

State of California - Office of Planning and Research and the California Strategic Growth Council GRANT AGREEMENT (revised 12/21/23)	GRANT AGREEMENT NUMBER: FI\$Cal NUMBER:
1. This Grant Agreement is entered into by and between the Office of Planning and Research ("the OPR")/ Strategic Growth Council ("the SGC") and The County of Santa Barbara ("Grantee")	
2. The Grant Agreement Term is: February 27, 2024 Upon execution of this Grant Agreement by both parties through August 31, 2024	
3. The maximum amount of this Grant Agreement is: \$50,000.00 Fifty Thousand Dollars and No Cents	
4. Signing this Grant Agreement means that Grantee agrees to comply with the terms and conditions of the following exhibits which are part of the Grant Agreement:	
Exhibit A, Scope of Work	4 Page(s)
Attachment 1: Authorized Signatory Form	1 Page(s)
Attachment 2: Work Plan	1 Page(s)
Attachment 3: Final Report	1 Page(s)
Exhibit B, Budget Detail and Payment Provisions	5 Page(s)
Attachment 4: Budget Detail Worksheet	1 Page(s)
Attachment 5: Invoice	3 Page(s)
Attachment 6: Invoice Dispute Notification Template	5 Page(s)
Exhibit C, General Terms and Conditions	3 Page(s)
Exhibit D, Special Terms and Conditions	6 Page(s)
Exhibit E, TCC Communications Kit	10 Page(s)
IN WITNESS WHEREOF, this Grant Agreement has been executed by the Parties hereto.	
GRANTEE	
The County of Santa Barbara	
BY (Authorized Signature) 	Date Signed 2-27-24
PRINTED NAME AND TITLE OF PERSON SIGNING Steve Lavagnino, Board Chair	
ADDRESS 105 E. Anapamu Street, Santa Barbara, CA 93101	
STATE OF CALIFORNIA	
Agency Name: Office of Planning and Research ("the OPR")/ Strategic Growth Council ("the SGC")	
BY (Authorized Signature) 	
Date Signed	
PRINTED NAME AND TITLE OF PERSON SIGNING	
ADDRESS	

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Exhibit A, Scope of Work

1. Transformative Climate Communities Program Background

The Office of Planning and Research / Strategic Growth Council ("the SGC") enters into this Grant Agreement with the County of Santa Barbara ("Grantee") for funding for staff time and materials to assist in the implementation of the Post Award Consultation (PAC) process for the Transformative Climate Communities (TCC) program. The SGC and Grantee are collectively referred to as "Parties."

The PAC process is the first step in the grant execution process following the approval of the TCC awards by SGC at its December 14, 2023 meeting. The final TCC Project Development Grant will be executed between the Grantee and the California Strategic Growth Council (SGC) and administered by the Department of Conservation (DOC). During the PAC process, the SGC and DOC will assist the awarded Grantee and Partners to refine the TCC Project Development Grant Agreement and all accompanying attachments to comply with administrative, statutory, and TCC Program requirements (see Appendix G of the Round 5 TCC Program Guidelines). TCC will make available Post Award Support Grants to provide funding to bridge the approximately four to six-month gap between TCC award and Project Development Grant execution.

2. Eligible Post Award Consultation Activities

A. The Scope of Work

These funds must be used to assist the Grantee and Partners in successfully carrying out the TCC PAC Process, which will result in an executed TCC Project Development Grant agreement. Partners are entities that will support the implementation of the TCC Project and are identified as Lead Entity or Supporting Entity. During the PAC process, the Grantee and Partners are required to update their work plans, budgets, and narratives to align with TCC program requirements, Interagency Review Panel recommendations, and Council direction. Grantees and Partners are responsible for deciding on the best distribution of PAC Support Grant funds; however, funds should be distributed to the projects, programs, and organizations that require the most resources to comply with the Post Award Consultation requirements and to those organizations that have limited capacity to support the PAC process. The PAC Support Grant should not be used to support activities outlined in the Project Development Grant proposal; this grant will help fund administrative support until Project Development grant execution, but is not intended to support activities that will be funded as part of the implementation of the Project Development Grant award.

Eligible activities for staff or contractors include, but are not limited to, the following:

- i) Direct staff time to oversee the progress and management of the PAC process, including time dedicated to administration and correspondence as set forth in the Budget Detail Worksheet ([Attachment 4](#))
- ii) Relevant supplies or materials costs. Please reference the Round 5 TCC Program Guidelines for direction on specific eligible costs, including food.

- iii) Travel expenses in accordance with Exhibit B Section 6
- iv) Indirect costs totaling no more than twelve percent (12%) of the total grant award

B. Hiring Procedures

Grantee must adhere to its own internal hiring processes when posting for staff positions or comply with its own competitive bidding and sole sourcing requirements for hiring a contractor.

C. Grant Term

The Grant Term for the Grant Agreement is upon execution and continues through June 30, 2024. All work must be completed no later than June 30, 2024; SGC will not reimburse the Grantee for costs or expenses incurred thereafter. The final invoice must be submitted no later than July 31, 2024.

3. Authorized Signatories

The Executive Director or designee is authorized to sign this Grant Agreement and grant-related documents on behalf of the SGC.

Grantee's Authorized Signatory or designee is authorized to sign this Grant Agreement and grant-related documents as shown in the Authorized Signatory Form (Attachment 1: Authorized Signatory Form).

Grantee must keep Authorized Signatory Forms up to date. Within seven (7) working days of any change to the authorized signatory or to the delegated authorized signatory, Grantee shall notify the SGC in writing of the change. The written notice shall be sent as an email attachment to be filed with the Grant Agreement.

4. Representatives

The representatives are the contact people for the SGC and Grantee. The representatives during the term of this Grant Agreement are:

The SGC

Name	Title	Phone Number	Email
TBD	Grant Manager*	TBD	TBD
	TCC Program Manager		

*Unless otherwise stated within this Grant Agreement, all correspondence and documents to the Strategic Growth Council will be sent to the Grant Manager as described in Document Submission (Exhibit A, Section 6).

The Grantee

Name	Title	Phone Number	Email
Garrett Wong	Climate Program Manager	805-390-2983	gwong@countyofsb.org
Zoë Carlson	Planner III	805-568-3532	carlsonz@countyofsb.org

The SGC and Grantee must keep the Project Representative(s) up to date. Any changes to the Project Representatives by either the Grantee or the SGC shall be made by providing seven (7) working days advance written notice to the other party. The written notice shall be sent as an email attachment to be filed with the Grant Agreement.

5. Grantee Duties

Grantee shall:

- A. Use grant funds from this Grant Agreement for staff and materials in direct support of the PAC process.
- B. Ensure work is completed on time and within budget. This includes meeting all milestones and deliverables, as described in the Work Plan (Attachment 2) and in accordance with the Budget Detail Worksheet (Attachment 4), unless otherwise agreed to by all parties through the amendment process described in Exhibit B, Budget Detail and Payment Provisions, Section 7. Deliverables for the TCC Post Award support grant will be specific to the Grantee, but should include timely revisions to the grant scope of work and the signed and executed implementation grant agreement.
- C. Submit invoices for reimbursement using the Invoice (Attachment 5) template, including any supporting documents.
- D. Submit a final report with the last invoice, using the Final Report template (Attachment 3).
- E. Comply with all terms and conditions of this Grant Agreement, including all incorporated documents.
- F. Comply with statutes, rules, and regulations applicable to this Grant Agreement.
- G. Maintain an accounting system that accurately reflects all fiscal transactions and provides accounting information, retaining all records and required documents as specified in Exhibit C, Section 4, and providing all required documents during an audit, as specified in Exhibit C, Section 5.

