


**Welcome!**

**WHALE TAIL® Grants  
Application  
Walk-Through**



**Please keep yourself muted until asked to unmute.**

**There will be time at the end to ask questions, or you can type questions into the Chat box during the presentation.**

**The presentation will be recorded and posted to the website.**

**It will be helpful for you to have the guidelines and application available to refer to during the presentation. Find them at [coastal.ca.gov/whaletailgrant](https://coastal.ca.gov/whaletailgrant)**

**1**

Thank you for your interest in the Whale Tail Grants. We're very happy to have you with us today, and hopefully after this presentation you'll feel prepared and confident to put together a grant proposal.

We're going to walk through the Whale Tail Grant Guidelines and Application during this presentation, which will take about 40 minutes. We'll have time for you to ask questions at the end, but you can also type questions into the Chat box at any time, which we'll answer after the presentation. If you have a question about a particular slide, make a note of the slide number, found in the box on the bottom left, and we can go back to it if that's helpful. During the presentation, all of you should be muted.

This slideshow, our script, and a video recording will be posted on the grant webpage within a few days.



This is our contact information, with email being the best way to initiate a conversation. Please feel free to contact us with questions about your project. This meeting isn't the place to get into your specific project details, but it *is* a good time to ask more general questions about the grants and the application process.

During this presentation it will be helpful if you have both the Guidelines and Application in front of you. We'll be showing a lot of text on the screen as we walk you through the Guidelines and Application. Most of it is taken directly from those documents so you don't need to try to read it all on the screen.

**The California Coastal Commission's WHALE TAIL® Grants fund projects that connect people to the California Coast and its watersheds through education, stewardship, and outdoor experiences.**



3

We're going to start with the Grant Guidelines. It's very important to read through the Guidelines before starting your Application.

The Guidelines start by explaining that this grant funds projects connecting people to the California Coast and its watersheds through education, stewardship, and outdoor experiences.

The California Coastal Commission started the WHALE TAIL® Grants Program in 1998, with funding from purchases of California's Whale Tail License Plate. In 2014, the Protect Our Coast and Oceans Fund was added to the California state tax return's Voluntary Contributions section to provide taxpayers the option to contribute to the WHALE TAIL® Grants Program. In 2021, \$10 million in one-time funding was allocated for this program through the state budget. Nearly all of the 2021 funds will be expended after this grant cycle. A total of approximately 1.5 million will be allocated this year.

Projects fall into one or more of the following four categories: *(page 2 of Grant Guidelines)*

- youth education programs
- programs for educating the general public or adults
- climate change education and stewardship
- shoreline cleanup and enhancement programs with community involvement

We strongly encourage projects that engage communities that have historically received fewer opportunities for coastal and marine education and stewardship, and applicant organizations based in and composed of the communities they are engaging.

We strive for broad geographic distribution within CA.

4

Please note that if you're following along with the Guidelines document in front of you, you can find the page number to refer to at the top of the slide in light blue.

If you turn to page 2 of the Guidelines under Program Overview, you'll see that projects should fall into one or more of the following four categories:

Youth education programs, programs for educating the general public or adults, climate change education and stewardship, and shoreline cleanup and enhancement programs with community involvement.

All of the categories are in the context of coastal and marine education as described in the purpose of the grant program.

We strongly encourage projects that engage communities that have historically received fewer opportunities for coastal and marine education and stewardship, and applicant organizations based in and composed of the communities they are engaging.

We strive for broad geographic distribution across California, both coastal and inland, and balancing that may influence the selection of proposals.

## Who can apply?

*(page 3 of Grant Guidelines)*

- Non-profit 501(c)(3) organizations
- Projects of a non-profit fiscal sponsor
- Public schools or districts
- Government agencies
- Federally Recognized Tribes and other California Native American Tribes as defined by Governor's Executive Order B-10-11

Projects must engage California audiences.

5

These are the types of organizations eligible to apply for a Whale Tail Grant, which are listed in the Grant Guidelines.

All projects must engage people in California.

# What do we fund?

6

Below the Sea  
by Kanoa Martinez



Now we're going to briefly leave the Guidelines document to talk a little bit about what this grant funds. The Coastal Commission has funded hundreds of different projects over the 25 years of Whale Tail Grants and although there isn't really a typical project, I'll give some examples of general types of projects that have been funded. This is by no means an exhaustive list and if I don't mention your project idea, that doesn't mean it's not appropriate for funding.

## Hands-on marine science...



7

Greater Farallones Association

Whale Tail Grants fund hands-on marine science...

## Educational field trips...



8

Tomales High School

...and a lot of experiential learning in the field. This doesn't have to be on the coast, although often it is, but it could be at a creek, or in a science center, or elsewhere.



## On-the-water education...



9

Green Life Project

The grants fund on-the-water educational programs

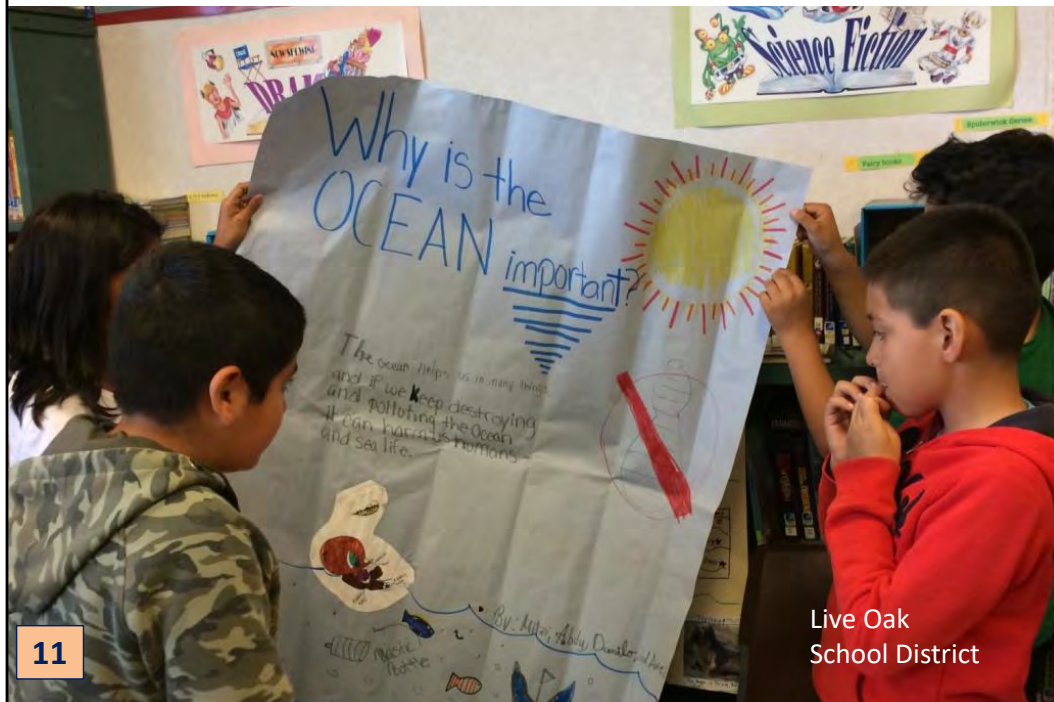
## Community science...

