Open Space Authority
Urban Grant Program Guidelines

2020 Grant Cycle

APPLICATION DEADLINE: ~~May 1, 2020~~

3/31/20 Update: Application Deadline extended to July 1, 2020. More information available at https://www.openspaceauthority.org/urban

OPEN SPACE AUTHORITY URBAN GRANT PROGRAM SUMMARY

The Santa Clara Valley Open Space Authority is seeking high quality grant proposals for projects that bring nature to the urban areas within the Authority's boundaries in one or more categories:

1. Environmental Stewardship & Restoration
2. Parks, Trails, and Public Access
3. Environmental Education
4. Urban Agriculture / Food Systems

AWARD INFORMATION

- Total funding: $1,000,000 between two categories:

Small grants (Programs only)	Large grants
o Request range: $10,000 - $39,999	o Request range: $40,000 - $250,000
o Estimated amount available: $200,000	o Estimated amount available: $800,000
o Anticipated grants awarded: 7-10	o Anticipated grants awarded: 5-7
o Grant period: 1 year to complete project	o Grant period: 3 years to complete project
o Required matching funds: 25%	o Required matching funds: 25%
o Grant type: Reimbursement basis	o Grant type: Reimbursement basis

ELIGIBLE APPLICANTS

- Local public agencies located within the Authority's boundaries.
- Schools and school districts located within the Authority's boundaries.
- Non-profit organizations whose project is located within the Authority's boundaries.

PUBLIC WORKSHOPS

The Authority will hold two public information workshops to provide an overview of the grant and the application process. Participation is recommended but not mandatory.   Registration and other information is available by clicking on "Apply" at https://www.openspaceauthority.org/urban.

April 6, 2020   3:00 – 4:30pm, Open Space Authority offices (33 Las Colinas Lane, San Jose CA 95119). Please register to attend. If you would like a Spanish or Vietnamese translator at this meeting, please register by March 23, 2020 and select this option.

April 7, 2020   10:30am – 12:00pm, ONLINE WORKSHOP ONLY Please register to receive access information.

DEADLINE

The complete proposal must be submitted by 11:59 pm on **May 1, 2020.** The application is available by clicking on "Apply" at https://www.openspaceauthority.org/urban.

MORE INFORMATION

For questions about this Grant Program, please contact Megan Dreger, Grants Administrator at mdreger@openspaceauthority.org. This document, mailing list information, and any program updates can be found by clicking on "Apply" at https://www.openspaceauthority.org/urban.

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About the Santa Clara Valley Open Space Authority

The Open Space Authority works to protect the quality of life in Santa Clara County by preserving open space and natural resources. Since 1993, the Authority has protected over 25,000 acres of open space, natural areas, watersheds, and wildlife habitat – providing ecologically friendly outdoor recreation and preserving the natural beauty and environmental health of the Santa Clara Valley.

The Open Space Authority is a public, independent special district created by the California state legislature in 1993 at the urging of community leaders who saw the importance of maintaining the ecological integrity of the region.

The Authority's jurisdiction includes the cities of San Jose, Santa Clara, Milpitas, Campbell, Morgan Hill, and parts of unincorporated Santa Clara County.

Mission Statement

The Open Space Authority conserves the natural environment, supports agriculture and connects people to nature, by protecting open spaces, natural areas, and working farms and ranches for future generations.

Measure Q

The Urban Grant Program is funded by Measure Q. In November 2014, voters approved the Open Space, Wildlife Habitat, Clean Water and Increased Public Access Measure (Measure Q). Measure Q is intended to increase the capacity of the Authority to protect and preserve natural open space areas for future generations by: improving parks, open spaces and trails; protecting land around creeks, rivers and streams to prevent pollution and improve local water quality; preserving and restoring wildlife habitat and natural areas; expanding public access; enhancing environmental education; and protecting scenic hillsides. Through a $24 annual parcel tax, Measure Q will generate approximately $7.9 million per year for open space protection through 2030. This funding will be used to help achieve the goals and objectives of the *Santa Clara Valley Greenprint*, which serves as the Authority's strategic vision to inform investments in open space protection.   The *Santa Clara Valley Greenprint* is available online at https://www.openspaceauthority.org/greenprint.

The *Measure Q Expenditure Plan* (https://www.openspaceauthority.org/MQEP) describes four key programs that emerged from the *Santa Clara Valley Greenprint*, including a Grants Program. No more than 25 percent of the revenues generated by Measure Q will be made available for this Grant Program. Grant funds will be expended throughout the 15-year term of Measure Q until 2030. Each year, the Board of Directors will determine the appropriate amount to be allocated to the grant program. The amount of funding allocated each year may vary based on the total funding accrued to-date, to take advantage of available matching funds, and to provide flexibility in addressing emerging issues. Grant awards will strive to reward a diversity of projects and to be balanced geographically across the Authority's jurisdiction. The grant solicitation process and the individual awards shall be subject to approval by the Authority's Board of Directors.

Purpose of the Urban Grant Program

The purpose of this Grant Program is to create healthy and safe open space and park areas in cities and unincorporated urban areas within the Authority's boundaries by:

- Creating or improving parks
- Preserving open space and maintaining or creating trails
- Enhancing and restoring habitat, natural resources and water resources
- Enhancing access to healthy food through urban farms and gardens
- Developing environmental education programs or facilities

The Grant Program is also intended to promote investments in underserved, disadvantaged, and park-poor neighborhoods and to more equitably distribute the benefits of nature throughout the diverse communities and neighborhoods within the Authority's jurisdiction. Through the *Understanding Our Community* assessment project (https://www.openspaceauthority.org/community.html#UOC), the Authority identified several priority "Deep Engagement Communities," which are areas with the greatest barriers to access of open space (due to, for example, language barriers and lack of personal vehicles) and the greatest environmental burdens (such as air pollution levels). Projects that address open space needs of Deep Engagement Communities or sensitive populations will be awarded bonus points. See Appendix C for a map of the Deep Engagement Communities.

The Grant Program will be evaluated annually and redesigned as needed in future funding cycles.

Application Process

Each grant cycle, a call for applications will be announced on the Authority's website (https://www.openspaceauthority.org/urban) and social media, distributed to agency partners, and through outreach by the Authority. Applications and related materials are available at the Authority's website. The Authority will maintain a list of interested parties to receive updates or notices. To receive these notices, sign up at https://www.openspaceauthority.org/urban.

SUBMISSION DATE
All applications for funding must be received by 11:59 pm on **May 1, 2020**.

The online application is submitted through online grant management portal ZoomGrants. A link is available by clicking on "Apply" at https://www.openspaceauthority.org/urban. Please note that all application materials are public record and may be included in public meeting packets and/or online.

PUBLIC WORKSHOPS

The Authority will hold two public information workshops to provide an overview of the grant and the application process. Participation is recommended but not mandatory. Registration and other information is available by clicking on "Apply" at https://www.openspaceauthority.org/urban.

April 6, 2020, 3:00 – 4:30pm Open Space Authority offices (33 Las Colinas Lane, San Jose CA 95119) Please register to attend. If you would like a Spanish or Vietnamese translator at this meeting, please register by March 23, 2020 and select this option.

April 7, 2020, 10:30 am – 12:00 pm
ONLINE WORKSHOP ONLY, please register to receive access information.

Questions:
Megan Dreger, Grants Administrator
408.224.7476
mdreger@openspaceauthority.org

Eligible Applicants

Eligible applicants for grant funding are:
- Local public agencies, including the cities of Campbell, Milpitas, Morgan Hill, Santa Clara and San Jose, Santa Clara County, and special districts. State and Federal agencies are not eligible.
- Private, non-profit organizations that qualify under Section 501(c)(3) of the United States Internal Revenue Code. The Authority will accept applications from non-profit organizations headquartered outside of its boundaries, but all projects and programs must be located within the Authority's boundaries.
- Local schools and school districts located within the Authority's boundaries.

