Division of Forestry, Community and Urban Forestry Program

Community and Urban Forestry Assistance (CUFA) Grant
Grant Management Guidelines

Revised 7/7/2023

Throughout the course of your grant project, you as Project Coordinator will be required to interact with Community & Urban Forestry staff. We will ask you to communicate and get confirmation on changes to your project with the CUF Director, submit regular reports, gather, and submit copies of documents related to your project, and file the necessary paperwork and products to qualify for reimbursement from the State of Indiana.

Some of these things are required by our funding source, the US Forest Service, some by Indiana state law, and some by our experience in assisting Indiana communities with their urban forestry goals. It won't be constant work but here are the must-do activities you'll be required to accomplish over your project's run.

Set Up with the Basics

Your CUF office team is: Urbanforestry@dnr.in.gov

- **Jacob Roos**, Director, 317-234-4386 JRoos@dnr.in.gov
- **Madeline Gullion,** Urban Forestry Specialist, 463-203-9219, Mgullion@dnr.in.gov
- **Racheal Stenger,** Outreach Coordinator, 317-234-4386 Rstenger@dnr.in.gov

You **MUST** have access to tools used to electronically communicate and send documents via email, cloud storage, video conferencing, etc. If you do not have suitable tools (personal computer, scanner, internet access, standard office software like Word and Excel, etc.), you **MUST** partner with someone local to you who will be a reliable way to stay in contact with our staff.

You have already registered your Grant Applicant as a Bidder with the State of Indiana Bidders Portal, enabling us to reimburse your municipality or organization for project expenditures. But before that can happen, the state government establishes a contractual relationship with the Applicant. We submitted paperwork to the state accounting system after we notified you of your grant award to generate this contract and accompanying purchase order. It's a sometimes months-long process that must be signed off by many people, including your Grant Applicant, who will receive an email directly from the State of Indiana with instructions on how to electronically sign it through DocuSign. Our office does not have a part in this process and does not receive updates on it, so you will need to alert your Applicant to monitor their email account for updates. When it is signed by all necessary parties, we will receive an email of the contract and PO that we forward to you for your records.

Keeping Track of Project Elements

It's extremely important to begin tracking your activities from **your grant start date, the day we informed you of the award**. For a comprehensive list of the documents, you will need to keep, and the activities and funds please refer to the original grant application document.

The DNR mission: Protect, enhance, preserve, and wisely use natural, cultural and recreational resources for the benefit of Indiana's citizens

through professional leadership, management, and education.

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We have created several Excel spreadsheets you should use in recording activities. Contact us if you have questions about how to use these Excel files (please contact us as soon as possible if you do not have access to Word or Excel).

Final expenditures must conform to those proposed in your application. **Note that any budget changes greater than 10% of your original proposal by line item must receive written approval from CUF personnel before you incur expenditures.**

Subgrantees usually wait until all project activities have been completed and paid for before filing for reimbursement. BUT if your organization needs partial reimbursement to complete your entire project, do not hesitate to file one with us while your project is under way.

Reporting Your Project Milestones

You will be required to file several reports to our office, and we provide them in both Word and PDF formats for your convenience. **Your first Accomplishment Report is due six months after your start date. You'll file another every six months until your project is finished**. **You will need to file a final Accomplishment Report within 30 days of your project end date**.

When Your Project is Done

Upon project completion, you'll complete the Reimbursement Request Form in the Excel workbook discussed above and email it with scans of all supporting documents to the CUF office at urbanforestry@dnr.in.gov . If your email client won't allow you to send large files, please contact us for alternate options.

Save copies of each claim for reimbursement along with everything you sent in with the claim.

When your claim is received, we will review it and make sure all payments, and everything is documented and has happened. We may contact you with questions and request additional documentation. Just remember that we want you to be able to claim 100% of your grant and ensure that your project is successful.

CUF personnel will review all project costs. The purpose of the audit is to verify the project expenditures and match and ensure that they are properly documented. The following guidelines will assist you in documenting your project costs and deliverables.

Project Documentation for Reimbursement

- All Subgrantees must save copies of paid invoices, receipts, purchase orders, claim vouchers, canceled checks (front and back), and/or credit card bank statements to document all expenditures of grant reimbursable monies and cash match.

- **Inventory, Management Plan and/or UTC Projects:** Email us your inventory (Excel), GIS files & layers, plan and all reports, summaries, tables, and analyses generated in-house or by your consultant. Additionally, you will need to PUBLICLY present your new inventory to your community, **make sure you gave credit to this CUF grant, IDNR, and the USFS**, and to send us proof of how you did so. Previous Subgrantees have come up with many creative ways to achieve this requirement. Presentations can be as formal as a government council or as

informal as a meeting convened in a community building. We appreciate the widespread use of webinars because we love to be invited to sit in on these informative meetings. We also encourage you to have the local press write up your projects, or better yet, make room on your municipal or nonprofit websites to house your project materials. Some communities load extracts of their tree inventory data on interactive maps – residents love being able to use these to learn about their urban forests.

- **Tree Planting Projects**: Contact the CUF office within 30 days of planting your trees to schedule a staff inspection of the project. If you are planning to do more than one planting event over the course of your project it is crucial that you have these inspections done soon after planting. For example, if trees planted improperly in the fall are not found and corrected immediately, they can die over the winter. **No grant funds will be distributed until CUF staff are satisfied that all trees have been planted according to the tree planting addendum.**

- **Education/Training & Community Event Projects:** All materials generated using grant funds are **required to include reference to funding from IDNR and the USFS. These materials ALSO must include the USDA USFS logo and equal opportunity statement**. Submit samples to the CUF office for approval before publication. Email CUF staff with the specifics of your funded programs and events at least two weeks in advance so that we can cross-promote on our outreach platforms and maybe even attend if we can. Collect materials from and document your training/events via flyers, website and social media screenshots, local media stories, photographs and videos, any outreach materials, etc., and submit with your reimbursement requests.

- **All project expenditures MUST occur during the contractual project period.**

Once we have approved the request, we will forward it on to IDNR Purchasing who will process the payment. You can expect an electronic deposit to the account designated by your Grant Applicant within 6-8 weeks.