California Urban Streams Alliance



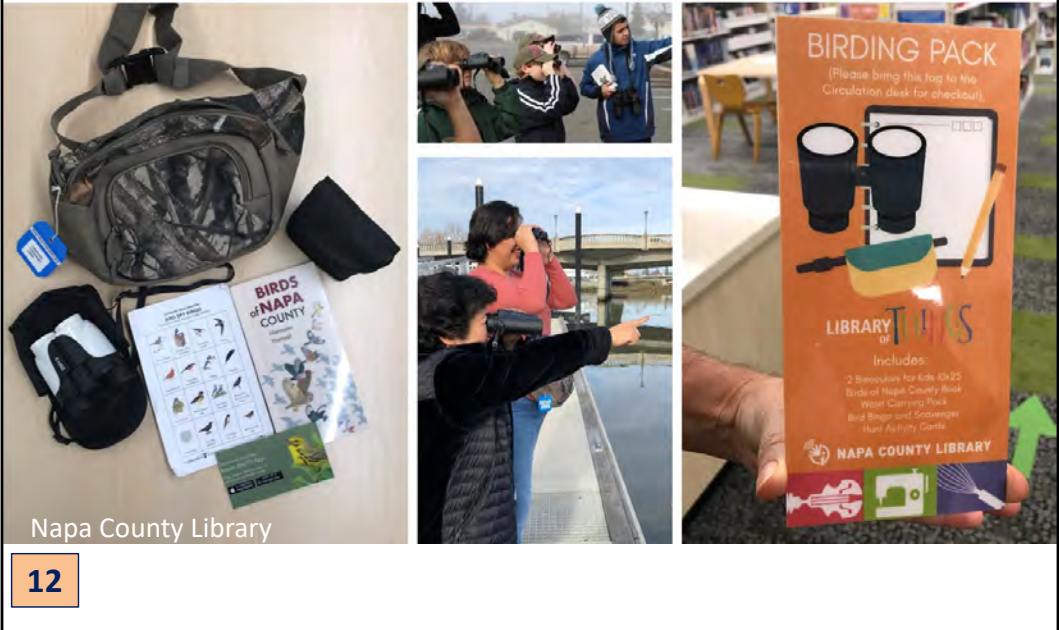
community science projects. . .

## In-school and after-school education...



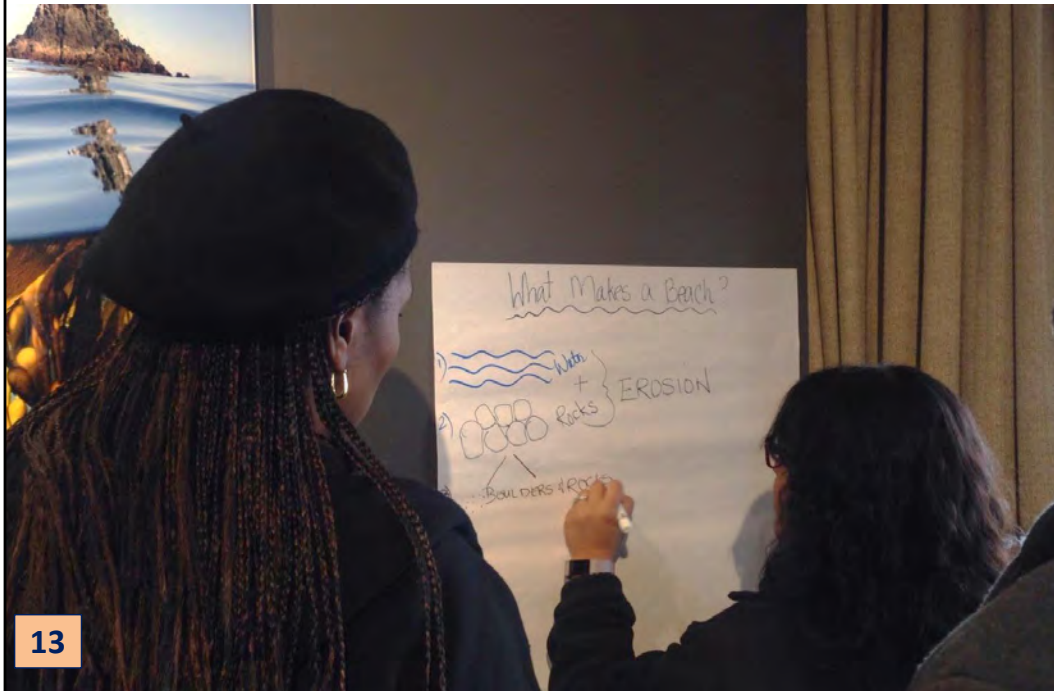
projects that take place at school and at after-school programs.

# Nature exploration kits...



The grants fund kits for independent exploration that organizations lend out.

## Teacher trainings...



They fund professional development for teachers.



## Climate Change Education

Roosevelt Middle School

And projects dealing with sea level rise, ocean acidification, or other things relating to climate change in the coastal and ocean environments.



15

**Watersport skills  
incorporating education or stewardship...**

The grants fund watersport skill programs that incorporate environmental education or stewardship



guided and self-guided tours.



## Wilderness trips...



17

Ventana Wilderness Alliance

And wilderness trips with education or stewardship elements.

## Cultural programming...

Tolowa Dunes Stewards



They fund cultural programming related to the coast and coastal watersheds...



**Interpretive signage...**

Redwood Community Action Agency

19

They've funded educational and interpretive signage...



This grants program has a big emphasis on environmental stewardship – meaning taking action to help care for the coast and other environmental resources. There are many ways to incorporate stewardship. For example, a project might involve participants in ecological restoration.

## Shoreline cleanups...



21

Another example of stewardship is a shoreline cleanup. Ideally we like to see that the stewardship aspect is well integrated with any educational aspect – so there is context that helps give the stewardship activity meaning to participants.