Details about the Authority's boundaries can be found on our Board District Map at https://www.openspaceauthority.org/public-information/board-of-directors.html.

FISCAL SPONSOR

If your organization does not have a tax-exempt ruling from the IRS, you can apply for a grant through a qualified fiscal sponsor. A fiscal sponsor is a tax-exempt 501(c)(3) organization that agrees to accept and be responsible for grant funds on behalf of another organization. If a fiscal sponsor is used, the fiscal sponsor is considered the legal applicant and therefore is responsible for all legal aspects of the grant. When filling out the application:
- The fiscal sponsor is the applicant
- The required financial statement (see p. 19) must be from the fiscal sponsor (applicant)
- The application must include a Fiscal Sponsorship Agreement form (Appendix D)

Grant Awards

The total funding available for Urban Grant Program awards in 2020 is $1,000,000. The Authority expects to award between 12-17 grants, aiming for a diversity of project types, project locations, and project size. Awards range from $10,000 - $250,000 in the following tiers:

- SMALL GRANTS:
    - *PROGRAMS* only (no *CAPITAL IMPROVEMENT* or *PLANNING*)
    - Request range: $10,000 - $39,999
    - Estimated amount available: $200,000
    - Anticipated grants awarded: 7-10
    - Grant period: 1 year to complete project
    - Required matching funds: 25%
    - Grant type: Reimbursement basis
    - Expedited review process

- LARGE GRANTS:
    - Request range: $40,000 - $250,000
    - Estimated amount available: $800,000
    - Anticipated grants awarded: 5-7
    - Grant period: 3 years to complete project
    - Required matching funds: 25%
    - Grant type: Reimbursement basis

Applicants may submit multiple applications in Small Grants, Large Grants or both.

Estimated Grant Timeline

The following is an approximate timeline for the 2020 grant cycle.   Note that Small grants and Large grants have different timelines, below.

SMALL GRANTS ($10,000 – 39,999) TIMELINE

APPLICATION	March 9, 2020	Grant application packet released
	April 6 & 7, 2020	Public Workshops
	May 1, 2020	**Grant applications due by 11:59 pm**
REVIEW & AWARD	May 2020	Staff screens applications
	May – June 2020	Review Committee prepares award recommendations
	August 13, 2020	**Board meeting for award decisions.** Staff recommendations presented to the Board of Directors for award decisions
AWARD PROCESSING	August 21, 2020	Award Notifications
	September 2020	Grantees submit final paperwork
	October 2020	Once all grantee paperwork is submitted and approved, grant agreements will be sent to grantees within approximately one month. If grantee paperwork is delayed, the grant agreement process will not move forward and the project start date will be postponed.
	November 2, 2020	<u>Earliest</u> date grant agreements are anticipated to be executed and projects begin. Some grant agreements may take longer.

LARGE GRANTS ($40,000 – $250,000) TIMELINE

APPLICATION	March 9, 2020	Grant application packet released
	April 6 & 7, 2020	Public Workshops
	May 1, 2020	**Grant applications due by 11:59 pm**
REVIEW & AWARD	May 2020	Staff screens applications
	June – July 2020	Review Committee prepares preliminary award recommendations
	August 24, 2020	**CAC meeting** to review eligible applications (Applicants strongly encouraged to attend)
	October 1, 2020	**Board meeting for award decisions.** Staff recommendations and CAC feedback presented to the Board of Directors for award decisions
AWARD PROCESSING	October 9, 2020	Award Notifications
	October 2020	Grantees submit final paperwork
	November – December 2020	Once all grantee paperwork is submitted and approved, grant agreements will be sent to grantees within 1-2 months. If grantee paperwork is delayed, the grant agreement process will not move forward and the project start date will be postponed.
	January 1, 2021	<u>Earliest</u> date grant agreements are anticipated to be executed and projects begin. Some grant agreements may take longer.

Grant Project Categories

Examples of the types of project elements that could be considered for funding within each of the Project Categories are provided for illustrative purposes only. Proposed projects must demonstrate elements within one or more of these Categories to qualify for the Program.

ENVIRONMENTAL STEWARDSHIP AND RESTORATION
In general, this broad category includes green infrastructure and natural resources projects. Some examples include:
- Planning, design, and/or implementation of habitat restoration and enhancement projects
- Restoration of wetlands, floodplains, or riparian areas
- Urban forestry, canopy census, and tree planting projects
- Integrating open space with stormwater management using raingardens, bioswales, permeable pavement, green roofs, etc.

PARKS, TRAILS, AND PUBLIC ACCESS

This includes parks and trails projects as well as projects which add to the connectivity between existing open space areas. Some examples include:

- Planning, design and construction of new parks, trails, and open space facilities
- Conversion of brownfields or vacant lots into parks or preserves
- Conversion of underutilized parking, street width, or public right of way into pocket parks, parklets, or linear parks
- Trails, bike lanes, and bicycle transit programs including bike share programs
- Trail sections which close gaps in the existing trail network
- Public nature-themed art that inspires understanding and appreciation of nature

ENVIRONMENTAL EDUCATION

This includes both education facilities and educational programs. Transportation may be included as a component of a project but must be within the Authority's jurisdiction. Some examples include:

- Nature centers and environmental education facilities
- Life labs, gardens, outdoor classrooms, and school greening projects
- Transportation and access to Authority preserves as a component of a program
- Job training related to protection and stewardship of the natural environment, wildlife, water resources and agricultural lands
- Citizen science programs
- Nature-based learning through field tours and hands-on stewardship projects
- Nature-based playgrounds for unstructured outdoor play

URBAN AGRICULTURE / FOOD SYSTEMS

This includes projects related to cultivating, and distributing food grown within the urban areas. Some examples include:

- Planning, design and implementation of urban farms and community gardens
- Farm education and access programs such as farm trails
- On-farm research and demonstration projects that balance agricultural production with environmental protection and enhancement

Grant Project Types

Three broad project types that are eligible in the grant program are below. Grant projects can combine two or more project types if desired (e.g. building a new community garden AND creating an environmental education program on site).

CAPITAL IMPROVEMENT
- Improvements to real property, including, but not limited to: construction of natural area improvements, rehabilitation, restoration, and enhancement.
- Larges grants only, see p. 4.

PLANNING
- Planning activities in service of work on specific properties prior to construction. This might include community outreach, site analysis, or site design.
- Other plans related to the use and management of the site, including recreation and management of natural resources.
- Planning projects generally result in a final report, plan, or construction documents.
- Large grants only, see p. 4.

PROGRAMS
- Social and educational programs, such as classes, training, or special events (e.g. creek clean-up day). This work can include curriculum and program development.
- Small grants and Large grants, see p. 4.

Grant Project Requirements

ELIGIBLE PROJECTS MUST

- Be consistent with the Authority's enabling legislation [Division 26, Sections 35100-35174 of the Public Resources Code]
- Achieve *at least* one of the purposes established in the *Measure Q Expenditure Plan* (https://www.openspaceauthority.org/MQEP):
  - Protect and enhance open space, wildlife habitat and wildlife corridors, and develop land for nature-based parks, open space preserves, trails and greenbelts.
  - Create, develop and implement pedestrian and bicycle trail connections to connect urban communities to local and regional parks, Open Space Preserves, creeks and flood control channels, to improve public health.
  - Implement urban tree planting and tree protection/maintenance.