6. Document Submission

- A. Email

When this Grant Agreement requires the Grantee to send invoices, reports, or other documents to the SGC, Grantee must use the online submission platform and email unless this Grant Agreement specifically requires that the document

be sent by mail. All email must contain the Grant Agreement number and Grantee's name in the subject line.

B. Mail Service/Courier Service

Correspondence and documents submitted through mail, certified mail, or courier service must use the following address:

California Strategic Growth Council
1400 10th Street
Attn: [Grant Manager]
Sacramento, CA 95814

7. Reporting Requirements

When the Project is completed, the Grantee must submit a Final Report with the last invoice. To complete and submit the Final Report:

- A. Submit the Final Report with the last invoice. If Grantee does not submit the Final Report with the last invoice, then the last invoice will be considered incomplete and returned following process specified in Exhibit D, Section 5.
- B. Use the Final Report Template, which is attached as Attachment 3.
- C. Make sure the Final Report is signed by the person authorized to sign on the most current Authorized Signatory Form (Attachment 1).
- D. Put enough detail in the Final Report to show that Grantee fulfilled the terms of the Grant Agreement and should be paid for completing the project.

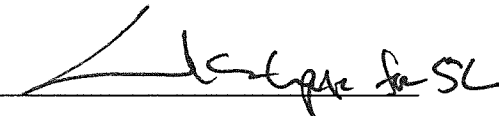
Attachment 1: Authorized Signatory Form

I hereby verify that I am an authorized Grantee representative and signatory and, as such, can sign and/or delegate authorization to sign and bind Grantee as it relates to the above-referenced Grant Agreement and grant related documents.

Grantee Authorized Signatory:

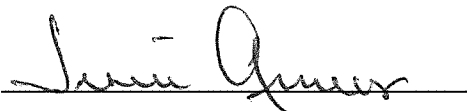
Name: Steve Lavagnino Title: Board Chair

(Type or Print Name)

Signature:  Date: 2-27-24

Delegated Authorized Signatories:

1. Name: Jesus Armas Title: Director, Community Services Dept
(Type or Print Name)

Signature:  Date: 2.15.2024

Document(s) Authorized to sign:

- All Grant Related Documents **or** Grant Agreement
 Grant Amendments Budget Amendments Reports
 Invoices Other _____

2. Name: Garrett Wong Title: Climate Program Manager
(Type or Print Name)

Signature:  Date: 2/15/24

Document(s) Authorized to sign:

- All Grant Related Documents **or** Grant Agreement
 Grant Amendments Budget Amendments Reports
 Invoices Other _____

Attachment 2: Work Plan

The Work Plan deliverables and performance measures will be specific to the Grantee, but should include timely revisions to the grant scope of work and a plan to execute the TCC Project Development Grant Agreement before August 31, 2024. This includes revising work plans and budgets as well as obtaining relevant memorandums of understanding for organizations and jurisdictions requiring one.

TASK 1: Grantee Coordination	Deliverables and Performance Measures	Timeline [Start and End Date]
<p>Subtask A: On-going grant administration, planning and coordination including regular meetings with SGC and DOC. Subtask B: Regular meetings and coordination with partners Subtask C: Project Development Grant Agreement scope of work and budget</p>	<p>Performance Measures: Execution of TCC Project Development Grant Agreement Final Invoice Final Report</p>	<p>2/27/24 to 6/30/24</p>
TASK 2: Partner Coordination		
<p>Subtask A: Revise TCC Project Development Grant (PDG) scope of work and budget, secure staff and agreements for completing the final PDG scope of work. Subtask B: Regular meetings and coordination with grantee.</p>	<p>Grant administration deliverables, participation in coordination meetings.</p>	<p>2/27/24 to 6/30/24</p>
<p>The Parties may make minor changes to the timeline and deliverables due without the requirement of an amendment. See Exhibit B, Sections 7 and 8.</p>		

Attachment 3: Final Report

Final Report	FY 23-4
Grantee Name:	Grant Number:
TCC Project Name:	

Project Summary

1. Provide a brief summary of the staff and material needs provided for the TCC PAC Process and the work completed under this grant.

Barriers and Accomplishments

2. Describe any notable outcomes, findings or conclusions. Report on successful strategies used to achieve the results and how these lessons learned can be useful to other TCC communities.
3. Describe how the Grantee communicated and managed the work plan and needs that emerged over the course of the grant.
4. Describe any goals or objectives that could not be met, as listed in the work plan, and the actual results. Describe any barriers that impeded the progress of the grant, any corrective actions taken, and the outcomes. Discuss how these lessons learned can be useful for other TCC communities.

Future Implementation

5. Describe how this grant has supported the PAC process.

Feedback

6. Based on your experience with implementation the PAC grant, please provide feedback about how SGC can improve future grant programs.

Attachments

7. Attach any relevant documents to this report, including annual reports and final reports, Technical Assistance materials, plans, photos, etc. If the documents cannot be sent electronically, notify the Grant Manager.

CERTIFICATION: I certify that this Final Report is accurate and that this project complies with the Agreement. I further certify that any expenditure discussed in this report is allowed under the Agreement and that all funds were expended for the purposes of this Project.

Agreement and that all funds were expended for the purposes of this Project.

Name: _____
(Type or Print Name)

Title: _____

Signature: _____

Date: _____

Exhibit B, Budget Detail and Payment Provisions

1. Payment

- A. Except as may be allowed under subsection (B), Grantee will be paid on a reimbursement basis.
 - i. To receive reimbursement payments of grant funds, Grantee must submit an invoice.
 - ii. Upon receipt and approval of an itemized invoice and required supporting documentation, the SGC agrees to reimburse Grantee for actual expenditures for tasks completed, in accordance with the rates specified in the Budget Detail Worksheet (Exhibit B).
 - iii. The SGC may withhold final payment until all terms of the Grant Agreement have been satisfied.
 - iv. The SGC will not reimburse for funds spent on activities that occur prior to grant execution.
 - v. Invoices may be submitted by the Grantee no more frequently than quarterly (once every 3 months) or as a single invoice at the end of the grant term. Please note, Grantees utilizing advance pay are required to submit progress reports (these progress reports can also include invoices requesting reimbursement payment) no less than on a quarterly basis.
 - vi. For cost principles, see [Cost Principles Section](#).
- B. Advance Pay
 - i. Through an Advance Pay Pilot Program, SGC is authorized to provide Grantees advance payments of TCC grant awards through July 1, 2025.¹ SGC may approve advance payments under this grant at its sole discretion. All requests for advance payments shall be submitted to SGC in writing and utilize the Advance Pay Request form (Attachment 7: Advance Pay Request Form), along with complete documentation of the Grantee's eligibility for advance payments in accordance with Government Code section 11019.1(c)(2)(A) (as further described below). Any material changes to the request form must be reported to SGC in writing within 30 days. Advance payments shall not exceed 25% of the total grant award unless the Grantee demonstrates that a larger advance is needed and provides sufficient justification and documentation. All advance payments and the amount of any advance payment is subject to SGC's sole discretion.
 - ii. Grantees requesting advance payments under this subsection shall, in their written request, provide complete documentation of their eligibility for advance payments under Government Code section 11019.1(c)(2)(A), as follows:
 - a. Confirm that SGC has approved Grantee's itemized budget, spending timeline, and workplan;

¹ Added by Statutes of 2022, Chapter 569, Section 15 (AB 156).

