



2025-2026 Urban Grant Program Grantee Handbook

3/19/26 *This Handbook is intended to be a living document and will be updated as needed in response to questions or changes.*

- GRANT QUESTIONS
- WIZEHIVE-ZENGINE GRANT MANAGEMENT SYSTEM
- REIMBURSEMENT REQUESTS
- REPORTING REQUIREMENTS
- MEDIA AND PROMOTIONS

GRANT QUESTIONS

Any questions or concerns about the Urban Grant Program (UGP), grant agreements, or procedures should be directed to Jackie McBride, Community Investment Specialist, at jmcbride@openspaceauthority.org. The Santa Clara Valley Open Space Authority phone number is (408) 224-7476.

WIZEHIVE-ZENGINE

Reimbursement Requests, Reports, Grant Agreement Amendments, and Final Grant Closeout Materials are submitted via Wizehive-Zengine (Wizehive) using the same account that was used for the grant application. Each organization must use one account in the system for grant project management.

1 - Project Homepage

The Homepage will show all Projects in their various stages – such as Pre-Application, Under Review, Active Grant, etc.

Once a grant is in Active Grant status, you will have access to Reimbursement Requests, Progress Reports and Match Documentation, Amendment Requests (optional), and Final Report (to be filled out at the end of the grant period).

OPEN SPACE AUTHORITY
SANTA CLARA VALLEY

Welcome, [User Name]

Please click "Create a Profile to Get Started" to begin. You can always edit your Profile by clicking "Edit".
You cannot move forward until you have completed your Profile.

Profile [Complete] [Edit]

To begin, click "Get Started" below.

When you return to this Homepage, you can see the status of your submission by the colored status bar below the submission card.

- If the status bar is **gray**, your submission is under review, and no action needs to be taken.
- If the status bar is **blue**, there is an action required. Click on the Submission Card to complete.
- If the status bar is **red**, there is an error. Please reach out to the Administrator of this program.

[Add Another]	Untitled Created on 07/25/2022 Pre-Application	test 123321 Created on 07/25/2022 Pre-Application	Test Application Created on 07/19/2022 Program Application (if Applica...
Test project 7/12 Created on 07/12/2022 Pre-Application	555 Test Org Created on 05/18/2022 Active Grant	Test Number Two 7/12/22 Created on 07/12/2022 Under Review	Jackie's Test Application Created on 06/17/2022 Under Review

REIMBURSEMENT REQUESTS

The Open Space Authority will reimburse the organization with which it has a Grant Agreement for approved costs listed in the Grant Agreement Scope of Work and Project Budget pursuant to the Disbursement process outlined in the Grant Agreement. Please see below for more information and detail about reimbursement requests.

- The Open Space Authority cannot reimburse any costs incurred outside the performance period of the contract.
- To receive reimbursement, a Grantee must submit a reimbursement request as described below. Incomplete or inaccurate requests may be returned to the Grantee for resubmittal.
- Reimbursement requests, if approved, are generally paid within six to eight weeks.
- Reimbursement requests must be submitted at least quarterly, but no more than monthly.
- The final 10% of the grant award will be held back from payment until project completion. This holdback money will be paid after the final report is submitted and the project is properly closed out.

SUBMITTING A REIMBURSEMENT REQUEST

Login to Wizehive here (<https://webportalapp.com/sp/santaclaravalleyopenspaceauthority-homepage>) – If it is the first time your organization is logging in, please see below for Organization Profile instructions.

There are three parts to a Reimbursement Request:

1. Reimbursement Request Online Form
2. Reimbursement Worksheet
3. Documentation (receipts, invoices, etc.) if required

1. REIMBURSEMENT REQUEST FORM

This form will be tracked in Wizehive so that users can log in to check on the status of the request. Note that the Reimbursement Worksheet (#2 above) and Documentation (#3 above) are uploaded through this form in addition to the information submitted in the form itself. We suggest that you complete the Reimbursement Worksheet first and then use the totals calculated in the worksheet to fill out the Reimbursement Request Form.