- o Create and expand urban farms and community gardens to support public health and local agriculture.
- o Expand nature and science-based environmental education programs and hands-on youth engagement projects.
- Support the Santa Clara Valley Greenprint goals and objectives (https://www.openspaceauthority.org/greenprint).
- Comply with all applicable California laws, including California law concerning prevailing wages.
- Meet all Grant Project Requirements outlined in this document.

LOCATION
- Projects must be located within the Authority's boundaries and serve residents of the urban area.
  - o *CAPITAL IMPROVEMENT* and *PLANNING* projects must be located in an urban area or within one mile of an urban area within the Authority's jurisdiction.
  - o *PROGRAMS* must be located within the Authority's jurisdiction and serve residents of the urban areas.
- Urban areas are, for the purposes of these guidelines, "urban areas" as currently defined by the United States Census Bureau.   See Appendix B for a map of the eligible grant area.

BUDGET AND MATCHING FUNDS
- A detailed Project Budget is required for all applicants. An Excel template is available in the ZoomGrants application. See Appendix E for a copy of the template.
- A minimum match of **25%** of the grant request is required. This can be through a cash match and/or an in-kind match.
  - o **Cash match** is a monetary contribution and can be from:
    - The grantee's own funds (general revenue).
    - Cash donations from third parties (i.e. partner organizations).
    - Other grants.
  - o **In-kind match** is a non-cash contribution from the grantee organization and can include:
    - Staff time spent on the project.
    - Volunteer hours valued at $29.95 per hour for general volunteer hours (more for volunteers with specialized skills). For more information, see https://www.independentsector.org/volunteer_time.
    - Staff on loan from another organization.
    - Use of existing equipment.
    - Goods or services donations from third parties.
    - Indirect costs cannot be counted match.
- Projects can include staff time if it is demonstrated that it is required to effectively implement the project.

- Indirect costs (administrative overhead) are eligible for 501(c)(3) non-profit organizations only. However, the indirect costs are limited to 5% of the grant award. See Appendix F for more information on direct vs. indirect costs.

LAND OWNERSHIP/SITE CONTROL
- For *CAPITAL IMPROVEMENT* projects, applicants must have a legal interest in the property that ensures their right to implement the project, or otherwise demonstrate that they have site control sufficient to implement the project.
    o If the applicant owns the project site, applicants must submit one of the following:
        ▪ Deed evidencing legal ownership
        ▪ Current Property tax statement
    o Projects located on property not owned by the applicant must demonstrate applicant's authority to utilize the site in the manner proposed by the grant application:
        ▪ This site control must be sufficient to ensure that the project remain in use for minimum time. This generally requires a period of:
            • At least 5 years for grants between $40 - $100K
            • At least 10 years for grants between $100 – 200K
            • At least 20 years for grants between $200 – 250K

        ▪ Submit documentation showing that the applicant has appropriate permissions (lease, MOU, etc.) that meet the requirements outlined on the Land Tenure Form (Appendix G) .
- If a project in the *PLANNING* or *PROGRAM* categories requires site control, information should be provided to show that the appropriate permissions are in place.

HIGHLY DESIRED PROJECT ELEMENTS
- Projects that enhance wildlife habitat and provide other environmental benefits. This includes appropriate plant selection, with a strong preference for native species wherever possible.

- Projects that provide recreational opportunities.

- Projects with multiple benefits (i.e. provides benefits in more than one area: wildlife, habitat, water quality, recreation, education, social justice, etc.).

- Projects featuring sustainable materials and practices.

- Projects benefitting underserved communities.

- Projects implemented through partnerships with other agencies and groups.

- Projects with strong public support.

- Projects with emphasis on community building.

- Projects in more than one category (e.g. Environmental Education *and* Urban Agriculture).

- Projects that provide opportunities for free public access to the project site and/or project materials (e.g. curriculum).

INELIGIBLE ELEMENTS

- Grant awards will NOT fund long term maintenance or any practices that are required as mitigation of any kind.

- Projects by public agencies CANNOT be related to ongoing maintenance or repair of publicly-owned parkland, open space, or facilities.

- Projects by public agencies CANNOT be projects for which public funds have previously been allocated.

- Developed facilities (structures, parking lots, etc.) may be included but will be evaluated to ensure that the developed footprint is balanced with the overall benefits.

- Grant awards CANNOT be utilized to fund land acquisition.

Evaluation Criteria

Authority staff will evaluate each application based on how well it meets the Evaluation Criteria. Additional factors in award recommendations may include: the total funding available, the geographic distribution of awards, and the variety of project types awarded.

CRITERIA	Points
PROJECT PLANNING	20 pts
PROJECT BUDGET	15 pts
PROJECT GOALS	15 pts
IMPACT	15 pts
COMMUNITY ENGAGEMENT / STAKEHOLDER SUPPORT	10 pts
LEADERSHIP & INNOVATION	10 pts
ORGANIZATIONAL CAPACITY	15 pts
TOTAL	**100 pts**

BONUS POINTS (If minimum score of 75 reached)	
UNDERSERVED COMMUNITIES	10 pts
COMMUNITY BUILDING	10 pts
CLIMATE RESILIENCE	5 pts
	25 pts

Note that bonus points are only calculated for applications with a minimum score of 75 out of 100 points possible in the overall scoring criteria.

Application Questions and Scoring

The application uses an online application tool called ZoomGrants. A link to the application as well as a ZoomGrants tutorial is available during the solicitation by clicking on "Apply" at https://www.openspaceauthority.org/urban. The application includes three tabs: Applicant Information, Project Description, and Documents Upload. The application questions and requirements are listed below.

TAB: APPLICANT INFORMATION

This tab includes general questions about the applicant. These questions are not included in the application scoring, but they are used to determine eligibility.

Application Title/Project Name	
Amount Requested	Min: $10,000 Max: $250,000
Applicant Information	Name and contact information
Organization Information	Name and contact information, and Employer Identification Number (EIN) of organization
Manager/Executive Director	

TAB: PROJECT DESCRIPTION

This tab includes detailed questions about the project.

APPLICANT TYPE

1. What type of organization is this?	☐ Public Agency ☐ School ☐ School District ☐ 501(c)3 Nonprofit ☐ Eligible organization acting as Fiscal Sponsor for another organization
2. Does the application include a fiscal sponsor?	*If the project includes a fiscal sponsor, the fiscal sponsor must be the applicant.* ☐ YES ☐ NO

OVERVIEW

3. Which type of grant are you requesting?	☐ Small ($10,000 - $39,999) ☐ Large ($40,000 - $250,000)
4. Grant category (check all that apply)	☐ Environmental Stewardship and Restoration ☐ Parks, Trails, and Public Access ☐ Environmental Education ☐ Urban Agriculture / Food Systems
5. Type of project (check all that apply)	☐ Capital improvement (Large grants only) ☐ Planning ☐ Program
6. Project Location: Address / Neighborhood	What is the physical location of the project? If there is no physical location, please enter "N/A". If the project will be in multiple locations, please list all. Note: project location(s) must be within the Authority's jurisdiction.
7. Project Location: Open Space Authority District (check all that apply)	A detailed map of the Authority's Districts is online at https://www.openspaceauthority.org/public-information/board-of-directors.html.
8. Who does the project serve? Please indicate which Open Space Authority District(s) are served (check all that apply)	A detailed map of the Authority's Districts is online at https://www.openspaceauthority.org/public-information/board-of-directors.html.
9. Project Abstract	(Brief, 3-4 sentences)

PROJECT PLANNING (20 PTS)

SCORING for this category is based on how well the application demonstrates that the project:
⇒ Promotes the Authority's <u>mission and vision</u>
⇒ Supports the goals and objectives of the *Santa Clara Valley Greenprint*
⇒ Achieves multiple objectives of the *Measure Q Expenditure Plan*
⇒ Provides multiple benefits (i.e. provides benefits in more than one area: wildlife, habitat, water quality, education, social justice, etc.)
⇒ Includes a clear project description with deliverables that are aligned with project budget
⇒ Applicant has demonstrated resources to ensure ongoing stewardship of land, management of facilities, and continuing programs
⇒ Applicant has adequate site control
⇒ Includes a plan for maintenance and care of the project for the term of use, if applicable
⇒ Is ready to begin
⇒ Features sustainable materials and practices, and includes native plants wherever possible
⇒ Provides public access where feasible and/or access to project materials (e.g. curriculum).