## Do we fund inland projects? Yes!



22

Resources for Indian Student Education

Your project does not have to be on the coast. We've funded projects in Riverside and Stockton and Modoc County and many other inland locations. But projects must still include education about the coast and ocean and how you are connected with the coast and ocean wherever your project is.

## Do we fund inland projects? Yes!

Include education about the downstream end of the watershed



For example, if you're teaching about watersheds, and where people are in their watershed, include the downstream end too.



**Do we fund inland projects? Yes!**

**Incorporate  
ocean education  
into your inland  
waterway  
experience.**

**24**

San Joaquin County  
Office of Education

Or, if you're doing a project on an inland waterway, you could incorporate content like tides or salinity or estuaries if those are relevant to where you are.

Another example of an inland project is one that includes education about migrating species like salmon.

And an example of a stewardship message for an inland project would be incorporating how actions taking place inland affect the coast and ocean.



*Page 4-5 in the Grant Guidelines for the complete text.*

**CRITERIA FOR SELECTING GRANT RECIPIENTS  
(out of 100 points)**

- 1. Educational Impact and/or Environmental Improvement (25 points)**
- 2. Audience (15 points)**
- 3. Project Concept (30 points)**
- 4. Proposal Content & Project Implementation (30 points)**

25

Now, moving back to the Guidelines, page 4.

We're going to go through the scoring criteria, which are fully described in the grant guidelines. The criteria tell you how we'll be evaluating your grant proposal. Keep them in mind as you answer the questions in the application. Your responses will be the basis for how your proposal is scored on these criteria.

First is the project's educational impact and/or environmental improvement. These grants are for meaningful education about marine and coastal environments, as well as for improving those habitats through community involvement. The stronger the educational impact of the experience, the more points your proposal will receive.

One way to think about the "educational impact" is what are the participants going to learn and experience, and what do you hope they will come away with from the project. In other words, we're using the phrase "educational impact" broadly to encompass knowledge, the impact of experiences, and the cultivation of a connection to nature and a stewardship ethic.

In the Guidelines under Criteria 1, you can read some examples of the types of methods and pathways that can lead to a strong proposal. Those are just examples - in your grant application, you might provide evidence of other effective strategies not listed there, and that's fine.

The second criteria is audience. Strong proposals will engage communities that have historically received few marine education and stewardship opportunities.

Third is Project Concept. This criteria has several components. One component is the project's "why," which is defined as the degree to which it is connected to a specific issue, interest, or need, and how that was identified.

Another element is the degree to which the proposal demonstrates that the project is relevant and appropriately designed for the audience.

A third element under Project Concept is a reasonable budget that is clearly connected to your project goals. And there are a few points that may be awarded based on elements such as building organizational capacity or incorporating creative ideas and innovative approaches.

And finally, the fourth criteria is proposal content and project implementation. We're looking for well-developed ideas where you've already figured out a lot of the details, you know how you're going to evaluate your success, and you've included all the information we asked for, as relevant.

It can help to look at your proposal from the point of view of the reader. Ask yourself questions such as "Does this paint a clear and complete picture of what I want to do? Are there parts that are vague and could leave the reader with questions?" A good practice is to have someone unfamiliar with the project read through it and see if it makes sense to them.



### 2024 WHALE TAIL® Grant Application Cover Sheet

→	Name of Applicant Organization:
→	WHALE TAIL® Grant Request: \$
	Total Project Budget (if larger than Grant Request): \$
→	Name and Title of Contact Person:
	Email (where you will receive grant notifications):
	Organization Mailing Address:
	Telephone:
	Website:
→	Project Title:
→	Brief Project Summary. No more than 3 sentences, focusing on WHAT you propose to do ( <i>not</i> WHY):
	Location(s) of the community(ies) you will engage:
	Number of people who will be directly reached by the project:
	Project Start Date:
	Project End Date:

**26** The Project Start and End Dates are the dates of your grant-funded project. Grant project tasks must begin between March 19 and June 30, 2025, and end by April 15, 2027.

Now, let's move to the Application.

The first element is the Cover Sheet.

The Applicant Organization is the organization's official name that will be written on a check if you get a grant. If you have a fiscal sponsor, you can write the fiscal sponsor's name, and a slash, and then the project organization name.

For the requested grant amount, keep in mind that there are two funding levels for this grant, which are explained in the Grant Guidelines. The small grants are \$20,000 or less, and the larger grants are from \$20,001-\$50,000. A minimum of 25% of the funded grants will be small grants. Depending on the applications we receive, it's possible that there may be a *slightly* lower bar for small grants. My advice is that you should apply for the amount of funding you need, *unless* what you need is just over \$20,000 in which case, ask for \$20,000.

The Contact Person is the person who will be notified whether your proposal receives funding, and who we would contact if there are questions about your application. Include their email address rather than a general email address box. It's important that someone will see and respond to our emails.

For the Project Title, you can make up whatever name you want. You don't have to repeat the name of the organization in the project title. And please keep your title concise.

The Brief Project Summary is an important part of this cover sheet. What you write here shouldn't include the *why* or the *how* of your project, but really just the *what* and maybe the *who*. This summary statement allows the reviewer to enter your application with an idea of what it's all about.

### EXAMPLE OF BRIEF PROJECT SUMMARY

“The project will host 120 8th grade students from Fort Bragg Middle School to attend a 4-day 3-night environmental education experience. Students will be led by experienced naturalists through a variety of local ecosystems and participate in hands-on comparative ecology concepts to enhance their classroom learning.”

27

I'll share a couple of real-life examples of that Brief Project Summary.

“The project will host 120 8th grade students from Fort Bragg Middle School to attend a 4-day 3-night environmental education experience. Students will be led by experienced naturalists through a variety of local ecosystems and participate in hands-on comparative ecology concepts to enhance their classroom learning.”

### EXAMPLE OF BRIEF PROJECT SUMMARY

“The project will increase environmental literacy and outdoor teaching techniques among formal educators in San Diego, with a focus on ocean, climate, and watershed literacy. Over the period of ten months, participants will visit and explore six local ecosystems by focusing directly on science practices that inspire engaged learning, curiosity and wonder.”

28

Here’s another example:

“The project will increase environmental literacy and outdoor teaching techniques among formal educators in San Diego, with a focus on ocean, climate, and watershed literacy. Over the period of ten months, participants will visit and explore six local ecosystems by focusing directly on science practices that inspire engaged learning, curiosity and wonder.”