- b. Identify the activities to be funded with any advance payment and provide support for the need for the advance payment, which may include but is not limited to, invoices, contracts, estimates, payroll records, and financial records;
 - c. Have no outstanding financial audit findings related to any of the moneys eligible for advance payment and be in good standing with the Franchise Tax Board and Internal Revenue Service;
 - d. Confirm compliance with all insurance terms of the grant agreement;
 - e. Confirm that all funds received as an advance payment will be deposited into a federally insured, interest-bearing account that provides the ability to track interest earned and withdrawals. Any accumulated interest shall be deemed to be grant moneys, subject to federal laws and regulations, and Grantee shall report interest earned on the advance payment to SGC;
 - f. Describe procedures Grantee will use to minimize the amount of time that elapses between the transfer of funds and the spend down of those funds by the Grantee. Further, Grantee shall demonstrate that any previously advanced funds have been spent down or a plan is in place to ensure spend down of those funds in a timely manner;
 - g. Confirm that Grantee shall provide progress reports on the spend down of advanced funds no less than on a quarterly basis; and
 - h. Confirm that Grantee shall provide progress reports following the expenditure of an advance payment that includes a summary of work completed, proof of expenditure, and other associated information.
- iii. Grantee shall provide money from advance payments to subrecipients in accordance with their grant program requirements. Grantee shall require all entities they subcontract with or award grant money to comply with (f), (g), and (h) of the eligibility requirements listed above. Regardless of any transfer or assignment of advance payments to subrecipients, Grantee shall be liable to the SGC for compliance with this paragraph and for any failures by subrecipients to perform contractual obligations or to comply with the requirements of this section.
 - iv. All unused funding and interest earned provided as an advance payment, but not spent down within the grant timeline, shall be returned to the state.

2. How to Submit Invoices

- A. Grantee must submit the invoices to the online submission platform. Following submission, Grantee must email the invoice (PDF) to accountspayable@opr.ca.gov and copy the TCC Grant Managers on the email. Include the Grant Agreement number and Grantee's name in the subject line.
- B. Grantee shall submit invoices no more frequently than quarterly, in arrears, to the Grant Manager. A request for payment shall consist of:
 - i. The Invoice (Attachment 5) on official letterhead and signed by the Authorized Signatory, or authorized designee on file with the SGC (Exhibit A,

Section 3), certifying the expenditures are for actual expenses for the tasks performed under this Grant Agreement.

- ii. Each cost category and task must correspond to a cost category and task identified in the Budget Detail Worksheet (Attachment 4).
 - iii. Supporting documentation for reimbursement of funds. Records documenting the completion of individual tasks and deliverables, an estimate of the time spent performing the work, identification of the relevant staff, and the time period over which the work was performed. Examples of acceptable supporting documentation includes but is not limited to: transaction detail reports, payroll reports, time sheets and ledger transactions.
 - iv. All records must reflect the actual time or money spent, rather than that which was planned or budgeted.
- C. Supporting documentation (e.g., timesheets, activity logs, cancelled checks) for matching funds does not need to be submitted to the SGC but should be retained by Grantee in the event of an audit (Exhibit C, Section 5).
- D. At any time, the SGC may request hard copies of invoices, reports, supporting documentation, and evidence of progress.

3. Invoice Dispute

In the event of an invoice dispute, see Exhibit D, Section 5.

4. Budget Contingency Clause

- A. If the Budget Act of the current year and/or any subsequent years covered under this Grant Agreement does not appropriate sufficient funds for the program, this Grant Agreement shall have no further force nor effect. In this event, the SGC shall have no liability to pay any funds whatsoever to Grantee or to furnish any other considerations under this Grant Agreement, and Grantee shall not be obligated to perform any provisions of this Grant Agreement.
- B. If funding for any fiscal year is reduced or deleted by the Budget Act for purposes of this program, the SGC shall have the option to either cancel this Grant Agreement with no liability occurring to the SGC or offer an amendment to reflect the reduced amount.

5. Cost Principles

- A. Direct staff, supplies, and materials costs as set forth in the Budget Detail Worksheet (Attachment 4); travel expenses in accordance with Exhibit B Section 6; and indirect costs totaling no more than twelve percent (12%) of the total grant award are eligible for reimbursement.
- B. The SGC will reimburse Grantee only for actual expenses incurred during the term of this Grant Agreement, as specified in the Budget Detail Worksheet (Attachment 4).

6. Travel Reimbursement

Travel expenses directly related to the performance of this Grant Agreement will be subject to the State of California travel reimbursement rates in effect during the term of this Grant Agreement.

- A. The SGC will only reimburse for actual expenditures incurred for in-state travel as specified here:
 - i. Accommodation-related travel costs: maximum reimbursement rates based on county as shown here: <https://www.calhr.ca.gov/employees/pages/travel-reimbursements.aspx> with no option for approval of an "excess lodging rate." Hotel bill is required as supporting documentation for hotel-stay reimbursement. Confirmation booking printouts are not acceptable.
 - ii. Mileage will be reimbursed at the Reimbursement Rate per Mile for Personal Vehicle as shown here: <https://www.calhr.ca.gov/employees/pages/travel-reimbursements.aspx> Google Maps Directions printout required as supporting documentation to show roundtrip start and end locations for mileage reimbursement.
 - iii. Train or airfare will only be reimbursed to attend meetings with the Strategic Growth Council, and then only if it is the typical method used to get from one location to the other.
 - iv. No other travel-related costs will be reimbursed through this grant program.
 - v. The SGC will only reimburse for actual expenditures incurred for in-state travel related to the implementation of this grant. Tips and gratuities are not reimbursable items, and must not be included in the total amount for an invoice.
- B. Grantee shall maintain, and submit upon request, detailed travel records and supporting documents (e.g., travel request and approval forms, expense claims, invoices, receipts for lodging and transportation) showing the date and purpose of the grant-related travel, destination, and, in the case of travel by automobile, the number of miles driven.
- C. Grantee shall ensure travel costs are included in the Budget Detail Worksheet ([Attachment 4](#)) and are tied to tasks and deliverables in the Work Plan ([Attachment 2](#)).
- D. Grantee and any person traveling pursuant to this Grant Agreement shall indemnify and hold harmless the SGC and State of California for any liabilities resulting from such travel.

7. Amendments

- A. This section applies to any changes to this Grant Agreement, excluding the following:
 - a. Changes to the Authorized Signatory Form ([Attachment 1](#)). For changes to the Authorized Signatory Form see [Exhibit A, Section 3](#).

- b. Changes to project representatives, see Exhibit A, Section 4.
- c. Changes to the Work Plan and Budget Detail Worksheet, see Exhibit A, Attachment 2, Exhibit B, Attachment 4, and Exhibit B, Section 7.
- B. Except as otherwise specified, Grantee must request and obtain prior written approval before any change (amendment) to this Grant Agreement is valid.
- C. Request for amendments must:
 - i. Be prepared, in writing, on official letterhead and signed by the Authorized Signatory or designee on file with the SGC.
 - ii. Be submitted to the Grant Manager at least two (2) months prior to when the amendment is needed.
 - iii. Include the Grant Agreement number, a detailed explanation of the proposed amendment, reason for the amendment, and the effect of not approving the request.
 - iv. Include a copy of the document(s) requested for amendment that shows the requested changes.
- D. The Grant Manager will respond in writing within fifteen (15) working days from receipt of request to approve or deny the request for amendment, including the reason for the decision.
- E. The Grant Manager will process amendments within thirty (30) days of the approval date. The amendment will not be in effect until both parties have signed the Grant Agreement amendment.

