Grant Workshop Transcript

*Bold Text = Title of Slide in Workshop Presentation

Information for Grant Applicants (0:00)
Hello and thank you for checking out this session. My name is Sarah Siedschlag and I am the Coastal Fund staff advisor. So today I'm going to be providing some background information on Coastal Fund and explaining our grant application process for everyone. I am recording this just for disclosure in late September of 2020 so it can be available on demand while we are unable to hold in-person workshops, but feel free to reach out to me with any questions or if you would like to discuss your project or application . I always really like hearing about the projects and helping everyone get ready for the application period. And, it's also really just helpful to us to have a sense of what people are going to be submitting and it helps us plan the quarter a bit. So, if you have any questions just feel free to reach out and we can talk more about anything you need. I'll give one more disclaimer; we may be updating our application process a bit this coming year, so there's a chance that some of this information might change. If you're looking to submit in the future, the piece might actually change is the application system. We're looking at some online application management programs that might replace our Word document application files, but this is still very much to be determined. The mission and the overall purpose and structure of Coastal Fund isn't going to change.

Introduction to Coastal Fund (1:40)
So, in this first section, I'm going to give a brief background of Coastal Fund, our structure and our mission, and after that I'll go into the application process and then into the follow up documentation and reporting requirement once you've been awarded a Coastal Fund grant.

Coastal Fund Mission and Funding (2:01)
So we'll start with the Coastal Fund founding in 1999 with a mission to preserve, protect, and enhance the terrestrial and marine habitats associated with the shoreline of the University of California, Santa Barbara. I highlight the mission statement here particularly to point out that we aren't necessarily like a general sustainability fund; everything we support needs to have a clear coastal connection and a local to the Santa Barbara connection. So in 1999, when we got started, the student body approved a lock-in fee to support the mission statement so that both graduate and undergraduate students pay into this lock-in fee each quarter. It adds up to collectively around $400,000 that we're able to allocate to projects each year split across our fall, winter, and spring grant cycles. This is a key piece to understanding Coastal Fund. Because our budget comes entirely from student fees, we consider supporting students to be our top priority.

Coastal Fund (3:14)
The Coastal Fund Board is made up of seven voting board members, two of which are graduate students and five are undergraduates. Two student staff who are focused on outreach, and one student staff who does all of our administrative work, and then me as the advisor. I am the only

non-student involved with Coastal Fund, and all voting members are students. Most [board members] tend to serve around a year or two depending on when they join and when they graduate, so our individual membership changes pretty frequently. Here's a picture from one of our zoom meetings from this last spring quarter.

Eligibility (3:56)
Our eligibility criteria are pretty standard and straightforward. For our purposes we typically define the Santa Barbara coastal region under point 2 to include not only the immediate coastline, but the channel and the Channel Islands as well as activities in the upstream watershed that impact our coastal system. We generally consider projects as far south as the Santa Barbara County line and as far north as Point Conception.

Application Submission and Success Rate (4:30)
This graph shows what's been requested from us and what we've funded over the last several years. You can see this kind of major anomaly in 2014-2015. This was just before I was involved with Coastal Fund, but looking back on our records there were a couple of very large requests that make up the bulk of the difference there. So it was kind of a one off, obviously not a trend at that point. In general, we're getting more money requested from us each year; 2019-2020 dipped a little bit due to a light spring quarter which we assume was from the coronavirus uncertainty and people not really knowing how projects might go. Before spring quarter we were on track to beat the previous year's total, we just had a really light spring. As of today, I'm not sure what this coming year is going to look like since we are still in the pandemic and a lot of campus and community work is slowed down.

We are also funding a little bit more each year, and we're able to do that because our funding comes from student fees. So when the student population goes up, our budget does as well. We also did manage to accumulate some reserves in these earlier, like lighter years, but now we are starting to cut into those as we fund more and more. For the last couple years, we've typically allocated around $125,000 to $150,000 among 15 to 20 projects each quarter. Most projects funded through our major grant program range from $3,000 to $15,000, although we do occasionally fund larger projects as well. Coastal Fund also has a tendency to partially fund some projects if it allows us to support a larger number of applicants. We do this, because many of our applicants are students, and we want to give as many as possible the experience of designing and implementing their own project, even if it ends up being at a slightly reduced scope.

Types of Grants (6:49)
So, we have a few different types of grants. Our major grants are requests for over $1,000, and minor grants are for $1,000 or less. The application and follow-up documentation are fairly similar, though minor grants tend to naturally have less complicated descriptions, budgets, and so on obviously. The major difference in terms of process is that the major grants are due early in

the grant cycle, and that we ask all our major grant applicants to attend a board meeting to discuss their project and answer some questions. Minor grant applicants do not have to present, so these applications are due closer to the end of the quarter.

