

CALIFORNIA TAHOE CONSERVANCY GRANT APPLICATION GUIDANCE

GRANT APPLICATION GUIDANCE OVERVIEW

This Grant Application Guidance provides instructions and necessary forms for completing the California Tahoe Conservancy (Conservancy) grant application. Applicants should first read the Conservancy's [Grant Guidelines](https://tahoe.ca.gov/grant-guidelines/) (https://tahoe.ca.gov/grant-guidelines/) and the [Grant Webpage](https://tahoe.ca.gov/grants/) (https://tahoe.ca.gov/grants/) for information regarding eligible applicants, funding considerations and priorities, grant process, and grant requirements. If applicants have additional questions on the application process, please contact us at grants@tahoe.ca.gov.

Grant Application Package Contents:

- Grant Application Guidance
 - Scope of Work and Budget Guidance
 - Grant Funding and Administration Requirements
 - Definitions
 - Evaluation Criteria
- Application

Submittal Requirements:

Applicants must submit an electronic version of their full grant application, including all attachments, using the [Grant Application Submission Form](https://tahoe.ca.gov/grant-application/) (https://tahoe.ca.gov/grant-application/).

SCOPE OF WORK AND BUDGET GUIDANCE

Project Scope of Work and Schedule

Complete the grant application scope of work (including tasks and deliverables) as appropriate for the project. The scope of work should list both project-specific and general grant deliverables (including progress reports and final report) and their due dates. It should be clear, concise, specific, and measurable. Specify who, what, when, where and how those activities will be carried out. For each task, applicants should include a very brief description and list of deliverable documents (including photos and maps) that would result from the task. The tasks

and deliverables vary significantly by project type. For assistance developing a scope of work please see the [Example scopes of work](https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Sample-Scopes-of-Work.pdf) (https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Sample-Scopes-of-Work.pdf). See the reporting section below and the sample grant agreement for more information on the general grant deliverables required.

Project Budget and Leveraged Funding

Complete the grant application budget template as appropriate for the project. Please round all budget numbers up to the nearest \$100. For assistance developing a budget please see the [Example budgets](https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Sample-Budgets.pdf) (https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Sample-Budgets.pdf) and [Budget templates in Excel](https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Fillable-Budget-Templates.xlsx) (https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Fillable-Budget-Templates.xlsx) or [Budget Templates in PDF](https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Fillable-Budget-Templates.pdf) (https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Fillable-Budget-Templates.pdf).

Direct Costs

Labor or personnel costs should include only the **actual** direct compensation for salaries or wages, fringe benefits, and employer payroll tax costs for staff time spent directly on activities for the grant.

Fringe benefits normally include employer contributions or expenses for employee health, vacation, and sick leave benefits, unemployment and disability insurance, workers compensation, and pension/retirement contributions. Employer payroll taxes include the employer's contributions for Social Security and Medicare for individual employees.

Identify travel costs and tie those costs to tasks and deliverables in the Scope of Work. It is best practice to have a separate budget line item for travel, but applicants can acknowledge budget line items that may include travel and per diem reimbursements in the Scope of Work.

Indirect Costs

Indirect Costs are the non-project-specific costs of doing business (e.g. rent, utilities, computers, telephones, office supplies, internet access, copy machines, electricity). These costs are shared and not specific to a particular project, so applicants pool and reallocate them, typically as a percentage, to staff, or in certain instances, other costs. Any cost that is billed as a direct cost may NOT be included in indirect costs.

Allowable indirect cost rates and associated documentation requirements for Conservancy grants vary depending on funding source. Applicants who seek to include indirect costs in grant budgets should consult with Conservancy staff during the application phase to confirm acceptable indirect rate documentation and any associated requirements. Indirect costs need to

be in a separate line item in grant budgets, and the applicant should include the percentage rate along with clarity on how the Applicant applies them (on staff, contracts, etc.).

Applicants may intend to include subcontracts or subgrants with associated indirect costs, as part of their grant. If this is a possibility, applicants should discuss it with Conservancy staff before submitting a budget or application.