8. Work Plan and Budget Modifications

- A. The Grantee must create a basic Work Plan and Budget. Once the Grantee and Partners develop a plan for specific allocations for individual partners, the Grantee will need to submit a revised work plan and budget to be used as an administrative tool. The Grantee must keep the Work Plan (Attachment 2) and Budget Detail Worksheet (Attachment 4) up to date. Grant Manager must be kept informed of any changes that are being made.
- B. Changes up to ten percent (10%) between tasks shall be made by providing written notice with or before submission of an invoice. Changes up to twenty percent (20%) require written approval from the Grant Manager.
- C. Changes to the deliverable due dates and minor changes to subtask descriptions shall be made by providing written notice with or before submission of an invoice.
- D. Material changes to the Work Plan and Budget shall follow the amendment process, specified in Exhibit B Section 8, including:
 - i. Changes of more than twenty percent (20%) between tasks
 - ii. Elimination or alteration of tasks or deliverables

Attachment 4, Budget Detail Worksheet

Task	Requested Grant Funds
Task 1: Grantee Coordination	\$28,184.00
Task 2: Partner Coordination	\$19,752.00
Indirect	\$2,064.00
Total	\$50,000.00

The Parties may make minor changes to the Budget without the requirement of an amendment. See Exhibit B, Sections 7 and 8.

Attachment 5, Invoice

Strategic Growth Council
 Transformative Climate Communities Program
 Email required invoice documents to: accountspayable@opr.ca.gov and cc the Grant Managers.

Date: _____

		Invoice Number:	
Grantee Name:		Grant Number:	
Project Name:			
Invoice Period		(Start Date)	(End Date)

Invoice Table

Cost Category	Task #1	Task #2	Task #3	Task #4	Total
Personnel (Salaries and Fringe Benefits)					
Materials and Supplies					
Equipment					
Travel					
Sub-awardees					
Other direct costs					
Indirect costs					
Current Invoice Total					
Advance Pay Deduction					
Total Reimbursement Requested					
Cumulative Total					
Allocated Total					

Advance Pay Summary

Advance Received: _____

Advance Balance: _____

Current Invoice: _____

Amount Paid Via Invoice: _____

Remaining Advance Balance: _____

Interest Earned: _____

Progress Report:

Work Plan Task #	Description of Work Completed
	<i>Please refer to specific deliverables in the Budget and Work Plan.</i>

1. Describe how the Provider supported the Grantee with the activities indicated in the scope of work.
2. Describe key accomplishments, activities, or trips.
3. Describe any challenges or obstacles encountered and plans to address those.
4. Do you anticipate any modifications to your Work Plan or Budget in the next few months?
5. Do you need any additional support from the Strategic Growth Council in the next few months?

CERTIFICATION: By my signature below, I certify that I have full authority to execute this payment request on behalf of Grantee. I declare under penalty of perjury, under the laws of the State of California, that this invoice for reimbursement, and any accompanying supporting documents, are true and correct to the best of my

knowledge, an all disbursements have been made for the purposes and conditions as outlined in the Grant Agreement.

Print Name:	Print Title:
Signature:	Date:

Attachment 6, Invoice Dispute Notification

INVOICE DISPUTE NOTIFICATION

GRANTEE ADDRESS		INVOICE DATE
		INVOICE NUMBER
		INVOICE AMOUNT \$
		DATE INVOICE RECEIVED
		GRANT AGREEMENT NUMBER

The invoice referenced above is disputed for the following reasons:

- | | |
|--|--|
| <input type="checkbox"/> Request reimbursement for expenses not in the Budget Detail | <input type="checkbox"/> Invoiced for indirect cost reimbursement |
| <input type="checkbox"/> Invoiced for incidental costs or travel costs outside of California | <input type="checkbox"/> Work performed prior to the Grant start or end date |
| <input type="checkbox"/> Insufficient evidence of progress made or task completion | <input type="checkbox"/> Invoice submitted without using required templates |
| <input type="checkbox"/> Insufficient supporting document for reimbursement | <input type="checkbox"/> Progress Report or Final Report not included with invoice |
| <input type="checkbox"/> Invoice not submitted by 5:00 p.m. on the required due date | <input type="checkbox"/> Request reimbursement through another funding source |
| <input type="checkbox"/> Other not listed above: | |

Comments:

THIS NOTIFICATION IS A FOLLOW UP TO A PHONE CONVERSATION WITH THE GRANTEE OR DESIGNEE WHOSE NAME APPEARS BELOW.

NAME	DATE OF CONVERSATION
------	----------------------

IF YOU HAVE ANY QUESTIONS REGARDING THIS DISPUTE, CONTACT:

NAME	TELEPHONE NUMBER (include Area Code)
------	--------------------------------------

RETURN A COPY OF THIS NOTIFICATION WITH THE CORRECTED INVOICE TO:
 Grant Manager
 Transformative Climate Communities Program
 1400 10th Street
 Sacramento, California 95814

STATE OF CALIFORNIA USE ONLY	
DATE DISPUTE RESOLVED	INITIALS
RESOLUTION	

Attachment 7: Advance Pay Request Form

Instructions

This request form and an accompanying formal invoice for the requested advance pay amount must be provided for advance payment requests to be reviewed and approved. Grantee shall email the completed form and invoice to OPR/SGC's Accounts Payable accountspayable@OPR.CA.GOV with their DOC and SGC Grant Managers copied. Advance payments can be dispersed in one of two (2) ways:

1. A one-time advance payment for 25% of the total grant award.
2. Multiple, smaller installments that collectively equate to 25% of the total grant award.

Regardless of the dispersal method, **advance payments cannot exceed 25% of the total grant award**. Advance payments will be provided via check. Grantees can expect to receive payment within 45 days of properly submitted, undisputed invoices and advance pay request forms. Please provide the following information.

Make Check Payable To:

Grantee Organization Name [Replace with text]

Billing Address [Replace with text]

City, State, and Zip Code [Replace with text]

Attn: Contact Name [Replace with text]

Grant Agreement Details

Grant Program: [Insert text]

Grant Agreement Number: [Insert text]

Project Name: [Insert text]

Grantee or Fiscal Sponsor: [Insert text]

Contact Name: [Insert text]

Contact Email: [Insert text]

Advanced Payment Dispersal

Is this a one-time payment or smaller installment? [Insert text]

Please note: if this is one of multiple installments, Grantee must submit a form for each request.

TOTAL AMOUNT REQUESTED AS ADVANCE PAYMENT: [Insert text]

Total Grant Award: [Insert text]

What is the period this advance will cover? From through (Month/Year)

Justification for Request & Overview of Anticipated Expenditures

In the text box below, for each entity to receive advance pay (e.g., Grantee, Partners), please include a brief justification for this request and describe how the advanced funds requested will be used, including the amount provided to each entity. If this advanced payment is an installment, please only include costs that will be covered in

this specific period.

Authorized Signature

The information contained in this request form is accurate and complete. Partners indicated as recipients of the requested advance funding will be paid by the Grantee in a timely manner. The recipient hereby commits to the development of procedures to ensure that expenditure of advanced funds is done expeditiously and will furnish supporting documentation upon request by the Strategic Growth Council staff. Funds received as an advance payment will be deposited into a federally insured, interest-bearing account that provides the ability to track interest earned and withdrawals. Any accumulated interest will be deemed grant moneys and earned interest will be reported to OPR/SGC. Changes to the information contained in this form will be reported to the OPR/SGC Grant Manager in writing within 30 days.

Name:

Signature:

Date:

-----FOR TCC PROGRAM INTERNAL USE ONLY-----

DOC Approval

Grant Manager Name: [Insert text]

Approve (Y/N):

Modify Approve: [Insert text - Why is the approved amount modified?]

Approved Modified Amount: [Insert text]

Signature: [Insert text]

Date: [Insert text]

SGC Approval

Grant Manager Name: [Insert text]

Required Advance Pay Documentation in SGC Possession (Y/N)?