Our last grant type is our emergency grant. This is our newest process and was developed after the Refugio Oil spill in 2015. Because the spill occurred in May, our normal spring quarter deadlines had already passed, and the board members were very frustrated that they didn't have a process that would allow them to help with the most immediate needs after the spill. So, we created this new process following that and ended funding several emergency grants following the Thomas Fire, but in general it's pretty rare that we get one of these applications. Emergency grants can be submitted at any point during any one of our grant cycles. We don't really have a process to review an emergency grant that is submitted during the summer or over quarterly breaks when we're not having regular meetings, but if that situation comes up feel free to email us maybe ahead of time, and we'll see if anything is possible. Emergency grants are almost identical to major grants in terms of the application. We just have some additional eligibility requirements, and that's that the applicant must make it clear that the need could not be previously foreseen before the end of the previous application period and that it cannot wait until the next application period. Short but predictable field seasons and wanting to complete work before graduation are not reasons for an emergency grant and so these will not be approved.

Sometimes the board likes a project, but doesn't feel that it fits the criteria to be considered for an emergency, so they'll deny the emergency request but then ask the applicant to resubmit for the next grant cycle. We've had projects in that situation get approved as a normal grant later on.

While funding for major and minor grants can be spent over a full year, emergency grants are approved just until the end of the next application cycle. This is because emergency funding is designed to just get the applicant through the immediate need, then allow them time to apply through the normal cycle if they would like to continue the project over a longer term. Really, we're just trying to minimize the amount of money that goes through emergency grants, because it is unpredictable and it makes it a little harder to plan for the year. So these are designed to be short term, as needed grants and still pretty rare.

Phase 1: Application and Decision (10:26)
Next, I'm going to discuss the details of the application itself and our evaluation process. As I've said earlier, we have three grant cycles each year, fitting within the three academic quarters of UCSB. If you apply in the second week of our quarter, which is when each of these deadlines are set, you'll hear back from us right at the end of our finals week. We can't fund retroactively, so please make sure that you plan far enough ahead to get your application in during the right cycle so you'll be approved in time when you need to have funds available.

Major and Minor Grant Deadlines (11:09)
Both major and minor grants can support projects for up to one year, and Coastal Fund does provide repeat funding for those who are working on longer initiatives or like ongoing programs. If you do have a longer-term project or program, we strongly prefer that you request funding once per year for the entire year, rather than for one or two quarters at a time, though we will make exceptions if your needs are just really hard to predict far enough in advance. We also don't like to have overlapping funding allocations for the same project, so please make sure to make your full request in the initial application rather than spreading it out across multiple submissions in the same year. We have had some inexperienced applicants who were afraid that their full request is too large or larger than our average and they don't want to do it all in one shot, but we'd much rather see it all at once rather than have you come back with a second request for another component of the project that we weren't expecting.

As I said before, we do also award partial funding, so having a large request won't necessarily exclude you from receiving funding if you make it clear that your project is still feasible at a reduced scope. On a similar note, please don't apply for multiple or repeating short-term minor grants within one major grant. The one time we maybe make an exception to this is that sometimes if someone for some reason misses the major grant deadline, I'll suggest that they should apply for a one quarter's worth of funding for a minor grant to help tie them over, then submit a major application in the next cycle. That works and we'll help people out in that case.

This is kind of our year, which obviously goes in cycles. We do get a lot of requests in spring, because a lot of organizations in the campus work on a fiscal close of like June 30th and July 1st as a new fiscal year. If you apply down here at the beginning of spring quarter, you'll receive your funding here at the end of spring quarter, and then your project will be in operation kind of all around for this full year and then can actually go again into the end of this next spring quarter. So, even if you had funding until the end of spring quarter, you can, if you need repeat funding, you can apply again at the beginning of spring quarter. You always have your funding available and it's continuous and you just apply in that period, say about three months before your funding deadline. You can apply for funding before you've funded your previous one as long as by the time we approve it it's about time that your previous grant is finishing up.

Navigating the Website (14:22)
This is our website, and you can go to coastalfund.as.ucsb.edu and I think actually just coastalfund.org should get you there as well. The majority of information you'll need as an applicant is under our funding tab including deadlines and our funding guidelines. For right now I'm going to tab out of this presentation and show you how to find the application file itself.

Over here's our website with everything up on top. It is fairly straightforward and so our funding guidelines are here. Some of the policies I'm talking about today in funding cycles shows our

deadlines, and major funding is where for a major grant you're going to find everything you need here. Right now we have the announcement about covid, just that we are still continuing to work over zoom, and then our deadline. So right here are our blank forms, and if you click on any one of these it'll save as a word document that you can complete. And here's kind of some instructions on applying and what you'll experience implementing the grant. Then, you know, just blank forms down at the bottom and then our email address where you can submit everything. So, there's all the forms you're going to need. The application and the budget worksheet are the things you submit when you're applying; the progress report, reallocations, extension requests, final reports, and evaluations are all things that come later.

