

Progress Reports

Good communication with your Grant Specialist (GS) is one of the most important ingredients of a successful grant project. Contact your GS at least once per month to report progress, issues and events related to the completion of your project. Communicate any setbacks or problems that affect your project. 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 advance payment requests. Continued failure to meet this requirement may result in termination of the subgrant.

How to Submit Quarterly Progress Reports

The online Progress Report is available by logging in to your ZoomGrants account at <http://www.zoomgrants.com>. Follow the guidance on the following pages as you complete your quarterly reports.

Your Progress Report consists of three parts:

1. Progress Report narrative
2. Match and Expense form
3. Source documentation for all federal and match funded activities

Progress Report Narrative

The Progress Report narrative is 24 questions that provide details about all activities that took place during the quarter, whether grant-funded or completed through matching contributions. Your Progress Report will tell the story of the subgrant, from early planning stages to project implementation to final completion. Be specific and descriptive. Use quantifiable data where possible. Progress Reports with insufficient data will not be accepted.

The Progress Report narrative also includes specific data on the number of accomplishments, expenses, match, and other deliverables that were formerly referred to as “Table Data”. Make sure this information is as accurate as possible and reflects the match and expense form you submit separately.

Match and Expense Reports

In addition to the online Progress Report, subgrantees must submit the Match & Expense Reports each quarter. These reports are spreadsheet forms that are available from your GS and on the CFSC website.

The Match Report will itemize each match contribution spent or used during the quarter. The Expense Report will itemize each cost paid for with grant funds.

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's information. These 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/.

The amounts reported **MUST** match the amounts reported in the online Progress Report. If the amounts do not match, then the reports must be revised. Payments will be denied until all required reports are submitted correctly.

Source Documentation

Subgrantees are required to submit source documentation to support all match and expense amounts reported on Progress Reports and Match & Expense Reports.

Source documentation includes receipts, invoices, documents and other items which validate the legitimacy of every grant expense, including those covered by matching contributions.

Lack of adequate and complete documentation will result in disallowance of costs and match, in which case you may have to pay back grant funds.

2. Reporting Periods

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

The 2015 SFA, SFAX and HM subgrants and 2016 USFS WUI subgrants span 2 years (24 months). Mark these quarter dates and reporting due dates to your calendar so that you do not miss these vital deadlines.

Reporting Periods for 2015 USFS- SFA, SFAX and HM Subgrants

Report Period	Progress , Match and Expense Reports Quarter Dates	Due Date
1	September 1 - November 30, 2015	December 31, 2015
2	December 1, 2015 - February 29, 2016	March 31, 2016
3	March 1 - May 31, 2016	June 30, 2016
4	June 1 - August 31, 2016	September 30, 2016
5	September 1 - November 30, 2016	December 31, 2016
6	December 1, 2016 - February 28, 2017	March 31, 2017
7	March 1- May 31, 2017	June 30, 2017
8	June 1 – August 31, 2017	September 30, 2017

Reporting Periods for 2016 USFS-WUI Subgrants

Report Period	Progress , Match and Expense Reports Quarter Dates	Due Date
1	December 1, 2015 - February 29, 2016	March 31, 2016
2	March 1 - May 31, 2016	June 30, 2016
3	June 1 - August 31, 2016	September 30, 2016
4	September 1 - November 30, 2016	December 31, 2016
5	December 1, 2016 - February 28, 2017	March 31, 2017
6	March 1- May 31, 2017	June 30, 2017
7	June 1 – August 31, 2017	September 30, 2017
8	September 1- November 30, 2017	December 31, 2017

3. Submitting Your Progress Report

A. Log In

The Progress Report can be found at www.ZoomGrants.com or <http://www.cafiresafecouncil.org/zoomgrantslogin/>. Simply enter your email address and password to enter the site.

If you experience problems logging in or have forgotten your password, use the “Forgot Password” link and an automated email will be sent to you with your password.

B. My Account Home Navigation

This is the first page that will open when you enter your account. From here you can jump to all your applications and progress reports.

1. **Tabs:** ZoomGrants is divided into tabs to help users access different parts of the reporting process. Simply click a tab to move through the account.
 - a. **My Applications Tab:** This is the default tab when logging into ZoomGrants. It will show the applications submitted and their status.
 - i. **Incomplete:** Full application not yet submitted
 - ii. **Submitted:** In review process
 - iii. **Approved:** Approved applications listed per the grant cycle/program. Click here to open the progress report.
 - iv. **Declined:** Declined applications listed per the grant cycle/program.
 - v. **Archived:** Applications that have been selected to be archived.
 - vi. **Currently Open:** All Clearinghouse grant programs that are currently open to accepting new applications will be listed here.
 - b. **Account Profile Tab:** Update contact information for the organization, for user account and change password or user ID.
2. **Open the Progress Report:** To access the progress report, click on the “Approved” tab and find the current grant project. Click on the yellow text of the title of the project or the button labeled “Add New Progress Report” to open the grant project.

C. Progress Report Navigation

1. Main Navigation Tabs (These appear at the top of the page)
 - a. Open Programs: Clicking will leave the progress report screen and open a new page with a list of current open grant programs.
 - b. Description: Description of the grant program

- c. Restrictions: Pertinent restrictions of the grant program
- d. Library: Resource and other documents related to the grant program
- e. Contact Admin: Sends email directly to CFSC Administrative staff
- f. Announcements: Messages from CFSC staff

2. Application Tabs

- a. Application Snapshot TAB 1: Contact information from application.
- b. Organization Information TAB 2: Organizational information from application.
- c. Project Information TAB 3: Application project information.
- d. Tables TAB 4: Financial and budget tables and accomplishments information from the application.
- e. Documents: Pre-Award documents, resource documents and other useful templates
- f. Extra: Skip this section
- g. Activity Log: Log of all activities on the application and progress report.

