

2022-2023 Urban Grant Program Grantee Handbook



9/16/22 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 Latham, Grants Program Coordinator, at jlatham@openspaceauthority.org, or Megan Dreger, Grants Program Manager, at mdreger@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

Homepage 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 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 Open Space Authority website interface for the '555 Test Org' project page. The header includes the organization's logo and name, a breadcrumb trail 'Homepage > 555 Test Org', and a user welcome message. The main content area is titled '555 Test Org' and includes a 'Project Page' section. Under 'Active Grant', there are four items: 'Progress Reports and Match Documentation', 'Reimbursements', 'Amendment Requests', and 'Final Report'. Each item has an 'Open' button. The 'Reimbursements' button is highlighted with an orange border. A 'Final Grant Close Out' button is also visible. The 'Final Report' item has a note: 'Action Required in order to complete grant close out process.' and a status indicator '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.

Santa Clara Valley Open Space Authority 2022-2023 Urban Grant Program				
PROJECT BUDGET				
Highlighted cells are automatically calculated.				
PROJECT				
Project Name:				
Organization:				
PERSONNEL				
Estimate employee and volunteer time <u>directly related</u> to the project. Hourly rates for employees can include salary plus				
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 <u>directly related</u> 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 <u>directly related</u> to the project. This might include travel, service fees for fiscal sponsorship, or newly-				
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 <u>limited to 5%</u> of grant funding. Indirect costs				
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 ca				
MATCHING FUNDS				
Please describe the source of matching funds listed above. The total matching funds listed here should match the total				
Source	Description	Type of Match (cash or in-kind)	Status of match (Secured or Pending)	Matching Funds (\$)
TOTAL MATCHING FUNDS				\$ -

3. DOCUMENTATION (RECEIPTS, INVOICES, ETC.)

All documentation should be scanned and uploaded using the UPLOAD button at the bottom of the Reimbursement Request Form. 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.

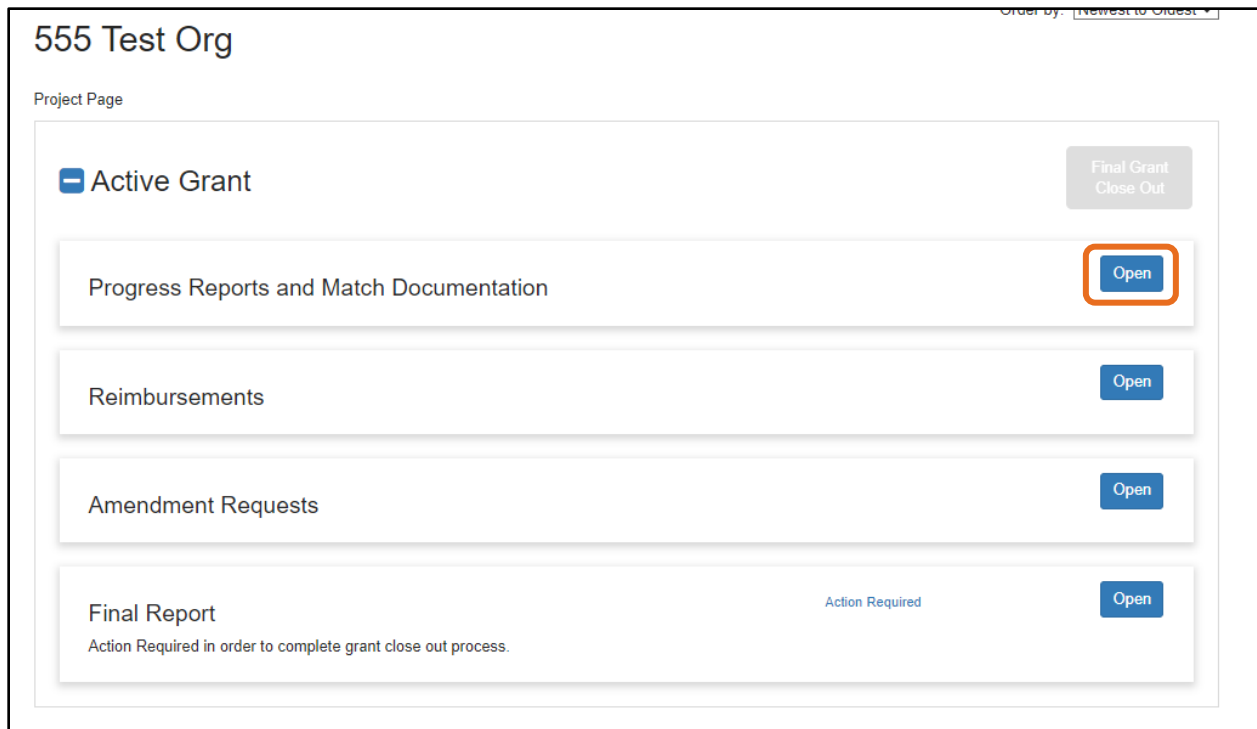
Indirect Costs

- Indirect costs are eligible ONLY for 501(c)(3) Nonprofits if included on approved Project Budget. Indirect costs are limited to 5% 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 5%).

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.



The screenshot shows the 'Project Page' for '555 Test Org'. It features a list of report categories, each with an 'Open' button. The 'Open' button for 'Progress Reports and Match Documentation' is highlighted with an orange border. A 'Final Grant Close Out' button is visible in the top right corner. The 'Final Report' category includes a note: 'Action Required in order to complete grant close out process.' and an 'Open' button.

Category	Action
Active Grant	Final Grant Close Out
Progress Reports and Match Documentation	Open
Reimbursements	Open
Amendment Requests	Open
Final Report <small>Action Required in order to complete grant close out process.</small>	Open

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.

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

Santa Clara Valley Open Space Authority Urban Grant Program 2022-2023					
MATCHING FUNDS WORKSHEET					
Please itemize the Reimbursement Request expenses below and provide documentation for each expense listed. Submit this form and all documentation via the "Documents Requested" section of the Reimbursement Request on ZoomGrants.					
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
<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	Amount		
<i>Documentation should include date, rates, and hours on invoices.</i>					
TOTAL CONTRACTED SERVICES					\$ -
SUPPLIES AND MATERIALS	Date	Description of Item	Amount		
<i>Documentation should include itemized receipts or invoices which include items, quantities and prices.</i>					
TOTAL SUPPLIES AND MATERIALS					\$ -
OTHER DIRECT COSTS	Date	Description of Item	Amount		
<i>Documentation should include itemized receipts or invoices which include items, quantities and prices.</i>					
TOTAL OTHER DIRECT COSTS					\$ -
GENERAL SUPPORT	Date	Description of Item	Amount		
<i>Large lump sum matching contributions (e.g. grant awards) that don't easily fall into categories above. Documentation should include the notice of award.</i>					
TOTAL GENERAL SUPPORT					\$ -
TOTAL					\$ -

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).

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), Instagram (@open_space_authority), or Twitter (@OpenSpaceSCC) accounts so we can easily re-tweet or share your announcements.

LOGOS

The Authority will provide logo files as well as a Style Guide with information about using the logo.