10. Describe the proposed project.	For *PROGRAM* projects, please include intended audience, location, and whether the program meets Common Core and Next Generation Science Standards (NGSS).
11. Describe key project deliverables and estimated completion dates.	A deliverable is something produced as a result of this project. (e.g. benches installed, trees planted, new curriculum developed, educational programs delivered, etc.).

12. Does this project require permission, permits, or other approvals? If so, please describe the status of these.	The project must comply with all local, state, and federal environmental and permitting requirements. Any necessary approvals or permits must be obtained in a timely manner.
	 For *CAPITAL IMPROVEMENT* projects, this includes:
	 • CEQA compliance: Submit CEQA form (Appendix H)
	 • Site Control: Submit documentation showing that the applicant either:
	     o owns the property (deed, property tax statement)
	     o has appropriate permissions (lease, MOU, etc.) by submitting both the document and the Land Tenure Form (Appendix G): Land Tenure Form
	     o See p. 10 for more information.
	 For *PROGRAM* projects, this includes any permissions needed for the site of the event(s) and delivery of the program.

	If no permission, permits, or other approvals are required for your project, please briefly explain.
13. What is the lifetime of this project? If applicable, describe plans for operating and maintaining the project in the future.	• For *CAPITAL IMPROVEMENT* projects, applicants must describe their plans for site maintenance during the term of use, see p. 10 for term requirements. • For *PLANNING* and *PROGRAM* projects, please answer if applicable, otherwise enter "N/A."
14. Describe the project's readiness for implementation.	

PROJECT BUDGET (15 PTS)

SCORING for this category is based on how well the application demonstrates:
⇒ Budget is cost-effective
⇒ Budget includes a minimum of 25% matching funds
⇒ Budget is aligned with project description and deliverables
Note: The Project Budget is a separate Excel document to submit using the Documents Upload tab. An Excel version of the template is available in the ZoomGrants application and a copy is included under Appendix E. See p. 9 for more information about budget and match requirements.

15. Budget Summary – Grant Request	This is a budget summary only; a detailed Project Budget must be submitted using the Documents Upload tab. Note: these fields will automatically total once application is submitted. _____Grant request: Personnel _____Grant request: Contracted Services _____Grant request: Supplies/Materials _____Grant request: Other Direct Costs _____Grant request: Indirect Costs
16. Budget Summary – Matching Funds	This is a budget summary only; a detailed Project Budget must be submitted using the Documents Upload tab. _____Total Matching Funds
17. Budget Narrative	Provide a brief budget narrative to explain the expenses listed in each of the budget categories (e.g. Personnel).

PROJECT GOALS (15 PTS)

SCORING for this category is based on how well the application demonstrates:
⇒ Measurable goals and measures of success are well defined (e.g. # visitors, etc.)
⇒ Measurable goals are realistic and appropriate to project
⇒ Project provides clear social and/or environmental benefits

18. Describe the specific problems, issues, or unserved needs the project will address.	
19. How does this project serve the community?	These metrics are required for all projects. Project-specific metrics can be added under Question 20 below. _____Number of people served _____Number of youth served (under 18 years) _____Number of programs provided
20. In what other ways does the project serve the community? Please list the project-specific goals (both social and environmental).	Please list any additional goals and how they will be measured (e.g. surveys, field measurements, attendance sheets, etc.). See Appendix I for sample goals.

IMPACT (15 PTS)

SCORING for this category is based on how well the application demonstrates:
⇒ The likelihood that the project will have a profound social and/or environmental impact
⇒ The project effectively addresses identified need

21. Describe the lasting impact of the project.	• *CAPITAL IMPROVEMENT* and *PLANNING* projects: Please include whether the project site is open to the public • *PROGRAMS*: please include whether the program is open to the public and whether any materials developed will be available to the public

COMMUNITY ENGAGEMENT / STAKEHOLDER SUPPORT (10 PTS)

SCORING for this category is based on how well the application demonstrates that the project:
⇒ Has strong public support and/or was developed with widespread community participation and engagement
⇒ Provided letters of support and/or commitment from local governments (employees/officials), Board members, Board of Supervisors, stakeholders, etc. Letters of support must be submitted as part of the application within ZoomGrants in order to be considered by the Review Committee for scoring.

22. Describe the community support and/or community engagement process.	Please submit letters using the Documents Upload tab.

LEADERSHIP & INNOVATION (10 PTS)

SCORING for this category is based on how well the application demonstrates:
⇒ The project employs new or innovative approaches resulting in greater efficiency, energy savings, climate resilience or advances in the field of parks, open space, urban agriculture, land conservation, or environmental education
⇒ The project encourages collaboration and partnership between agencies and organizations or promotes leadership in the field of conservation

23. Describe how this project employs innovative approaches or encourages collaboration and partnerships.	If there are project partners, please upload partner letters on the Documents Upload tab.

ORGANIZATIONAL CAPACITY (15 PTS)

SCORING for this category is based on how well the application demonstrates:
⇒ Applicant has demonstrated resources, capacity, expertise, and support to ensure project completion. This can be demonstrated through evidence of successful projects or by providing references of individuals knowledgeable about the organization's work.

24. Briefly describe the organization and its ability to successfully implement this project. This might include successful past projects, key staff qualifications, financial resources, etc.	If the applicant is a Fiscal Sponsor, please describe both the Fiscal Sponsor and the sponsored organization.

BONUS POINTS
Note that bonus points are only calculated for applications with a minimum score of 75 out of 100 points possible in the overall scoring criteria. The bonus point questions are optional, but responses are encouraged in order to maximize the application score.

BONUS POINTS: UNDERSERVED COMMUNITIES (10 PTS)

SCORING for this category is based on how well the application demonstrates:
⇒ Project addresses open space needs for sensitive populations such as residents of park-poor neighborhoods, underserved or disadvantaged communities, youth, seniors, or is located within a Deep Engagement Community (DEC) (see Appendix C)
⇒ Project provides job training or skills development opportunities for youth, underserved populations, or at-risk populations

25. Describe how the project addresses open space needs for sensitive populations such as residents of park-poor neighborhoods, underserved or disadvantaged communities, youth, seniors, persons with disabilities, or is located within a Deep Engagement Community (DEC).	This question is optional; please answer if applicable, otherwise enter "N/A." A map of the DECs can be found by clicking on "Apply" at https://www.openspaceauthority.org/urban.

BONUS POINTS: COMMUNITY BUILDING (10 PTS)

SCORING for this category is based on how well the application demonstrates:
⇒ Project actively encourages community building by engaging or accommodating local residents in novel and creative ways

26. Describe how this project actively encourages community building by engaging or accommodating local residents in novel and creative ways.	This question is optional; please answer if applicable, otherwise enter "N/A."