3. Progress Report Tabs

- a. Progress Report: Narrative questions and required document uploads. Each quarter will have its own tab. Select the current quarter to complete the report.
 - i. Narrative Questions #1-13
The first thirteen questions on the progress report require a paragraph style response or a check box. Detailed instructions on appropriate responses for the questions are included in the online form and in the sample progress report
 - ii. Table Style Questions #14-21
Progress report questions #14-21 prompt you to enter a whole number into the boxes. Some response will be quantities and others will be costs. Only enter whole numbers, no commas, decimals, text, or dollar signs.
- b. Progress Report Totals: Auto-summary of progress report narrative questions. No information will be entered in this section.

D. Submitting the report

The ZoomGrants system will not allow you to submit the report until you have uploaded the Expense, Match and Source documentation.

After you have finished questions #1-24, ZoomGrants will perform an automatic error check for any missing information. Missing information will be listed in red at the top of the progress report screen. Once you have completed the missing information, click *Refresh* , ZoomGrants will re-check all of the answers and then you may Submit again if the report is complete.

E. Saving your report and printing

All answers on the progress report are automatically saved when you move to another field. If you want to complete the report later, no need to save it, it's automatically done for you.

You can print a copy of the report by selecting the *Print/Preview* button on the top right of your screen.

4. Step-by-Step Instructions for the Progress Report

A. Progress Report Narrative Section (Located in the Progress Report Tab)

WORKPLAN ACTIVITY PROGRESS

Question #1: What work plan tasks and activities were accomplished this quarter? Describe the steps accomplished, each outcome and who participated in them. Include activities funded by the grant and match. *Describe in detail all major accomplishments of your project during the quarter, such as events conducted, public meetings held, project milestones reached, comments from community members, press coverage, participation by matching contributors, etc. Be descriptive and complete and use quantifiable data where possible. Reference specific workplan activities from your grant application, when applicable. Limit your response to 5,000 characters (approximately 1,000 words)*

Question #2: What problems or setbacks occurred this quarter? Describe which work plan activities were delayed and the reasons the project did not progress this quarter.

List the major details about barriers to completion that you experienced and how you dealt with them. Reference specific workplan activities, from the application, that were affected by the delay. Discuss any major setbacks with your CFSC Grant Specialist. Limit your response to 5,000 characters (approximately 1,000 words)

CHANGES

Question #3: Are you projecting any changes from your original application? *Remember, you must seek prior written approval before making changes to the scope of work plan, objectives of the approved project, key personnel, location or transfer of substantive programmatic work to*

another party, or budget modification. Modifications shall be made only with CFSC Grant Manager approval, by the issuance of Modification Request Form, prior to any changes being implemented.

- *No- Please select or enter "N/A" in the next two questions*
- *Yes-Please answer the next two questions.*

Question #4: What kind of changes are you projecting? *Check ALL that apply.*

- N/A - We are not projecting any changes from our original application.
- Scope Change
- Budget Change
- Extension

Question #5: Describe the Change/Extension and what activities will be involved. For budget changes, include the dollar amount involved . For extension changes, include the new end date. If the change has already been approved, include the date approved. If you are not projecting any changes, please enter 'N/A'.

Any work performed or expense incurred without prior written approval from CFSC will not be reimbursed.

Budget changes that affect greater than 10% of your grant budget must be pre-approved. Please indicate if you are or have requested a greater than 10% change to your budget. If your budget change affects less than 10% of your budget, indicate the amount and how it will affect your project's goals.

Revisions to budget and/or program plans shall be made in accordance with federal grant regulations.

If Yes, describe a) when the extension was granted, b) the reasons for the request, c) what date the extension was approved, d) the new end date of the grant Limit your response to 3,000 characters (approximately 500 words)

COMMUNITIES AFFECTED

Question #6: List the names of communities that were directly affected by your project's Prevention and Education Programs. Remember that you may only list a community's name once throughout the grant term. *You may only list communities if the Prevention and Education*

Programs were accomplished during this quarter AND the programs had a direct effect on the community. This should correlate to what you report as your accomplishments later in the report. Limit your response to 500 characters (approximately 250 words)

Question #7. List the names of communities that were directly affected by your project's Hazardous Fuel Reduction Programs. Remember that you may only list a community's name once throughout the grant term. *You may only list communities if the Hazardous Fuel Reduction Programs were accomplished during this quarter AND the programs had a direct effect on the community. This should correlate to what you report as your accomplishments below. List the names of the communities, do not include a narrative of the communities or the county.*

Question #8. List the names of communities that were directly affected by your project's Fire Management Plans, Risk Assessments or Equivalents. Remember that you may only list a community's name once throughout the grant term. *You may only list communities if the Fire Management Plans, Risk Assessments or Equivalents were accomplished during this quarter AND the programs had a direct effect on the community. This should correlate to what you report as your accomplishments. List the names of the communities, do not include a narrative of the communities or the county.*

There are a variety of methods by which your project deliverables reach your audience. Consider the number of people who will be contacted about your project through meetings, educational mailings, email lists, homeowner participation, or other events.

PROGRAM INCOME

Question #9: Did you earn or use as match any program income during this period?

- ☐ No
- ☐ Yes

Questions #10 – 13 will only be displayed if “yes” is selected on question #9.

10. Projected Program Income

Enter the projected program income (from your application) for your entire project. You will need to re-enter the same projected value every quarter, it should not change.

_____ *Projected Program Income*

_____ *Total (This field will automatically calculate the total)*

11. Program Income Earned

Enter the \$ amount of program income that was earned or generated during this quarter. Remember, program income is gross income directly generated by grant activities. Program income must be "added" to the grant amount and spent during the grant term.

_____ Program Income Earned

_____ Total (This field will automatically calculate the total)

Program income is gross income directly generated by subgrant activities during the subgrant term. Program income must be "added" to the subgrant amount and spent during the subgrant term to further the objectives of the subgrant. Unspent program income will be considered excess grant funds and must be sent to California Fire Safe Council at grant close-out.

12. Program Income Spent

Enter the \$ amount of program income that was spent during this quarter. Unspent program income will be considered excess grant funds and must be returned to California Fire Safe Council at grant close out.

