



DEPARTMENT OF PESTICIDE REGULATION ALLIANCE GRANTS PROGRAM 2024 SUPPLEMENTAL GUIDANCE DOCUMENTS

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ALLIANCE GRANT PROPOSAL APPLICATION OVERVIEW

I. GETTING STARTED WITH YOUR ALLIANCE GRANT PROPOSAL APPLICATION

Here are some tips and recommendations to help you get started with your proposal application:

- Carefully review the [solicitation](#).
- Review the “Considerations for Developing Your Proposal Application” in Section II of this document for additional information that will aid you in creating a complete proposal.
- Familiarize yourself with the “Ranking Considerations for Reviewers” section of the [solicitation](#) to identify the criteria that will guide DPR staff and Pest Management Advisory Committee (PMAC) members when reviewing proposal applications and placing proposal applications in rank order.

- Complete all mandatory documents, and any desired optional documents, and submit them with the [proposal application](#).
- Please contact DPRpmGrants.Solicitation@cdpr.ca.gov with any additional questions you may have.

II. CONSIDERATIONS FOR DEVELOPING YOUR PROPOSAL APPLICATION

The following additional information and/or consideration points may assist you in developing a complete and competitive proposal.

1. Proposals must be a good fit to the funding priority stated in the solicitation.

DPR is soliciting Alliance Grant proposal applications that seek to promote or increase the implementation, expansion, and/or adoption of effective, proven, and affordable integrated pest management (IPM) systems or practices that reduce risks to public health and the environment in agricultural, urban, or wildland settings.

Successful applications will demonstrate strong partnerships, outreach, and/or an educational or training component to promote IPM and the broad application of the proposed IPM systems or practices. The most successful Alliance Grant projects are those that can serve as a model for similar situations and have a high potential for wide adoption.

The 2024 Alliance Grants Program is particularly seeking applications that address one or more of the following topic areas:

- IPM for underserved or disadvantaged communities;
- Decreasing the use of high-risk/high-volume pesticides (such as fumigants like 1,3-dichloropropene or sulfuryl fluoride);
- Advancement of urban IPM and safer, more sustainable pest management tools and strategies in urban settings;
- Advancement of IPM and safer, more sustainable pest management tools and strategies in agricultural settings adjacent to or near a school(s);
- Meeting the IPM needs of small growers; and/or
- **TWO or more** of the three sustainability pillars noted below and referenced in the [Sustainable Pest Management \(SPM\) Roadmap](#):
 1. Human Health and Social Equity,
 2. Environmental Protections,
 3. Economic Vitality

The project must not be contingent on additional research. Projects with IPM research should apply to DPR's [Research Grants Program](#).

2. Alliance Team formation, IPM adoption, and implementation

Assembling an effective Alliance Team is essential to the success of the project. Alliance Team members should include active participants such as: commodity group representatives, growers, academic and private researchers, school district representatives, representatives of public

health entities, urban or industry representatives, sustainability or certification programs, non-governmental organizations (NGOs), and other entities with a regional scope. Roles and expectations for each member should be developed, along with the project goals and objectives, to ensure Alliance Team members have a significant stake in the project.

A needs assessment survey can be an efficient and useful way to begin and plan for a new project. It can provide beneficial insights and the results can be used to modify project plans. Depending on the complexity of the project, a needs assessment may be an important first step in planning the project.

The creation of training programs should include time and travel funds for trainers to meet and practice as part of the scope of work and budget. The creation of on-line courses requires experienced online course designers and a realistic estimate of time required. Content must come from those who are “experts” and their costs, if any, must be included in the scope of work and budget.

3. Ensure the budget aligns with the work being performed and is fully justified.

Reviewers sometimes find it difficult to reconcile the amount of money being requested with the work proposed to be performed. In some cases, the amount may seem inadequate; and in others, overestimated. Please be clear and thorough in justifying the project’s budget in the budget justification section of the scope of work and budget information and double check all calculations in the budget tables worksheet and any needed subaward budget tables worksheets. Note that DPR cannot fund out-of-state travel.

If you need help developing your budget, please consider watching our informational video on “Budgets and Budget Justifications.”

4. Ensure all personnel and staff belong to the same organization as the grantee’s principal investigator.

To receive grant funds as personnel, staff must be paid through the same organization as the principal investigator (see the terms and conditions section of the grant agreement template for who can be a principal investigator). If staff cannot receive funds through the principal investigator’s organization, they must instead be listed as subcontractors. Alliance Team members who are members of an entity submitting a budget and who will donate their time, resources, etc. in kind and will not be receiving grant funds can be listed as personnel for that entity.

5. The proposed project must be a ‘stand-alone’ project even if it is a component of a larger outreach endeavor.

If all external aspects of the outreach endeavor were removed, the DPR-funded project must still be able to achieve all objectives and deliverables with the amount funded under the grant agreement. Additionally, the project budget should not contain funds that support activities outside of the described scope of work. Please note that this requirement precludes any sources of matching funding.

- 6. The full text of each key cited reference (limited to a maximum of five references) supporting the proposal’s merits, whether the reference is an unpublished report or a published paper, must be provided as a PDF document.**

Key cited documents supporting your proposal application are an important way to show the viability of your idea. Key cited documents that show the efficacy of an idea, economic feasibility, and potential value to the public can significantly strengthen a proposal application’s merits.

ALLIANCE GRANTS FREQUENTLY ASKED QUESTIONS

GENERAL QUESTIONS ABOUT THE ALLIANCE GRANTS PROGRAM

1. What is an Alliance Team?

An Alliance Team is the group of individuals and organizations with broad influence as experts in their fields of work who will jointly accomplish the goals laid out in the proposal application. An Alliance Team should include a lead principal investigator who will oversee coordination of the project. Team members can include a broad swath of participants, but the best Alliance Teams have members with relevant knowledge in the field of study and strong connections to the intended audiences.

Assembling an effective Alliance Team is essential to the success of the project. Alliance Team members should actively participate in the project and have these types of industry or community affiliations: commodity group representatives, growers, academic and private advisors, school district representatives, representatives of public health entities, urban or industry representatives, sustainability or certification programs, non-governmental organizations (NGOs), and other entities with a regional scope. Roles and expectations for each member should be developed, along with the project goals and objectives, to ensure Alliance Team members have a significant stake in the project.

The most competitive applications will be those that form their Alliance Team of members from more than one organization, prior to applying, and include letters of support from members.

For more on building a strong Alliance Team, please reference our “Building a Strong Alliance Team” informational video.

2. How do Alliance Grants differ from Research Grants?

DPR’s two grant programs comprehensively promote IPM advancement by funding both new IPM knowledge development as well as IPM knowledge-sharing and implementation. The Research Grants Program funds the research and development of new IPM tools and practices while the Alliance Grants Program funds the implementation, expansion, and/or adoption of effective, proven, and affordable IPM practices at the user level. Knowledge gained from a DPR Research Grant could be a great source for an eventual Alliance Grant proposal. If you’re struggling to decide which program your ideas fit into best, please reference our “Purpose and Priorities” informational video.

3. Can work be conducted outside the state of California?

Yes. However, work conducted outside of California must be in California-like conditions and the project must benefit Californians. Additionally, note that travel outside of California cannot be funded.

4. Can multiple applications for different projects be submitted?

Yes. Principal investigators and institutions may submit multiple proposal applications for funding. Proposals are evaluated independently, and DPR has made multiple awards to the same principal investigator in a single funding cycle. However, principal investigators should be mindful and ensure they are capable of successfully completing the required tasks for all proposals submitted and any ongoing work consistent with DPR’s “Reasonable Efforts” term and condition.

QUESTIONS ABOUT WHO CAN APPLY

5. Am I eligible to apply for an Alliance Grant?

All principal investigators, key personnel, subawardees, subcontractors, and consultants must meet all eligibility requirements laid out in the eligibility requirements section of the solicitation.

6. Can private entities apply?

Yes. Please note that all DPR grant recipients are bound by the terms and conditions laid out on our website, including provisions concerning public use of data and project results. Please review all terms and conditions carefully before applying.