BONUS POINTS: CLIMATE RESILIENCE (5 PTS)

SCORING for this category is based on how well the application demonstrates:
⇒ Project actively addresses climate resilience, which includes reducing, adapting, preparing for, and/or responding to the impacts of climate change

27. How does this project enhance and/or raise awareness about climate resilience?	This question is optional; please answer if applicable, otherwise enter "N/A." Please include any metrics that can be used to help quantity or understand the climate benefits of the project.

TAB: DOCUMENTS UPLOAD
This tab includes a section for uploading documents. All applications must include financial statements and a project budget. Additional documents may be required, depending on the project. See Appendix I for a Documents Checklist. All documents must be submitted with ZoomGrants before the application due date.

FINANCIAL STATEMENT	REQUIRED for ALL PROJECTS • Non-profits should provide the most recent IRS Form 990 or internally-prepared financial statements (preferably audited). • Schools, school districts and public agencies should provide the most recent annual budget. • For large institutions such as universities or cities, please provide the department or program budget. • If the application includes a fiscal sponsor, the financial statements should be for the fiscal sponsor.
FISCAL SPONSORSHIP AGREEMENT	REQUIRED for applications with Fiscal Sponsors. See Appendix D for more information. The template is available as a Word document from ZoomGrants.
PROJECT BUDGET	REQUIRED for ALL PROJECTS See Appendix E for more information. The template is available as an Excel document from ZoomGrants.
LAND TENURE FORM	REQUIRED for *CAPITAL IMPROVEMENT* projects
CEQA COMPLIANCE CERTIFICATION FORM	REQUIRED for *CAPITAL IMPROVEMENT* projects

LETTERS OF SUPPORT	• Letters of support must be submitted as part of the application within ZoomGrants in order to be considered by the Review Committee for scoring. Letters submitted outside of the ZoomGrants application or after the application deadline will not be included in the Review Committee scoring, but can be sent to the relevant group (Citizens' Advisory Committee or Board of Directors) for distribution at the meeting. Letters sent to the Citizens' Advisory Committee or Board of Directors must be dropped off, mailed, or emailed by noon on the date of the meeting.
	  o Drop off or mail: 33 Las Colinas Lane, San Jose, CA 95119
	  o Email: clerk@openspaceauthority.org

OTHER	• Maps, site design, brochures, etc.

Application Review

ELIGIBILITY SCREENING

All applications will first be screened for eligibility and completeness. Applications that fail to meet these requirements will be disqualified and will not be reviewed.

STAFF REVIEW

Once the applications have been screened, they will be split into two groups: one for Small grants and one for Large grants. Authority staff will then review, evaluate, and recommend projects for funding based on how well each application meets the Evaluation Criteria. Additional factors in staff award recommendations may include: the total funding available, the geographic distribution of awards, and the variety of project types awarded. Applicants may be contacted to provide additional information during the review process. Authority staff may seek assistance from outside agencies and organizations in evaluating the applications.

AWARD PROCESS

After the staff review, the Small grants and Large grants are awarded with different timelines and process:

Small Grants

For Small grants, staff recommendations will be summarized and presented at a publicly-noticed Board of Directors meeting on August 13, 2020.   The Board will make the determination about project funding in consideration of staff recommendations and any public comments.   The Board of Directors reserves the right not to award all the funds allocated.

Large Grants

For Large grants, the staff recommendations will be summarized and presented at a publicly-noticed Citizen's Advisory Committee (CAC) meeting on August 24, 2020. The CAC will review and provide feedback to staff for inclusion in final recommendations to the Board of Directors. Applicants are strongly encouraged to attend this meeting in order to answer any questions from the CAC.

The Large grant applications, staff recommendations, and CAC feedback will be presented to the Authority's Board of Directors on October 1, 2020. The Board will make the determination about project funding at this publicly-noticed meeting in consideration of staff recommendations, CAC feedback, and any public comments.   The Board of Directors reserves the right not to award all the funds allocated.

Grant Administration

POST-AWARD PROCESS

1. Following the Board decisions, the Authority will send official award letters to applicants whose projects have been selected for funding.
1. All necessary paperwork must be submitted prior to initiating the grant agreement process. This includes a resolution or formal statement adopted by the grantee's governing body authorizing the terms of the grant. More information and a resolution template is available by clicking on "Apply" at https://www.openspaceauthority.org/urban.
2. The Authority will send out grant agreements based on the Open Space Authority Urban Grant Program Agreement template, available by clicking on "Apply" at https://www.openspaceauthority.org/urban. A summary of key grant agreement terms is below.
3. The grant agreements must be fully executed (signed and dated by all parties) and all required material must be submitted (W9, insurance certificates, etc.).
4. The Authority will notify Grantees that the grant agreement has been executed and the project can begin.
5. The Authority will provide an overview of the reimbursement and reporting process.

GRANT AGREEMENT TERMS
- The applicant must enter into an agreement with the Authority to conduct the proposed project according to the terms and conditions that correspond to the project type, without negotiation. See Sample Grant Agreement (Click on "Apply" at https://www.openspaceauthority.org/urban). The Authority reserves the right to modify the terms and conditions prior to executing grant agreements.
- Please note: The Authority's approval is required for any major amendments to the project, such as changes in the scope of work, budget, and the grant period.

GRANT PERIOD
- The grant period begins when the grant agreement is fully executed (signed and dated by all parties) and extends for three years. Note: Expenses incurred before or after the grant period cannot be billed to the grant.

INSURANCE
- Grantees must meet the insurance requirements in the Grant Agreement and agree to the indemnification obligation. See the Sample Grant Agreement for the insurance requirements.

TERM OF USE
- The Grant Agreement requires that the project remain in the approved use or condition for the set period of time set forth in the term of use. See p. 10 for an outline of the term of use requirements for *CAPITAL IMPROVEMENT* projects.

OTHER REQUIREMENTS
- Some larger *CAPITAL IMPROVEMENT* projects may also require a *CONSERVATION EASEMENT*.

REPORTING
- During the grant period, projects are required to submit semiannual performance reports using a template provided at the time of the award.
- A Final Report is due by the end of the grant period. A report template will be provided at the time of the award.

FUND DISBURSEMENT
- The Authority reimburses grantees for expenses after they are incurred.
- Invoices can be submitted monthly and reimbursement typically occurs within six weeks. Disbursements of grant funds are made incrementally, as work is satisfactorily completed. Ten percent of the grant award will be held back to ensure satisfactory completion of the project. This holdback money will be paid after the final report is submitted and the project is properly closed out.
- All reimbursement requests must be supported by appropriate invoices, purchase orders, canceled warrants/checks, payroll documents and other approved documents. Only actual and direct project-related costs incurred during the approved term of the grant agreement and other costs specified in the grant agreement budget (i.e., indirect costs/administrative overhead) are eligible for reimbursement.
- Expenses incurred before the grant agreement is executed cannot be billed to the grant.
- Grantees may be required to reimburse the Authority for some or all of the disbursed grant funds if the project is not completed according to the provisions of the agreement.

ACCOUNTING REQUIREMENTS
- Grantees should be familiar with and maintain financial operations, records, systems, and procedures, and maintain sufficient documentation to support their expenses.

RECORDS RETENTION
- Applicants must retain all records pertaining to the project for audit purposes for a period of three (3) years after completion of the project or until all project-related claims have been fully and finally settled, whichever occurs last. Applicants shall make all project records and data available to the Authority within five (5) business days of the Authority's written request.

PROJECT RECOGNITION
- Authority funding of projects shall be recognized through appropriate site signage (if applicable) as well as on all publications, press releases, web sites, and other electronic media associated with the project.
- Authority shall be invited to any ribbon cutting ceremony.