_____ Program Income Spent

_____ Total (This field will automatically calculate the total)

Question #13: How was the program income used/spent to further the project's goals during this quarter? *If you reported program income this quarter, explain how it was used. Types of program income include fees for services performed, such as a fee for a workshop or training provided. Donations are not program income. Limit your response to 5000 characters (approximately 1,000 words)*

EXPENSES

Question #14: Expenses: *Please enter numbers ONLY - no letters or other characters (commas or decimals). Refer to the Print/Preview (scroll to the very bottom) for calculated subtotals and totals.*

_____ Payments Received (Enter as a NEGATIVE NUMBER)

_____ Personnel

_____ Fringe Benefits

_____ Travels

_____ Equipment

_____ Supplies

_____ Contractual
_____ Other
_____ Indirect Costs (Only with Approved Indirect Cost Rate Agreement)
_____ **Total**

MATCH

Question #15: Match: *Please enter numbers ONLY - no letters or other characters (commas or decimals). Refer to the Print/Preview (scroll to the very bottom) for calculated subtotals and totals.*

In each Cost Category section, enter total expenses and the amount paid for each *using matching contributions of cash or in-kind goods and services, not grant funds*. Do not use dollar signs or commas, and use only whole dollar amounts, no cents.

If you or your fiscal sponsor has a federally approved Indirect Cost Rate that has been prorated as part of your match, please indicate the cost savings you are claiming in the “Other” cost category.

Match is reported when it is spent or used for the project not when it is received. For example, if you receive a cash match of \$500 in quarter 1 that you use to buy supplies in quarter 3, then you will report the match in quarter 3.

_____ Match Projected (Enter as a NEGATIVE NUMBER)
_____ Personnel
_____ Fringe Benefits
_____ Travels
_____ Equipment
_____ Supplies
_____ Contractual
_____ Other
_____ Indirect Costs (Only with Approved Indirect Cost Rate Agreement)
_____ **Total**

PROJECTED DELIVERABLES- FEDERAL FUNDS

16. Project Deliverables QUANTITIES- FEDERAL FUNDS

Please enter numbers ONLY - no letters or other characters. Refer to the Print/Preview (scroll to the very bottom) for calculated totals.

Report on the quantity accomplished with the deliverable. Remember you identified quantities and costs for projected deliverables in the original subgrant application. By the end of the subgrant term, you must meet or exceed those projections.

In the “Community Assessment Wildfire Planning” section:

For “community risk assessments”, if your project workplan includes completion of community risk assessments, it will normally be 1 or at the most 2 or 3, over the entire life of the grant, and we would expect to see the “completed” number show up in one of the last quarters of the grant. DO NOT enter the number of defensible space hazard evaluations that you performed on individual properties.

For “Community Wildfire Protection Plans”, if your project workplan includes completion of a CWPP, this would normally be 1 or at most 2 over the life of the grant, and we would expect to see the “completed” number show up in one of the last quarters of the grant.

For “Fire Management Plans” this type of project is normally only conducted by grantees that are local government fire protection agencies, and normally they would only do 1 plan over the life of the grant.

In the “Information/Education” section:

For “fire education Workshops/Training Sessions”, this number would normally be in a range of from 1 to 10, depending on your project work plan

For “Outreach/Education Programs” normally this would be in a range of from 1 to 10.

For “Education/Information Products”, if you printed 3 different types of brochures or posters in conjunction with your project, and distributed 500 copies of each, enter 3, not 1,500.

In the “Fuels Treatment” section:

In the “Fuels Treatment” section, as you complete this section each quarter, compare the totals to date to the totals you projected for the entire project in your grant application.

For “Acres Prepared for Treatment”, enter the number of acres encompassed by pre-treatment activities, such as flagging the project boundary, conducting archeological and biological surveys, preparing timber harvest plans, etc.

For “Acres Mechanically Treated”, enter the total acres treated by all of the Mechanical Treatment methods listed in the “Fuels Treatment” portion of Section 28 “Project Deliverables” of your Grant Application.

For “Acres Treated with Prescribed Fire” enter the total acres treated by all of the Prescribed Fire methods listed in the “Fuels Treatment” portion of Section 28 “Project Deliverables” of your Grant Application.

For “Acres Treated by other Methods”, enter the total acres treated by all of the Other Treatment methods listed in the “Fuels Treatment” portion of Section 28 “Project Deliverables” of your Grant Application.

For “Acres Treated by Mechanical Means with By Products Utilized”, enter the total acres treated by all Mechanical Treatment methods that had a byproduct utilized. Byproducts include logs, chips, firewood etc that was created as a result of mechanical removal from your project. Utilized means the byproduct was used for additional purposes regardless if there is monetary gain from it. For example, wood chips used as a mulch that was removed from homeowners backyard.

_____	Community Risk Assessment
_____	Community Wildfire Protection Plan
_____	Fire Management Plan
_____	Workshop Training Session
_____	Outreach Education Program
_____	Education/Information Products
_____	Acres Prepared for Treatment
_____	Acres Mechanically Treated
_____	Acres Mechanically Treated
_____	Acres Treated with Prescribed Fire
_____	Acres Treated with Other Methods
_____	Total

17. Project Deliverables COSTS - FEDERAL FUNDS

Please enter numbers ONLY - no letters or other characters (commas or decimals). Refer to the Print/Preview (scroll to the very bottom) for calculated totals.

_____ Community Risk Assessment
_____ Community Wildfire Protection Plan
_____ Fire Management Plan
_____ Workshop Training Session
_____ Outreach Education Program
_____ Education/Information Products
_____ Acres Prepared for Treatment
_____ Acres Mechanically Treated
_____ Acres Mechanically Treated
_____ Acres Treated with Prescribed Fire
_____ Acres Treated with Other Methods
_____ **Total**

PROJECT DELIVERABLES – MATCH

18. Project Deliverables QUANTITIES - MATCH

Please enter numbers ONLY - no letters or other characters (commas or decimals). Refer to the Print/Preview (scroll to the very bottom) for calculated totals.

_____ Community Risk Assessment
_____ Community Wildfire Protection Plan
_____ Fire Management Plan
_____ Workshop Training Session
_____ Outreach Education Program
_____ Education/Information Products
_____ Acres Prepared for Treatment
_____ Acres Mechanically Treated
_____ Acres Mechanically Treated
_____ Acres Treated with Prescribed Fire
_____ Acres Treated with Other Methods
_____ **Total**

19. Project Deliverables COSTS - MATCH

Please enter numbers ONLY - no letters or other characters (commas or decimals). Refer to the Print/Preview (scroll to the very bottom) for calculated totals.