Once on the Project Homepage, click the blue “open” button next to Reimbursements. You will have the option to click the green “Add New Item” button to start a new reimbursement, or click “edit” to view or edit any submitted reimbursement requests, or “open” to edit and submit any incomplete reimbursement requests.

The screenshot shows the user interface for the Open Space Authority Santa Clara Valley. At the top, there is a logo and the text "OPEN SPACE AUTHORITY SANTA CLARA VALLEY". Below the logo, there is a navigation bar with "Homepage > 555 Test Org" and a "Welcome" message. The main content area is titled "555 Test Org" and includes a "Project Page" section. This section contains a list of items under the heading "Active Grant". The items are: "Progress Reports and Match Documentation", "Reimbursements", "Amendment Requests", and "Final Report". Each item has an "Open" button next to it. The "Reimbursements" button is highlighted with a red box. There is also a "Final Grant Close Out" button in the top right corner of the list. The "Final Report" item has a note that says "Action Required in order to complete grant close out process." and a status of "Action Required".

To begin new reimbursement, click the green “Add New Item” button:

Reimbursements ▾ Close

Please click "+Add New Item" to add a new Reimbursement Request.

+ New Item

Name ↕

(untitled) draft Open

Please fill out all relevant items within the Reimbursement Form. When finished, click “Mark Complete”. If you need to save your work and return, click “Save Draft”:

Reimbursements ▾ Delete Save Draft Mark Complete Close

2. REIMBURSEMENT WORKSHEET

This form outlines which documentation (e.g. receipts, invoices, etc.) go with which budget category (i.e. Personnel, Contracted Services, Supplies and Materials, Other Direct Costs, and Indirect Costs).

A template is available to download from the Reimbursement Request Form on Wizehive.

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REIMBURSEMENT WORKSHEET

Please itemize the Reimbursement Request expenses below and provide documentation for each expense listed. Submit this form and all documentation as an attachment on the grant reimbursement form.

NOTE: The final 10% of the grant award will be held back from payment until project completion. This holdback money will be paid after the final report is submitted and the project is properly closed out.

PROJECT

Project Name:	
Organization:	
Grant ID #:	G-0000##
Dates covered by this worksheet:	

PERSONNEL	Date	Name & Title, plus brief description of tasks performed	Rate	Units	Request
<i>List each person by name and title. The title should be listed in the approved Project Budget.</i>					\$ -
					\$ -
					\$ -
					\$ -
					\$ -
TOTAL PERSONNEL					\$ -

CONTRACTED SERVICES	Date	Description of Item	Request
<i>Documentation should include date, rates, and hours on invoices.</i>			
TOTAL CONTRACTED SERVICES			\$ -

SUPPLIES AND MATERIALS	Date	Description of Item	Request
<i>Documentation should include itemized receipts or invoices which include items, quantities and prices.</i>			
TOTAL SUPPLIES AND MATERIALS			\$0.00

OTHER DIRECT COSTS	Date	Description of Item	Request
<i>Documentation should include itemized receipts or invoices which include items, quantities and prices.</i>			
TOTAL OTHER DIRECT COSTS			\$ -

INDIRECT COSTS	Date	Description of Item	Request
<i>Indirect costs are eligible ONLY if included on approved budget. Limited to 20% of grant funding. No additional documentation required.</i>			
TOTAL INDIRECT COSTS			\$ -

TOTAL					\$ -
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3. DOCUMENTATION (RECEIPTS, INVOICES, ETC.)

All documentation should be scanned and uploaded using the UPLOAD button for that section of the budget. See the list below for necessary documentation for each category of expense.

Personnel

- No additional documentation required, though must be provided if requested.

Contracted services

- Invoices, including source (e.g. contractor), rate and hours. Please include a description of the service provided and relationship to scope if it is not obvious by the invoice. If relevant, any invoices or requests for payment require proof of payment such as a voided check or bank statement.

Supplies and Materials

- Receipts and/or invoices. Please include a description of the item if it is not obvious by the receipt or invoice. If relevant, any invoices or requests for payment require proof of payment such as a voided check or bank statement.