QUESTIONS ABOUT FUNDING PRIORITIES, FUNDING DECISIONS & SPECIFIC PROJECT TYPES

7. Are there any funding priorities?

Yes. For 2024, DPR has identified the following priority topic areas:

- IPM for underserved or disadvantaged communities;
- Decreasing the use of high-risk/high-volume pesticides (such as fumigants like 1,3-dichloropropene or sulfuryl fluoride);
- Advancement of urban IPM and safer, more sustainable pest management tools and strategies in urban settings;
- Advancement of IPM and safer, more sustainable pest management tools and strategies in agricultural settings adjacent to or near a school(s);
- Meeting the IPM needs of small growers; and/or
- **TWO or more** of the three sustainability pillars noted below and referenced in the [Sustainable Pest Management \(SPM\) Roadmap](#):
 1. Human Health and Social Equity,
 2. Environmental Protections,
 3. Economic Vitality

For examples of the variety of Alliance Grants DPR has funded in the past, please visit our [funded projects webpage](#).

8. How many projects are expected to be funded?

Project budgets may range from \$50,000 to \$800,000.

The number of proposals funded varies according to many factors such as the number of proposals received, the available funding pool, and how Pest Management Advisory Committee and DPR reviewers perceive the project value to Californians. It is recommended that projects with budgets near the funding pool maximum demonstrate a particularly compelling benefit to Californians.

9. Are cannabis projects allowed?

Yes, we consider all projects that focus on increasing the implementation, expansion, and/or adoption of effective, proven, and affordable IPM systems or practices that reduce risks to public health and the environment, including those related to cannabis. Please note that projects which cannot establish a reduction in high-risk pesticide usage from a legally applied pesticide are ineligible for funding.

QUESTIONS RELATING TO FEDERAL OR TRIBAL ENTITIES

10. My institution is a tribal or federal agency and cannot agree to certain non-UC terms and conditions. What should I do?

Please carefully review the DPR terms and conditions and contact DPR at DPRpmGrants.Solicitation@cdpr.ca.gov with any questions or concerns regarding terms and conditions. Additionally, please check the appropriate box in the proposal application form noting that you have contacted DPR regarding this issue prior to submitting your proposal.

11. I'm a federal or tribal agency applicant and must abide by a specific travel policy. What should I do?

Review the frequently asked question relating to allowable travel to identify any concerns relative to your travel policy and reach out to DPR staff to discuss specifics prior to submitting a proposal application.

QUESTIONS ABOUT WHAT CAN BE INCLUDED IN A BUDGET

12. Is match funding allowed?

No, the entire set of project objectives, tasks, and deliverables must be completed with funds from the proposed budget. No outside funding is allowed to support project activities. However, please note that in-kind contributions are allowed. Allowed in-kind services include personnel time given to project by team members, the use of team member's existing equipment or facilities, and donations of materials by team members.

13. Can I pay for work conducted outside my organization?

Yes, but only through subcontracts or subawards. For more information, please review the terms and conditions ([UC/CSU Applicants – Exhibits C and G](#), [Non-UC/CSU Applicants – Exhibit C](#)).

14. What purchases qualify as equipment?

Equipment is defined as having a useful life of at least one year, having an acquisition unit cost of at least \$5,000, and purchased with grant funds. Equipment is also defined as any products, objects, machinery, apparatus, implements, or tools purchased, used, or constructed within the grant, including those products, objects, machinery, apparatus, implements, or tools from which over thirty percent (30%) of the equipment is composed of materials purchased for the grant.

15. What travel is allowable?

Only travel within the state of California is allowable. Travel costs associated with visits to sites outside of California, including scientific conference locations, are not allowed. Additionally, any travel originating or ending out of the state is not allowed.

Any travel must be included in the approved budget.

For non-UC applicants, travel and reimbursement for travel costs shall be in accordance with the California Department of Human Resources' (CalHR) travel policy in effect as of July 1 of the fiscal year in which the grant agreement is executed. The CalHR travel policy is found at:

<https://www.calhr.ca.gov/employees/pages/travel-reimbursements.aspx>.

Travel and reimbursement for University employee travel costs shall be in accordance with the University's travel policy in effect as of the date the cost is incurred. The University's travel policy is found at:

- [UC] <https://www.ucop.edu/central-travel-management/resources/index.html>
- [CSU] <http://www.calstate.policystat.com/policy/10083590/latest>

QUESTIONS ABOUT HOW TO COMPLETE/DEVELOP A BUDGET

16. How do I complete the budget and budget justification?

Complete the budget tables worksheet and any needed subaward budget tables worksheets found on the [Alliance Grants Application Materials](#) webpage. These spreadsheets will calculate the numbers needed to fill out the budget and budget justification sections of the proposal application. Note: these numbers *must* match between the two documents.

You may have institutional resources available for these sections – grant offices or other administrative divisions often are helpful in drafting and revising budgets. See the sample Alliance Grant scope of work and budget section of this document for an example. The Research Grants Program guidance document also contains a sample scope of work and budget available for review.

If you have further questions, please reference our “Budgets and Budget Justifications” informational video.

17. Can I submit my budget and budget justification in another format?

No, the budget tables worksheet and any needed subaward budget tables worksheets, budgets, and budget justifications must all be submitted using the provided formats.

18. Can I use my organization’s internal software to calculate budgetary numbers?

Yes, any software may be used to prepare the budget calculations, as long as the values are transferred to the document provided in the application materials. Note that DPR manually reconciles amounts listed in the budget using the values provided in the budget justification and budget tables worksheet (and any needed subaward budget tables worksheets). It is the applicant's responsibility to ensure that all values, including those obtained via internal software, can be reconciled manually using the values provided in the budget justification and budget tables worksheet (and any needed subaward budget tables worksheets). Applicants may choose to include a copy of their budget software’s outputs as an optional attachment; however, such materials cannot be used in lieu of the provided application materials.

19. How do I specify in-kind contributions in the budget justification?

In-kind contributions should be specified in the applicable sections of the budget justification. For example, if the in-kind contribution is time and service of an individual, that should be stated in the personnel section. If the in-kind contribution is equipment or materials and supplies, it should be stated in the relevant section. It is not necessary to include in-kind contributions in the budget tables worksheet and subaward budget tables worksheets.

20. What is the MTDC?

The MTDC is the modified total direct cost that is used to calculate the indirect costs associated with the grant.

21. How do I calculate the MTDC?

The MTDC is calculated for each year by totaling all the direct costs that are allowed to have associated indirect costs. The MTDC includes all salaries and wages, fringe benefits, materials, supplies, services, travel, consultants, and subcontracts (up to the first \$25,000 of each subcontract).

22. Which direct costs cannot be included in the MTDC calculation?

Certain direct costs are not allowed to have associated indirect costs and must not be included when calculating the indirect cost for the grant. These costs include costs associated with equipment, capital expenditures, patient care charges, tuition remission, rental costs, scholarships and fellowships, and the portion of any subcontract in excess of \$25,000 cannot be included in the MTDC calculation.

23. What is the indirect cost rate?

This rate is the percentage of the MTDC that can be claimed as indirect costs. DPR limits the indirect costs rate to a maximum rate of 25%. Please use a single, percentage-based calculation for indirect cost rates.

24. How are indirect costs calculated for budgets involving multiple UC campuses or multiple CSU campuses?

In these cases, indirect costs are not calculated for individual subrecipients. Instead, the MTDC of each subrecipient is added to the main MTDC to calculate indirect costs.

For example, if the grantee for a grant is the Regents of the University of California, and there are other UC campuses and/or UCANR listed as subcontractors or subrecipients, only the campus associated with the principal investigator may charge overhead on the costs attributed to the other campuses and/or UCANR. In other words, all relevant UC costs must be combined into a single amount (in the main budget table) and the indirect cost rate of 25% must be calculated on that combined amount. Indirect costs for budgets involving multiple UC campuses and/or UCANR should be denoted as 0% in each UC campuses and/or UCANR subaward table.

The Regents of the University of California is responsible for internally allocating the overhead among the various subrecipients. Applicants should refer to their UC or CSU institution to determine how indirect costs for subrecipients/subawardees are allocated, as this should be in accordance with UC or CSU policies.