_____ Community Risk Assessment
_____ Community Wildfire Protection Plan
_____ Fire Management Plan
_____ Workshop Training Session
_____ Outreach Education Program
_____ Education/Information Products
_____ Acres Prepared for Treatment
_____ Acres Mechanically Treated
_____ Acres Mechanically Treated
_____ Acres Treated with Prescribed Fire
_____ Acres Treated with Other Methods
_____ **Total**

MECHANIZED TREATMENT WITH BYPRODUCTS UTILIZED

20. Mechanized Treatment with Byproducts Utilized QUANTITY

Please enter numbers ONLY - no letters or other characters (commas or decimals). Refer to the Print/Preview (scroll to the very bottom) for calculated totals.

_____ Acres- FEDERAL FUNDS
_____ Acres- MATCH
_____ TOTAL

21. Mechanized Treatment with Byproducts Utilized COST

Please enter numbers ONLY - no letters or other characters (commas or decimals). Refer to the Print/Preview (scroll to the very bottom) for calculated totals.

_____ Acres- FEDERAL FUNDS
_____ Acres- MATCH
_____ TOTAL

SUCCESS STORIES

22. Please share any success stories or anecdotes. Limit your response to 5,000 characters (approximately 1,000 words)

IS YOUR PROJECT COMPLETE?

23. Is your project complete? If yes, have you notified your grant specialist and prepared your close-out documents?

If this is your final Progress Report, contact your CFSC Grant Specialist for details on closing out your grant. Close-out forms can be found in the Documents Tab.

- *No- Our project is not complete*
- *Yes- Our project is complete AND we have notified our grant specialist and prepared our close-out documents.*
- *Yes- Our project is complete BUT we have NOT notified our grant specialist and/or prepared our close-out documents.*

DID YOU SUBMIT MATCH AND EXPENSE DOCUMENTATION?

24. Did you submit your match and expense forms and source documentation for this quarter?

- Yes- They have been uploaded.
- No- I will complete it before I submit the progress report.

4. Submitting your Match and Expense Reports

Match and Expense Report forms are required every quarter; the online report cannot be submitted without uploading these forms. Use the template titled **Quarterly Match and Expense Reporting Form** located in [ZoomGrants](#) at the bottom of the progress report tab. There are two Excel sheets in the document: both forms must be completed, signed and uploaded to [ZoomGrants](#). All entries must be whole dollars only using the standard rounding principles of >.50 round up and <.50 round down.

A. EXPENSE FORM INSTRUCTIONS:

1. TOTAL EXPENSES FROM PROGRESS REPORT FOR THIS QUARTER: Enter the total for the current quarter as shown on the bottom of Expense Form. This number must be the same as the total on your ZoomGrants Progress Report under the #14 Expenses.

2. PAYEE/VENDOR: Enter the payee/vendor for the expense in the appropriate cost category. Each expense was logged on your original budget against a cost category. You may group items together in the same cost category, but please keep records for rates and hours for those individual expenses. For example, if you purchased 3

different brochures and 1 custom calendar at a printing company, you can total the expenses and just log the total.

3. EXPENSE AMOUNT: Enter total expense accrued for each line item. Whole dollars only. Add rows as needed

a. **Total Personnel:** Copy and paste the total amount in the cell to the appropriate cell of the Quarterly Progress Report of #14 Expenses in the ZoomGrants account.

b. **Total Fringe Benefits:** Copy and paste the total amount in the cell to the appropriate cell of the Quarterly Progress Report of #14 Expenses in the ZoomGrants account.

c. **Total Travel:** Copy and paste the total amount in the cell to the appropriate cell of the Quarterly Progress Report of #14 Expenses in the ZoomGrants account.

d. **Total Equipment:** Copy and paste the total amount in the cell to the appropriate cell of the Quarterly Progress Report of #14 Expenses in the ZoomGrants account.

e. **Total Supplies:** Copy and paste the total amount in the cell to the appropriate cell of the Quarterly Progress Report of #14 Expenses in the ZoomGrants account.

f. **Total Contractual:** Copy and paste the total amount in the cell to the appropriate cell of the Quarterly Progress Report of #14 Expenses in the ZoomGrants account.

g. **Total Other:** Copy and paste the total amount in the cell to the appropriate cell of the Quarterly Progress Report of #14 Expenses in the ZoomGrants account.

h. **Total Indirect Costs:** Copy and paste the total amount in the cell to the appropriate cell of the Quarterly Progress Report of #14 Expenses in the ZoomGrants account.

4. PAYMENT METHOD: Select cash, check or automatic payment/debit from the drop-down box.

5. QUARTER TOTAL: This line automatically calculates all amounts in the EXPENSE AMOUNT column. This amount should equal the amount of total expense in your progress report and the line called TOTAL EXPENSE FROM PROGRESS REPORT FOR THIS QUARTER.

6. CERTIFICATION: Please type your signature and date the certification.

B. MATCH FORM INSTRUCTIONS:

A. TOTAL MATCH FROM PROGRESS REPORT FOR THIS QUARTER: Enter the total for the current quarter as shown on the bottom of Match Form. This number must be the same as on your ZoomGrants Progress Report on #15 Match.

B. MATCH PROVIDER: Enter the individual(s) or organization(s) that provided the match in the appropriate cost category. Each contribution was logged on your original budget against a cost category. Group items together if they are charged to the same cost category, but please keep records for the rates and hours for those individuals. For example, if your public education event had 5 different volunteers, list their names (up to 5 individuals) and sum their in-kind contribution(s).