What We Fund (16:25)
So what we fund under our grant program is more fully described on those funding guidelines on our website I pointed out, but I'll touch on a few points briefly. At this time all of our funding is project or program-specific, and we are unfortunately unable to provide general or unrestricted organization support. Because Coastal Fund's budget comes from student fees, our highest priority is to support quality student experiences through paid internships or student staff positions or through student-led projects. We will fund staff time as needed, though more than a small amount of time tends to get pretty expensive for us pretty quickly. Project supplies, mileage, and so on are fairly common; the kind of equipment that lasts beyond the life of a project we'll evaluate on a case by case basis. We want to know that it's going to be used in some useful, helpful way that continues to support the program in the long-term. And we don't fund events under our grant program, but we do have a co-sponsorship program that is listed separately on our website, if you need event support.

Crafting a Budget (17:50)
And then our budget form that you'll download and fill out is an excel file with a few different categories. There's one section for student hourly staff, student stipends, non-student wages, and other expenses. It's set up to auto-calculate the total column based on your input, but please fill out the "requested from Coastal Fund" column on the far right of each to clarify what you're asking from us and maybe what you might have covered from other sources. So, it might be hard to see on this slide maybe, but this is a total cost column that, depends on what you input here, will multiply itself out, but what we really want is for you, based on this, fill out this column on each category. So you're clarifying what you're requesting from us.

A couple more notes about student funding; students can be paid through a stipend or hourly wage depending on how the position is structured. We are not human resource specialists, and we won't tell you what's the correct choice, so please speak to your department payroll or HR staff for help on deciding how to structure any student positions. And even for undergraduates that are employed part-time at UCSB and don't receive healthcare and other benefits, there is a small additional cost added onto their hourly wage to cover things like workers comp

(compensation). And for most undergraduates this like 1.9%, and so you can include that with your request so we don't want you to come up short in the end. Graduate students, university staff, and other employees have different percentages here, but there's a link on our budget spreadsheet that goes to the rate tables where you can look up exactly what percentage for each category. And then just remember, this applies to those employed at the university. If you're an outside organization, you may have a different benefit-cost, or not one at all. And then lastly, if you are a UC-department funding students via stipend, depending on how your department pays the stipend, there is a chance you may impact their financial aid package. And that depends both on how it's structured on your end, the category you use to pay the stipend with, and the exact level of their financial aid. I'm not an expert in financial aid, so if you run into any issues please check with the financial aid office, or the department budget analyst and they should know how all this is set up.

Completing the Application (20:51)
So when you are done with your application you just email it in to us. We have a new email address this year, though for now we are still automatically forwarding anything we receive at our old email, so if you send it there for whatever reason we should still get it. We do have a new email address, and this is also the best way to get in contact with us with any questions or project updates; especially while we are remote, we are not really super accessible by phone, so email is the best.

Presenting to the Board (21:24)
So after you have submitted your application, and the grant deadline passses, our administrative coordinator Carissa will email you to set up a time to discuss your project with the board. So presentations are during our weekly board meetings, which is always on Tuesday night, and we usually have a presentation at 7pm, 7:30pm, and 8pm each week. All presentations are conducted over zoom, during the pandemic. You are welcome to use screen share to show slides, or anything else you'd like to present, but this is not required at all. And typically we ask the applicant to describe their project and funding request for 10 to 15 minutes, and then answer questions from the board members who will have read your application. And then I always advise to remember that our board is made up of students, and changes every year, and so while we do our best to make sure that our board members are aware of repeat applicants' previous relationship with Coastal Fund, I always recommend that you describe the project as though the board has never heard you talk about it before. Because due to our turnover for at least a couple of our members that's probably true. And again these presentations to the board are only for major grants; minor grants don't have this component.

Decision Process (22:46)
Our decision process; we do not make any decisions about a proposal the night it is presented. We wait until the last week of the quarter when we have finished reviewing every application,

and then we have one very long meeting where we go through every project and make a final decision about funding. Because Coastal Fund often only offers partial funding, this is also where we might discuss any projects that seem like they could be able to function at a reduced scope. So if you're a regular applicant of ours, the funding we award you might fluctuate a little bit from year to year depending on how many other applications we receive. And our board membership also, again changes from year to year, and new board members may have slightly different priorities, but in general we do our best to support as many quality projects as we can.

And so once all decisions have been made, the administrative assistant and I compile all the applications and paperwork, and notify all the applicants. Funded applicants will receive a grant agreement which outlines their funding totals, deadlines, and any stipulations.