Approve (Y/N):

Modify Approve: [Insert text - Why is the approved amount modified?]

Approved Modified Amount: [Insert text]

Signature: [Insert text]

Date: [Insert text]

Exhibit C, General Terms and Conditions

1. Approval

This Grant Agreement is of no force or effect until signed by both parties. Grantee may not commence performance until such approval has been obtained.

2. Amendment

No change to this Grant Agreement shall be valid unless made in accordance with Exhibit A, Section 3 or 4, or Exhibit B, Section 7. No oral understanding or change not incorporated in this Grant Agreement is binding on any of the parties.

3. Assignment

This Grant Agreement is not assignable by Grantee, either in whole or in part, without the consent of the SGC in the form of an amendment.

4. Records Retention

- A. Grantee shall establish an official file containing adequate documentation of all actions taken with respect to the Project, including copies of the Grant Agreement, changes, amendments, letters, email correspondence, financial records, and required reports for a minimum of four (4) years following the final payment of funds or until completion of any action and resolution of all issues which may arise as a result of an audit, whichever is later.
- B. Grantee shall adequately protect all records, physical and electronic, from loss, damage, or destruction during the four (4) year retention period.

5. Audit

- A. Grant funded projects are subject to audit by the State of California during the grant term and for up to four years following the termination of the grant agreement. Grantee agrees that the SGC, DOC, Department of Finance, Bureau of State Audits, or their designated representative shall have the right to review and to copy any records and supporting documentation pertaining to the performance of this Grant Agreement. The audit may consist of examining and auditing pertinent books, documents, papers, and records including financial transactions and supporting documents, general accounting systems, internal controls, management practices, policies, and procedures pertaining to the performance of this Grant Agreement.
- B. At any time, the SGC, DOC, Department of Finance, Bureau of State Audits, or their designated representative may request to review Grantee's records to ensure proper grant management. Grantee shall be given advance notice when the grant-funded Project is selected for an audit or review by the SGC, DOC, Department of Finance, Bureau of State Audits, or their designated representative. Grantee agrees to allow the auditor(s) access to such records during normal business hours, excluding State of California holidays, and to allow

interviews of any employees who might reasonably have information related to such records. Further, Grantee agrees to include a similar right of the SGC to audit records and interview staff in any subcontract related to performance of this Grant Agreement in accordance with Government Code section 8546.7. Grantee shall comply with the above and be aware of the penalties for violations of fraud and for obstruction of investigation as set forth in Public Contract Code section 10115.10.

6. Indemnification

Grantee agrees to indemnify, defend, and hold harmless the State of California, its officers, agents, and employees from any and all claims and losses accruing or resulting to any and all Grantees, partners, subcontractors, suppliers, laborers, and any other person, firm, or corporation furnishing or supplying work services, materials, or supplies in connection with the performance of this Grant Agreement, and from any and all claims and losses accruing or resulting to any person, firm, or corporation who may be injured or damaged by Grantee in the performance of this Grant Agreement.

7. Disputes

Grantee shall continue with the responsibilities under this Grant Agreement during any dispute.

8. Independent Grantee

Grantee, and the agents and employees of Grantee, in the performance of this Grant Agreement, shall act in an independent capacity and not as officers, employees, or agents of the SGC.

9. Non-Discrimination Clause

During the performance of this Grant Agreement, Grantee and its subcontractors shall not unlawfully discriminate, harass, or allow harassment against any employee or applicant for employment because of race, color, ancestry, national origin, religion, creed, age (over 40), mental disability, physical disability, sex, gender (including pregnancy, childbirth, breastfeeding, or related medical conditions), sexual orientation, gender identity, gender expression, medical condition, genetic information, marital status, and military and veteran status. Grantee and subcontractors shall ensure that the evaluation and treatment of their employees and applicants for employment are free from such discrimination and harassment. Grantee and subcontractors shall comply with the provisions of the Fair Employment and Housing Act (Gov. Code § 12990 (a-f) et seq.) and the applicable regulations promulgated thereunder (California Code of Regulations, Title 2, Section 7285 et seq.). The applicable regulations of the Fair Employment and Housing Commission implementing Government Code Section 12990 (a-f), set forth in Chapter 5 of Division 4 of Title 2 of the California Code of Regulations, are incorporated into this Grant Agreement by reference and made a part hereof as if set forth in full. Grantee and its subcontractors shall give written notice of their obligations under this

clause to labor organizations with which they have a collective bargaining or other Grant Agreement.

Grantee shall include the nondiscrimination and compliance provisions of this clause in all subcontracts to perform work under this Grant Agreement.

10. Timeliness

Time is of the essence in this Grant Agreement. The SGC and Grantee will work collaboratively to ensure this Grant Agreement is administered in a timely fashion.

11. Governing Law

This Grant Agreement is governed by and shall be interpreted in accordance with the laws of the State of California.

12. Unenforceable Provision

If any provision of this Grant Agreement is unenforceable or held to be unenforceable, then the parties agree that all other provisions of this Grant Agreement have force and effect and shall not be affected thereby.

Exhibit D, Special Terms and Conditions

1. Compliance with Laws and Regulations

By signing this Grant Agreement, Grantee certifies that it shall comply fully with all applicable federal, state, and local laws, ordinances, regulations, and permits and shall secure any new permits required by authorities having jurisdiction over the Project(s), and maintain all presently required permits. Grantee shall ensure that any applicable requirements of the California Environmental Quality Act are met in order to carry out the terms of this Grant Agreement.

2. Subcontractors

The SGC's contractual relationship is with Grantee, and not any of its subcontractors. Grantee is entitled to make use of its own staff and subcontractors, as identified in the Budget Detail Worksheet ([Attachment 4](#)), and will comply with its own competitive bidding and sole sourcing requirements for subcontracts that arise out of or in connection with this Grant Agreement. Grantee shall manage, monitor, and accept responsibility for the performance of its own staff and subcontractors, and will conduct Project activities and services consistent with professional standards for the industry and type of work being performed under this Grant Agreement.

Nothing contained in this Grant Agreement or otherwise, shall create any contractual relation between the SGC and any subcontractors, and no subcontract shall relieve Grantee of its responsibilities and obligations hereunder. Grantee agrees to be as fully responsible to the SGC for the acts and omissions of its subcontractors and of persons either directly or indirectly employed by any of them as it is for the acts and omissions of persons directly employed by Grantee. Grantee's obligation to pay its subcontractors is an independent obligation from the SGC's obligation to make payments to Grantee. As a result, the SGC shall have no obligation to pay or to enforce the payment of any moneys to any subcontractor.

3. No Third-Party Beneficiaries

This Grant Agreement is not intended for the benefit of any person or entity other than the parties, and no one other than the parties themselves may enforce any of the rights or obligations created by this Grant Agreement.

4. Project Monitoring and Oversight

Project monitoring and oversight is essential to ensure the Project stays within scope and is completed on schedule and within budget in accordance with this Grant Agreement.

5. Dispute Resolution

A. Invoice Disputes

- i. In the event of an invoice dispute, the TCC Grant Manager will notify Grantee in writing within fifteen (15) working days of receipt of the disputed invoice and follow up in writing using the Invoice Dispute Notification Template ([Attachment 6](#)).

- ii. During the dispute, both parties shall deal in good faith to resolve the dispute. Grantee shall continue to meet its responsibilities and obligations under the terms of this Grant Agreement.
- iii. If Grantee contests the decision made by the Grant Manager, Grantee shall submit a written "Notice of Dispute" on official letterhead, according to Subsection C below.