Equipment

If applicants intend to purchase or subcontract for equipment, supplies, or services costing \$2,500 or more with Conservancy grant funds, they should include information about these costs in their application's Scope of Work and budget to the extent possible. If this specific information is not known at the time of preparing an application, the Conservancy will need to provide prior approval of these costs later during the active grant phase. The applicant may **only** use the equipment **for the grant project**. For each individual piece of equipment, the applicant proposes for purchase, they should provide:

- Anticipated cost and explanation of whether they will also use other funding sources for the purchase
- Justification/Purpose of the acquisition—what will they use the equipment for (then link the equipment to the grant task in the schedule and budget) and why it is necessary for the success of the project
- Benefits of purchasing versus leasing the equipment

Equipment Leases

Sometimes an applicant may deem it easier to rent equipment rather than purchase it. For projects over a short period, it may also be more cost effective. It is good practice to consider leasing versus purchase when applying for a grant.

If an applicant proposes leasing equipment, they should include justification of the leased costs along with the application. Justification should include a brief financial analysis, a summary of the lease amount and lease terms (unit rate, time period, etc.), and a summary of three informal purchase prices for the same or similar equipment. Such lease terms could require the applicant to cover insurance or other costs that they should disclose in their justification.

Supplies and Other Purchases

If the applicant requests approval of any purchase order or subcontract exceeding \$2,500 for any articles or supplies, they should provide all information necessary for the Conservancy to evaluate whether the cost or price is reasonable and necessary or desirable to incur.

Travel

Travel costs are typically mileage and per diem for lodging and meals, but may include airfare and rental vehicles, depending on the grant. Travel-related expenses may not exceed the state travel reimbursement rates in effect during the term of the agreement (see the [CalHR Travel Reimbursement website](https://www.calhr.ca.gov/about-calhr/divisions-programs/benefits/travel-reimbursements/) (<https://www.calhr.ca.gov/about-calhr/divisions-programs/benefits/travel-reimbursements/>)). The Conservancy will only reimburse the applicant for actual expenses incurred and miles traveled that are directly related to the performance of the grant agreement.

Out-of-State Travel

The Conservancy does not reimburse travel outside of California unless it is approved in writing in advance. The Conservancy typically approves travel within the greater regional area, meaning the Lake Tahoe Basin (Basin) and the Reno/Carson City area. The Conservancy does not typically allow out-of-state travel costs beyond the greater Tahoe or Reno/Carson City region.

Eligible and ineligible costs

The applicant's use of the grant funds is limited to those expenditures that are necessary to implement the scope of work and that are in accordance with the budget and schedule. For bond-funded grants: All costs must be consistent with General Obligation Bond Law (Government Code section 16727) or the applicable bond act. Direct questions associated with eligible or ineligible costs to the Conservancy staff prior to submitting an application or budget. Grantees may incur eligible expenses starting on the effective date of the grant agreement.

Eligible activities and expenses include, but are not limited to:

Planning Grants

- Project management/administration;
- site analysis and base mapping;
- preliminary project design, as necessary for environmental documentation;
- opportunities and constraints analysis;
- environmental review and documentation (including surveys and other environmental assessments);
- interagency and public coordination and consultation;
- preliminary specifications and cost estimates;

- pre-acquisition activities (such as obtaining title reports, appraisals, legal descriptions and initial coordination with the property owners to determine if they are willing sellers. Purchase negotiations and escrow fees are not eligible expenses under planning grants but are covered by acquisition grants.);
- pre-construction monitoring related to the goals of the project;
- preparation of permit applications; and
- other relevant costs approved by Conservancy staff.

Implementation Grants

- Project management/administration;
- preparation of contract documents, including final design plans;
- preparation of grant-required documents;
- project specifications, engineering, and cost estimates;
- preparation and processing of permit applications, including Storm Water Pollution Prevention Plans;
- preparation of construction bid packages, project bidding, and award;
- construction of site improvements;
- project inspection, evaluation, reporting and monitoring (including compliance monitoring); and
- other relevant costs approved by Conservancy staff.