Location(s) of the community(ies) you will engage:	
Number of people who will be directly reached by the project:	
Project Start Date:	Project End Date:
The Project Start and End Dates are the dates of your grant-funded project. Grant project tasks must begin between March 19 and June 30, 2025, and end by April 15, 2027.	
<b>Which describes your organization? (Mark all that apply)</b>	
<input type="checkbox"/> Non-profit corporation	<input type="checkbox"/> Project of non-profit fiscal sponsor
<input type="checkbox"/> Government entity	<input type="checkbox"/> Public school
<input type="checkbox"/> CA Native American Tribe	
Where/how did you find out about this grant program?	
Name and title of person submitting proposal (May be same or different from Contact Person):	
Signature of person submitting proposal:	
Date:	

29

Back to the Application Cover Sheet.

For the Project Start Date, the earliest grant project tasks can start is March 19, 2025, and some tasks will need to start by June 30, 2025. Don't put down March 19 if that's not when you need or want to start. It's fine to start in April, May, or June. Your grant project can last any amount of time up until April 15, 2027.

Please indicate what type of organization you are. If you're more than one type, that's fine. And the last thing I want to note about the cover sheet is that the person who prepared the grant can sign it. It doesn't need to be signed by a director or other high-level representative.

**Read the Grant Guidelines and all the application questions before starting your proposal. Use black, 12-point font.**

**Please do your best to stay within a limit of 15 pages for Questions 1-11. (The remaining items may exceed that page limit if necessary.) There's no minimum page amount, as long as all relevant questions are answered.**

**If you already responded to something in a previous question, feel free to refer us to that question. If a question is not relevant to your project, write N/A.**

**30**

After the cover sheet comes the body of your proposal. At the top of page 2 of the Application, there are some instructions and requests. Please read all the questions before you start. Sometimes people feel like they want to explain something that's not being asked in a question, but if they read further down, they may see that we ask for that information later.

Please stay within a limit of 15 pages for the first 11 questions. If you go a little bit over, we're not going to disqualify your proposal, but do your best to stay within the limit. You don't *need* to use 15 pages if that's not necessary for your proposal. There's no minimum page amount.

If you did answer something in a previous question that you think also answers a later question, you can refer us to the previous question rather than repeating yourself. If there's a question that doesn't apply to your project, you can write N/A for not applicable next to the number.

## WHO

### **1. Organization's History**

Briefly describe your organization, its history (including the year it was founded), and its mission.

### **2. Participants**

Describe who you will directly engage with your project, in as much detail as you can, such as number of people; location; demographics such as race, ethnicity, income, age/grade level, disability, sexual orientation, gender identity, and/or other identities as relevant to your project and participants.

31

The application questions are organized into a Who, Why, What, How, When system. It starts with WHO.

For the first question, "Organization's History" you can briefly describe your organization and its mission. No need to go into tons of detail for this. You may notice that, throughout the application, some questions ask you to answer *briefly*, and that's a clue to the amount of detail we're looking for.

Question 2 is all about who you're going to engage with your project. You'll want to recall from our Scoring Criteria, that strong proposals will engage communities that have historically received fewer marine education and stewardship opportunities. The information you provide in this question will guide that scoring, and the more specific you're able to be in terms of numbers or percentages, the better. We list some categories of identities and demographics to consider, but you don't necessarily need to include all of them.



## **2. Participants (continued)**

If working with schools, include the school name(s) and district if possible.

If your project reaches an *indirect* audience, briefly describe and quantify that wider group.

(Please note that if selected for funding, your final report must include detailed information on who you engaged with your project.)

32

If you're working with schools and you already know which ones, tell us.

We ask about your indirect audience, but if there's not a clear indirect audience for your project, there's no need to stretch to find one.

If you receive a grant, you'll be required to provide details on your participants in your final report.

### **3. Organization and Staff**

Explain whether and how your organization identifies as part of the community you plan to reach.

Explain why and how your organization and staff is particularly suited to working with your participants to carry out the project.

Describe the key staff members who will carry out the project: their positions, their specific roles in the project, and their relevant qualifications and experience. Be sure to include the people who will interact directly with participants, including volunteers if they will lead your programming. If positions are not yet filled, explain the qualifications for those positions.

33

#3. We want to understand whether and how your organization identifies as part of the community you're planning to reach, and why and how your organization and staff are particularly suited to working with your intended participants to carry out your project. You're asked to describe your key staff. This is your chance to talk about who will be carrying out the project, their roles, and their relevant qualifications and experience. Staffing is a key factor for project impact – here is where you can talk about how your staff will contribute to your project's success. If you have yet to hire staff, you can explain the process for filling the positions and the qualifications you will be seeking. If volunteers are the ones doing the work, tell us about them. We do really want to understand the people who will be interacting with your participants, or doing the work of your project. If you feel that it's important for us to know the background of your director, that's great, but if others are doing the on-the-ground work, be sure to include them.

**4. Partners**

If any partnerships are integral to your project, describe them.

(If you addressed this as part of another question, refer us to that question number rather than repeating the information.)

34

The next question asks about any partnerships integral to your project. If there aren't any, you can write Not Applicable. You'll notice the note at the end of this question that if you already addressed partnerships, like perhaps in question #2, you can refer us to that rather than repeating yourself.

**WHY**

**5. Why are you proposing this project?**

Explain your “why” as an issue, interest, or need that your project will address and explain why *this project* is suited to be successful in that effort. How did you come to identify and understand this issue, interest, or need? Why is this project of value to the community you want to engage?

***If this idea arose from the community, be sure to talk about that here.***

35

Now we get to the WHY of your project. #5 asks for the issue, interest, or need that your project is addressing. Explain why your project would be of value to the community you want to engage. If it arose from the desires of the community, be sure to talk about that. This question is not about the financial needs of your organization.

**WHAT AND HOW**

**6. Goals and Objectives**

List the goals and objectives of your project. (Specific objectives are measurable and relate to what you will do in your project to accomplish the broader, longer-term goals.)

36

Next we're in the What and How of your project. This question asks for your goals and objectives, which, taken together, are a summary of what you hope to accomplish, without all the details. If you receive a grant, you'll be assessing how well you met your objectives when you submit your final report to us.

As used here the terms "goals" and "objectives" are not interchangeable, but they are related. Goals are broader and longer term. Objectives are specific, measurable actions that together will lead to achieving a goal or goals. On the application form, this question includes a link that provides some example goals and objectives, which you can use to get an idea of how you might format them, and the level and type of detail you might include.

## **Example of goals and objectives:**

### **GOALS:**

1. Youth will learn about environmental issues and marine and coastal stewardship
2. Youth will make an impact on their community through service-learning projects that connect them to the natural environment and protect and preserve local marine environments.
3. Youth will actively engage with science curriculum in marine biology and environmental studies.