B. General Disputes

- i. In the event of a dispute unrelated to the dispute of an invoice, Grantee shall first attempt to resolve the dispute with the Grant Manager.
- ii. Both parties shall deal in good faith and attempt to resolve the dispute informally.
- iii. Grantee shall continue to meet its responsibilities and obligations under the terms of this Grant Agreement during a dispute.
- iv. If Grantee contests the decision made by the Grant Manager, Grantee shall submit a written "Notice of Dispute" on official letterhead, according to Subsection C below.

C. Contesting a Dispute Decision

- i. If Grantee contests a decision made by the Grant Manager, Grantee may submit a written "Notice of Dispute" on official letterhead. The "Notice of Dispute" shall include:
 - The Grant Agreement number
 - A complete description of the basis for the dispute
 - Legal authority or pertinent facts, supporting arguments and documentation
 - Action requested for resolution

The "Notice of Dispute" shall be sent to:

California Strategic Growth Council
Transformative Climate Communities Program
Attn: Program Manager
1400 10th Street
Sacramento, CA 95814

- ii. Within 30 days after receipt of the "Notice of Dispute," the Division Director shall review the dispute and submit a written decision to Grantee, which shall include:
 - The decision made
 - An explanation for the decision
 - Whether the decision shall be conclusive and binding or can be appealed and the steps to take to appeal the decision

6. Termination

- A. Completion of Project. This Grant Agreement shall terminate upon completion of the project and payment of the last invoice.
- B. Early Termination. Either Party may terminate this Grant Agreement upon thirty (30) days advance written notice by certified mail to the other Party. The notice shall specify the reason for early termination and may permit Grantee or the SGC to rectify any deficiency(ies) prior to the early termination date.

7. Waiver of Rights

- A. Grantee waives any and all rights to any type of express or implied indemnity or right of contribution from the SGC, its officers, agents, or employees for any liability arising from, growing out of, or in any way connected with this Grant Agreement.
- B. Grantee waives all claims and recourses against the SGC, including the right to contribution for loss or damage to persons or property arising from, growing out of, or in any way connected with or incident to this Grant Agreement, except claims arising from the gross negligence of the SGC, its officers, agents, and employees.
- C. None of the provisions of this Grant Agreement shall be deemed waived unless expressly waived in writing.

8. Insurance Requirements

- A. Grantee that is a governmental organization may provide evidence of sufficient self-insurance to satisfy the insurance requirements below.
- B. If Grantee is not a governmental organization or is unable to provide evidence of sufficient self-insurance, then the following are the insurance requirements:
 - a. Grantee must ensure the following insurance policies are obtained and kept in force for the term of this Grant Agreement, with no lapses in coverage, that cover any acts or omissions of Grantee and its employees engaged in carrying out any tasks specified in this Grant Agreement:
 - i. Workers' Compensation Insurance in an amount of not less than the statutory requirement of the State of California (California Labor Code § 3700 et seq.).
 - ii. Commercial general liability insurance in an amount of not less than \$1,000,000 per occurrence for bodily injury and property damage combined.
 - iii. Motor vehicle liability with limits not less than \$1,000,000 per accident for bodily injury and property damage combined. Such insurance shall cover liability arising out of a motor vehicle including owned or hired, and non-owned motor vehicles.
 - b. Insurance policies must name the State of California, its officers, agents, employees, and servants as additional insured parties for the commercial general liability and automobile liability insurance, but only with respect to work performed under this Grant Agreement.

- C. Grantee is responsible for guaranteeing that a copy of each Certificate of Insurance is submitted to the TCC Grant Manager within sixty (60) calendar days of the Grant Agreement signature. The grant number must be included on each submitted Certificate of Insurance.
- D. Grantee must notify the TCC Grant Manager prior to any insurance policy cancellation or substantial change of policy, including lapse of coverage, change in coverage amount, or change in carrier. Grantee shall submit proof of new or updated policy based on insurance requirements within thirty (30) days of policy cancellation or substantial policy change. Failure to provide proof of insurance may result in termination of this Grant Agreement.
- E. Grantee is responsible for determining the appropriate level of insurance, if any, for its Partners or subcontractors.

9. Stop Work

If it is determined, at the sole discretion of the SGC, that Grantee is not meeting the terms and conditions of this Grant Agreement, immediately upon receiving a written notice through certified mail from the SGC to stop work, Grantee shall cease all work under this Grant Agreement. The SGC has the sole discretion to determine that Grantee meets the terms and conditions after a stop work order, and to send through certified mail a written notice to Grantee to resume work under this Grant Agreement.

10. Publicity

Grantee agrees that it will acknowledge SGC in all publications, websites, signage, invitations, and other media-related and public-outreach products related to the TCC grant. SGC staff will provide SGC logo files and guidance on their usage directly to Grantee. Grantee agrees to adhere to the TCC Communications Kit provided by SGC (Exhibit E). If Grantee is planning an event or announcement, needs sample materials, or needs assistance or advice regarding digital or print materials, press, social media, and/or general communications, please contact your TCC Grant Manager.

- A. Long-Form Materials: Long-form written materials, such as reports, must include the following standard language about SGC and TCC:
 - . *The Transformative Climate Communities (TCC) Program funds community-led development and infrastructure projects that achieve major environmental, health and economic benefits in California's most disadvantaged communities. TCC empowers the communities most impacted by pollution to choose their own goals, strategies and projects to enact transformational change – all with data-driven milestones and measurable outcomes. This program is administered by the California Strategic Growth Council (SGC) which coordinates the activities of State agencies and partners with stakeholders to promote sustainability, economic prosperity, and quality of life for all Californians. www.sgc.ca.gov.*
- B. Press Releases, Flyers, and Visual Materials: Any informational materials that do not qualify as long-form, but that include at least a paragraph of text, such as press releases, media advisories, short case studies, some flyers, etc., should include following language:

- "[Project Name] is **supported** by California Strategic Growth Council's Transformative Climate Communities program with funds from California's General Fund.

Grantee may at times produce promotional materials that are primarily visual in nature, such as banners, signage, certain flyers, and sharable images for social media. In such cases, when including the above boilerplate language acknowledging SGC support is not practical, Grantee should instead include the official logo of SGC, preceded by the words "Funded by."

11. Drug-Free Workplace Certification

In signing this Grant Agreement, Grantee certifies that it will comply with the requirements of the Drug-Free Workplace Act of 1990 and will provide a drug-free workplace by taking the following actions:

- A. Publish a statement notifying employees that unlawful manufacture, distribution, dispensation, possession, or use of a controlled substance is prohibited and specifying actions to be taken against employees for violations.
- B. Establish a Drug-Free Awareness Program to inform employees about:
 - i. The dangers of drug abuse in the workplace.
 - ii. The person's or organization's policy of maintaining a drug-free workplace.
 - iii. Any available counseling, rehabilitation, and employee assistance programs.
 - iv. Penalties that may be imposed upon employees for drug abuse violations.
- C. Every employee who works on this Grant Agreement will:
 - i. Receive a copy of the company's drug-free workplace policy statement.
 - ii. Agree to abide by the terms of the company's statement as a condition of employment on this Grant Agreement.

Failure to comply with these requirements may result in suspension of payments under this Grant Agreement or termination of this Grant Agreement or both, and Grantee may be ineligible for award of any future State of California agreements if the SGC determines that any of the following has occurred: Grantee has made false certification, or violated the certification by failing to carry out the requirements as noted above (Gov. Code §8350 et seq.).

12. Americans with Disabilities Act

Grantee assures the SGC that it complies with the Americans with Disabilities Act (ADA) of 1990, which prohibits discrimination on the basis of disability, as well as all applicable regulations and guidelines issued pursuant to the ADA (42 U.S.C. 12101 et seq.).