Acquisition Grants

- Acquisition of land or interests in land up to the current fair market value of the interest(s) being acquired;
- pre-acquisition costs;
- escrow, title, and other closing costs;
- project administration; and
- other relevant transactional costs requested in the grant application and approved by Conservancy staff.

Monitoring Grants

- Monitoring equipment purchase, calibration, installation and removal;
- laboratory tests and analysis;
- collection and retrieval of monitoring data;
- data analysis and evaluation; and
- preparation of monitoring reports.

Ineligible activities and expenses include, but are not limited to:

- All costs incurred before the Effective Date or after the Project End Date (other than the final report);
- food or beverages for meetings, workshops, or trainings (does not include eligible per diem meals);
- publicity and marketing expenses not necessary to implement the scope of work, such as promotional items (e.g., key chains, tote bags, or other items known colloquially as “swag”) or advertising designed solely to promote the grantee;
- lobbying or fundraising;
- travel not expressly identified in the budget;
- equipment purchases that are not identified in the budget or approved by the grant coordinator prior to purchase;
- ongoing project site operations and maintenance;
- eminent domain actions; and
- property acquisition costs in excess of fair market value.

Contingency

The Conservancy generally does not allow a contingency line item. If the applicant feels that contingency is critical to their project, discuss with Conservancy staff prior to applying.

GRANT FUNDING AND ADMINISTRATION REQUIREMENTS

For more information on standard requirements in the grant agreement please review the [Sample grant agreement](https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Sample-agreement.pdf) (https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Sample-agreement.pdf).

Retention and Advances

The Conservancy typically distributes grants on a reimbursement basis (see below for exceptions), and withholding retention helps ensure applicants complete a project as intended. The Conservancy typically retains the final grant disbursement request until the applicant provides adequate documentation of grant completion, including all deliverables and a final report. The Conservancy may also include other retention requirements, such as retaining a percentage of each invoice, if specific conditions warrant additional fiscal control.

Exceptions to reimbursement basis for grant distribution: Certain statutory authorities or funding sources, such as Proposition 4, allow for advance payments of grant funds if requested by the applicant. It is important that applicants consult with Conservancy staff early in the grant process if they intend to request an advance.

Reporting

Applicants must submit regular progress reports and invoices on an active grant per the schedule specified in the grant agreement. The Conservancy typically requires these submittals on a quarterly basis, although other cadences may be acceptable for certain grants.

Typically, implementation grant applications must include a monitoring and reporting component that explains how the implementation and effectiveness of the project will be measured and reported. The Conservancy can help applicants to develop appropriate monitoring and reporting templates and procedures following an award.

Monitoring should be consistent with existing Basin monitoring programs, such as the Lake Tahoe Environmental Improvement Program (EIP), Regional Stormwater Monitoring Program, or Lake Tahoe Interagency Monitoring Program. Detailed information on EIP performance measures can be found on the [EIP website](https://eip.laketahoeinfo.org/EIPPerformanceMeasure/Index) (https://eip.laketahoeinfo.org/EIPPerformanceMeasure/Index).

Conservancy grants require applicants report in the [Lake Tahoe Info EIP Project Tracker](https://eip.laketahoeinfo.org/) (https://eip.laketahoeinfo.org/). Applicants should consult with Conservancy staff, if needed, to fulfill this requirement.

Long-term requirements

The Conservancy typically requires long-term operations and maintenance (O&M) for implementation grants. The applicant agrees to perform and document O&M activities over the useful life of the project improvements. For implementation grants without a defined useful life, the grant agreement may include a section discussing long-term management expectations the applicant will need to fulfill in lieu of O&M.

Grants for projects that result in improvements to the land must state the useful life of the funded improvements. The useful life varies depending on the project type and, possibly, the funding source.

Signage Requirement

The grant agreement may require onsite signage indicating project funding source. Check with Conservancy staff for more information.