37

Here are some example goals and objectives. This project starts by listing several goals. You'll see they're pretty broad, like "Youth will learn about environmental issues and marine and coastal stewardship."

### Example of goals and objectives :

#### OBJECTIVES:

1. By the end of the project, 15 high school students will complete the summer program and demonstrate increased understanding of marine science and ocean literacy principles, via pre- and post-surveys.
2. 15 sixth grade students will participate in after-school workshops and show increased understanding of coastal environments, via pre- and post-surveys.
3. 15 high school students and 15 sixth graders will demonstrate they understand the importance of ocean and coastal protection by participating in habitat restoration and shoreline cleanup projects.

38

Those goals are followed by a few measurable objectives that specifically list how the overarching goals will be met. You'll notice that they include how they will be measured, sometimes referencing an evaluation tool like a survey, or through an action like in Objective 3, the students will participate in restoration and cleanup projects.

### **Example of goals and objectives:**

Goal: Provide a meaningful coastal experience and inspire an ongoing coastal resource stewardship ethic through active learning and interactive exploration.

Objectives:

1. Host six interpretive events that encourage community members to explore the wetlands while learning about the region's natural systems and cultural history.
2. Host six stewardship events that teach about and involve participants in coastal wetland restoration, habitat protection, and sea level rise community science through in-the-field workshops and hands-on restoration work.
3. Demonstrate an increased sense of connection to and responsibility for the coastal wetlands through participant interviews.

39

Here's another example showing a different layout. This one also lists specific, measurable objectives that will accomplish overarching goals. Objective 3 will use participant interviews as the tool to assess success. You might decide that a qualitative tool like that works best for one or more of your project's objectives.



### **Example of goals and objectives :**

**GOAL 1:** Improve youth understanding of coastal and watershed ecology.

Objective 1.1: Implement 10 two-hour classroom presentations at each of 3 schools.

Objective 1.2: Increase average score of post-test over pre-test by at least 20%.

**GOAL 2:** Improve youth interest in coastal and watershed stewardship and restoration science.

Objective 2.1: Lead 10 field trips designed to interest students in coastal environments and active stewardship.

Objective 2.2: Provide at least 15 stewardship and restoration-based internships for local teens.

Objective 2.3: Increase relevant career interest by 10% from pre-survey to post-survey.

40

Here, each goal has its own corresponding objectives listed out. Objective 2.3 is, “Increase relevant career interest by 10% from pre-survey to post-survey.” So they identify what tool they’ll use and how much change will indicate success to them.

How you format the goals and objectives will depend on what makes sense for your project. The main point here is to go for clarity, which will help keep the project on track. The time you put in to develop measurable objectives will lay the groundwork for how you evaluate your project’s success.

## **7. Project Description**

- Describe your plan for recruiting your participants, or a description of how you already recruited them.
- Describe all project elements, such as events, field trips, classroom activities, trainings, presentations, meetings, development of educational resources or tools, or other aspects of your project.
- Describe what participants will do and experience during your project, including details such as the number of days, number of hours per day, and general timing of participant programming as applicable.
- Be sure to discuss your project design considerations such as cultural relevancy, age-appropriateness, accessibility, and/or education strategies.

41

Question 7, Project Description, is where you give us the details of what you want to do with this grant.

First, you'll describe how you will reach your intended participants.

What will participants be doing as part of your project? Or if your project is to create a resource or tool, you can describe that here.

We want to know how intensive your program is for individual participants, in terms of days or hours of programming, if that's applicable. Will all the participants take part in all of the project elements, or will different people participate in different activities? Describe that here.

This is the place to talk about how you have designed your project as culturally relevant, age-appropriate, accessible, or using other strategies or expertise, in order to effectively and appropriately engage your audience.

## **7. Project Description (continued)**

If you will create resources or tools or some other kind of product to be used by your organization or by others, explain the product and how it will be experienced or distributed.

If you will use an existing curriculum, handbook, or other program material, briefly describe it and explain why you have chosen it, and include a copy with your application or a link if it's viewable online. Make sure that we can open any links you include.

If you're creating a resource or tool to be used or distributed, explain how that will happen. If you're using an existing curriculum or program material, include a copy with your proposal. You can link to it if it's viewable online.

If you include a link within your application, make sure that anyone who clicks on it will have access. If we can't access something, we won't be able to consider it when reviewing your grant proposal. We *do* carefully review curriculum and program materials you include.

### **8. Project Future and History**

If your project is funded, will you continue it past the grant period? If so, briefly explain the longer-term funding plan.

If your proposal is for an existing project, how long has it been operating, how was it funded in the past, and what results have you achieved?

If this project was previously funded by a WHALE TAIL<sup>®</sup> Grant, include a brief summary of what was accomplished through the previous grant and how the new proposal relates to the previous work.

43

Question 8 is about what came before and what might come after your grant. If you receive funding, will this project continue after the grant period? If so, how will you cover any associated costs?

If your proposal is for a project that already exists, tell us a little about its history and impact, and how it's been funded in the past.

If this *project* was previously funded by a Whale Tail Grant, briefly tell us about that, and how your new proposal relates to the previous work.

### **9. Tracking and assessing your impact**

Describe your project evaluation plan.

How and when will you track and assess your project outcomes and success relative to your project goals and objectives? Possible examples of outcome indicators might include participant satisfaction with the project experience; changes in knowledge, skills, attitudes and/or behaviors; and changes to the environment.

44

Question #9. How you track and assess your impact should be closely linked to and planned around project goals and objectives. Many of our grantees do this work themselves, but some hire external contractors. Either is fine and your choice will depend mainly on budget considerations and in-house capabilities, as well as the scope of your specific project.

## **9. Tracking and assessing your impact (continued)**

Consider whether quantitative methods such as pre-tests/post-tests and surveys; qualitative methods such as interviews, observation, and focus groups; or a combination of methods is most appropriate for learning about your program and its impacts.

How will you use what you learn to improve your project in the future?

If you already have specific tools you plan to use (such as surveys or tests), include them as attachments.

45

Listed in this question are some general examples of methods of assessing your impact. Your chosen methods may be quantitative, qualitative, or both. Describe in your proposal the methods you will use. Remember from our example goals and objectives, many of them specifically reference the tools and methods for assessing success. Please tell us how you expect to use what you learn, and if you already have tools you plan to use, like surveys or interview protocols, be sure to include them with your application.

**10. Permits required (if any)**

If permits will be required for your project, explain whether you already have them or whether you will need to acquire them during the project timeline.