However, an indirect cost rate of 25% may still be charged on non-UC/UCANR subcontracts up to the \$25,000 cap.

QUESTIONS ABOUT SUBCONTRACTS/SUBAWARDS/SUBRECIPIENTS

25. Can subcontracts or subrecipients be outside of the state of California?

Yes. Subcontracts and subrecipients may be outside of California. As a reminder, proposals are assessed based on their benefit to Californians.

26. What is the difference between a subcontractor and a subrecipient?

A subcontractor is an independent entity that will be collaborating with or providing a service to the applicant to complete the objectives of the grant. Note that to receive grant funds as personnel, staff must be paid through the same organization as the principal investigator. If staff cannot receive funds through the principal investigator's organization, they must instead be listed as subcontractors.

Subrecipients are a specific classification of subcontractor that applies to UC/CSU applicants only. Applicants should refer to their UC or CSU institution for guidance on whether or not a subcontractor meets the criteria of a subrecipient.

27. If my project includes multiple subcontractors/subrecipients, should they each have their own line in the budget table?

Yes. For each subcontractor, the total costs per year (combined direct and indirect costs) should be entered on the respective line in the budget justification and budget tables worksheet.

28. Do subcontractors and subrecipients need their own budget table and budget justification?

Yes, each subcontractor and/or subrecipient will need to complete a subaward budget tables worksheet and budget justification.

29. How are subcontractors incorporated into the MTDC calculated in the main budget?

There is a \$25,000 total maximum limit allowed for each subcontract over the term of the grant that can be factored into the MTDC of the main budget.

For example, consider a budget with one subcontractor whose total costs per year are \$15,000 in year 1, \$12,000 in year 2, and \$7,500 in year 3. In year 1, the \$15,000 can be factored into the year 1 main budget MTDC. In year 2, \$10,000 can be factored into the year 2 main budget MTDC. The \$25,000 maximum limit for this subcontractor has been reached in year 2, so the remaining year 2 cost of \$2,000 cannot be included in the year 2 main budget MTDC and the year 3 cost of \$7,500 cannot be included in the year 3 main budget MTDC. Instead, these costs over the \$25,000 limit are direct costs not subject to indirect costs.

See table below showing how this should be shown.

Direct Cost Type	Year 1	Year 2	Year 3	Total
Subcontractor total direct costs	\$15,000	\$12,000	\$7,500	\$34,500
Direct costs that can be factored into the main budget MTDC	\$15,000	\$10,000	\$0	\$25,000
Direct costs that cannot be factored into the main budget MTDC	\$0	\$2,000	\$7,500	\$9,500

30. How are Indirect Costs calculated for subcontractors?

Indirect costs for subcontractors are calculated the same as in the main budget.

SAMPLE ALLIANCE GRANT SCOPE OF WORK AND BUDGET

To assist you in developing your proposal application, DPR has developed a **fictional** sample scope of work and budget for the Alliance Grants Program. Please note that this sample is ONLY intended to provide a comprehensive example of a properly completed and formatted Section 3. All names are invented for this example and any similarity to an actual individual is coincidental.

This **fictional**, yet illustrative sample is not intended to describe DPR's preferred grant topics or budget sizes for the 2024 Alliance Grants Solicitation, nor is it intended to limit creativity. For examples of the variety of Alliance Grants DPR has funded, please visit our [funded projects webpage](#). For questions regarding the sample scope of work and budget, please contact DPRpmGrants.Solicitation@cdpr.ca.gov.

For an additional example of a completed scope of work and budget document specific to the Research Grants Program, see the [2024 Research Grants Guidance Document](#). Please note that while these documents bear many useful similarities, some sections of each scope of work are specific to the Research and Alliance Grants Programs.

SECTION 3: SCOPE OF WORK AND BUDGET

(20 Percent Weight)

Project Abstract:

Provide a succinct (600 characters maximum) and accurate abstract of the project, including the project purpose, priorities, scope, and grant beneficiaries. Beneficiaries include any communities, persons, or entities that benefit from this funding. This summary should be in clear language and understandable to technical and non-technical readers.

The purpose of this project is to broaden the use of a proven practice, early detection and rapid response (EDRR), to optimize management of invasive plant species in California's wildlands and reduce the need for pesticide applications. This project proposes to employ community science by engaging members of the public, volunteer groups, and work crews, and giving them the tools to detect and record potentially invasive plants. The Alliance Team includes groups that have signed on to carry out monitoring for invasive species and land managers who have committed to responding to detections.

Project Summary:

Provide a succinct (1 page maximum) and accurate description of the project. The summary should include the target audience and geographical area; the outreach/communication framework in place; the potential for implementation, expansion, or adoption; and the methods for measuring success. Additionally, the summary should address the relevance of the project to the mission of the department.

Sample Scope of Work and Budget

This project seeks to broaden the use of early detection and rapid response (EDRR) to optimize management of invasive plant species in California’s wildlands and reduce the need for pesticide applications.

Invasive plants pose significant threats to California ecosystems – degrading rangeland, increasing the potential for wildfire and flooding, consuming water, and decreasing biodiversity. While prevention is the preferred method of protecting ecosystems from invasion, vigilant monitoring and swift action is crucial to catching any non-native species that manage to establish. With the significant rise in park usership in recent years and increased fuel reduction work in wildlands, the potential for non-native species to be introduced has likewise surged. However, this influx of park visitors, volunteers, and staff also offers an opportunity to expand surveillance efforts, especially with the advent of cell phone applications that allow one to identify and document a plant in minutes.

This project proposes to employ community science by engaging members of the public, volunteer groups, and work crews, and giving them the tools to detect and record potentially invasive plants. The Alliance Team includes groups that have signed on to carry out early detection of invasive species and land managers who have committed to rapidly responding to detections (letters of support provided in application package). Efforts will initially focus on the Sacramento Valley before expanding throughout California with outreach to other regions (letters of support from partnering regions included in application package).

In accordance with the spirit of the Alliance Grants Program, this project builds upon successful programs, such as those coordinated by Native Habitat Society and Wildlands Coalition (supporting documents provided in application package), leveraging the availability of identification and mapping software to increase collaboration and scale up integrated pest management (IPM) efforts in wildlands. Furthermore, by facilitating relationships and direct channels between community scientists and local land managers, this project will demonstrate how EDRR can be implemented more widely and efficiently, yielding healthier ecosystems and safer, more sustainable pest management.

Alliance Team Members:

Provide the names, organizations, and role on the project (principal investigator, key personnel, or non-key personnel) for all identified members of the Alliance Team. Add additional rows to the table as needed. Succinct definitions of the roles are listed below; for the full descriptions of the roles, please see the relevant terms and conditions for your university or organization.

- *Principal investigator: individual(s) that has the primary responsibility for financial management and control of project funds and is responsible for all aspects of project administration*
- *Key personnel: individuals who contribute to the scientific development or execution of the project in a substantive, measurable way, whether or not salaries are requested*
- *Non-key personnel: individuals that are not specifically required for completion of the Scope of Work*

Sample Scope of Work and Budget

Name	Organization	Role on the project (principal investigator, key personnel, or non-key personnel)
Anne Vassiv	California Habitat Conservancy	principal investigator
Erin Dao	California Habitat Conservancy	non-key personnel
Tim Ericks	California Habitat Conservancy	non-key personnel
Beau Tannock	CalPhyta	key personnel
Al Anthis	California Wildlands Protection Agency	key personnel
Rob Inya	Sacramento Valley Regional Park District	key personnel
Phil Ariss	Boots On Sacramento	non-key personnel
Sal Zola	Friends of Sacramento Parks	non-key personnel

Goals:

Describe the goals of the project in a bullet-point list. List the specific objectives, provide tasks to achieve the objectives, and provide a deliverable and deliverable due date for every task. DPR-required objectives, tasks, and deliverables are included under Objective 1. The grantee is required to provide project-specific objectives, tasks, and deliverables following Objective 1.

