



(Date)

Dear (Project Leader),

In keeping with the Coastal Fund's mission to connect people and the environment by allocating funds to programs that celebrate, explore, and protect the coastal ecosystems in and around the University of California, Santa Barbara, we are pleased to inform you that your application has been selected to receive funding!

Standard terms for all Coastal Fund grants and grant recipients are listed below. If you accept the terms and funding, initial next to each section to indicate you have read and agree to the points listed and sign at the bottom of the document. Return the signed document via email to **coastalfund@as.ucsb.edu**. Grant checks will not be processed until this Agreement is received and fully signed.

PROJECT TITLE

(Project Title)

CF GRANT NUMBER
(please reference in all
communications)

(Grant Number)

AMOUNT FUNDED

(Total Funded)

APPROVED BUDGET
BREAKDOWN

(Funding Breakdown, allow space for 2 lines of text)

BOARD COMMENTS AND STIPULATIONS ON DECISION

(Feedback, enough space for several lines of text)



IMPORTANT DATES

- (Start Date)** Project start date; funds may only be spent after this time AND after this grant agreement is signed and returned to Coastal Fund.
- (1PR Date)** Progress Check-In due. See details below.
- (2PR Date)** Second Progress Check-In due. See details below.
- (FR Date)** Expected end of grant and Final Report due. See details below.

Funding must be used only to complete the project outlined in the original application. Desired or necessary changes in project scope or goals should be submitted to Coastal Fund for approval before funds are spent. See following pages for details on flexibility and limitations of expenditures. **Violation of these terms may result in Coastal Fund ceasing future funding to the Project Leader and/or sponsoring organization, and/or may necessitate the return of funds already granted.**

Direct all questions, updates, and general communications, both about this Agreement and about the project as a whole, to coastalfund@as.ucsb.edu.

RESPONSIBILITIES OF THE PROJECT LEADER AND SPONSORING ENTITY

(INITIAL)

- The individual specified as Project Leader, along with their respective sponsoring organization or department, is responsible for all activities related to the approved project, including:
 - Completing Project Check-Ins and submitting requested documentation in a timely manner.
 - Notifying Coastal Fund of any changes in the project scope or direction, and requesting guidance as needed.
 - Contacting Coastal Fund with any questions or concerns, and/or responding to questions or comments from Coastal Fund as needed.
- The sponsoring organization or department, in coordination with the Project Leader, is responsible for hiring, employing, and, if needed, disciplining any individuals involved with the funded project.
- The sponsoring entity is responsible for ensuring that relevant employment laws and policies are followed and that all wages, stipends, benefits and taxes are paid and reported as required.
- Neither the Project Leader nor the sponsoring organization will be held responsible for delays due to pandemic, political insurrection, wildfire, labor



strike, or other incidents outside of the Project Leader's control. If such an incident occurs, Coastal Fund and the Project Leader will work together to determine a mutually acceptable path forward.

ALLOCATION AND USE OF FUNDING

(INITIAL)

- Funds may not be used to to participate or intervene in any political campaign on behalf of or against any candidate for public office or to carry on, directly or indirectly, any voter registration drive, unless the voter registration drive meets the requirements of Section 4945(f) of the Internal Revenue Code.
- Funds are not earmarked for any attempt to influence legislation. Any use of grant funds by your organization for such activities constitutes a decision of yours that is wholly independent of Coastal Fund.
- Coastal Fund uses the budget submitted with the funding proposal to determine its funding approvals, but understands that project needs and expenses change between planning and implementation. When possible, we approve funds in broad categories to allow flexibility, though funds must be spent only within the approved project.
- Funds designated for a particular use (for example, “wages and/or stipends for UCSB students”) may only be spent on the specified expense. Funds allocated towards general project expenses may be used for any allowable expense within the project, including on expenses for which other funding is explicitly designated, and/or allowable expenses not anticipated at the time of the original proposal.
- If the Project Leader would like to use funds explicitly specified for one expense on another project expense, they must contact **coastalfund@as.ucsb.edu** and seek Board approval before spending the funds. Please be aware that Coastal Fund does not meet during finals week or during spring, summer or winter breaks and approval for requests received during this time may be significantly delayed.

DOCUMENTATION AND REPORTING OF PROGRESS AND EXPENDITURES

(INITIAL)

- All projects must complete Progress Check-In phone or video calls with Coastal Fund staff by the date(s) listed on the first page of this form. Coastal Fund staff



will contact the Project Leader at the beginning of the month in which a Progress Check-In is due in order to schedule an exact date and time, and will provide example questions that may be asked. No research data or project deliverables are required at the time of the first Check-In, though we will discuss progress in reference to your proposed timeline.

- Projects are expected to be complete by or near the final Progress Check-In date listed at the top of this form. If the Project Leader needs more time to complete the project, Coastal Fund staff will collect necessary information during the Check-In and request that the Board approve an Extension Request.
- If an Extension Request is approved, an additional Check-In will be scheduled for the new project end date.
- When the project and final Check-In is completed, or if the Board denies an Extension Request, Coastal Fund staff will provide the Project Leader with a Final Report form. Coastal Fund staff will also discuss options and requirements for any remaining funds at this time.
- All projects must complete the Final Report form within 30 days of receipt from Coastal Fund staff. The Final Report must include invoices, receipts, or other documentation for all funded expenditures.
- The Project Leader and/or sponsoring organization must retain all records related to this award, and must make such records available for review by Coastal Fund or its designated auditor upon reasonable notice during the grant period and for four years after completion or termination of the terms outlined in this Agreement.

ACKNOWLEDGEMENT OF FUNDING

(INITIAL)

- All physical signage, posters, print or online articles, outreach literature or publicity related to this project or program should include mention of the “UCSB Associated Students Coastal Fund” as a source of funding.
- Acknowledgements of funding should include a Coastal Fund logo when possible. Various high-resolution logos can be obtained online at www.coastalfund.org.
- Coastal Fund retains the right to publicize information regarding this award, including the Project Leader’s name and/or organization, the amount funded,



and the purpose of the funding, on its website, annual report, or other outreach or promotional material.

- Neither Coastal Fund nor the funding recipient may use the other party's name or logo to imply participation in or endorsement of any activity beyond what is approved in this agreement.

I, _____, have read the above letter and guidelines for Coastal Fund supported projects and agree to the terms set forth by UCSB Associated Students and the Coastal Fund Board of Directors.

Signed: _____ Date: _____
(Grant Recipient)

The request outlined in this agreement, as well as all related and supporting documentation, has been reviewed and approved by Coastal Fund and Associated Students for funding as specified.

Signed: _____ Date: _____
(Coastal Fund Advisor)

Signed: _____ Date: _____
(Associated Students Executive Director – will be signed upon completion)