Possible examples include:

- Collection permit from Dept. of Fish and Wildlife
- Construction permit
- Ecological restoration (permission from landowner)
- Event permit

46

Most projects won't require a permit, but in case yours does, then Question 10 is the place to list it. Here are a few examples of types of permits sometimes associated with Whale Tail Grants.

## WHEN

### 11. Task timeline

Grant project tasks must begin between March 19 and June 30, 2025, and the project may be of any length as long as funding ends by April 15, 2027.

#### Example:

March 2025

- Outreach to community service organizations
- Outreach to high school students

April 2025

- Location scouting
- Instructor planning

May 2025

- Conduct week-long outing with students

June 2025

- Evaluation

July 2025

- Final grant report

47

Next is the timeline. This timeline is only for work done as part of the grant, within the grant period. Remember, the grant period needs to start between March 19 and June 30, 2025, and can last as long as April 15, 2027. Please don't include anything in your timeline outside of the grant period.

It's up to you what you want the task timeline to look like. There's a link within this question in the application to some example timeline formats. It can be a very simple bullet list like this example...



### 11. Task timeline

Example:

Project Stage	Date	Tasks
Program Prep	June-Dec 2025	<ul style="list-style-type: none"><li>• Meet with teachers and administrators to refine curriculum and field trip dates</li><li>• Logistical planning with partners and field trip hosts</li><li>• Identify and compile supporting materials required for experiments, demonstrations, journals, presentations, and trips</li><li>• Introduce program at Back to School Night</li></ul>
Program Implementation	Jan-May 2026	<ul style="list-style-type: none"><li>• Introduce students to the program</li><li>• Implement pre-test</li><li>• Implement 10 in-class lessons</li><li>• Conduct 3 field trips</li><li>• Facilitate student communication projects: presentation to parents, presentation to City Council</li></ul>
Program Evaluation/Follow-up	May-June 2026	<ul style="list-style-type: none"><li>• Implement post-test</li><li>• Compile program reports</li><li>• Conduct focus groups with teachers to determine satisfaction with program, elements that worked best, elements that need improvement</li></ul>

48

...or a table like this, or another format that works for you.

**12. Budget details** - Use our Grant Budget Form or your own document that includes the same information. The form is available at the end of the application or as a downloadable [Excel form](#).

*This form is on Page 6*

**WHALE TAIL® GRANT PROJECT BUDGET FORM**

**PERSONNEL EXPENSES REQUESTED (Rate and # of hours requested for each position)**

<b>Job title #1:</b>		
Rate (\$/hour):	Time (hours):	Total (Rate x Time): \$
<b>Job title #2:</b>		
Rate (\$/hour):	Time (hours):	Total (Rate x Time): \$
<b>Job title #3:</b>		
Rate (\$/hour):	Time (hours):	Total (Rate x Time): \$
<i>(Add additional positions as needed. Include title, rate, hours, and \$ amount.)</i>		
Total Benefits requested <sup>(1)</sup> : \$		
<b>1. Total Personnel Expenses requested (all positions plus benefits): \$</b>		
<b>OPERATING EXPENSES REQUESTED<sup>(2)</sup></b>		
Supplies/Materials: \$		
List your anticipated major purchases of supplies/materials and estimated costs:		
Travel <sup>(3)</sup> : \$		
Briefly explain any proposed travel costs:		
Food <sup>(4)</sup> : \$		
Briefly explain the purpose of this food or beverage request:		
External Contract(s): \$		
Briefly explain the purpose of the contract(s):		
Other operating expenses:		
Type of expense:	Amount requested: \$	
Type of expense:	Amount requested: \$	
<i>(Add additional types of expenses as needed, with dollar amount for each.)</i>		
<b>2. Total Operating Expenses requested: \$</b>		
<b>3. Indirect Costs/Overhead requested<sup>(5)</sup>: \$</b>		
<b>Total Budget Request (add 1, 2, and 3): \$</b>		

49

Next we come to the budget, which should explain what you want to spend the grant money on.

On page 6 of the Application, there's a budget form that you can use, seen here, or you can use the link in Question 12 to download an Excel budget form. Either is fine, or you can submit your own budget sheet, as long as it includes all the information we're asking for here. We don't want you wasting time on formatting challenges, so if you have trouble inputting information into this form or using the Excel spreadsheet, you can send us your own document instead.

Whale Tail grants are paid by reimbursement only, so keep in mind that for everything in your grant budget, you're going to need to invoice us *after* you have a bill or a receipt. You can invoice as often as once per month. It can take up to 45 days to receive your reimbursement check from the state.

Grants will not be awarded to fund political advocacy work; for projects that include religious content in their programming; for travel outside of California; or for the purchase of vehicles, insurance, prizes, incentives, gift cards, cash gifts, or items that will be sold.

WHALE TAIL® Grants are for defined projects, not for an organization's general, ongoing administrative costs.

Habitat enhancement projects must be ecologically responsible.

50

There are some things that we *don't* fund, which are listed on page 3 of the Grant Guidelines. Grants will not be made to fund political advocacy work; for projects that include religious content in their programming; for travel outside of California; or for the purchase of vehicles, insurance, prizes, incentives, gift cards, cash gifts, or items that will be sold.

This grant is not for general organizational support – it's for definable projects. And it may go without saying, but we can't fund projects that aren't ecologically responsible.

## WHALE TAIL® GRANT BUDGET FORM

### PERSONNEL (Rate and # of hours for each position for which funds are being requested)

<b>Job title #1:</b> <span style="color: red;">Camp Leader</span>		
Rate (\$/hour): <span style="color: red;">\$20/hour</span>	Time (hours): <span style="color: red;">100 hrs</span>	Total (Rate x Time): \$ <span style="color: red;">2,000</span>
<b>Job title #2:</b>		
Rate (\$/hour):	Time (hours):	Total (Rate x Time): \$
<b>Job title #3:</b>		
Rate (\$/hour):	Time (hours):	Total (Rate x Time): \$
<b>Job title #4:</b>		
Rate (\$/hour):	Time (hours):	Total (Rate x Time): \$

*(Add additional positions as needed. Include title, rate, hours, and \$ amount.)*

Total Benefits requested <sup>(1)</sup> : \$ <span style="color: red;">300</span>
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<b>1. Total Personnel Expenses requested (all positions plus benefits): \$ <span style="color: red;">2,300</span></b>
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**51**

Let's take a closer look at the Budget Form. If you're requesting funding for staff, you'll need to list the positions you want to pay for, their rate of pay, the amount of time you want the grant to pay for, and the total cost for each position. If you want the grant to pay for benefits you can include those as a lump sum. The pay rate should be the *actual* rate you pay your staff.