- Devise a plan for land managers to verify observations submitted by community members and field crews and implement appropriate control methods.
- Engage and educate community members and field crews to be able to identify and document observations of invasive and EDRR-listed species.
- Evaluate and refine EDRR program for future adoption.
- Perform outreach by promoting and demonstrating program in other regions.

Objective 1: Conduct general grant administration and deliver an outreach plan, required meetings, quarterly and annual progress reports, invoices, and a final report. ***(Do Not Modify Objective 1 and its associated tasks. These are required for all DPR grants.)***

Task 1.1 Initial project meeting: The grant manager and the principal investigator will meet in person or virtually within 30 days after the grant agreement has been executed. The agenda will be to review the role of the principal investigator, the project timeline, the project deliverables, and to discuss any questions about the objectives and tasks. The grant manager may require additional meetings as needed. The grant manager will write up meeting minutes and share with all attendees after the meeting.

Deliverable: Meeting agenda as a Microsoft Word file via email (one week in advance) and revisions to the meeting minutes (within 14 days of receiving the meeting minutes).

Due Date: Meeting within 30 days from the full execution of the grant agreement and meeting minute revisions within 14 days of receiving meeting minutes.

Sample Scope of Work and Budget

Task 1.2 Outreach plan: Provide an outreach plan for Department's review and approval that provides the Alliance Team members, the schedule, the methods to accomplish the outreach, and the measures of success for determining if the outreach is effective.

Deliverables: The outreach plan as a Microsoft Word file inclusive of written explanations, tables, figures, or images needed to fully convey the plan.

Due Date: Within 30 days after the grant agreement is executed.

Task 1.3 Invoices: Periodic invoices, a final invoice, and an invoice for the return of the ten percent retention are required. No funds may be requested or invoiced after 90 days from the project completion date. To meet that deadline, all project work and required deliverables, including the final report, must be completed and delivered to the Department by June 30, 2027.

Deliverables: Periodic, final, and ten percent retention invoices. At a minimum, quarterly invoices are required even if no expenses were incurred and, in that case, would indicate zero (\$0) expense. All invoices must use the template forms supplied by the Department and include backup documentation to support the expenditures.

Due Date: Periodic invoices must be submitted no more than once a month and no less than quarterly (every 3 months). The final invoice and the ten percent retention invoice are due within ninety days after the project completion date.

Task 1.4 Project quarterly update meetings: Project update meetings will occur by the last day of every calendar quarter, in person or virtually, as requested by the grant manager or a designated representative. Any key personnel needed to explain project results, problems, and special situations that are explicitly related to project deliverables must attend. The principal investigator must notify the grant manager of meeting dates and locations at least two weeks in advance. If requested by the grant manager, meetings should occasionally include representation by the intended end-users of the project results (e.g., growers, marketing boards) for feedback and insights to improve effectiveness and usefulness of the results. The grant manager may require additional meetings as needed. The grant manager will write up meeting minutes and share with all attendees after each meeting.

Deliverable: Meeting agenda as a Microsoft Word file via email (one week in advance) and revisions to the meeting minutes (within 14 days of receiving the meeting minutes).

Due Date: One month after the end of every calendar quarter through April 30, 2027.

Task 1.5 Quarterly progress reports: Quarterly reports must contain the information required on the template. Quarterly report should include relevant results, problems, and special situations that are explicitly related to project deliverables and any potential or actual effects on the deliverables or their completion dates. Submit quarterly reports to grant manager.

Deliverables: Quarterly reports (using template forms supplied by the Department).

Due Date: The end of every calendar quarter through March 31, 2027.

Task 1.6 Annual reports: The annual reports must contain the information required on the template. The annual report should include relevant results, problems, and special situations that are explicitly related to project deliverables and any potential or actual effects on the deliverables or their completion dates. Additionally, the annual report must include a project work plan for the

Sample Scope of Work and Budget

coming year and any expected modifications from what was originally proposed in the grant agreement and/or the outreach plan. Submit annual reports to grant manager.

Deliverables: Annual reports completed using the template due June 30 of each year (except for the year the final report is due) following grant execution as a Microsoft Word file via email.

Due Date: Every June 30 through June 2026.

Task 1.7 Final report draft: Use the final report template to describe in detail how project goals and objectives have been fulfilled through the completion of project deliverables, summarize and evaluate project activities and accomplishments, and include recommendations for outreach and/or future research. The report must focus on how project results are explicitly related to project deliverables and must clearly describe any potential or actual effects on the deliverables. Also, include all relevant materials, documentation, and deliverables not previously submitted. Submit draft report to the grant manager.

Deliverable: Final report draft as a Microsoft Word file via email (security settings should be unlocked, not password protected).

Due Date: June 15, 2027.

Task 1.8 Final report: Final report, incorporating any feedback, edits, or revisions to the draft final report. Submit final report to grant manager. Final reports may be published on DPR's website for review by the public.

Deliverable: Final report as a Microsoft Word file and high-resolution files (jpeg, png, tiff, etc.) of all photos, figures, and illustrations included in the final report via email (security settings should be unlocked, not password protected).

Due Date: June 30, 2027.

Task 1.9 Department presentation: The principal investigator or other key personnel will make a summary presentation, in person in the greater Sacramento area or virtually, during the last year of the project or the year after the project is completed. The presentation will provide information about project goals, objectives, and results. DPR retains the right to publish the presentation on DPR's website for review by the public.

Deliverables: Presentation with an electronic copy of the presentation provided to the grant manager via email at least three weeks in advance.

Due Date: Last year of the project or the year after the project is completed.

Objective 2: Develop electronic system for community scientists to make observations and for land managers for verify and plan management based those observations.

Task 2.1 Convene with Alliance Team: Alliance Team members will meet in person to review roles and responsibilities and strategize effective communication with community scientists and land managers. The Alliance Team will discuss the desired user interface of the CalPhyta webpage and collaborate on a framework for the action plan to be developed at the meeting with land managers.

Deliverable: Meeting minutes (attendance list, topics discussed, action items, etc.)

Due Date: Within 30 days of full grant execution.

Sample Scope of Work and Budget

Task 2.2 Create regional EDRR CalPhyta group: An existing EDRR species list for the Sacramento Valley region will be uploaded to the CalPhyta website and linked to the Sacramento Valley group. The observation upload tool will be modified to only include the data relevant to the Sacramento Valley region.

Deliverable: PDF of the CalPhyta group landing page with web address.

Due Date: December 31, 2024

Task 2.3 Codify action plan for EDRR observations: The PI and Alliance Team will meet virtually with land managers and set forth a clear plan for verifying EDRR observations that are recorded by community scientists and, when necessary, implementing appropriate management.

Deliverable: Meeting minutes (attendance list, topics discussed, action items, etc.)

Due Date: December 31, 2024

Task 2.4 Draft EDRR action plan: Based on the Alliance Team meeting and any necessary follow-up correspondence, the PI and California Habitat Conservancy staff will create a document that delineates the roles and responsibilities of all parties. This document will include a decision tree for management actions and serve as a guide for other regions that choose to adopt this program.

Deliverable: Finalized report of the EDRR action plan in a Microsoft Word file with images, figures, and tables as needed.

Due Date: March 31, 2025

Objective 3: Prepare members of the public and field crews to participate as community scientists in monitoring for EDRR species.

Task 3.1 Produce instructional materials: Create digital content to teach community scientists how to identify plants and use CalPhyta to record observations. This content will include instructional videos demonstrating the process of monitoring and recording observations in the field. Part of this effort will include creating social media page to host this content and communicate with community members about the project and upcoming trainings.

Deliverable: Files of all content created with the web address for the social media page.

Files will be sent to the grant manager via email at least 20 days prior to publication.

Due Date: March 31, 2025

Task 3.2 Produce field guide for community scientists: The PI and California Habitat Conservancy staff, with significant input from the Alliance Team and CalPhyta staff, will create a field guide to be provided to training attendees. This guide will serve as a reference for plant identification, common characteristics of invasive plants, and proper protocol for monitoring for invasive plants.

Deliverable: PDF version of field guide. Files will be sent to the grant manager via email at least 20 days prior to printing.

