CALIFORNIA COASTAL COMMISSION
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DATE: August 14, 2026
TO: California Coastal Commission Grant Recipients
FROM: Jessica Lie, Public Education Program
SUBJECT: Guidance on invoicing and grant requirements

WHALE TAIL GRANT ADMINISTRATIVE REQUIREMENTS

Your grant with the California Coastal Commission includes several administrative requirements, some of which are explained in more detail here. Please read this memo and your grant agreement carefully, and please don't hesitate to contact Jessica.Lie@coastal.ca.gov with any questions.

INVOICES

You can find an invoicing checklist and optional invoice templates on the For Grantees webpage, or by contacting your Grant Manager. Invoices must be submitted "in arrears," meaning for work you've already done or things you've already purchased. All invoice items must be specified in the grant budget in your signed grant agreement, or in writing from your Grant Manager as an amendment to your budget. Invoices can be submitted for payment as often as once a month, or less frequently if desired. Do not submit more than one invoice at a time. Invoices need to include:

- Grantee organization name and address, matching what's on the grant agreement and/or the Payee Data Record you completed for your Whale Tail Grant. If your mailing address has changed, contact your Grant Manager to complete a new Payee Data Record prior to submitting your invoice.
- Grant number (found at the top right of each page of the *signed* grant agreement)
- Unique invoice number (not just "1," "2," etc.)
- Date the invoice is being submitted
- Period of time covered by the invoice
- For each authorized staff position being invoiced for, their hours worked, their pay rate, and their total payment
- Total amount of the invoice

Documentation of expenses, including all receipts or bills for any Operating Expenses, need to accompany the invoice. Travel expenses must follow the rules outlined on page 2.

Please sign your invoice. Digital signature is fine.

We cannot reimburse for purchases of insurance, prizes, incentives, "honoraria," gifts, "give-aways," or items that will be sold. If you have questions, please contact your Grant Manager.

Online purchases should be documented with packing slips summarizing total charges after shipment whenever possible. If an online receipt is used, it should indicate that the product has already shipped. (For Amazon purchases, make sure you include the receipt/invoice that says "Shipped" or "Delivered.")

Food or drink purchased outside of an overnight trip, such as snacks for a single-day field trip or volunteer event, must be specified in your grant budget under General Expenses, must be economical, and must not exceed $20 per person per meal. We cannot reimburse tips for this type of expense. When submitting a receipt for food for multiple people, note on your receipt how many people and meals it was for.

Invoices should be sent by email to your Grant Manager at Jessica.Lie@coastal.ca.gov. Coastal Commission staff will review, follow up about any questions or missing elements, and notify you when the invoice has been approved and forwarded to our accounting division for processing and submission to the State Controller's Office. Payment from the State Controller's Office can take up to 45 days after you submit your invoice to the Coastal Commission. If you have not received your check after that time, please alert your Grant Manager. If sending invoices by email presents a problem, contact your Grant Manager to arrange another method.

TRAVEL EXPENSES

All travel must be specified in your approved grant budget. After a trip, you will need to submit a Travel Expense Claim Form as part of your invoice, which you can find on the For Grantees website or by contacting your Grant Manager. Please be sure to sign the claim form and fill in the purpose of the trip(s). If your organization has its own travel form you'd like to submit instead, please first check with your Grant Manager to verify that it can substitute for our Travel Expense Claim Form. Receipts are required for all non-mileage items and should be included with the invoice. (If your travel expense is only for school bus fees, you do not need to complete a Travel Expense Claim Form.)

These are the rules for travel reimbursement:

- Personal or organization-owned vehicle travel: Mileage is reimbursed at the IRS rate, which is 76 cents per mile as of July 1, 2026. (If you are invoicing for travel that took place January 2026 – June 2026, please use the prior rate of 72.5 cents per mile. For travel that took place during 2025, the rate is 70 cents per mile.) The mileage reimbursement covers gasoline, maintenance, licensing and registration, depreciation and all other costs associated with operation of the vehicle.
- Rental car travel: Submit receipts for rental and gasoline.
- Ride-hailing services or taxis: Submit full receipt including tip. Tips up to $2.00 or 20% of the ride cost, whichever is greater, may be reimbursed.
- Airplane travel: Use the lowest available fare. We cannot reimburse for early check-in.
- Lodging: Contact your grant manager for maximum lodging reimbursement rates depending on location. If you are unable to find lodging within those rates, you may submit a cost comparison of three lodging options to your Grant Manager for approval before securing your lodging.
- Meals: $20 maximum per person per meal, *including* tip on meal total of $2.00 or 20%, whichever amount is greater. (This maximum is for competitive grantees only. If you are a targeted grant recipient, please contact your Grant Manager to ensure you know your meal reimbursement limits.)

REPORTING

Your grant agreement includes requirements for a final report and may include requirements for periodic progress reports. Please check your individual grant agreement for your reporting deadlines and what to include in your final report. Plan ahead to collect

the data you will need for your final report. Progress reports can be brief and can be submitted by email or as a phone conversation, when you will note if you're on schedule regarding your scope and timeline, if there are any issues to bring up or changes you might need to request, and if there's anything going especially well in the project you want to share. Contact your Grant Manager if you have questions. At any time, you can also reach out to share photos or grant-funded events or announcements you'd like the Coastal Commission to consider sharing on social media.

FUNDING CREDIT

Funding for our grants program is made possible by sales of the WHALE TAIL® License Plate, donations to the Protect Our Coast and Oceans Fund on the California state tax return, and funds from the State of California. Your grant agreement includes language requiring acknowledgement of support from the grant, including using the funding credit graphic where possible. You should credit the funding source when doing outreach for, promoting, or presenting grant-funded programming, including on printed or online content produced for the grant project. This is vitally important to building support for continuing funding for this grant program. You will include evidence showing how and where you acknowledged your funding source in your final grant report. Find the graphic on the For Grantees webpage or contact your Grant Manager.

CHANGES?

Please work diligently to meet the project milestones and deadlines set out in your grant agreement. If unforeseen circumstances necessitate any changes to your timeline, budget, or scope of work, please contact your Grant Manager immediately.

OPTIONAL: SPEAKING AT A COASTAL COMMISSION MEETING

You are invited to share about your Whale Tail-funded project at a Commission public meeting, which is held each month at different locations throughout the state. You can sign up to speak during General Public Comment in person or via Zoom. Find upcoming meeting dates and locations at www.coastal.ca.gov/meetings/mtgdates.html. If you'd like to discuss this opportunity or need assistance, please reach out to your Grant Manager.

CONTACT INFORMATION

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