APPENDIX A: GLOSSARY

CALIFORNIA ENVIRONMENTAL QUALITY ACT (CEQA) is a statute that requires state and local agencies to identify the significant environmental impacts of their actions and to avoid or mitigate those impacts, if feasible. Most proposals for physical development in California are subject to the provisions of CEQA.

CAPITAL IMPROVEMENT projects are improvements to real property, including, but not limited to: improvement, rehabilitation, restoration, or enhancement.

CONSERVATION EASEMENTS are legal agreements between a landowner and a land trust or government agency that permanently limit the use of the land in order to protect its conservation values.

DIRECT COSTS are the labor, material, and other expenses directly related to a project or service.

GRANT PERIOD is the period of time between the effective date and the expiration date of a grant. The grant period begins when the grant agreement is fully executed (signed and dated by all parties).

INDIRECT COSTS are expenses that are not directly related to a particular project or service, such as depreciation or administrative costs. These are often referred to as general operating expenses.

MATCHING FUNDS are cash or in-kind support contributed by the applicant to augment grant funds in order to attain project objectives. In-kind support, also called "soft" match, is goods, services or other things of value that will benefit the project (e.g. staff time).

PLANNING projects including planning activities only; there are no capital improvements. This might include community outreach, needs assessments, coordination with stakeholders, or site analysis. Planning projects generally result in a final report.

PROGRAM projects are social and educational programs, such as classes, training, or special events (e.g. creek clean-up day).

URBAN AREAS are defined by the US Census Bureau as densely settled areas that meet minimum population density requirements. For more information, see https://www.census.gov/programs-surveys/geography/guidance/geo-areas/urban-rural.html.

VOLUNTEER HOURS can be included as in-kind matching funds. The rate is currently valued at $29.95 for general volunteer hours. For more information, see https://www.independentsector.org/volunteer_time.

APPENDIX B: MAP OF ELIGIBLE GRANT AREA

Below is a map showing the eligible grant areas. There is also an interactive version of this map available by clicking on "Apply" at https://www.openspaceauthority.org/urban.

If you have questions about whether a project is in an eligible grant area, please contact Megan Dreger, Grants Administrator, at mdreger@openspaceauthority.org.
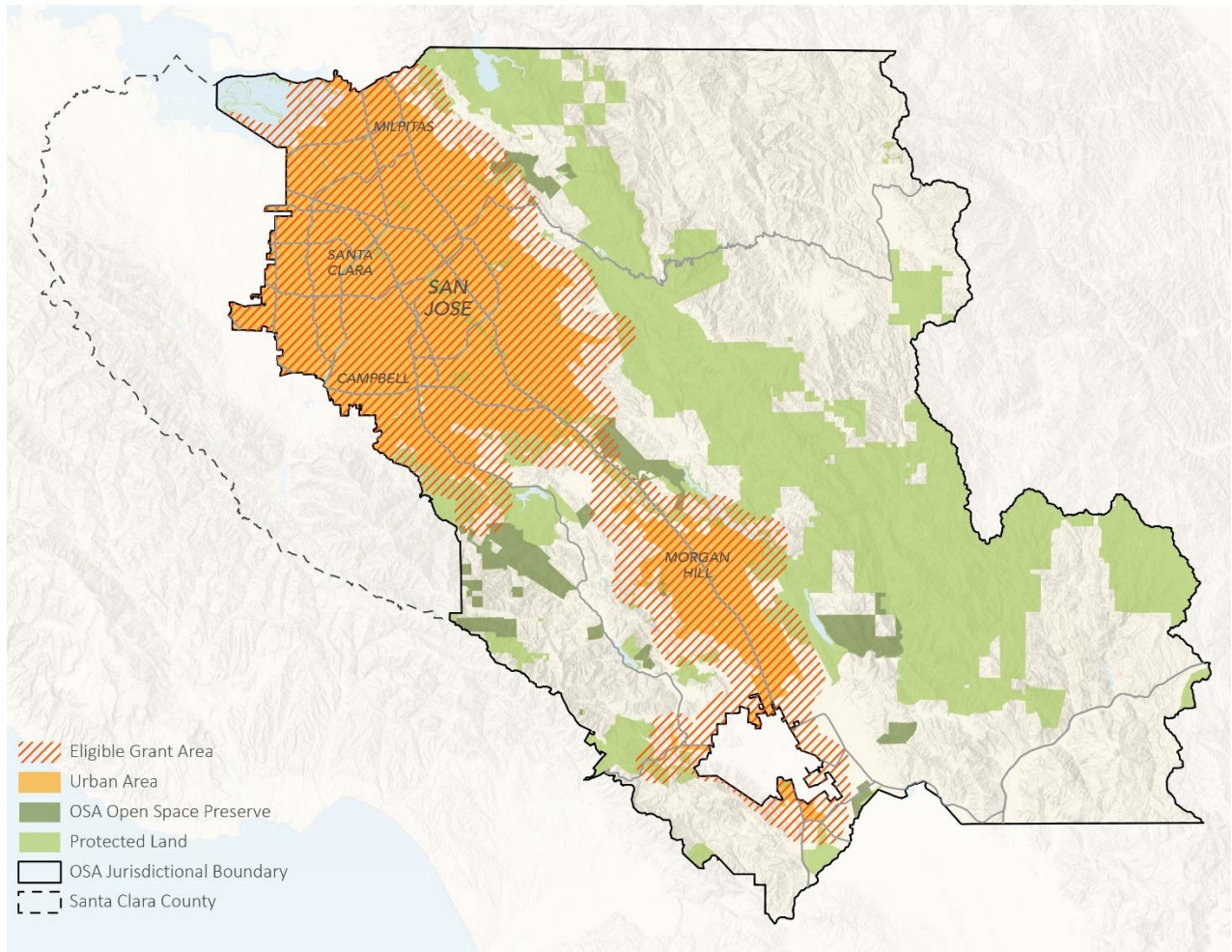
APPENDIX C: DEEP ENGAGEMENT COMMUNITIES MAP