Other Direct Costs

- Receipts, invoices, or other documentation as appropriate. If relevant, any invoices or requests for payment require proof of payment such as a voided check or bank statement.

Indirect Costs

- Indirect costs are eligible ONLY for 501(c)(3) Nonprofits if included on approved Project Budget. Indirect costs are limited to 20% of grant funding.
- No additional documentation required, though must be provided if requested.
- If you do not spend the entire award, your total indirect costs will need to be pro-rated so they do not exceed the percentage rate outlined in your contract (not to exceed 20%).

REPORTING REQUIREMENTS

Please use Wizehive to submit all reports. Login to Wizehive (<https://webportalapp.com/sp/santaclaravalleyopenspaceauthority-homepage>) to get to the “Project Homepage” screen. Click on the active grant that you will be submitting a report for. To submit a report, click on “Open” next to Project Reports and Match Documentation, and then "+Add New Item" to add a new Progress Report, or click “edit” or “open” to click on a previously started Report.

Reporting is an important tool for communicating project progress. Grantees will submit reports semi-annually during the grant period and one final report upon project completion. The reports will include a summary of grant activities, description and documentation for matching contributions, and progress toward project goals.

555 Test Org

Project Page

Active Grant

Final Grant Close Out

Progress Reports and Match Documentation **Open**

Reimbursements **Open**

Amendment Requests **Open**

Final Report **Open**
Action Required in order to complete grant close out process.

PROGRESS REPORTS

Using Wizehive, please submit the semi-annual reports by answering the questions in the brief online form. Any matching contributions during that period will require uploading the Match Worksheet and documentation (if required by your grant). Please also include any high-quality promotional photos of the program or project, materials, and activities for use in Authority publications and on the Authority’s website. The progress reports will be due at the end of the following month:

Report covering:	Due:
January 1 – June 30	July 31
July 1 – December 31	January 31

The questions included in the Progress Reports include:

- Date
- Email of Person Completing Report
- Please give a brief summary of accomplishments during this reporting period.
- Please report overall progress to date for the following applicable goals:
- Number of people served
- Number of youth served (under 18 years)
- Number of programs provided (in person/hybrid/virtual)
- Optional: Additional grantee goals based on grant agreement, if applicable. Please state the original goal and overall progress to date.
- Please report on your project's progress in serving under-resourced communities.
- Is the project on schedule?
 - If not, please describe any issues.
- When do you expect to complete the project?
- Is the project on budget?
 - If not, please describe any issues.
- Do you have any photos or publicity about the project site or program activities? If so, please upload under the Documents section below.
- Do you have any Match to contribute this cycle? (if required by your contract)

THE FINAL REPORT

The final report provides the Grantee and the Authority a chance to review the program or project's activities, outcomes, challenges, and successes. Please include any high-quality promotional photos of the program or project, materials, and activities for use in Authority publications and on the Authority's website.

The questions in the Final Report are the same as the Progress Reports, with the addition of:

FINAL REPORT: Has your program/project been successful? What were the lessons learned?

FINAL REPORT: What were the most challenging aspects of your project? What skills or resources would you need to make future projects work better?

FINAL REPORT: The positive impact of a project is not always easy to communicate via quantified goals. If this is true of your program/project, please share a story that illustrates the impact.

Signage and site visit required for CAPITAL projects.

555 Test Org Order by: Newest to Oldest ▾

Project Page

Active Grant Final Grant
Close Out

Progress Reports and Match Documentation Open

Reimbursements Open

Amendment Requests Open

Final Report Action Required Open

Action Required in order to complete grant close out process.

Please note that throughout the duration of an Active Grant, it will say “Action Required” in the Final Report section until the grant is completed. Once the Final Report is submitted, the “Final Grant Close Out” button will be open. Choose this button to begin the Close Out process.

MATCHING FUNDS

For applicable grantees, matching contributions are reported semi-annually as part of the required progress report. Please refer to your Grant Agreement details to see if your project is required to submit matching funds. Documentation required for match is similar to the documentation required for reimbursement and is outlined below.