Due Date: March 31, 2025

Task 3.3 Administer field trainings: The PI and Alliance Team will collaborate with participating land managers to hold 5 field trainings between July 1, 2024 and March 30, 2025 in Rancho Cordova for community scientists and work crews. Several work crews from Workforce Development Program will be participating under contract, but others will be invited to attend the training to add to their credentials. These trainings will review the information covered in the

Sample Scope of Work and Budget

digital content and demonstrate how to document observations in the field. Successive trainings will serve to on-board new community scientists and work crews.

Deliverable: For each training, agenda, attendance list, and photos for each training will be submitted as a Microsoft Word file.

Due Date: Quarterly beginning September 30, 2025 through June 30, 2026

Task 3.4 Summarize data on field trainings, recorded observations, and resulting management actions:

The PI and California Habitat Conservancy staff, will compile data on the number of training participants, number of hours worked, and number of observations logged. The PI will analyze the number of confirmed detections and resulting management actions, with particular focus on pesticide usage, to measure success of the program and identify areas for improvement.

Deliverable: Report detailing the number of training participants, recorded observations, and verified invasive species observations, along with the methods by which they were addressed, submitted as a Microsoft Word file with images, figures, and tables as needed. A follow-up report will be provided to include management actions that may be carried out after the initial report.

Due Date: March 31, 2026 and June 30, 2026

Objective 4: Refine the EDRR program and perform outreach to regions throughout California.

Task 4.1 Refine training and implementation framework: Alliance Team will meet virtually to discuss summary report from Task 3.4 and plan improvements to the training and/or implementation framework. Efforts will be made to maximize the number of observations that result in management action.

Deliverable: Meeting minutes (attendance list, topics discussed, action items, etc.)

Due Date: December 31, 2026

Task 4.2 Draft recommendations for future program adoption: Based on the Alliance Team meeting, the PI and California Habitat Conservancy staff will write-up a guiding document, detailing program successes, challenges, and potential improvements. This guiding document will be posted on the California Habitat Conservancy and CalPhyta websites.

Deliverable: Finalized report of recommendations for future program adoption in a Microsoft Word file with images, figures, and tables as needed. Materials will be submitted to grant manager 20 days before publication.

Due Date: December 31, 2026

Objective 5: Promote EDRR program throughout California through outreach and collaboration with other regions.

Task 5.1 Present to other regions: California Habitat Conservancy staff will visit at least three partner regions to promote the EDRR program. The staff will provide the virtual and physical training materials, demonstrate the EDRR field training, and share the data and statistics from the Task 3.4 summary report, along with the recommendations from Task 4.2.

Deliverable: Report detailing each partner region visited in a Microsoft Word file with images, figures, and tables as needed. Materials will be submitted to grant manager 20 days before presentations.

Due Date: May 31, 2027

Sample Scope of Work and Budget

Task 5.2 Plan annual check in meetings with participating regions: PI and members of Alliance Team will set a date and agenda for annual meeting with all participating regions to communicate program successes and challenges and collaborate on program improvement and expansion.

Deliverable: Standing agenda for annual check in meetings.

Due Date: May 31, 2027

Schedule of Deliverables

List all items that will be delivered to the State under the proposed Scope of Work. Include all reports, including draft reports for State review, and any other Deliverables, if requested by the State and agreed to by the Parties.

If use of any Deliverable is restricted or is anticipated to contain preexisting Intellectual Property with any restricted use, it must be clearly identified.

Unless otherwise directed by the State, the Principal Investigator shall submit all Deliverables to the State Contract/Grant Project Manager.

Objective	Task and Deliverable	Due Date
1	1.1 Initial project meeting	30 days from grant execution
1	1.2 Outreach plan	30 days from grant execution
1	1.3 Invoices	Frequency: maximum monthly and minimum quarterly. Final invoice and 10% retention invoice both due within 90 days of project completion.
1	1.4 Quarterly project update meetings	Every quarter through April 30, 2027
1	1.5 Quarterly project reports	Every quarter through March 31, 2027
1	1.6 Annual reports	Every June 30 through 2026
1	1.7 Draft final report	June 15, 2027
1	1.8 Final report	June 30, 2027
1	1.9 DPR presentation	Final year of project or following year
2	2.1 Meeting minutes	30 days from grant execution
2	2.2 PDF of regional group landing page	December 31, 2024
2	2.3 Meeting minutes	December 31, 2024
2	2.4 EDRR action plan report	March 31, 2025
3	3.1 Files of instructional materials	March 31, 2025
3	3.2 PDF of field guide for community scientists	March 31, 2025
3	3.3 Agenda, attendee list, and photos for each training	Quarterly beginning September 30, 2026 through June 30, 2026
3	3.4 Summary report	March 31, 2026, and June 30, 2026
4	4.1 Meeting minutes	December 31, 2026
4	4.2 Report on recommendations for future program adoption	December 31, 2026
5	5.1 Report on each trip to partner region	May 31, 2027
5	5.2 Agenda for future meetings	May 31, 2027
The following Deliverables are subject to Copyrights, See Terms and Conditions.		

Principal Investigator: Dr. Anne Vassiv
Organization: California Habitat Conservancy

COMPOSITE BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 07/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 7/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$27,083	\$47,906	\$55,125	\$130,114
TRAVEL	\$99	\$1,315	\$299	\$1,713
MATERIALS & SUPPLIES	\$2,440	\$2,500	\$120	\$5,060
EQUIPMENT	\$0	\$8,500	\$0	\$8,500
RENT	\$200	\$1,000	\$0	\$1,200
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$14,739	\$19,184	\$3,868	\$37,791
SUBCONTRACTOR #2 (IDC allowed up to 25% on first \$25,000)	\$0	\$40,262	\$0	\$40,262
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHER DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$44,561	\$120,667	\$59,412	\$224,640
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$44,361	\$86,982	\$55,544	\$186,887
INDIRECT (F&A) COSTS Rate: 25%	\$11,090	\$21,746	\$13,886	\$46,722
TOTAL COSTS PER YEAR	\$55,651	\$142,413	\$73,298	
TOTAL COSTS FOR THE PROJECT PERIOD				\$271,362

* MTDC = Modified Total Direct Cost

JUSTIFICATION: Follow the budget justification instructions.

Budget Flexibility: Prior approval is required for all budget changes.

Budget Justification

The budget justification will include the following items in this format. Identify and report in-kind contributions of personnel time, equipment, facilities, and materials by team members. Complete a separate budget justification (see below) for each subrecipient (UC/CSU applicants only) or subcontractor.

For all applicable items reported in this budget justification section, the corresponding sheet in the budget tables worksheet (Microsoft Excel) must be completed in full. Numbers contained in the budget tables worksheet must match the numbers reported in this budget justification section.

PERSONNEL

Name. *Starting with the principal investigator, list the names of all known personnel who will be involved on the project for each year of the proposed project period. Include all collaborating investigators, individuals in training, technical and support staff and include as “to-be-determined” (TBD).*

Dr. Anne Vassiv
Erin Dao
Tim Ericks
Al Anthis
Rob Inya
Phil Ariss
Sal Zola

Role on Project. *For each personnel listed by name, including “to-be-determined” (TBD) positions, list their role on the project. Add additional lines as needed.*

Anne Vassiv, Principal Investigator, from California Habitat Conservancy will oversee all aspects of project completion and serve as the supervisor for all other personnel on this project.

Erin Dao, Program Manager, from California Habitat Conservancy will coordinate between Alliance Team members and lead the development of the action plan and reports.

Tim Ericks, Training Lead, from California Habitat Conservancy will develop training materials and lead trainings and presentations.

Al Anthis and Rob Inya, Regional and State Agency Liaisons will provide in-kind services, as part of their salaried positions with their respective agencies, to attend Alliance Team meetings, provide institutional knowledge, and supervise field trainings. *No salary requested.*

Phil Ariss, volunteer organizer, from Boots On Sacramento will provide in-kind services as part of their salaried position and supervise groups of volunteers that are enrolled in the organization’s fellowship program. *No salary requested.*

Sample Scope of Work and Budget

Sal Zola, community organizer, from Friends of Sacramento Parks will be serving on a volunteer basis to recruit and lead members of the public during the field trainings. *No salary requested.*

Salary. For all personnel, including “to-be-determined” positions, list the salary per year and the total salary. Additionally, note any in-kind salary contributions. Add additional lines as needed.