C. MATCH AMOUNT: Enter total match accrued for each line item. Whole dollars only. Add rows as needed.

a. Total Personnel: Copy and paste the amount in the cell to the appropriate of the Quarterly Progress Report on #15 Match in the ZoomGrants account.

b. Total Fringe Benefits: Copy and paste the amount in the cell to the appropriate of the Quarterly Progress Report on #15 Match in the ZoomGrants account.

c. Total Travel: Copy and paste the amount in the cell to the appropriate of the Quarterly Progress Report on #15 Match in the ZoomGrants account.

d. Total Equipment: Copy and paste the amount in the cell to the appropriate of the Quarterly Progress Report on #15 Match in the ZoomGrants account.

e. Total Supplies: Copy and paste the amount in the cell to the appropriate of the Quarterly Progress Report on #15 Match in the ZoomGrants account.

f. Total Contractual: Copy and paste the amount in the cell to the appropriate of the Quarterly Progress Report on #15 Match in the ZoomGrants account.

g. Total Other: Copy and paste the amount in the cell to the appropriate of the Quarterly Progress Report on #15 Match in the ZoomGrants account.

D. TYPE OF MATCH: Select either cash or in-kind from the drop-down box.

E. QUARTER TOTAL: This line automatically calculates all amounts in the MATCH AMOUNT column. This amount should equal the amount of total match in your progress report and the line called TOTAL MATCH FROM PROGRESS REPORT FOR THIS QUARTER.

F. CERTIFICATION: Please type your signature and date the certification.

5. Submitting Your Source Documentation

Source documentation for all expenses and matching contributions is also required quarterly and must be uploaded to ZoomGrants into the Expense Source Documentation or Match Source Documentation Folder in the Documents Tab. Each document must not exceed 4MB in size. Upload source documentation for each cost category separately using a descriptive title such as "Personnel Match Documentation 1 of 10". Source documentation includes receipts, paid invoices, time sheets, chipping request forms, etc.

Every source document that relates to a specific cost must have a label identifying the following information: 1) Grant #, 2) Cost Category, 3) Approved by, 4) Date, 5) Amount, 6) Check/credit/receipt number and 7) Description of how these items or services relate to the project objective.



QUARTERLY EXPENSE REPORTING FORM

Date:

Quarter:

Grant Number:

Organization:

Name:

Contact Name:

Email Address:

**A. TOTAL EXPENSES FROM PROGRESS
REPORT FOR THIS QUARTER**

\$ -

B. Payee/Vendor	C. Expense Amount	D. Payment Method
Enter itemized costs under the appropriate category	(whole dollars only)	Click on the cell and select the method in the drop-down menu

PERSONNEL

a. Total Personnel:	0	

FRINGE BENEFITS

b. Total Fringe Benefits:	0	

TRAVEL

c. Total Travel:	0	

EQUIPMENT

d. Total Equipment:	0	

B. Payee/Vendor	C. Expense Amount	D. Payment Method
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SUPPLIES

e. Total Supplies:	0	

CONTRACTUAL

Fiscal Sponsor Administrative Fee (if applicable)		
f. Total Contractual:	0	

OTHER

g. Total Other:	0	
TOTAL DIRECT COSTS:		
h. Indirect Costs	0	
E. TOTAL:		

F. CERTIFICATION

The information provided above to California Fire Safe Council is a true and accurate itemized report of the match incurred during the above reporting period and represents the total provided in our budget in the appropriate progress report. Our organization agrees to provide the documentation (receipts, letters, etc) supporting the above information within 24 hours to the CFSC, should there be a need. We understand that we must retain our documentation regarding this grant until we are advised by CFSC that the information is no longer needed. I certify that the above information is true and accurate and that it is documentable.

Organizational Representative

Date



QUARTERLY MATCH/COST SHARING REPORTING FORM

Date:

Quarter:

Grant Number:

Organization:

Name:

Contact Name:

Email Address:

**A. TOTAL MATCH FROM PROGRESS
REPORT FOR THIS QUARTER**

\$ -

B. Match Provider	C. Match Amount	D. Type of Match
Enter itemized costs under the appropriate category	(whole dollars only)	Click on the cell and select the type in the drop-down menu

PERSONNEL

a. Total Personnel:	0	

FRINGE BENEFITS

b. Total Fringe Benefits:	0	

TRAVEL

c. Total Travel:	0	

EQUIPMENT

d. Total Equipment:	0	

B. Match Provider	C. Match Amount	D. Type of Match
Enter itemized costs under the appropriate category	(whole dollars only)	Click on the cell and select the type in the drop-down menu

SUPPLIES

e. Total Supplies:	0	

CONTRACTUAL

Fiscal Sponsor Administrative Fee (if applicable)		
f. Total Contractual:	0	

OTHER

g. Total Other:	0	

TOTAL DIRECT MATCH 0

h. Indirect Costs		
TOTAL:	0	

F. CERTIFICATION

The information provided above to California Fire Safe Council is a true and accurate itemized report of the match incurred during the above reporting period and represents the total provided in our budget in the appropriate progress report. Our organization agrees to provide the documentation (receipts, letters, etc) supporting the above information within 24 hours to the CFSC, should there be a need. We understand that we must retain our documentation regarding this grant until we are advised by CFSC that the information is no longer needed. I certify that the above information is true and accurate and that it is documentable.

Organizational Representative

Date

MATCH DOCUMENTATION

Background: Recent fiscal reviews by California Fire Safe Council staff found that some documentation for match contributions did not meet the federal grant regulations. Grantees were not following the federal grant standards for documenting match and therefore were collecting inadequate records for the match counted towards grant projects. The documentation lacked key elements that are required in order for the match to be allowed. Due to the lack of proper documentation, some match amounts were deemed unallowable, causing some grantees to fall short of their approved match requirement.

Purpose: This guidance is provided by California Fire Safe Council to highlight the requirements for documenting cash and 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 in clear and understandable terms.

Read the full regulation applicable to your organization for a complete understanding of the requirements.

- OMB Circular A-102, Part 24: State, Local, and Indian Tribal Governments
- 2 CFR 215, Part 24: Non-Profit Organizations

Guidance: Match contributions can come in two forms: cash or in-kind contributions. 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 accepted:

- ☐ Are **verifiable** from the recipient's records.
- ☐ Are not included as contributions for any other federally-assisted project or program.
- ☐ Are **necessary** and **reasonable** for proper and efficient accomplishment of project or program objectives.
- ☐ Are **allowable** under the applicable cost principles in 2 CFR Parts 220 or 230.
- ☐ Are not paid by the Federal Government under another award, except where authorized by Federal statute to be used for cost sharing or matching.