- The Authority cannot apply match incurred prior to the performance period of the contract.
- Match needs to be reported as part of progress reports.
- If there was no match contribution during that period, answer “no” in the report. No Match Worksheet or documentation is required.

MATCHING FUNDS WORKSHEET

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MATCHING FUNDS WORKSHEET

Please itemize the Matching Funds items expenses below and provide documentation if noted. Submit this form and all documentation via as an attachment in the Progress Reports section of the grant webpage.

NOTE: The final 10% of the grant award will be held back from payment until project completion. This holdback money will be paid after the final report is submitted and the project is properly closed out.

PROJECT

Project Name:	
Organization:	
Grant ID #:	G-0000##
Dates covered by this worksheet:	

PERSONNEL	Date	Name & Title, plus brief description of tasks performed	Rate	Units	Amount
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<i>List each person by name and title. The title should be listed in the approved Project Budget.</i>					\$ -
					\$ -
					\$ -
					\$ -
					\$ -

TOTAL PERSONNEL					\$ -
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CONTRACTED SERVICES	Date	Description of Item	Amount
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<i>Documentation should include date, rates, and hours on invoices.</i>			

TOTAL CONTRACTED SERVICES			\$ -
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SUPPLIES AND MATERIALS	Date	Description of Item	Amount
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<i>Documentation should include itemized receipts or invoices which include items, quantities and prices.</i>			

TOTAL SUPPLIES AND MATERIALS			\$ -
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OTHER DIRECT COSTS	Date	Description of Item	Amount
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<i>Documentation should include itemized receipts or invoices which include items, quantities and prices.</i>			

TOTAL OTHER DIRECT COSTS			\$ -
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GENERAL SUPPORT	Date	Description of Item	Amount
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<i>Large lump sum matching contributions (e.g. grant awards) that don't easily fall into categories above. Documentation should include the</i>			

TOTAL GENERAL SUPPORT			\$ -
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TOTAL			\$ -
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This form outlines which documentation (e.g. receipts, invoices, etc.) go with which budget line items (i.e. Personnel, Contracted Services, Supplies and Materials, Other Direct Costs).

All documentation should be scanned and uploaded via Wizehive. Documentation for match is generally the same as documentation for reimbursement (described above).

FINAL CLOSE OUT

In order to close out the grant project, a few steps must be finalized. The final reimbursements need to be submitted, as well as the Final Report. If the grantee is not using all of their awarded grant funds, this needs to be communicated to grants staff. In order to close out a project, all deliverables in the contract must be met. This may include all reimbursements submitted, all reports submitted, match requirement met if applicable, signage requirement met if applicable, and goals and scope of project met. Once the project is closed, staff will confirm project close out via email and any remaining funds (up to 10% of the grant) that were held will be paid out.

MEDIA AND PROMOTIONS

Do you have upcoming events or a call-to-action for your Authority-funded project? As part of this grant, please acknowledge the Open Space Authority as a supporter for your program or project when possible. This includes, but is not limited to, newsletters, social media, signs, event mailings, annual reports, print or film media, websites, and news releases. An example of this acknowledgement:

This project was funded in part by the Open Space Authority Urban Grant Program.

When you announce events on social media, please tag the Authority's Facebook (@openspaceauthority) and/or Instagram (@open_space_authority) accounts so we can easily re-share your announcements.

LOGOS

Please find the Open Space Authority logo and style guide information in the following pages. To use our logo, please use this link via Dropbox:

<https://www.dropbox.com/scl/fo/n080zy1qmr07c4fjzq3n9/AOpee9FhdYiNBOZzAlw54Z8?rlkey=glkgmazopec3o05ttqafgty&st=fuqxim0k&dl=0>



If needed, horizontal Logo may be used, as shown below:



About the Logo

The Open Space Ecosystem logo for the Santa Clara Valley Open Space Authority represents our progressive and integrated approach to land conservation. When the agency was formed in 1993, its representative mark was a mature valley oak tree. Today, the tree has been replaced by a related but more dynamic symbol: the oak seedling.