Anne Vassiv – Year 1 - \$3,125; Year 2 - \$3,938; Year 3 - \$4,134; Total: \$11,197
Erin Dao – Year 1 - \$15,625; Year 2 - \$19,688; Year 3 - \$20,672; Total: \$55,985
Tim Ericks – Year 1 - \$2,917; Year 2 - \$14,700; Year 3 - \$19,294; Total: \$36,911

Fringe Benefits. For all personnel, including “to-be-determined” positions, list the fringe benefits per year and the total fringe benefits. Add additional lines as needed.

Anne Vassiv – Year 1 - \$781; Year 2 - \$984; Year 3 - \$1,034; Total: \$2,799
Erin Dao – Year 1 - \$3,906; Year 2 - \$4,922; Year 3 - \$5,168; Total: \$13,996
Tim Ericks – Year 1 - \$729; Year 2 - \$3,675; Year 3 - \$4,823; Total: \$9,227

Total Personnel Costs.

Yearly Salary Totals

Year 1 - \$21,667; Year 2 - \$38,325; Year 3 - \$44,100; Total: \$104,092

Yearly Fringe Benefits Totals

Year 1 - \$5,417; Year 2 - \$9,581; Year 3 - \$11,025; Total: \$26,023

Yearly Personnel Totals

Year 1 - \$27,083; Year 2 - \$47,906; Year 3 - \$55,125; Total: \$130,115

TRAVEL (SEE TERMS AND CONDITIONS)

Itemize all travel requests separately by trip and justify, in accordance with university or organizational travel guidelines. Travel and reimbursement for travel for applicants not affiliated with the University of California (UC) or the California State University (CSU) systems shall be in accordance with the [California Department of Human Resources’ \(CalHR\) travel policy](#). For trips that occur over multiple years, include as separate trips. Add additional trips as needed.

TRIP #1

Trip Occurs in: Year 1 Year 2 Year 3

Origin: Oakland, CA

Destination: Sutter’s Fort, Sacramento, CA

Duration (number of days and number of nights): 1 day, 0 nights

Personnel Names: Anne Vassiv, Erin Dao, Tim Ericks

Purpose: In-person meeting with Alliance Team

Total Cost per Trip: \$99

Number of Trip Occurrences: 1

Trip #1 Total: \$99

Sample Scope of Work and Budget

TRIP #2

Trip Occurs in: Year 1 Year 2 Year 3

Origin: Oakland, CA

Destination: Prairie City State Vehicle Recreation Area, Folsom, CA

Duration (number of days and number of nights): 1 day, 0 nights

Personnel Names: Anne Vassiv, Erin Dao, Tim Ericks

Purpose: Field training

Total Cost per Trip: \$123

Number of Trip Occurrences: 5

Trip #2 Total: \$615

TRIP #3

Trip Occurs in: Year 1 Year 2 Year 3

Origin: Sacramento, CA

Destination: Prairie City State Vehicle Recreation Area, Folsom, CA

Duration (number of days and number of nights): 1 day, 0 nights

Personnel Names: Al Anthis

Purpose: Field training

Total Cost per Trip: \$35

Number of Trip Occurrences: 5

Trip #3 Total: \$175

TRIP #4

Trip Occurs in: Year 1 Year 2 Year 3

Origin: Sacramento, CA

Destination: Prairie City State Vehicle Recreation Area, Folsom, CA

Duration (number of days and number of nights): 1 day, 0 nights

Personnel Names: Rob Inya

Purpose: Field training

Total Cost per Trip: \$35

Number of Trip Occurrences: 5

Trip #4 Total: \$175

TRIP #5

Trip Occurs in: Year 1 Year 2 Year 3

Origin: Sacramento, CA

Destination: Prairie City State Vehicle Recreation Area, Folsom, CA

Duration (number of days and number of nights): 1 day, 0 nights

Personnel Names: Phil Ariss

Purpose: Field training

Total Cost per Trip: \$35

Number of Trip Occurrences: 5

Trip #5 Total: \$175

Sample Scope of Work and Budget

TRIP #6

Trip Occurs in: Year 1 Year 2 Year 3
Origin: Sacramento, CA
Destination: Prairie City State Vehicle Recreation Area, Folsom, CA
Duration (number of days and number of nights): 1 day, 0 nights
Personnel Names: Sal Zola
Purpose: Field training
Total Cost per Trip: \$35
Number of Trip Occurrences: 5
Trip #3 Total: \$175

TRIP #7

Trip Occurs in: Year 1 Year 2 Year 3
Origin: Oakland, CA
Destination: Santa Cruz, CA
Duration (number of days and number of nights): 1 day, 0 nights
Personnel Names: Anne Vassiv, Erin Dao, Tim Ericks
Purpose: Outreach visit with partner region
Total Cost per Trip: \$88
Number of Trip Occurrences: 1
Trip #1 Total: \$88

TRIP #8

Trip Occurs in: Year 1 Year 2 Year 3
Origin: Oakland, CA
Destination: Mendocino, CA
Duration (number of days and number of nights): 1 day, 0 nights
Personnel Names: Anne Vassiv, Erin Dao, Tim Ericks
Purpose: Outreach visit with partner region
Total Cost per Trip: \$176
Number of Trip Occurrences: 1
Trip #1 Total: \$176

TRIP #9

Trip Occurs in: Year 1 Year 2 Year 3
Origin: Oakland, CA
Destination: Livermore, CA
Duration (number of days and number of nights): 1 day, 0 nights
Personnel Names: Anne Vassiv, Erin Dao, Tim Ericks
Purpose: Outreach visit with partner region
Total Cost per Trip: \$35
Number of Trip Occurrences: 1
Trip #1 Total: \$35

Total Travel Costs.

Year 1 - \$99; Year 2 - \$1,315; Year 3 - \$299; Total: \$1,713

MATERIALS AND SUPPLIES

Itemize all materials and supplies separately by item and include a complete justification of the project's need for these items. Theft sensitive equipment (under \$5,000) must be justified and tracked separately in accordance with State Contracting Manual Section 7.29. Add additional lines as needed.

Materials and Supplies Justification:

We will purchase 4 tablets in Year 1 to allow trainees to access the software necessary to identify and document plant observations in the field.

We will print our field guide in Year 2 and provide a copy to each training participant to assist with plant identification and monitoring protocols.

We will purchase hand tools (hand mattocks, weed wrenches, and rogue hoes) and personal protective equipment (PPE) in Year 2 and bring them to field trainings and outreach visits so that populations of invasive plants that are observed and verified by land managers can be mechanically removed.

We will purchase beverages and snacks for each in-person meeting and training. We estimate this amount to be \$40 per meeting and outreach visit and \$100 per training.

Total Materials and Supplies Costs.

Year 1 - \$2,440; Year 2 - \$2,500; Year 3 - \$120; Total: \$5,060

EQUIPMENT

List each item of equipment (value greater than or equal to \$5,000 with a useful life of more than one year) with amount requested separately and justify each. List all equipment purchases by year. Add additional lines as needed.

Eos Arrow Gold – Year 1 - \$0; Year 2 - \$8,500; Year 3 - \$0; Total: \$8,500

Equipment Justification:

Due to the remote nature of the field trainings, funds are requested for a one-time purchase of a Global Navigation Satellite Systems (GNSS) receiver to allow for better location accuracy for the phones and tablets recording plant observations. The specific receiver we plan to purchase, the EOS Arrow Gold, can be connected to multiple devices at once, allowing for a single receiver to be used for an entire group.

Total Equipment Costs.

Year 1 - \$0; Year 2 - \$8,500; Year 3 - \$0; Total: \$8,500

RENT

If the Scope of Work will be performed in a facility rented from a third party for a specific project or projects, then rent may be charged as a direct expense to the award. List all facilities rented by year. Add additional lines as needed.

Sutter's Fort Facility – Year 1 - \$200; Year 2 - \$0; Year 3 - \$0; Total: \$200

Prairie City Facility – Year 1 - \$0; Year 2 - \$1,000; Year 3 - \$0; Total: \$1,000

Total Rent Costs.