Then you include the total of your personnel request.

**OPERATING EXPENSES REQUESTED**

Supplies/Materials: \$ <b>100</b>	
List your anticipated major purchases of supplies/materials and estimated costs: <b>Art supplies \$80; Garden tools \$20</b>	
Travel <sup>(2)</sup> : \$ <b>900</b>	
Briefly explain your proposed travel costs: <b>Bus for field trip</b>	
Food: \$ <b>50</b>	
Briefly explain the purpose of this food or beverage request: <b>Snacks needed for the volunteer workday for 20 people</b>	
External Contract(s): \$ <b>1,000</b>	
Briefly explain the purpose of the contract(s): <b>Evaluation consultant</b>	
Other operating expenses:	
Type of expense:	Amount requested: \$
Type of expense:	Amount requested: \$
<i>(Add additional types of expenses as needed, with dollar amount for each.)</i>	
<b>2. Total Operating Expenses requested: \$ <b>2,050</b></b>	
 <b>3. Indirect Costs/Overhead</b> (No more than 10% of <i>Total Personnel Expenses</i> , #1 above) <sup>(3)</sup> : \$	
 <b>Total Budget Request (add 1, 2, and 3): \$</b>	

**52**

Next are any operating expenses you're requesting. If you want to pay for supplies or materials, please list what you want to purchase and their estimated costs. It's ok if this is a general description, like "gardening tools," or "art supplies." However, if you do know that you will be buying a big, specific item like a 200-gallon fish tank and you know exactly what it costs, then be specific.

If you want to pay for travel, please briefly explain that. You might say something like, school buses for field trips, or mileage for visiting project locations. This grant can't pay for any out of state travel, including travel from another state into California.

We can pay for food and drinks, if that purchase is necessary for the success of the project. That might look like snacks during a field trip or lunch during a volunteer workday. If you want the grant to pay for food, briefly explain what it's for here.

If you want to contract with someone, like an educational service provider or an evaluation consultant, explain that here. If you already know who you'd like to contract with, include that information.

And there's space for other categories of operating expenses if what you need isn't already included. Then in space number two, add up all your operating expenses.

To be clear, if you want to request a budget that's all Personnel, or one that's all Operating Expenses, or one that has both, any of those are fine.

One last item on the budget sheet is Indirect Costs, or Overhead. The Whale Tail Grant is limited to paying Indirect Costs at a maximum of 10% of the Total Personnel Expenses that you're requesting. So if you have only Operating Expenses in your budget, there would be no Indirect Costs included.

And finally at the bottom you add up Personnel Expenses, Operating Expenses, and Indirect Costs for your Total Budget Request.

<sup>1</sup> Pay rates and benefits reflect actual costs. Benefits may not exceed 55.34% of amount requested for wages.

<sup>2</sup> Grant funds can't purchase vehicles, insurance, prizes, incentives, gift cards, cash gifts, or items that will be sold.

<sup>3</sup> Use of owned vehicles are reimbursed at the federal rate, currently 67 cents/mile. Rented vehicles are reimbursed for rental fee and gas. Travel to or from outside California is not eligible for funding by this grant.

<sup>4</sup> Maximum reimbursement for food is \$20 per person per meal. No tips are reimbursed for food not part of overnight travel.

<sup>5</sup> Indirect costs are limited to 10% of Total Personnel Expenses and include, for example, a pro rata share of rent, utilities, and salaries for certain positions indirectly supporting the proposed project but not directly staffing it.

53

The budget form has five footnotes. Make sure you read them as they are all important. #1 tells you the maximum benefits amount we can pay, #2 lists those items we can't pay for, #3 explains a little about our travel policy. If you plan to use a private or company vehicle, the state reimburses for mileage only, at whatever the current IRS mileage rate is. If you rent a car for your project, the state reimburses the rental fee and gas, which both require you to submit receipts. #4 talks about food. We can reimburse up to \$20 per person per meal. We do expect that all grant purchases, including food, are made in an economical manner. The final footnote explains the Indirect Costs.

## **12. Budget details (continued)**

If your total project budget is larger than your grant request, complete the Total Project Budget Form, located at the end of the packet on page 7.

54

If it will cost more to complete your project than what you're requesting from the Whale Tail Grant, we ask that you complete a second budget form, that you can find on page 7 of the Application Packet. Only complete that form if your project budget is larger than your grant request. This will help us understand how your request fits into the larger project, if applicable.



### TOTAL PROJECT BUDGET FORM

*ONLY complete this form IF Project Budget is LARGER than your Grant Request. In the spaces below, note the TOTAL amounts needed to complete your entire project.*

#### TOTAL PROJECT PERSONNEL EXPENSES

1. Total Personnel Expenses for this project (all positions plus benefits): \$

#### TOTAL PROJECT OPERATING EXPENSES

Supplies/Materials: \$

Travel: \$

Food: \$

External Contract(s): \$

Other operating expenses:

Type of expense:	Amount: \$
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Type of expense:	Amount: \$
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*(Add additional types of expenses as needed, with dollar amount for each.)*

2. Total Operating Expenses for this project: \$

3. Total Indirect Costs/Overhead for this project: \$

**Total Project Budget (add 1, 2, and 3): \$**

**Please answer the following questions in the box below:**

Have you already secured the additional funds (beyond the grant request) needed to complete your project? If not, what is your plan to secure them?

55

The Total Project Budget Form is a simplified version of our Grant Budget Form. It asks for the *total* project costs, *including* what you're requesting from the grant.

At the bottom of the page there's an additional question to answer about whether you already secured the additional funds needed to complete your project, and if not, what is your plan to secure them. Remember, this page is only for projects with a budget larger than the grant request.

Similar to the Grant Budget Form, you're welcome to submit this information in your own format if that's easier for you.

### **13. Authorization**

A letter of authorization or a resolution from the applicant organization's governing body that contains the following: support for and authority to submit the proposal, authority to enter into a contract with the California Coastal Commission if the grant is awarded, and designation of the applicant's authorized representative—the person who would sign a grant contract (name and title).

If the authority to perform such tasks has already been delegated by the governing body, a letter from the person who has that delegated authority is sufficient.

56

Next in your application is a letter of authorization or a resolution from your organization. Public agencies and some nonprofits may require a formal resolution from their board. For some, it can be a letter from a board chair or a treasurer. And for a lot of you, a letter could come from an executive director or a finance director or someone like that who's already authorized to sign contracts and submit grant proposals. Whether the authorization is in the form of a resolution or a letter is up to your organization and how it authorizes grants.