13. Air/Water Pollution Violation Certification

Under State of California laws, Grantee shall not be: (1) in violation of any order or resolution not subject to review promulgated by the California Air Resources Board or an air pollution control district; (2) subject to cease and desist order not subject to review issued pursuant to Section 13301 of the Water Code for violation of waste

discharge requirements or discharge prohibitions; or (3) finally determined to be in violation of provisions of federal law relating to air or water pollution.

14. Payee Data Record Form - STD 204

This form must be completed by all Grantees that are not another state agency or other governmental entity.

Exhibit E, TCC Communications Kit



Communications Kit
Transformative Climate Communities Program Grantee



WELCOME TO THE CALIFORNIA STRATEGIC GROWTH COUNCIL GRANTEE COMMUNITY!

Our team believes everyone deserves to hear about the important work you're doing to put California cap-and-trade dollars to work through your Transformative Climate Communities Program (TCC) award. This Communications Kit provides you with tips and recommendations to help you spread the word far and wide, as well as information to ensure that you are well-equipped to comply with our publicity and communications requirements for all TCC grantees.

Dear Transformative Climate Communities Grantee,

Congratulations on your Transformative Climate Communities Program (TCC) award. All of your hard work has paid off! We look forward to working closely with you to achieve major environmental, health, and climate benefits your project promises.

Your work is important and deserves to be celebrated – both in your community and as a model for others. To help you spread the word, the communications and external affairs team at California Strategic Growth Council (SGC) has prepared this Communications Kit. As you plan communications and events related to your TCC award, please use this kit, which includes both 1) a set of communications and branding guidelines we require TCC grantees to follow, and 2) an array of resources and best practices that can help you streamline and enhance your communications efforts across traditional and digital media channels.

We hope this kit serves as a resource for your current project and provides you with tools that can help you harness and strengthen your continuing relationship with SGC. We're here, along with the Department of Conservation, as resources for you and your work.

If you are planning an event or announcement, need sample materials, or need assistance or advice, please contact SGC's Deputy Director of Communications and External Affairs, Emily Breslin, at emily.breslin@opr.ca.gov.

Thank you for your inspiring work to implement transformative, collaborative, community-driven, place-based projects: your work will help achieve major environmental, health, and equity impacts in your community. We look forward to partnering with you!

Best,

The California Strategic Growth Council Team



Publicity Requirements & Guidelines for TCC Grantees

SGC requires TCC grantees to acknowledge the California Strategic Growth Council and the California Department of Conservation (DOC) in all publications, websites, signage, invitations, and other media-related and public-out-reach products related to the TCC grant.

When using SGC's logo, use the color version only when the logo appears on a white background; on backgrounds of any other color, please use the white version of the logo.

LONG-FORM MATERIALS

Long-form written materials, such as reports, must include the following standard language about SGC, TCC, and DOC:

The California Strategic Growth Council's (SGC) Transformative Climate Communities Program (TCC) empowers the communities most impacted by pollution to choose their own goals, strategies, and projects to reduce greenhouse gas emissions and local air pollution. Administered in partnership with the California Department of Conservation, TCC funds community-led development and infrastructure projects that achieve major environmental, health, and economic benefits in California's most disadvantaged communities. For more information, visit sgc.ca.gov/programs/tcc/

PRESS RELEASES, FLYERS, AND VISUAL MATERIALS

Any informational materials that do not qualify as long-form, but that include at least a paragraph of text, such as press releases, media advisories, short case studies, some flyers, etc., should include the following language:

LONG VERSION:

"[Project Name] is supported by California Strategic Growth Council's Transformative Climate Communities Program strengthening the economy, and improving public health and the environment – particularly in disadvantaged communities."

SHORT VERSION:

"[Project Name] is supported by California Strategic Growth Council's Transformative Climate Communities Program."

MOSTLY VISUAL:

Grantees may at times produce promotional materials that are primarily visual in nature, such as banners, signage, certain flyers, and sharable images for social media. In such cases, when including the boilerplate language acknowledging SGC support is not practical, grantees should instead include the official logos of SGC and DOC preceded by the words "Supported by."

SIGNAGE

Grantees must post signs on project construction sites stating that SGC is providing financing through the TCC Program in an appropriate location(s), typeface and size conveying the following message:

[PROJECT NAME]

*THIS PROJECT HAS BEEN MADE POSSIBLE
BY FINANCING FROM*

*TRANSFORMATIVE CLIMATE COMMUNITIES
PROGRAM*

*THROUGH THE CALIFORNIA STRATEGIC GROWTH
COUNCIL*

The sign should also include the SGC and DOC logos. Please refer to the "Publicity" section of the TCC Grant Agreement for specific, additional guidelines about signage.

MEDIA INQUIRIES

TCC Grantees must identify a point of contact for all press inquiries and communications needs related to the project and provide the name, phone number and email address of this individual to SGC. Grantees must also distribute a press release after grant decisions are made at SGC's Public Council Meeting and are encouraged to do so for other major milestones throughout the lifecycle of the grant. All press releases must be approved by SGC's Chief External Affairs Officer prior to distribution and SGC must be alerted and invited to participate in any and all press conferences related to the grant.

COMMUNICATIONS MATERIALS & PHOTOS

TCC grant recipients must prepare one or more two-to-four-page documents that provide a summary of the grant components and tell the story of the project development process and/or implementation. All such materials must be approved by SGC's Chief Communications Officer prior to distribution. SGC may display such materials on its website.

In addition, SGC requires TCC grantees to share between 8-24 high-resolution, color photos with SGC during the project period. These photos should include pictures of both people and the project. SGC reserves the right to use these photos across any and all of its communications platforms.

SOCIAL MEDIA

SGC encourages TCC grantees to use social media to share the process of creating and developing a TCC pro-posal as well as stages of the project's implementation. Grantees must tag @CalSGC and @CalConservation in all Tweets related to the TCC grant; tag California Strategic Growth Council and California Department of Conservation on LinkedIn; on Facebook and other platforms, please mention California Strategic Growth Council and California Department of Conservation.



Spread the Word

Here are a few effective ways to raise awareness around your important work. In every case, we recommend a clear, concise writing style that avoids technical terms and is easy for most readers to access. Be sure all of your communications comply with the Publicity Requirements and Guidelines on pages ____-____ of this kit.

CREATE A WEBSITE

One of the best ways to share the latest information about the progress of your TCC project is to compile everything the public needs to know into well-organized website. Your website should be simple and inviting, with sections explaining who you are, what the TCC program is, and why the project is important. Keeping the website updated with your latest accomplishments and steps taken to achieve your goals will keep members of your community enthusiastic and engaged. You can choose from dozens of inexpensive website templates, such as Wix, Square Space, and WordPress.

PRESS RELEASES & MEDIA ADVISORIES

If you're interested in getting mentioned by your local news outlets (newspapers, web-based news, radio, television), you've got to alert reporters, editors, hosts, news desks, and producers in your local media market. Here are a couple ways to get their attention (in both cases, include a contact name, title, phone number, and email at the top):

PRESS RELEASE

This is a narrative piece that tells the reader a story. Your best bet is to write it in the style of a story you'd read in the newspaper. Start with the most important part so that the reader knows immediately what you want to tell them about. From there, add details to flesh out the story (the amount of the grant, the number of affordable units,

total emissions reductions), along with quotes from people who are engaged with your project – for example, representatives from partner organizations, residents who engaged in project design, and SGC's Executive Director. Some media outlets might publish your press release as is! Others will follow up with questions or to interview someone.