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

Documentation shall include the following:

- Name and contact information of the donor
- Date of the donation/contribution
- Detailed description of the item or service
- Value of the contribution, including *how the value was determined* and who made the determination
- Where applicable, receipts/invoices shall be provided as source documentation for the donated item or service
- Time sheets and donation forms with the required elements listed above may be used for collecting match

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. Contact your Grant Manager for more information.

Reasonable generally means that a cost or value would withstand public scrutiny (i.e. objective individuals would agree that the cost is appropriate). For matching contributions, grantees should use cost amounts or values that are consistent with the fair market value and similar work, goods or services in the organization or in 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 (2 CFR Parts 220 or 230). **Match is to be treated as an expense when determining allowability.**

Organization Name:	
Grant #:	
Project Name:	

VOLUNTEER TIME SHEET

Quarter:	
-----------------	--

Name:	
Title:	
Phone:	
Email:	
Signature:	

VOLUNTEER TIME			MILEAGE	
Date(s)	Description of Activity	# of Hours	Location (To/From)	# Miles
TOTAL HOURS:		0	TOTAL MILES:	0

MATCHING FOR GRANTS

“Matching” requirements are prescribed by Congress in the grant program’s authorizing legislation and establish a limit on the amount of federal financial participation in a project or program.

Costs used to satisfy a grantee’s matching share may be financed using either or both of the following:

- Allowable costs incurred by the grantee
 - Grantee in-kind contributions are valued in accordance with applicable OMB Cost Principles
- Allowable third-party in-kind contributions:
 - The rule for valuation is “what it would have cost if the grantee had paid for the item or service itself”
 - Be necessary to accomplish program activities
 - Be allowable if the grantee were required to pay for them

Example: A third-party contribution of entertainment would not count because it would not be allowable had the grantee incurred the cost.

Proposals may include specific documentation of third-party match, in the form of copies of existing grants from third parties that constitute match to the Forest Service grantee, or letters from third parties. For large amounts of match anticipated from a third party, this (1) assures the grantee that match is secure; (2) assures Forest Service program managers of the nature of the match; and (3) the letter may spell out for all concerned the expectations concerning timing, reporting, and filing. See sample match letters.

Cash and in-kind contributions must:

- Not be included as the non-federal share for another federally assisted program (double-dipping)
- Be necessary, reasonable and allowable
- Not have been paid by the federal government under any other grant or agreement (federal funds cannot be used for the match) unless authorized by law or regulation
- Be verifiable in the grantee’s records

The most common problem is lack of documentation:

- Grantee and third-party contributions must be supported by documentation

Examples: timesheets, invoices, contracts
- Grantee records must show how the third-party contributions were valued

SAMPLE CONTRIBUTION REPORT – 1

Organization Name

Address

Phone Number

(*Organization Name*) gratefully acknowledges:

The non-monetary contribution for the fair market value of: \$ _____

The cash contribution of: \$ _____

Date of contribution: _____

Contribution description: _____

Made by: _____

Company: _____

Address: _____

Nature of business: _____

Contact person: _____

Description of _____

Signed: _____
(*Authorized Representative*)

Date: _____

1. The first part of the document is a header section containing the title "THE EFFECTS OF THE 1997-1998 ASIAN FINANCIAL CRISIS ON THE ECONOMIC GROWTH OF THE ASEAN-4 COUNTRIES" and the author's name "Dr. [Name Redacted]".

Address

[illegible]

Date: _____

SAMPLE CONTRIBUTION REPORT – 3

Organization Name

Address

Phone Number

This form is to be used for all types of contributions. Original is the contributor's receipt. Copy goes to the Fiscal Manager through the Project Coordinator.

(Print)

Contributor: _____

Address: _____

Phone: _____

Date	Description of Contributed Goods or Services	Quantity (# of hrs)	Hours Worked		Unit Value or Hourly Rate	Total Value
			To	From		

TOTAL: \$ _____

Signed: _____
(Contributor)

Date: _____

Signed: _____
(Authorized Program Representative)

Date: _____

Title: _____

SAMPLE CONTRIBUTION REPORT – 4

=====

Organization Name

Address

Phone

Federal Assistance Program: _____

Grant Project: _____

VALUE OF MY EFFORT LOG		
<p>Name: _____</p> <p>Period Covered: _____</p> <p><u>Time</u> @ \$ _____ per hour <u>Mileage</u> @ \$ 0. _____ per mile <u>Other</u> (such as donations of material, equipment, telephone charges, etc.)</p> <p>NOTE: You will not be reimbursed! BUT your effort may count toward our matching requirements for this federal grant.</p>		
DATE	DESCRIPTION (Time, Mileage, Other Non-Reimbursed Expense)	AMOUNT

RETURN TO: Organization Representative
Address

Allowability of Matching Contributions For Services That Would Be Performed in the Absence of the Grant-Funded Project

A recurring question that the California Fire Safe Council receives is whether or not powerline clearing activities performed by electric utility companies can be counted as matching contributions for grants.

If the work was going to be done anyway as a part of the company's normal powerline clearance maintenance work, then the answer is No, because that work was not performed specifically for the grant project. It would have been done even if the project had not been funded. See references below.

However, the answer could be Yes if:

1. The electric company will be doing work in addition to what they would normally do, such as removing hazardous vegetation from the ground beneath the powerlines
AND
2. That additional work was discussed with the company and agreed to them in writing in a Letter of Commitment before submittal of the grant application.

FEDERAL GRANT REGULATION REFERENCES:

Non-Profit Organizations

7 CFR 3019 Uniform Administrative Requirements for Grants and Agreements with Institutions of Higher Education, Hospitals, And Other Non-Profit Organizations

§ 3019.23 Cost sharing or matching.

(a) All contributions, including cash and third party in-kind, shall be accepted as part of the recipient's cost sharing or matching when such contributions meet all of the following criteria.