Year 1 - \$200; Year 2 - \$1000; Year 3 - \$0; Total: \$1,200

SUBCONTRACTOR

Each subcontractor must submit a separate detailed budget for every year in the project period. Add additional lines as needed. Include a complete Budget Justification for the need for any subcontractor listed in the application.

CalPhyta – Year 1 - \$14,739; Year 2 - \$19,184; Year 3 - \$1,868; Total: \$37,791

Workforce Development Program – Year 1 - \$0; Year 2 - \$40,262; Year 3 - \$0; Total: \$40,262

SUBRECIPIENT (UC/CSU APPLICANTS ONLY)

Each subrecipient must submit a separate detailed budget for every year in the project period. Add additional lines as needed. Include a complete Budget Justification for the need for any subrecipient listed in the application.

N/A

OTHER DIRECT COSTS (ODC)

Itemize any other expenses by category and include a complete justification of the project's need for these expenses. Specifically include and justify costs that may typically be treated as indirect costs. For example, if insurance, telecommunication, or IT costs are charged as a direct expense, explain reason and methodology. Add additional lines as needed.

N/A

MODIFIED TOTAL DIRECT COSTS (MTDC) AND INDIRECT (F&A) COSTS (SEE TERMS AND CONDITIONS)

*Indirect costs are calculated on the modified total direct costs (MTDC) in accordance with the budgeted indirect cost rate (Limit 25% maximum). The MTDC includes **up to the first \$25,000 of each subcontract**; the portion of each subcontract in excess of \$25,000 is not included in the MTDC.*

Indirect Cost Rate (%): 25

Modified Total Direct Costs (MTDC) – Year 1 - \$44,361; Year 2 - \$86,982; Year 3 - \$55,544; Total: \$186,887

Total Indirect Costs.

Year 1 - \$11,090; Year 2 - \$21,746; Year 3 - \$13,886; Total: \$46,722

Subcontractor/Subrecipient Budgets

(when applicable; submit separate budget and budget justification for each)

Subcontractor/Subrecipient: CalPhyta

Principal Investigator: Dr. Anne Vassiv

Organization: California Habitat Conservancy

SUBCONTRACTOR/SUBRECIPIENT BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 07/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 7/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$11,692	\$14,732	\$3,094	\$29,518
TRAVEL	\$99	\$615	\$0	\$714
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHER DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$11,791	\$15,347	\$3,094	\$30,232
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$11,791	\$15,347	\$3,094	\$30,232
INDIRECT (F&A) COSTS Rate: 25%	\$2,948	\$3,837	\$774	\$7,558
TOTAL COSTS PER YEAR	\$14,739	\$19,184	\$3,868	
TOTAL COSTS FOR THE PROJECT PERIOD				\$37,790

* MTDC = Modified Total Direct Cost

JUSTIFICATION: Follow the budget justification instructions.

Budget Flexibility: Prior approval is required for all budget changes.

Subcontractor/Subrecipient Budget Justification (when applicable)

The budget justification will include the following items in this format. Identify and report in-kind contributions of personnel time, equipment, facilities, and materials by team members. Complete a separate budget justification (see below) for each subrecipient (UC/CSU applicants only) or subcontractor.

For all applicable items reported in this budget justification section, the corresponding sheet in the subaward budget tables worksheet (Microsoft Excel) must be completed in full. Numbers contained in the subaward budget tables worksheet must match the numbers reported in this budget justification section.

PERSONNEL

Name. Starting with the principal investigator, list the names of all known personnel who will be involved on the project for each year of the proposed project period. Include all collaborating investigators, individuals in training, technical and support staff and include as “to-be-determined” (TBD).

Beau Tannock

Role on Project. For each personnel listed by name, including “to-be-determined” (TBD) positions, list their role on the project. Add additional lines as needed.

Beau Tannock, Observation tool and instructional materials creator, will serve as the point person at CalPhyta to get the webpage tailored to the Sacramento Valley group and train users to use the application. They will also lead the development of the educational materials, videos, and field guide.

Salary. For all personnel, including “to-be-determined” positions, list the salary per year and the total salary. Additionally, note any in-kind salary contributions. Add additional lines as needed.

Beau Tannock – Year 1 - \$9,583; Year 2 - \$12,075; Year 3 - \$2,536; Total: \$24,194

Fringe Benefits. For all personnel, including “to-be-determined” positions, list the fringe benefits per year and the total fringe benefits. Add additional lines as needed.

Beau Tannock – Year 1 - \$2,108; Year 2 - \$2,657; Year 3 - \$558; Total: \$5,323

Total Personnel Costs.

Yearly Salary Totals

Year 1 - \$9,583; Year 2 - \$12,075; Year 3 - \$2,536; Total: \$24,194

Yearly Fringe Benefits Totals

Year 1 - \$2,108; Year 2 - \$2,657; Year 3 - \$558; Total: \$5,323

Yearly Personnel Totals

Year 1 - \$11,692; Year 2 - \$14,732; Year 3 - \$3,094; Total: \$29,517

TRAVEL (SEE TERMS AND CONDITIONS)

Itemize all travel requests separately by trip and justify, in accordance with university or organizational travel guidelines. Travel and reimbursement for travel for applicants not affiliated with the University of California (UC) or the California State University (CSU) systems shall be in accordance with the [California Department of Human Resources' \(CalHR\) travel policy](#). For trips that occur over multiple years, include as separate trips. Add additional trips as needed.

TRIP #1

Trip Occurs in: Year 1 Year 2 Year 3

Origin: Oakland, CA

Destination: Sutter's Fort, Sacramento, CA

Duration (number of days and number of nights): 1 day, 0 nights

Personnel Names: Beau Tannock

Purpose: In-person meeting with Alliance Team

Total Cost per Trip: \$99

Number of Trip Occurrences: 1

Trip #1 Total: \$99

TRIP #2

Trip Occurs in: Year 1 Year 2 Year 3

Origin: Oakland, CA

Destination: Prairie City State Vehicle Recreation Area, Folsom, CA

Duration (number of days and number of nights): 1 day, 0 nights

Personnel Names: Beau Tannock

Purpose: Field training

Total Cost per Trip: \$123

Number of Trip Occurrences: 5

Trip #2 Total: \$615

Total Travel Costs.

Year 1 - \$99; Year 2 - \$615; Year 3 - \$0; Total: \$714

MATERIALS AND SUPPLIES

Itemize all materials and supplies separately by item and include **a complete justification of the project's need for these items. Theft sensitive equipment (under \$5,000) must be justified and tracked separately in accordance with State Contracting Manual Section 7.29.** Add additional lines as needed.

N/A

EQUIPMENT

List each item of equipment (value greater than or equal to \$5,000 with a useful life of more than one year) with amount requested separately and justify each. List all equipment purchases by year. Add additional lines as needed.

N/A

RENT

If the Scope of Work will be performed in a facility rented from a third party for a specific project or projects, then rent may be charged as a direct expense to the award. List all facilities rented by year. Add additional lines as needed.

N/A

SUBCONTRACTOR

Each subcontractor must submit a separate detailed budget for every year in the project period. Add additional lines as needed. Include a complete budget justification for the need for any subcontractor listed in the application.

N/A

SUBRECIPIENT (UC/CSU APPLICANTS ONLY)

Each subrecipient must submit a separate detailed budget for every year in the project period. Add additional lines as needed. Include a complete budget justification for the need for any subrecipient listed in the application.

N/A

OTHER DIRECT COSTS (ODC)

Itemize any other expenses by category and include a complete justification of the project's need for these expenses. Specifically include and justify costs that may typically be treated as indirect costs. For example, if insurance, telecommunication, or IT costs are charged as a direct expense, explain reason and methodology. Add additional lines as needed.