The oak seedling represents the growth of our organization as well as our current paradigm for open space stewardship: partnership, collaboration, growth, regeneration and possibility. From the tiny acorn grows the mighty oak.

The many colors of the ring represent the various services that open space provides to our communities, from keeping our air and water clean, to mitigating the effects of climate change, to keeping people healthy and happy. Open space is central to maintaining our quality of life in the Santa Clara Valley.

As the source for knowledge about stewardship of nature, the Santa Clara Valley Open Space Authority is a community resource and advocate for the integrated health of our region.

Note: Starting in 2026, the identity has been updated with a slightly darker blue hue within the logomark's ring. Please check to make sure the digital identity file being used—regardless of the file format—includes "2026" in the file name.



Primary Identity

The “square” version of the identity for Santa Clara Valley Open Space Authority is considered the primary default. This should be the version used when applying the identity to any project.

A **safety area** equal to the capital E in OPEN SPACE should be observed when applying the identity. Do not place other art within this open space, except backgrounds when applicable (see page 8).



The **minimum size** for legible application of the identity is 0.9”w by 0.75” (270px by 226px) at 300dpi. Adherence to the minimum size ensures legibility.



Horizontal Identity

This version of the identity should be used in instances where a it would allow for the text to be more legible, and/or in a situation where available layout space is too difficult or awkward for use of the primary identity.

A **safety area** equal to the capital E in OPEN SPACE should be observed when applying the horizontal identity. Do not place other art within this open space, except backgrounds when applicable (see page 8).



The **minimum size** for legible application of the horizontal identity is 2.0" w by 0.5" h (608px by 150px) at 300dpi. Adherence to the minimum size ensures legibility.



One-Color Identity

One-color versions of the identity have been created for use in instances where full color is not viable. Black and gray versions are reserved for select situations only. Priority should always be given to placement of the full-color primary or horizontal identity.

The one-color primary identity and horizontal identity in **100% black**.



The one-color primary identity and horizontal identity in **Urban Gray** (70% black; see page 11).



Additional one-color logos using the brand colors may be utilized if they meet accessibility standards and match the material. Please contact the agency's Communications Department for guidance and approval.

The Identity on Backgrounds

The identity for the Santa Clara Valley Open Space Authority has been provided in variations that can be placed on dark, solid color or photographic backgrounds. Digital art for these variations are provided.

The full color reversed identity, with the five-color logomark and white logotype, should be prioritized in most uses.



If a background is too challenging for the five-color logomark to properly stand out, a fully white version of the logo is available.



When placed over a full-color photo, a graduated white transparent block should be placed behind the full color identity to ensure legibility. As a general rule, the white block should have an opacity of no less than 80%. This percentage can be adjusted to ensure legibility of the identity against the background photo. (The example shown at right contains a 90% white opacity block.)



The Identity: Dos and Don'ts

The identity of Santa Clara Valley Open Space Authority should never be modified, recreated, stretched, cropped or altered in any way. Below are fictional examples of the identity used in an incorrect manner. Please avoid making these alterations.

Do not alter the colors within the identity.



Do not stretch the identity, either horizontally or vertically.



Do not use a different font for the identity.



Do not reposition the elements of the identity.



Do not add art to the identity.*



* The logo can be amended for a special occasion such as an anniversary, but only when authorized by the agency's communications department.

The Identity: File Formats

The identity of Santa Clara Valley Open Space Authority is available in multiple formats for both print and online use.

Print

EPS: This vector-based file format should be used for all high-resolution print applications.

Colorspace: EPS files have been provided in both PMS spot colors and as CMYK mixes.

Resolution: Because this file type is vector-based, it can be enlarged to any size without losing quality.

Web / Electronic

PNG: This file format has been provided for use on the web and on-screen applications such as Microsoft Office. PNG files are preferred over JPG files because they offer better quality for line art, are smaller in file size, and because they allow for transparency.

Colorspace: PNGs have been provided in RGB for use on the web and on-screen applications such as Microsoft Office.

Resolution: These file types have been provided at resolutions appropriate for both Microsoft Office print applications and at lower resolution for on-screen and web-based applications. They are not to be used for printed materials.