any photos, videos, or other media associated with this success story?	<input type="checkbox"/> Yes, and they are attached. <input type="checkbox"/> Yes, but I need to upload them later. <input type="checkbox"/> No, I do not have any supporting media.

**Success Story Example #1:**

Project Name:	North Coast County Coordinator Project
Organization:	Northern Fire Safe Council
Grant Number:	112009
Date:	12/23/2022
Link to website:	
Location where the story took place:	North Town County
Partners:	Internal: MVFSC External: Property owners; CAL FIRE
Data associated with story (individuals served, acres treated, workshops completed, etc.):	Two project-planning workshops were held with stakeholders including: tribal council, CAL FIRE, 3 Firewise communities, two local Fire Safe Councils, County Board of Supervisors, and county-wide Fire Safe Council

Please describe your story in 300-1000 words:

The North Coast County Coordinator hosted two project planning workshops this year to build regional networks and develop consensus around critical wildfire mitigation projects in our county. All stakeholders in the wildfire mitigation space were invited. The workshops were intended to develop new partnerships and relationships between stakeholders in the wildfire mitigation space, discuss critical projects to improve our county’s wildfire resiliency, learn about group’s project successes and outcomes, and attempt to streamline communication between groups. Post-event surveys showed that attendees found the workshops to be critically important to the future success of our county’s wildfire mitigation efforts. Attendees appreciated the opportunity to engage with others and discuss best practices, as well as the chance to discuss the most critical fire issues facing our county.

What, if any, are the ways you intend to share this story with your networks?	Shared with CFSC during quarterly reports and shared across our social media networks.
Are there any photos, videos, or other media associated with this success story?	<input checked="" type="checkbox"/> Yes, and they are attached. <input type="checkbox"/> Yes, but I need to upload them later. <input type="checkbox"/> No, I do not have any supporting media.