N/A

MODIFIED TOTAL DIRECT COSTS (MTDC) AND INDIRECT (F&A) COSTS (SEE TERMS AND CONDITIONS)

*Indirect costs are calculated on the modified total direct costs (MTDC) in accordance with the budgeted indirect cost rate (Limit 25% maximum). The MTDC includes **up to the first \$25,000 of each subcontract**; the portion of each subcontract in excess of \$25,000 is not included in the MTDC.*

Indirect Cost Rate (%): 25

Modified Total Direct Costs (MTDC) – Year 1 - \$11,791; Year 2 - \$15,347; Year 3 - \$3,094; Total: \$30,232

Total Indirect Costs.

Year 1 - \$2,948; Year 2 - \$3,837; Year 3 - \$774; Total: \$7,558

Subcontractor/Subrecipient Budgets

(when applicable; submit separate budget and budget justification for each)

Subcontractor/Subrecipient: Workforce Development Program

Principal Investigator: Dr. Anne Vassiv

Organization: California Habitat Conservancy

SUBCONTRACTOR/SUBRECIPIENT BUDGET FOR ENTIRE PROPOSED PROJECT PERIOD: 07/01/2024 to 06/30/2027

BUDGET CATEGORY	Year 1 7/1/2024 – 6/30/2025	Year 2 7/1/2025 – 6/30/2026	Year 3 7/1/2026 – 06/30/2027	TOTAL
PERSONNEL: <i>Salary and fringe benefits.</i>	\$0	\$33,245	\$0	\$33,245
TRAVEL	\$0	\$875	\$0	\$875
MATERIALS & SUPPLIES	\$0	\$0	\$0	\$0
EQUIPMENT	\$0	\$0	\$0	\$0
RENT	\$0	\$0	\$0	\$0
SUBCONTRACTOR #1 (IDC allowed up to 25% on first \$25,000)	\$0	\$0	\$0	\$0
SUBRECIPIENT #1 (UC/CSU applicants only, IDC not allowed)	\$0	\$0	\$0	\$0
OTHER DIRECT COST #1: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
OTHER DIRECT COST #2: Subject to IDC: Y/N	\$0	\$0	\$0	\$0
TOTAL DIRECT COSTS	\$0	\$34,120	\$0	\$34,120
MODIFIED TOTAL DIRECT COSTS (F&A Base)	\$0	\$34,120	\$0	\$34,120
INDIRECT (F&A) COSTS Rate: 18%	\$0	\$6,142	\$0	\$6,142
TOTAL COSTS PER YEAR	\$0	\$40,262	\$0	
TOTAL COSTS FOR THE PROJECT PERIOD				\$40,262

* MTDC = Modified Total Direct Cost

JUSTIFICATION: Follow the budget justification instructions.

Budget Flexibility: Prior approval is required for all budget changes.

Subcontractor/Subrecipient Budget Justification (when applicable)

The budget justification will include the following items in this format. Identify and report in-kind contributions of personnel time, equipment, facilities, and materials by team members. Complete a separate budget justification (see below) for each subrecipient (UC/CSU applicants only) or subcontractor.

For all applicable items reported in this budget justification section, the corresponding sheet in the subaward budget tables worksheet (Microsoft Excel) must be completed in full. Numbers contained in the subaward budget tables worksheet must match the numbers reported in this budget justification section.

PERSONNEL

Name. Starting with the principal investigator, list the names of all known personnel who will be involved on the project for each year of the proposed project period. Include all collaborating investigators, individuals in training, technical and support staff and include as “to-be-determined” (TBD).

Crew Lead, TBD
Crew Member (x5), TBD

Role on Project. For each personnel listed by name, including “to-be-determined” (TBD) positions, list their role on the project. Add additional lines as needed.

The Crew Lead will serve assist with the procurement and set-up of the training and outreach trailer. The Crew Lead will attend each field training and lead a crew of 5 crew members for four days following the training to monitor for invasive species and record observations.

The 5 Crew Members will work together under the direction of the Crew Lead. The Crew Members will attend a field training and work for four days following each training to monitor for invasive species and record observations.

Salary. For all personnel, including “to-be-determined” positions, list the salary per year and the total salary. Additionally, note any in-kind salary contributions. Add additional lines as needed.

Crew Lead – Year 1 - \$0; Year 2 - \$5,500; Year 3 - \$0; Total: \$5,500
Crew Member – Year 1 - \$0; Year 2 - \$4,000; Year 3 - \$0; Total: \$4,000

Fringe Benefits. For all personnel, including “to-be-determined” positions, list the fringe benefits per year and the total fringe benefits. Add additional lines as needed.

Crew Lead – Year 1 - \$0; Year 2 - \$2,145; Year 3 - \$0; Total: \$2,145
Crew Member – Year 1 - \$0; Year 2 - \$1,120; Year 3 - \$0; Total: \$1,120

Total Personnel Costs.

Yearly Salary Totals

Year 1 - \$0; Year 2 - \$25,500; Year 3 - \$0; Total: \$25,500

Yearly Fringe Benefits Totals

Year 1 - \$0; Year 2 - \$7,745; Year 3 - \$0; Total: \$7,745

Yearly Personnel Totals

Year 1 - \$0; Year 2 - \$33,245; Year 3 - \$0; Total: \$33,245

TRAVEL (SEE TERMS AND CONDITIONS)

Itemize all travel requests separately by trip and justify, in accordance with university or organizational travel guidelines. Travel and reimbursement for travel for applicants not affiliated with the University of California (UC) or the California State University (CSU) systems shall be in accordance with the [California Department of Human Resources' \(CalHR\) travel policy](#). For trips that occur over multiple years, include as separate trips. Add additional trips as needed.

TRIP #1

Trip Occurs in: Year 1 Year 2 Year 3

Origin: Sacramento, CA

Destination: Prairie City State Vehicle Recreation Area, Folsom, CA

Duration (number of days and number of nights): 1 day, 0 nights

Personnel Names: Crew Lead and 5 Crew Members

Purpose: Field training and follow-up monitoring

Total Cost per Trip: \$35

Number of Trip Occurrences: 25

Trip #1 Total: \$875

Total Travel Costs.

Year 1 - \$0; Year 2 - \$875; Year 3 - \$0; Total: \$875

MATERIALS AND SUPPLIES

*Itemize all materials and supplies separately by item and include **a complete justification of the project's need for these items. Theft sensitive equipment (under \$5,000) must be justified and tracked separately in accordance with State Contracting Manual Section 7.29.** Add additional lines as needed.*

N/A

EQUIPMENT

List each item of equipment (value greater than or equal to \$5,000 with a useful life of more than one year) with amount requested separately and justify each. List all equipment purchases by year. Add additional lines as needed.

N/A

RENT

If the Scope of Work will be performed in a facility rented from a third party for a specific project or projects, then rent may be charged as a direct expense to the award. List all facilities rented by year. Add additional lines as needed.

N/A

SUBCONTRACTOR

Each subcontractor must submit a separate detailed budget for every year in the project period. Add additional lines as needed. Include a complete budget justification for the need for any subcontractor listed in the application.

N/A

SUBRECIPIENT (UC/CSU APPLICANTS ONLY)

Each subrecipient must submit a separate detailed budget for every year in the project period. Add additional lines as needed. Include a complete budget justification for the need for any subrecipient listed in the application.

N/A

OTHER DIRECT COSTS (ODC)

Itemize any other expenses by category and include a complete justification of the project's need for these expenses. Specifically include and justify costs that may typically be treated as indirect costs. For example, if insurance, telecommunication, or IT costs are charged as a direct expense, explain reason and methodology. Add additional lines as needed.

N/A

MODIFIED TOTAL DIRECT COSTS (MTDC) AND INDIRECT (F&A) COSTS (SEE TERMS AND CONDITIONS)

*Indirect costs are calculated on the modified total direct costs (MTDC) in accordance with the budgeted indirect cost rate (Limit 25% maximum). The MTDC includes **up to the first \$25,000 of each subcontract**; the portion of each subcontract in excess of \$25,000 is not included in the MTDC.*

Indirect Cost Rate (%): 18

Modified Total Direct Costs (MTDC) – Year 1 - \$0; Year 2 - \$34,120; Year 3 - \$0; Total: \$34,120

Total Indirect Costs.

Year 1 - \$0; Year 2 - \$6,142; Year 3 - \$0; Total: \$6,142