Phase II: Implementation and Reporting (24:06)
Making Adjustments Mid-Project
So this next section is fairly brief, but I wanted to describe some of the reporting we require from our applicants, and anything else that might come up while you're implementing your project. So first there are many cases where our funding recipients need to adjust their project part-way through. We understand that this is something that happens normally, so don't worry if you have to change your project from what we originally approved. We do have a process for that. If you would like to spend funds on something other than what was approved in your grant agreement, we will ask you to fill out a budget reallocation form. It's a fairly brief form and generally straightforward to fill out, and we trust that our applicants know their projects.

One situation where the board is hesitant to approve reallocations, is if the project leader wants to pull funds away from student wages. And there are still cases where we've approved these requests. For example, recently campus restrictions around COVID meant that the students were not allowed to work on some projects, and staff had to complete more of the tasks. But in general, we always want to ensure that students stay as involved as possible.

And then next if you're getting close to your project deadline and need more time, you might want to submit an extension request. As with budget reallocations, the board is generally pretty understanding, and knows things can be pretty unpredictable, and does approve the majority of these requests. We almost always approve a project's first extension request, but we'll start to be a little bit more concerned if we get a second one without a clear reason or sign of progress. The other situation where we may deny extension request, or approve it on a shorter time frame than was requested is if we are coming up on a new grant cycle and that project is up for new funding, and that's just because we want to make sure that we close out one round of funding before approving another one. So we look at these situations on a case by case basis, but again we don't want to have multiple awards active for the same project at the same time. These forms are both

on our website and can be emailed to us after you have filled them out, and the board will review and approve them at their next meeting.

Reporting (26:37)

So our grant recipients are also asked to complete a progress report and a final report, unless the project has a very short timeline, in which case we skip the progress report and only require the final report. And the due dates for each will be specified in your grant agreement. Our progress and final reports are fairly broad since we do fund a wide variety of projects, for the progress report we're mainly just checking that you've gotten started and if you've run into any issues you want us to be aware of. On the final report, we're counting on how funds were spent, and any impacts that your projects had that you want to report to us, and any way you were able to involve students and the community.

And then the intern evaluation is completed by any students that worked on your project, and sent directly to us. We ask them about their experience and it may have impacted their career goals, how it's kind of shaped their time as students at UCSB. In general students really love their experience, and we really like reading about it. We do get some students who will say that their internship was great and they really like their supervisor but it also made them realize that they don't want to do that type of work as much as they thought they did. And we think that's fantastic, and a great use of their time, rather than committing to a full time job or graduating school in the field. We like that they had that experience and figured out it was right or not right for them. So we really like getting the intern evaluations as well.

Communication (28:12)

So again, anytime you need to reach out and get a hold of us, feel free to email. Our outreach team also puts together a monthly newsletter you can sign up for on our website, and they may reach out to you to feature your project, either in our newsletter or on social media.

Coastal Fund Logos (28:32)

So if you ever need a file of the Coastal Fund logo for a poster or a publicity fair project, we have them on our website. If you go over to "contact us" the drop down menu has a link to our logo either in color or in balck and white.

Examples of Successful Projects (28:48)

And so here are just some examples of the variety of projects we funded over the years. The first is from EDC, which advocated against expanding the oil infrastructure in Santa Barbara. The second is with Milton Love, which was a citizen science project in the Santa Barbara Channel. We also fund local restoration projects, this one was with CCBER, restoring the area around the UCSB lagoon. And here's an example of one of the educational programs we fund, this is from Nature Track, which provides educational outdoor field trips at no cost to local schools.

Final Tips (29:34)

So here are just my closing, top recommendations for applicants based on what I've seen and heard from the board discussions. First just clearly describe how your project fits with the Coastal Fund mission. A lot of times it is pretty obvious, but the board really wants to see how you describe it and work through it. And then clearly explain how your listed expenses are essential for your project's success. Sometimes we have a project that really just has a great project description of how it's helpful to the mission and applies, but then the things they list for what they need to purchase, it's not necessarily clear exactly why they need that piece of equipment or supplies and essential that is for the project to happen. So both describe why your project is critical and why the expenses you list are critical for project success.

And again, remember that the board is always changing and the new members are not familiar with your organization, even if you've worked with us before, so just take a little extra time to do that introduction each time. Make sure any internships will be a valuable experience for the students; that they're not just doing data entry, but they're actually receiving training and mentorship they can use later. And if possible, involve them in the application writing and project development decision. And then just always please proofread and check your math.

Keep in Touch! (31:27)

So hopefully we will be back to having in person events by this coming June in 2021, and so we can host our Coastal Fund Gala again. This is a great event we have each year, and we invite the whole Coastal Fund family to check out everything we funded and support over the year. And it's a fun evening, so keep an eye out. And that's all I have for today. And again, just please feel free to reach out to our general email or to me specifically with any questions or if you want to talk through your project idea before you apply, or if you just want to know a little bit more if Coastal Fund is right for you. So thank you, that is what I have. Bye everyone!