- (1) Are verifiable from the recipient's records.
- (2) Are not included as contributions for any other federally-assisted project or program.
- (3) Are necessary and reasonable for proper and efficient accomplishment of project or program objectives.
- (4) Are allowable under the applicable costs principles. (see 2 CFR 230, Appendix. A, subsection A.4 (1))**
- (5) Are not paid by the Federal Government under another award, except where authorized by Federal statute to be used for cost sharing or matching.
- (6) Are provided for in the approved budget when required by the Federal awarding agency.

2 CFR 230 Cost Principles for Non-Profit Organizations (OMB Circular A-122)

Appendix A to Part 230—General Principles

A. Basic Considerations

4. Allocable costs. a. A cost is allocable to a particular cost objective, such as a grant, contract, project, service, or other activity, in accordance with the relative benefits received. A cost is allocable to a Federal award if it is treated consistently with other costs incurred for the same purpose in like circumstances and if it:

(1) Is incurred specifically for the award.

State and Local Government Agencies

7 CFR 3016 Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments

§ 3016.22 Allowable costs.

(b) Applicable cost principles. For each kind of organization, there is a set of Federal principles for determining allowable costs. Allowable costs will be determined in accordance with the cost principles applicable to the organization incurring the costs. The following chart lists the kinds of organizations and the applicable cost principles.

For the costs of a—	Use the principles in—
State, local or Indian tribal government	OMB Circular A-87

2 CFR 225 Cost Principles for State, Local, and Indian Tribal Governments (OMB Circular A-87)

Appendix A to Part 225—General Principles for Determining Allowable Costs

E. Direct Costs

1. General. Direct costs are those that can be identified specifically with a particular final cost objective.

2. Application. Typical direct costs chargeable to Federal awards are:

a. Compensation of employees for the time devoted and identified specifically to the performance of those awards.

b. Cost of materials acquired, consumed, or expended specifically for the purpose of those awards.

777 Happy Lane
Your City, CA 99011
Phone 800-255-5560
Fax 800-255-5555

INVOICE #55
DATE: 11/16/2012

DESCRIPTION	HOURS	RATE	AMOUNT
11/5/12 - October payroll	1	35.00	35.00
11/7/12 – Expense & match accounting for Fuel Break grant	4.25	35.00	148.75
11/15/12 - CA Attorney General Filing	1.5	35.00	52.50
TOTAL			236.25

THANK YOU FOR YOUR BUSINESS!



Residential Chipping Service 2015 Hayward, California

Postcards Mailed: 8,598

Participants: 127 pickups

Acres treated: 78

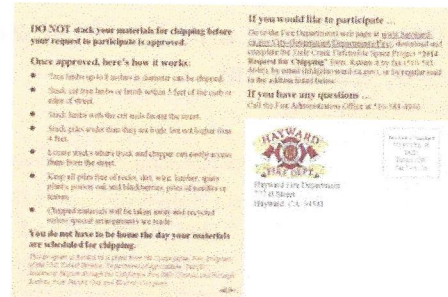
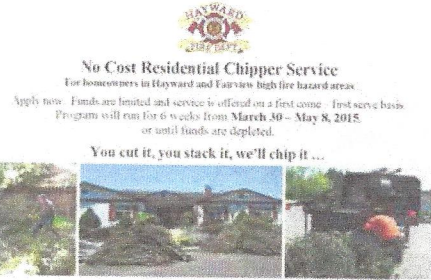
Community Hours: 602

Cubic Yards Disposed: 438

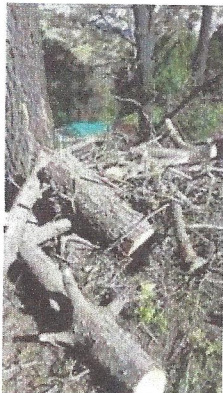
Project cost: \$23,509.21

Contractor: Pacheco Brothers Gardening Inc., Hayward

Many of the homes in the unincorporated community of Fairview and throughout Hayward hills include deep back yards that extend into canyons. Other homes, with smaller yards, also can develop a build-up of vegetation that can fuel a wildfire. From March 30 – May 13, 2015, Hayward Fire Department partnered with residents to reduce the potential for fire to spread. Postcards were sent to the 8,598 residents in the Fairview and Hayward High Fire Area. Throughout the program, residents cut and stacked their brush and tree limbs. Pacheco Brothers Gardening Inc. was hired to chip the piles. By the end of May 19 all the allocated funds had been expended with 16 homes on a wait list for next year. Over 78 acres had been treated at 127 homes, removing 438 cubic yards of chip (18 homes kept chips for week and erosion control).



Piles ready to chip varied in size and content.



Funding provided by a National Fire Plan grant from the Cooperative Fire Program of the U.S. Forest Service, Department of Agriculture, Pacific Southwest Region, through the California Fire Safe Council. Project partners included East Bay Regional Park District and Hayward Area Recreation and Park District.



BIG BEAR VALLEY'S FIRE AGENCIES COLLABORATE AND MEASURE SUCCESS...BY THE TONS



This year, three fire agencies collaborated to provide a valley wide curbside chipping program. This program is in place to assist property owners in creating defensible space around their structures. Each agency has received a grant through California Fire Safe Council's Clearinghouse or another source to conduct this operation. The three Fire Agencies are Big Bear Lake Fire Protection District, Big Bear City Fire Department and San Bernardino County Fire Department.

The fire agencies thought they could provide a more uniform approach that was more cost effective to conducting curbside chipping. Most of the chipped material was temporarily stored at one location. As needed, Big Bear Lake's Public Works Department helped by building the pile to accommodate the chipping material. In the end, the Public Works Department helped in loading of the material.



The joint agency program began on June 1, 2010. The community responded in an exceptional manner. There were over 4200 requests for curbside pickup. They collected over 2 million lbs. of chipped material.



For the first time, Chipping Supervisor, David Yegge, contacted Colmac Energy a BioMass Electrical green energy plant in Thermal, CA. to see if they would be interested in utilizing the chipped material. Even though Colmac is over 111 miles away; the company still thought the chipped material was cost-effective to send their trucks up the mountain to pick up the wood chips. We shipped off 9 truckloads of biomass to Colmac Energy. Colmac Energy uses the material for their BioMass energy plant in Thermal. Each Truck load held 110 cubic yards of material. Each truck load averages 25 tons.