This map is an excerpt from the Understanding Our Community report (https://www.openspaceauthority.org/community.html#UOC). The Six Deep Engagement Communities (DECs) include approximately 205,000 residents, or 15% of the total population in the Authority's jurisdiction. There is also an interactive version of this map available by clicking on "Apply" at https://www.openspaceauthority.org/urban.
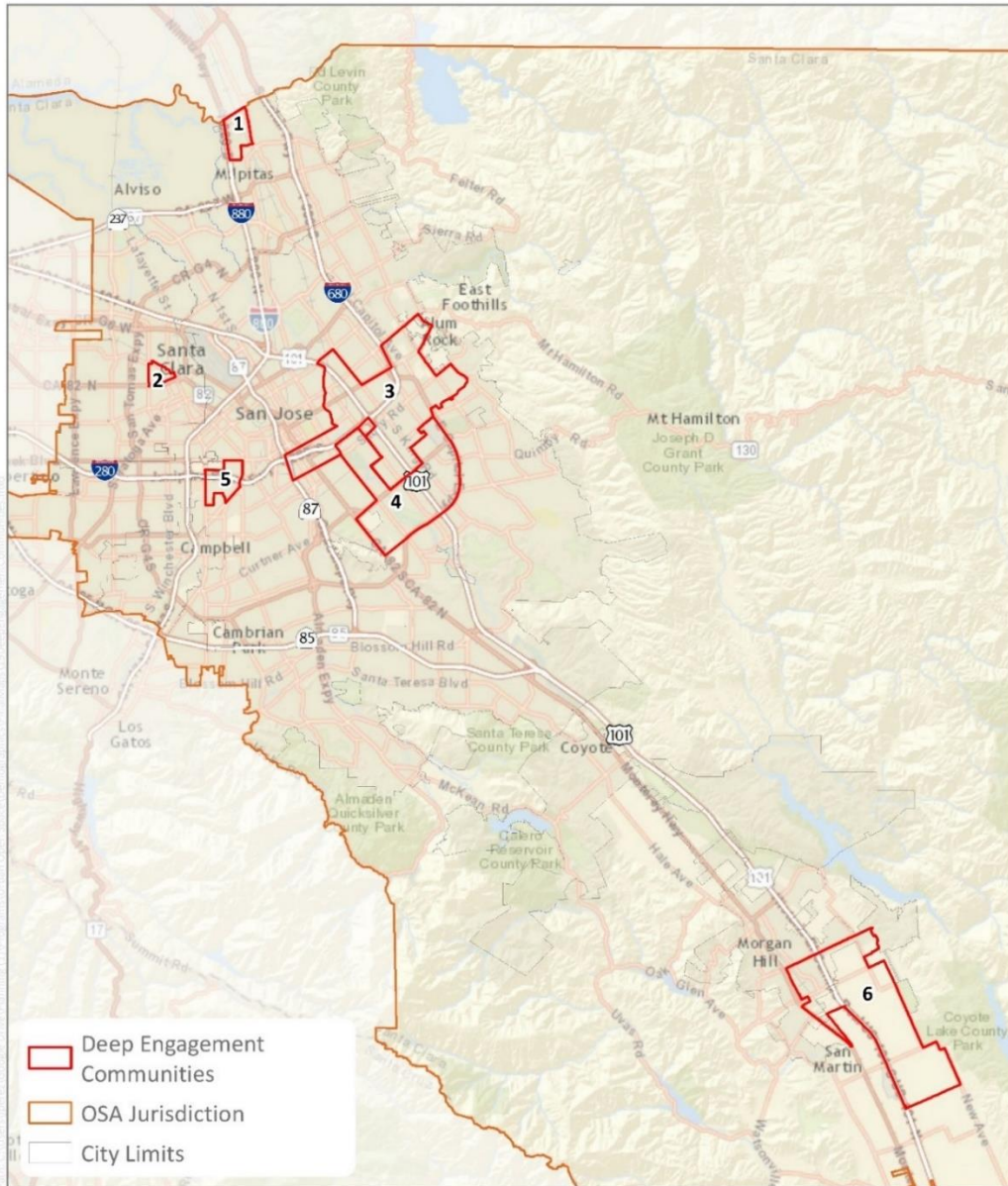
DEC #1- Milpitas: Dixon Landing Park
DEC #2- Santa Clara: Main to Scott
DEC #3- San José: Story and King

DEC #4- San José: Kelley Park and Senter
DEC #5- Burbank/Unincorporated: S. Bascom to W. San Carlos
DEC #6- Morgan Hill: 101 and Tennant

APPENDIX D: FISCAL SPONSORSHIP AGREEMENT

This form is also available as a separate Word document from the ZoomGrants application.

FISCAL SPONSORSHIP AGREEMENT

Date:

Fiscal Sponsor (Legal Applicant):
Fiscal Sponsor Contact Person:
Fiscal Sponsor Contact Email:
Fiscal Sponsor Full Mailing Address:
Sponsored Organization Conducting Project:
Project Name:

[FISCAL SPONSOR] (hereafter referred to as the Applicant) has agreed to serve as a fiscal sponsor for [ORGANIZATION BEING SPONSORED] (hereafter referred to as the Sponsored Organization) and serve as the legal applicant for the Open Space Authority Urban Grant Program as outlined in the attached application and supporting materials.

Since the Sponsored Organization is not recognized by the IRS as a charitable tax-exempt entity, the Applicant must exercise full control over the Sponsored Organization's financial administration, management and disbursement of funds resulting from this grant application. The Applicant is responsible for ensuring completion of timely reports and submission of necessary financial statements to the Open Space Authority.

This agreement shall be in effect from the date of a grant award to support the above-named project until the grant funds are expended and the final report has been submitted and accepted.

We agree to the terms stated above in this agreement.

Fiscal Sponsor Representative Signature: _____
Printed Name:
Title:
Date:

Sponsored Organization Representative Signature: _____
Printed Name:
Title:
Date:

APPENDIX E: PROJECT BUDGET

The Project Budget is required for all projects. The Excel template is available as part of the application on ZoomGrants. The excel template includes instructions and a sample budget as well as the blank form.

Santa Clara Valley Open Space Authority Urban Grant Program 2020

PROJECT BUDGET

PERSONNEL

Estimate employee and volunteer time directly related to the project. Hourly rates for employees can include salarly plus fringe benefits, payroll tax, etc, but can not include indirect costs. Note: please list position titles only.

Position Title	Description of Budget Item	Grant Request ($)	Matching Funds ($)	Total	
				$	-
				$	-
TOTAL PERSONNEL		$ -	$ -	$	-

CONTRACTED SERVICES

Labor, supplies, and materials to be provided by consultants/contractors for project implementation.

Item	Description of Budget Item	Grant Request ($)	Matching Funds ($)	Total	
				$	-
				$	-
TOTAL CONTRACTED SERVICES		$ -	$ -	$	-

SUPPLIES AND MATERIALS

Supplies and materials that are directly related to the project.

Item	Description of Budget Item	Grant Request ($)	Matching Funds ($)	Total	
				$	-
				$	-
TOTAL SUPPLIES AND MATERIALS		$ -	$ -	$	-

OTHER DIRECT COSTS

Other direct costs that are directly related to the project. This might include travel, service fees for fiscal sponsorship, or newly-acquired equipment.

Item	Description of Budget Item	Grant Request ($)	Matching Funds ($)	Total	
				$	-
				$	-
TOTAL OTHER DIRECT COSTS		$ -	$ -	$	-

INDIRECT COSTS

Indirect costs are eligible for grant funding only for 501(c)(3) Nonprofits and are limited to 5% of grant funding. Indirect costs cannot be counted as matching funds.

Item	Description of Budget Item	Grant Request ($)	Matching Funds ($)	Total	
			n/a	$	-
TOTAL INDIRECT COSTS		$ -	n/a	$	-
PERCENT OF GRANT REQUEST			n/a	n/a	

GRAND TOTAL				
		Grant Request ($)	Matching Funds ($)	Total
TOTALS		$ -	$ -	$ -

COST SHARE				
				Matching Funds (%)
A minimum of 25% of grant request in matching funds is required. This field is automatically calculated.				

MATCHING FUNDS				
Please describe the source of matching funds listed above. The total matching funds listed here should match the total matching funds listed under Grand Total above. This might include cash match (e.g. grantee's own funds, donations, grants, etc) or in-kind match (non-cash contribution such as volunteer time).				
Source	Description	Type of Match (cash or in-kind)	Status of match (Secured or Pending)	Matching Funds ($)
TOTAL MATCHING FUNDS				$ -

APPENDIX F: DIRECT AND INDIRECT COST EXAMPLES

The *Measure Q Expenditure Plan* limits administrative expenses, or INDIRECT COSTS, to no more than 5%. The following table is provided differentiate DIRECT COSTS, which are generally eligible for grant funding, and INDIRECT COSTS, which are eligible only in limited circumstances.

DIRECT COSTS	INDIRECT COSTS

Direct costs are eligible for grant funding provided they are <u>directly attributable</u> to the project.   This applies to all project types: *CAPITAL IMPROVEMENT, PLANNING*, and *PROGRAMS*. These costs should be included in the project budget.
 	