Use of California Conservation Corps

The Grant Guidelines and funding source may require that the applicant consult with and use the California Conservation Corps (CCC) for their projects if “feasible” and “in the best interest” of the project. The Conservancy may require proof of this consultation and proposed CCC use in the grant application. Follow the appropriate process defined in the grant application and use the CCC consultation process to request their services as described in the California Conservation Corps Grant Consultation webpage (<https://ccc.ca.gov/collaborate/consultation/>).

The Conservancy encourages applicants to also explore the use of the Washoe Tribe of Nevada and California Youth Conservation Corps for their projects. The CCC supports tribal conservation crews and recognizes the importance of shared knowledge between these crews and the CCC.

Land Tenure

The applicant must have adequate permission and/or site control to support the project. If the applicant does not own or manage the lands involved in the project, they should explain how they have or will secure necessary permissions or land tenure.

Governing board resolution

Applicants should include a governing board resolution, or letter from an authorized administrator, to confirm the applicant's commitment to the project and deliverables of the grant, as opposed to simply acknowledging their interest in obtaining grant funding. The resolution allows the applicant to enter into a grant agreement with the Conservancy.

For implementation projects, the resolution should include that the applicant will implement and manage the project in a manner consistent with grant program/funding objectives and will fund the operations and maintenance of the project improvements for a minimum of the useful life of the project. For some planning projects, the resolution could state that the applicant intends to develop a site improvement project after they complete the planning phase.

Support letters

Applicants can include letter(s) of support along with the application. Letter(s) should be current and specific to the proposed project.

DEFINITIONS

Disadvantaged community (DAC): A community with a median household income of less than 80 percent of the area average or less than 80 percent of statewide median household income.

Severely disadvantaged community (SDAC): A community with a median household income of less than 60 percent of the area average or less than 60 percent of statewide median household income.

Vulnerable population: A subgroup population within a region or community that faces a disproportionately heightened risk or increased sensitivity to impacts of climate change and that lacks adequate resources to cope with, adapt to, or recover from such impacts. (Note: tribes are considered vulnerable populations)

Tribe: A federally recognized Native American tribe or a non-federally recognized Native American tribe listed on the California Tribal Consultation List maintained by the Native American Heritage Commission.

EVALUATION CRITERIA

The Conservancy will evaluate applications using the following criteria: multiple benefits, cost-sharing, high-quality project design, scope of work, schedule, budget, project readiness, consistency with the Conservancy's strategic plan and other existing plans and guidance,

innovation, use of CCCs, durability, project team qualifications, monitoring and reporting, long term management and maintenance, benefits to disadvantaged communities and vulnerable populations, climate benefits, workforce development, and community, agency, and tribal support.



Tahoe Conservancy Grant Application

Project Information

1. Project Name
2. Abstract/Project Summary
3. Total Cost
4. Amount Requested from Tahoe Conservancy
5. Estimated Start Date
6. Estimated End Date
7. Project Type

Applicant Information

8. Organization Name

9. Organization Type

10. Primary Applicant Name and Title

11. Phone

12. Email Address

13. Mailing Address

14. Signatory Name and Title

Project Description

On the next page, provide a concise project description. Include each of the elements listed below with clear, but detailed answers.

Purpose and need

- Describe the specific problems (current conditions, limiting factors, etc.), issues, or unserved needs the project will address.
- Describe the goals and objectives of the project. Be specific.

Approach/Activities

- Thoroughly describe the proposed approach, including the actions required to solve the identified problem(s), how it applies the use of best available science, and any new or innovative methodologies or practices proposed to be used. Identify how the project will address the project need described above.
- For projects involving restoration or construction, summarize the plan for the long-term management, maintenance, and monitoring of the project.
- If this is a phase of or part of a larger plan or project, please explain how.

Outcomes

To the extent known, provide information on both the quantitative and qualitative project outcomes, including specific project benefits and how these multiple benefits will be sustainable over time.