Amazingly, in addition to Colmac absorbing the shipping cost, they paid \$25.00 a load back to the valley wide fire agencies chipping program. "That's not a lot of money, but it's at least something" said David Yegge". In addition, the valley-wide agency also sent three loads of the material to Viramontes Industries in Corona, CA. This was a mixed load with some rocks mixed with the chipped material. This material will be bagged and reused as mulch that is sold at retail outlets across Southern California. David Yegge states "we already have plans to improve our storage method for next year".

***For more information, please contact
California Fire Safe Council,
info@cafiresafecouncil.org or (626) 335-7426***

Funding provided by a National Fire Plan grant from the Cooperative Fire Program of the U.S. Forest Service, Department of Agriculture, Pacific Southwest Region, through the California Fire Safe Council. This institution is an equal opportunity provider.

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CHIPPING BUILDS COMMUNITY IN SAN DIEGO COUNTY



Greater Alpine Fire Safe Council serves sixty square miles deep in the foothills of San Diego County, much of which is carpeted in 70-100 year old chaparral. Affordable real estate and close proximity to San Diego inspired a housing boom, sprouting homes for Alpine's 20,000 residents throughout this Wildland Urban Interface – more than half the area falls within the Cleveland National Forest and Viejas Indian Reservation.

In September, 2008, Greater Alpine Fire Safe Council received a National Fire Plan Grant from US Forest Service through California Fire Safe Council to purchase a chipper and implement a community-wide chipping program,



an invaluable service to members of this rural pocket of San Diego County. The widespread program meets the needs to remove and dispose of hazardous fuels and exemplifies how Fire Safe Councils create a sense of community where there had once only been a collection of homes.

Twice a month, trained contractors offer curbside chipping in one of the seven zones that cut this 20,000 strong town into manageable work areas. Corporate and tribal partners host Community Chipping Days to allow people to bring their material to a central location. Volunteers and contractors work together to assist folks who are not able to create

defensible space around their homes through their Defensible Space Assistance Program (DSAP). Periodically, the Kiwanis and Greater Alpine Fire Safe Council collaborate to complete vital defensible space projects.

The multi-faceted Alpine Chipping program proves that two heads are better than one – and four heads are better than two – and those who collaborate, celebrate! The four-pronged chipping program has been a huge success, helping more than 300 families create and maintain 312 acres of defensible space. During 2010, GAFSC hopes to break their own record and chip 400,000 cubic feet of flammable materials.

But collaboration is not exclusive to the Grater Alpine Fire Safe Council's chipping program. Viejas Indian Reservation regularly hosts community chipping days and advertises them in newsletters they mail to the entire Greater Alpine area. Alpine-based Tom Dyke Drilling and Blasting not only hosts community chipping days but also offers tractor service and the expertise of his foreman as part of the contribution. Alpine Sheriff's Station and Alpine Fire Protection District suggest and qualify projects for the DSAP. And Alpine Kiwanis Club sponsored a DSAP family and provided volunteer labor to make the project a success.



With \$40,000 in grant dollars, Greater Alpine Fire Safe Council has been able to protect homes valued at more than \$163,000,000. But perhaps more importantly, its Alpine Chipping Program has helped strengthen and unifying an otherwise isolated community. That is a priceless benefit!

For more information, please contact California Fire Safe Council, info@cafiresafecouncil.org or (626) 335-7426

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GOOD PLANNING AND EFFECTIVE FUEL BREAKS SAVE HOMES IN KERN COUNTY



In March, 2009, the Greater Tehachapi Fire Safe Council requested funding for a hazardous fuel reduction project, to be called the “Blackburn Mendiburu Shaded Fuel Break,” named for two large adjacent drainage areas, Blackburn and Mendiburu Canyons. The proposed project was designed to improve the community’s vulnerability to a fire originating in Oak Creek and burning toward Old West Ranch. The picturesquely-named Old West Ranch is a remote community of 150-200 homes, largely accessible by narrow and unpaved roads. Few homes have access to utilities, cable, or telephone service. Homes in the middle and upper elevations are especially difficult to reach, and lack safety zones and water resources. Further compounding the dangerous



conditions in this area are many dead “bug kill” trees. Other than a small lightning-caused fire in 2005, there had been no recorded history of fire in the area for over 110 years. Clearly a disaster just waiting to happen!

The Old West Ranch area had long been on local fire agencies’ radar as a likely location for wildfire. Vegetation management projects had begun in 2004 with a California Fire Safe Council Clearinghouse-funded project dubbed “The Blackburn Canyon Escape Route.” Crews removed hazardous fuels along 25 feet on both sides of the road in order to

facilitate evacuation of residents as well as access for emergency vehicles. Funding was approved for the “Blackburn Mendiburu Fuel Break” and Kern County Fire Department crews began working in late spring of 2010; about 70% of the work proposed for the project was completed in a 12-week period. And that was a very good thing indeed!

The West Fire started on July 28, 2010, caused by two men cutting up windmill steel with a saw. It began along Blackburn Canyon Road, and went south to the ridge top. It was wind-driven and spread quickly, destroying or damaging 31 homes and 47 outbuildings and ultimately consuming 1,658 acres. However, the damage could have been far worse. All of the pre-planning and fuel reduction projects resulted in stopping the fire’s southern progress. The 2004 Escape Route project proved its worth by allowing for safe evacuation of residents and equally safe access for firefighters.



Another valuable weapon in limiting the West Fire’s destructive potential was the residents’ compliance with the California state 100’ defensible space ordinance. This cleared space was vital in saving numerous homes in a neighborhood where there was limited availability of water due to the lack of an established water system, extreme fire behavior (flame lengths in excess of 150’) and numerous wind-abetted spot fires ¼ to ½ miles ahead of the main fire.

Sadly, homes were lost during the West Fire. However, due to collaboration, pre-planning, maintenance of defensible space around structures and grant-funded fuel reduction projects that worked just like they were supposed to, even greater destruction was avoided. As The A Team’s Hannibal Smith was fond of saying, “I love it when a plan comes together!”

For more information, please contact California Fire Safe Council at www.cafiresafecouncil.org or (626) 335-7426.

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