MEDIA ADVISORY

This is a short piece you send to reporters, editors, hosts, news desks, and producers when you want to invite them to attend and cover an event, such as a groundbreaking, ribbon-cutting, dedication, etc. Make sure you answer the most important questions (who/what/when/where/why/how) and emphasize what makes your story worthy of media attention – as well as what photo opportunities will be available at the event.

SOCIAL MEDIA

Numerous social media platforms support digital storytelling and promotion. Use your existing platforms to talk about your TCC project. We also encourage you to follow SGC on Twitter and LinkedIn so we can watch for and share your updates about your TCC project. Please see our social media section of this kit for more details.

BLOG POST

If you or any of your partners currently has an active blog, we encourage you to write a post highlighting the progress or impact of your TCC project. For example, ask a project partner to write a guest blog or sit with you for a Q&A to highlight some of the specific benefits of their programs, who is receiving those benefits, and how the community has been involved. After you've posted your blog, you can share it on your social media platforms!



NEWSLETTER

If you or any of your TCC partners have a newsletter or listserv, please share your award announcement and other important milestones through that platform. Encourage community leaders and/or elected officials who work with you frequently to announce TCC milestones through their newsletters or listservs as well. Please contact us at SGC so we can share your important TCC milestones through our newsletter as well!

OP-ED OR LETTER TO THE EDITOR

Consider writing an op-ed or letter to the editor of your local newspaper to raise awareness of your new TCC award and the benefits it will bring to your community. A good approach is to acknowledge the various stakeholders involved in the planning process, name the specific benefits this project will bring to members of your community, and emphasize the place-based, community-driven approach to this project using TCC's model. An op-ed is typically around 600 words (it depends on the outlet) and you submit it to the Op-Ed Editor; it is best to reach out to this editor with an outline for your piece and ask if they're interested in running a developed piece from you. A letter-to-the-editor is short – usually under 200 words – and you just submit it directly to the letters section of the outlet.



Events and Engagement

Events with community members, leaders, and elected officials can be a draw for the press, as well as for local residents, and are a great way to build excitement about your TCC project.

HOLD A PROJECT AREA TOUR AND RIBBON CUTTING CEREMONY

Invite project partners, elected officials, funders, and other stakeholders to speak at the event. SGC staff members and Council members try to be available to participate in these events. Invite local media to attend the event (see “Media Advisory” on page _____) and provide enough information that they’ll be excited to cover it.

Do a press conference right before the ribbon cutting. Plan the message you want attendees to take away from the event, so you can craft speakers’ dialogue around it. Generally, you want to agree in advance with your speakers about what angles they’ll cover – that way, you can be sure all the important points get attention without too much repetition. Let speakers know how much time they have for their comments – typically 4-5 speakers giving comments for about 2 minutes each is plenty for a press conference. Leave time for questions at the end. You’ll need a master of ceremonies who introduces each speaker, facilitates the Q&A, and keeps the program on-track. And an audio amplification system – a microphone and a speaker – is usually important, unless you are in a very quiet space.

Give yourself plenty of time to secure the location, publicize the event, invite press, gather equipment and any visual materials, and ensure spokespeople are fully prepared.

HOST COMMUNITY EVENTS

Organizing a fun kick-off meeting and other community events for stakeholders and the general public is a great way to raise awareness about your TCC award and get more people involved in the planning and implementation process. These kinds of events can help make sure everyone is on the same page and united in your mission, as well as enthusiastic about the tangible benefits your project will create.

REMEMBER

The SGC team is here to help! We love to work with grantees to brainstorm communication strategies. We can provide quotes from SGC leadership for your press releases and make leadership available for media interviews. We can coach you on how to pitch media, help you identify reporters, and help secure participation by State officials in your event. Contact SGC’s Deputy Director of Communications and External Affairs, Emily Breslin, for support: emily.breslin@opr.ca.gov.



Social Media

Social media offers an array of powerful, free platforms that enable you to communicate about your TCC project to potentially large audiences.

FOLLOW US

The California Strategic Growth Council (@CalSGC) and the Department of Conservation (@CalConservation) post frequently on Twitter about the State's efforts to improve our environment and communities. SGC and DOC are also active on LinkedIn. We encourage you and your TCC partners to follow our accounts to stay up to date on the latest news on our policies and programs. If we tweet about TCC, or about anything else relevant or interesting to you, please 'like' and retweet us – sometimes it can even save you the trouble of crafting your own tweet.

TAG US

We love seeing grantees' progress from vision to reality. Please post updates and photos of project events or outcomes on social media, and make sure to tag us so that we can like, comment, and retweet to share your hard work with all of California.

TAG YOUR PARTNERS

Remember to include co-applicants and other key stakeholders and champions in social media posts about your TCC award. Tagging partners gives them the recognition they deserve while increasing the audience for your post.

USE HASHTAGS

Hashtags can be a very effective way to increase a post's visibility and response rate. It is best to use a few relevant hashtags, like #TransformativeClimateCommunities, #transit, #equity and #climatechange.

TAKE PICTURES

A social post with a great image attached is bound to get more traction than one without an image. Throughout every stage of the TCC process, be sure to encourage your team to bring their phones or even a nice camera and take a picture of their colleagues or work environment. Having a photobank of pictures can work wonders on your social media accounts, especially because you'll have the freedom to choose the highest quality or most interesting photos. Please see the Photo Tips section of this kit for more information.

SHORTEN THE MESSAGE

Given the character limit for tweets, you will need to pick and choose what information to include. Incorporate hashtags and tagging partners into your sentences, (see the sample posts below). Use commonly known abbreviations and conjunctions.

AMPLIFY THE VOICES OF COMMUNITY MEMBERS

Reach out to partners and community members for their videos, quotes, and pictures that share how your TCC project will affect their lives. These stories can increase your social media audience's enthusiasm for your project. Retweeting posts that residents and stakeholders create is another way to demonstrate TCC's impact.

POST OFTEN

Interact with your audience as much as possible on all platforms. It is ideal to post between a few times a week and once or twice a day on social media. Brainstorm with your staff to come up with creative ways to keep the public informed and interested in your work. Then create a schedule and remain consistent.

MORE SOCIAL MEDIA TIPS

- » Encourage audience engagement by posting questions.
- » Use URL shortening tools from sites like bitly.com and tinyurl.com.
- » Don't be afraid to use emojis.
- » Encourage your colleagues and TCC partners to participate in social media conversations.
- » Be visual! Use infographics instead of text when possible.
- » Observe copyright laws.



Photo Tips

Consider pointers in this section when using photography to tell your project's story.

QUALITY

Use the highest quality camera you can access. Good news: many modern smartphones are usually sufficient, as long as your subject is in focus, well-lit, and the phone is turned sideways (landscape orientation – use this orientation for videos, too!). Photos on social media don't have to be as high quality as photos on your website or newsletter.

EVERYONE'S A PHOTOGRAPHER

Encourage your staff and partners to take photos whenever they have the chance, and to send them all to your organization's communications team. Designating someone who owns a nice camera to take photographs during events is always a good practice.

DON'T HAVE A GREAT PHOTO?

Services like Flickr, Pixabay, and Unsplash offer countless high-quality photos that you can download and use for free.

CONTENT

When possible, photos should be bright and colorful, without being too 'noisy,' blurry, or filtered. Candid photos of people working or interacting tend to be more unique and eye-catching than people smiling at the camera. Highlight interesting aspects of your project so your photo stands out.

REMEMBER

The picture is what draws people in to read the caption and learn about your work. Don't underestimate its importance!



STAY IN TOUCH!

Feel free to contact SGC's Deputy Director of Communications and External Affairs, Emily Breslin, if you have questions or need support on any of your communications efforts at emily.breslin@opr.ca.gov.

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