- Quantitative Outcomes
 - Examples include:
 - Acres of habitat restored
 - Miles of trail planned or built
 - Number of each type of access amenities
 - Number of community members engaged in project
- Qualitative Outcomes
 - Examples include:
 - Habitat functions restored
 - Integration of community input into project/design plan
 - Tribal access to land restored

15. Project Description

Project Location

16. Briefly describe the project location, including landownership, nearby communities and public lands, county(ies), and latitude and longitude (if place-based).

17. If your project is place-based, identify any Conservancy land (Assessor's Parcel Numbers or APNs) located within or adjacent to the project footprint.

18. If your project is place-based, please submit at least one map of the project boundaries as a separate document in PDF format. The map should display the project location as part of the larger landscape in relation to communities, infrastructure, water sources, and/or complementary projects. It should also clearly indicate ownership boundaries.

PROJECT SCOPE OF WORK (SOW) AND SCHEDULE

19. Provide a detailed SOW (work plan) including tasks and deliverables for work that will be completed under this grant. Include a schedule. SOW can be submitted as a separate attachment if needed. Click here for a sample SOW. (<https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Sample-Scopes-of-Work.pdf>)

PROJECT BUDGET AND LEVERAGED FUNDING

20. Provide a detailed budget table for the funds requested from the Tahoe Conservancy. Budget can be submitted as a separate attachment if needed. Please round all budget numbers up to the nearest \$100. Click here for a sample budget. (<https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Sample-Budgets.pdf>)

Click here for a budget template in Excel format (<https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Fillable-Budget-Templates.xlsx>), or PDF format (<https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Fillable-Budget-Templates.pdf>).

21. If the cost of the project is beyond what the applicant is asking from the Tahoe Conservancy, please fill out the leveraged funds table below, identifying total project cost, and other funding sources that have been secured, applied for, or are being considered, and any in-kind assistance to be provided by the applicant. Leveraged funds table can be submitted as a separate attachment if needed.

Source	Amount	Status
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CONSISTENCY WITH STATE, FEDERAL, REGIONAL, AND LOCAL PLANS

22. Identify and discuss how the proposed project is consistent with any of the specific goals, strategies, and actions outlined in the Conservancy strategic plan. (<https://tahoe.ca.gov/about-us/strategic-plan/>)

23. How does your project support state initiatives, including 30x30 (<https://resources.ca.gov/Initiatives/Protecting-Biodiversity>) and other California Natural Resources Agency (CNRA) priorities (<https://resources.ca.gov/initiatives>)?

24. How will your project support California's climate change goals, including the California Climate Adaptation Strategy (<https://resources.ca.gov/Initiatives/Building-Climate-Resilience/2024-State-Adaptation-Strategy-Update>) and Climate Change Scoping Plan (<https://ww2.arb.ca.gov/our-work/programs/ab-32-climate-change-scoping-plan>)?

25. Is this project on the Lake Tahoe Basin Environmental Improvement Program (EIP) project tracker (<https://eip.laketahoeinfo.org/>)? If yes, list EIP Project number.

26. Does the project advance any local or regional plans and priorities ? If yes, describe .

READINESS

27. For implementation projects: is the project implementation-ready ? If yes, describe. If this is not applicable, please describe why.

28. For planning projects, will the planning project result in an implementation-ready project ? If yes, describe. If this is not applicable, please describe why.

29. The proposed project:

Is not a project under the California Environmental Quality Act (CEQA) (e.g. planning grants or grants for CEQA development). Briefly specify why.

Is exempt under CEQA. Provide the CEQA exemption number and specify how the project meets the terms of the exemption or describe how the project is exempt and how you plan on filing the exemption.

Requires Negative Declaration, Mitigated Negative Declaration, or Environmental Impact Report. Specify the lead CEQA agency (the agency preparing the document) and the (expected) completion date.

30. If the proposed project requires CEQA, has CEQA been completed?

Please note the CEQA document does not need to be complete to apply for a grant, but the Conservancy will need to review and consider any CEQA document prior to awarding a Conservancy grant.