If your organization is the project of a non-profit fiscal sponsor, this document will come from them.

In this question in the application there's a link where you can see some examples of different types of grant resolutions and authorization letters.

This is the only part of your application that may be submitted after the deadline, if that's necessary, for example because of your board meeting schedule.

**14. Proof of tax status** - For non-profits, proof of 501(c)(3) status in the form of an exemption letter from the IRS. If you are a project of a non-profit fiscal sponsor, this document will be for that organization.

**15. Leadership** - Names of board members and/or organization leaders. If any are on the staff or members of the Coastal Commission, please note that.

**16. Organizational Budget** - The organization's most recent annual budget (previous year's budget is fine), including sources of funds. We do not require a specific format – send your budget in the format you have. Not required for public schools or government agencies.

57

And finally, the application asks for some basic background information on your organization.

Non-profits must include a tax exemption letter from the IRS. If you have a fiscal sponsor, this will be their letter.

Please include a list of your board members or organization leaders. For a public school, this could be your principal, department head/s, and perhaps the superintendent if the district is the applicant. If you're fiscally sponsored, list the leaders of your own organization rather than the sponsor. Affiliation with the Coastal Commission is not necessarily a problem, but we'll want to make sure that we're being fair with who is reviewing or approving proposals so please let us know if there's overlap.

And, we require an annual budget for everyone except public agencies and schools. It's fine if it's the previous year's budget. We don't require a specific format for the budget, just send it in the form you have it in.

**17. Letters of Support and other supporting materials (Optional):**

Newsletters, press clippings, or letters of support from project partners or others (such as partner schools that are already identified, or landowners where ecological restoration will occur).

58

Any other supporting materials are optional. As an example, letters of support from project partners can be especially helpful to include, like if you plan to work with a school, you can get a letter from them. It does help to know if partners are already on board.

**Submit your complete application package by 8:00pm, November 4, 2024, by email to [whaletailgrant@coastal.ca.gov](mailto:whaletailgrant@coastal.ca.gov) or by uploading it to the link in the Application.**

If you are not able to email or upload your application, you can mail it with a postmark no later than November 4<sup>th</sup>.

***Read the Grant Guidelines for how to submit your application.***

59

Next is submitting your application. There are several options, which are described in the Grant Guidelines. An easy way to submit your application is by email, as long as there's less than 30 Mb attached to the email. If you need to submit your attachments in more than one email, that's fine. I do recommend that you reduce the size of any PDFs before submitting them. Another way is to use the link in the guidelines to upload your application to a Dropbox folder instead. You can save all of your application files in a folder on your desktop and upload the folder into the dropbox webpage. Once you do that, wait to see the confirmation message on the webpage that your upload was successful.

It's much easier for us to confirm that we've received your application if only one person on your team is responsible for emailing or uploading the packet. When multiple people from an organization send parts of the packet, it gets confusing, and it takes longer for us to confirm we've got your application.

The deadline is 8pm November 4<sup>th</sup>. I really encourage you not to wait until the last minute, because internet problems can happen and you don't want your service to fail at 7:58pm when you're about to submit your application. And if you're using the upload option, that can sometimes take a while so I especially encourage you to not wait till the deadline to do that.

If for any reason you need to use postal mail instead, your package must be *postmarked* no later than November 4<sup>th</sup>. You do not need to pay for rush shipping. Please don't include any extra packaging, folders, or plastic covers. Annie will send you an email to let you know we've received your proposal in the mail, but we're not responsible for anything that's lost in the mail.

If you would like to email your application packet but have a curriculum sample or other

supplementary material that you need to mail, you can do that separately (by the same deadline). Include a note with the applicant organization name and project title in the package. Scanned copies or links to online versions are perfectly fine though. Again, the Grant Guidelines explain how to submit your application for whichever method you choose. Be sure to read that carefully.

## What requirements will be placed on me if I receive a grant?

- Respond promptly to requests for information needed for your grant contract.
- Wait to do work or purchase items until you have a signed grant contract.
- Recognize the California Coastal Commission's WHALE TAIL® Grant as the project funder during outreach and programming, and place our funding logo on any printed or online content produced for the project.

60

If your proposal is selected for funding, you will need to respond promptly to requests for information needed for your grant contract, such as confirming who is authorized to sign the contract, and reviewing and approving draft contract language. If you're a teacher applying for a grant, figuring out who will sign the contract etc. can sometimes be challenging, so I recommend you understand the process for your school or district before you submit your application.

You will need to wait until you have a signed grant contract to make any grant purchases or do work you want to be reimbursed for.

You will be required to recognize the Coastal Commission and the Whale Tail Grant as a funder on materials and outreach related to the project.

### **What requirements will be placed on me if I receive a grant?**

- Maintain complete accounting and time records and invoice us accurately.
- Document your project by taking photos and/or video.
- Depending on the length of your grant project, you may be asked to submit one or more brief progress reports in writing or by phone.
- Submit a written final report at the completion of your project detailing what you accomplished and who you engaged.

61

You'll need to save receipts and accurately invoice in order to get reimbursed.

You will document your project through photos and/or video.

You'll likely be required to submit one or more brief progress reports either by email or phone to let us know if the project is progressing as planned or if problems have arisen.

You'll be required to submit a detailed final report, covering topics such as who you succeeded in engaging with your project, whether you accomplished your planned objectives, any media coverage, etc.



## What happens next?

- November 4, 2024: Application deadline.
- November '24 - January '25: Application review.
- Late January-early Feb. 2025: The applicants being recommended for funding will be notified.
- 2nd week of February: Coastal Commissioners vote on funding.
- Mid-Late February: All applicants are notified.
- March-June 2025: Grant agreements executed.

62

Here's the timeline for what happens next...

The application deadline is November 4th.

Then the review process happens through January.

We'll have funding recommendations by early February, at which point we'll notify the recommended applicants.

The Coastal Commission will vote on the final funding decision at its meeting in February.

The grants being recommended for funding will be posted on the meeting agenda webpage prior to the meeting date.

After the meeting, we'll notify all applicants.

And between March and June 2025 grant contracts will be drafted and signed and grants can begin.

## ASK US YOUR QUESTIONS!

Please contact one of us later  
to talk about your individual  
projects.

[Annie.Frankel@coastal.ca.gov](mailto:Annie.Frankel@coastal.ca.gov)

[Chris.Parry@coastal.ca.gov](mailto:Chris.Parry@coastal.ca.gov)