The following costs are generally eligible:
➔ Hourly rate for employees
   • CAN include salary plus fringe benefits, workers' compensation, payroll tax, etc.
   • CANNOT include indirect costs
   • Includes employees working directly on the project, including Project Management, Grant Management, and <u>directly attributable</u> administrative support, legal or accounting functions
➔ Travel for employees
➔ Consultants or contractors
➔ Grant service fees for fiscal sponsorship
➔ Supplies and materials
 	
The following may be included as direct costs only if they are <u>directly attributable</u> to the project AND are <u>newly acquired</u> specifically for the project:
 	
➔ Equipment purchases [Note that all existing equipment would be indirect costs]
➔ Newly-acquired facilities [Note all existing facilities would be indirect costs]
➔ Newly acquired Information Technology equipment and support for the project
	Indirect costs are eligible for grant funding ONLY FOR 501(c)(3) NONPROFITS and are limited to 5% of grant funding.
	
	➔ Existing facilities costs (e.g. rent, maintenance, etc.)
	➔ Utilities
	➔ Existing Information Technology equipment and support
	➔ Existing equipment
	➔ Existing equipment maintenance
	➔ Depreciation on equipment
	➔ Insurance
	➔ Communications expenses (e.g. phones, etc.)
	➔ Administrative office supplies
	➔ General administrative support:
	   • Executive management (CEO, etc.) unless DIRECTLY attributable to the project
	   • Executive administrators
	   • General financial management staff
	   • General ledger accounting
	   • Institutional legal support
	   • Information Technology support staff
	   • Facilities support personnel
	   • Scientific support functions
	   • Environmental health/safety personnel
	   • Human resources
	   • Shared procurement resources
	   • General logistics support
	   • Other shared resources not directly attributable to the project

APPENDIX G: LAND TENURE FORM

This form is also available as a separate Word document within ZoomGrants.

<div align="center">

LAND TENURE FORM
</div>

If the applicant does not own the land in fee simple, complete this form and attach the agreement granting the applicant property rights over the project site. Indicate the page number(s) where the following information can be found in the agreement.

Page #

p. ____	**Type of agreement**: _____ Identify the type of agreement, such as a lease, joint powers agreement, easement, memorandum of understanding, etc.
p. ____	**Parties to the signed agreement**: Party Date Signed _____ _____ _____ _____ _____ _____
p. ____	**Term of the agreement:** _____ **years** This site control must be sufficient to ensure that the project remain in the approved use or condition for minimum time. This generally requires a period of: • At least 5 years for grants between $40 - $100K • At least 10 years for grants between $100 – 200K • At least 20 years for grants between $200 – 250K
p. ____	**Termination (revocability)** Any of the following is acceptable: • No termination clause - the agreement is non-revocable. • The termination clause may specify that the agreement is revocable for breach of the agreement/for cause. • The termination clause may specify that the agreement is revocable by mutual consent. The following is not acceptable: <u>A termination clause that allows the land owner to revoke the agreement without cause (at will) will not be approved</u>.
p. ____	**Site Control Roles and Responsibilities** The APPLICANT must have the authority to construct, operate, and maintain the PROJECT in accordance with the grant provisions.

APPENDIX H: CEQA COMPLIANCE CERTIFICATION FORM

This form is also available as a separate Word document from the ZoomGrants application.

CALIFORNIA ENVIRONMENTAL QUALITY ACT (CEQA) Compliance Certification Form

Grantee/Applicant:
Project Name:
Project Address:

When was CEQA analysis completed for this project? Date:

What document(s) was filed for this project's CEQA analysis: (check all that apply)
☐Initial Study   ☐Notice of Exemption   ☐Negative Declaration   ☐Mitigated Negative Declaration

☐Environmental Impact Report   ☐Other:

Please attach the <u>Notice of Exemption</u> or the <u>Notice of Determination</u> as appropriate.
If these forms were not completed please attach a letter from the Lead Agency explaining why, certifying the project has complied with CEQA and noting the date that the project was approved by the Lead Agency.

Lead Agency Contact Information:

Agency Name:
Contact Person:

Mailing Address:

Phone:
Email:

Certification:
I hereby certify that the Lead Agency listed above has determined that it has complied with the California Environmental Quality Act (CEQA) for the project identified above and that the project is described in adequate and sufficient detail to allow the project's construction or acquisition.

I certify that the CEQA analysis for this project encompasses all aspects of the work to be completed with grant funds.

Authorized Representative Date	Authorized Representative
(Signature)	(Printed Name and Title)

APPENDIX I: SAMPLE GOALS

This list includes examples to describe and evaluate the goals of a project.   For example, if a project includes trail construction, one goal might be to build two miles of trail. This is not an exhaustive list; some projects may need to use alternate measures.

Project Element	Number of	Result
Cleanup	Pounds	Trash removed
Cleanup	Square feet or acres	Cleaned/trash removed
Education facilities	People	Using facility
Education facilities	Youth (age 0-18)	Using facility
Education facilities	Programs	Scheduled
Educational programs	People	Participating
Habitat restoration	Acres	Restored
People	People	Attending public meeting
People	People	Engaged
People	People	Using trail
People	People	Using park
People	People	Living within ½ mile
People	Families	Served
Planning project	Percent	Design completed
Planning project	Stakeholders	Engaged
Planting	Square feet	CA native plants planted
Planting	Square feet	Invasive plants removed
Planting	Trees	Planted
Planting	Square feet	Drought tolerant plants planted
Site development	Percentage	Pervious surface
Site development	Square feet	Pavement replaced by pervious material
Site Development	Miles	Trails constructed
Site Development	Pounds	Construction material repurposed/reused
Urban Farms/ Community Gardens	Pounds	Food produced
Urban Farms/ Community Gardens	Pounds	Produce distributed to local community
Volunteers	Volunteers	Participating
Water	Gallons	Stormwater treated/retained/reused on site
Water	Gallons	Water conserved
Water	Gallons	Recycled water used
Water	Gallons	Rainwater stored/used on site

APPENDIX J: APPLICATION CHECKLISTS

The application uses an online application tool called ZoomGrants. A link to the application as well as a ZoomGrants tutorial is available by clicking on "Apply" at https://www.openspaceauthority.org/urban.

In addition to the online application questions, the following documents may be required. Please submit these items using the Documents Upload Tab within the online application. If an application includes multiple project types (e.g. *CAPITAL IMPROVEMENT* and *PROGRAM*), please include all documents required for each.

REQUIRED DOCUMENTS FOR ALL PROJECTS

☐ Project Budget	An Excel template is available in the ZoomGrants application. See Appendix E for a copy of the template. For information about budget and match requirements, see p. 9.
☐ Financial Statements	See p. 19 for more information.
☐ Fiscal Sponsorship Agreement	Required if using a Fiscal Sponsor. A Word template is available in the ZoomGrants application. See Appendix D for a copy of the template. For more information about fiscal sponsors, see p. 3.

OPTIONAL DOCUMENTS

☐ Letters of Support	See p. 19 for more information.
☐ Project Partner Letters	See p. 16 for more information.
☐ Photographs	If applicable

ADDITIONAL REQUIRED DOCUMENTS FOR *CAPITAL IMPROVEMENT* PROJECTS

☐ Documentation of Site Control	Applicants must document that they have sufficient site control to implement the project. See p. 10 for more information.
☐ Project Location Map	Provide a map (city or county) with enough detail to allow a person unfamiliar with the area to locate the project.
☐ Site Plans	Provide a drawing or depiction indicating what improvements will be made and where the improvements will be located on the property.
☐ *CEQA* Compliance Certification Form	At the time of application, the applicant must submit a *CEQA* Certification Form (Appendix H) along with either a Notice of Exemption or a Notice of Determination.