31. Describe the project team's qualifications, experience, and capacity to perform the proposed tasks to complete the proposed project. Provide specific examples of similar projects completed to date.

PUBLIC, PARTNER , AND AGENCY SUPPORT

32. Does the project have broad-based public and institutional support, at the local, regional, or larger scale? Describe efforts to include partners in project planning, design, outreach/education, implementation, monitoring, and maintenance.

33. What other partners are involved in this project and what is their specific role/extent of participation?

34. Describe how you have engaged tribes and under-resourced communities facing the greatest inequities in the development of this project and how you plan to involve them going forward.

CLIMATE BENEFITS

35. Will the project protect people and/or nature from climate impacts, such as extreme heat, wildfire, flooding, and/or drought? If so, how?

36. Will the project reduce and/or remove greenhouse gas emissions? If so, how ?

37. Was the project designed to be resilient to climate impacts, such as extreme heat, wildfire, flooding, and/or drought? If so, how?

ADDITIONAL INFORMATION REQUIRED FOR PROP 4 FUNDING

38. Does the project provide benefits to a Severely Disadvantaged or Disadvantaged Community (<https://gis.water.ca.gov/app/dacs/>)? Use layer "Disadvantaged Communities – Census Tracts (ACS 2016-2020)". If so, what benefits will it provide, and which specific DAC or SDAC communities or populations will it benefit? How will the benefits be meaningful and direct?

39. Briefly describe how your project addresses specific vulnerable populations using the mapping tools below.

- Climate Change & Health Vulnerability Indicators for California (<https://skylab.cdph.ca.gov/CCHVlz/>)
- Healthy Places Index (<https://map.healthylplacesindex.org/>)
- Vulnerable Communities Platform (<https://vcp.lci.ca.gov/>)

40. For implementation projects, will the project include work undertaken by the California Conservation Corps or a Local Conservation Corps? (Use of CCCs is encouraged for Prop 4 funding consideration). If so, please describe the role they will play, include the selected Corps in the proposed budget and workplan, with relevant activities described, and include an estimated timeline to re-engage with the selected Corps should the applicant be awarded a grant, including a statement that the applicant will reach out to the selected Corps within 30 days of award notification.

41. Does your project provide opportunities for workforce education and job training, and/or contractor and job opportunities for vulnerable populations, including Native American and tribally owned businesses? If so, describe how.

42. Does the project support activities that will protect people and/or nature from climate change impacts or reduce/remove greenhouse gas emissions. If so, how?

43. Does your project meet one of the California's Nature-Based Solution (NBS) Climate Targets (<https://resources.ca.gov/initiatives/expanding-nature-based-solutions>)? If so, which one and for how many acres/miles?

ADDITIONAL INFORMATION REQUIRED FOR IMPLEMENTATION AND MONITORING GRANTS

44. Site ownership or control – Check the applicable box .
Applicant owns the site(s) where the project will occur

Applicant has a written agreement with the property owner(s) to conduct the project on their property(ies). If checked, please provide a copy as an attachment to your application. Please also include the contact information for the landowner

Applicant does not yet have a written agreement with the property owner(s) to conduct the project on their property. If this answer is checked, specify how and when the property owner agreement will be reached.

45. Describe any plans to locate the project on or adjacent to Conservancy land, and how that land might be affected.

ATTACHMENTS REQUIRED FOR ACQUISITION GRANTS

Supplemental acquisition application (<https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Supplemental-Application-Information-for-Acquisition-Grants.pdf>)

Land acquisition form (<https://tahoe.ca.gov/wp-content/uploads/sites/257/2025/11/Land-Acquisition-Form.pdf>)

OTHER ATTACHMENTS

Location Map (required)

Map(s) identifying any Conservancy land located within the Project Area (if applicable)

Governing Body Resolution or equivalent authorization letter (required)

Support Letters (optional)

Implementation and Monitoring Grants: Site Control Documentation (if applicable)