DATE: July 27, 2022
TO: California Coastal Commission Grant Recipients
FROM: Annie Kohut Frankel, Public Education Program
SUBJECT: Guidance on invoicing and grant 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 Annie.Frankel@coastal.ca.gov with any questions.

INVOICES
You can find a sample invoice at the end of this document and on the For Grantees webpage. Invoices must be submitted “in arrears,” meaning for work you’ve already done or things you’ve already purchased. Invoices can be submitted for payment as often as once a month, or less frequently if desired. Invoices need to include:

- Grantee name and address
- Grant number (found at the top of the front page of the signed agreement)
- Invoice number and the date the invoice is being submitted
- Period of time covered by the invoice
- Itemized description of the services for which payment is being requested, including the hours worked by each authorized staff person and their pay rate
- Total amount of the invoice

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

If an invoice is not on preprinted letterhead, it must have the grantee’s signature.

We cannot reimburse for purchases of insurance, prizes or gifts, or items that will be sold.

Food or drink purchased outside of the travel rules on page 2, such as snacks or lunch for a single-day field trip or volunteer event, must be pre-approved as critical to the success of your project and specified in your grant budget, and must not exceed the per-diem amounts on page 2. We cannot reimburse for tips for this type of expense. Contact your Grant Manager if this is relevant to your project and you have questions.

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.

Invoices should be sent by email to your Grant Manager at Annie.Frankel@coastal.ca.gov, who will review, approve, and forward them to our accounting division. Payment typically takes 40 days. If sending invoices by email presents a problem, contact your Grant Coordinator to arrange another method.
TRAVEL EXPENSES
The State requires that grantees follow the same guidelines for travel as State employees. All travel must be included in your approved grant budget. After your trip, you will need to submit a State 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). Receipts are required and should be included with the invoice.

These are the rules for travel reimbursement:

- Personal or organization-owned vehicle travel: Mileage is reimbursed at the IRS rate, which is 62.5 cents per mile as of July 1, 2022. (If you are invoicing for travel that took place prior to July 1, 2022, please use the prior rate of 58.5 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. We cannot reimburse for collision-damage waiver/loss-damage waiver (CDW/LDW).
- 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: We can reimburse for the following per-night cost (plus taxes and fees): $95 in the counties of Napa, Riverside, and Sacramento; $110 in Marin County; $120 in the counties of Orange, Ventura, and Los Angeles (except in Santa Monica); $125 in the counties of Monterey and San Diego; $140 in the counties of Alameda, San Mateo, and Santa Clara; $150 in Santa Monica; $250 in San Francisco. All other locations can be reimbursed for up to $90 per night plus taxes and fees.
- Meals: Maximums per person (including tip on meal total of $2.00 or 20%, whichever amount is greater):
  - Breakfast = $7.00
  - Lunch = $11.00
  - Dinner = $23.00
- Here is when meals can be claimed, unless specified in your grant budget:
  - For trips of less than 24 hours:
    - If trip begins before 6am and ends after 9am, breakfast may be claimed.
    - If trip begins before 4pm and ends after 7pm, dinner may be claimed.
    - Lunch may not be claimed.
  - For trips of more than 24 hours, all meals may be claimed for full 24-hour periods.
  - First day of trip (of more than 24 hours):
    - If trip begins before 6am, breakfast may be claimed.
    - If trip begins before 11am, lunch may be claimed.
    - If trip begins before 5pm, dinner may be claimed.
  - Last day of trip (of more than 24 hours):
    - If trip ends after 8am, breakfast may be claimed.
    - If trip ends after 2pm, lunch may be claimed.
    - If trip ends after 7pm, dinner may be claimed.
- Incidental of up to $5.00 per 24-hour period can only be claimed for trips lasting at least 24 hours and include hotel tips, laundry, etc.
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 the questions to answer. Progress reports can be brief and can be submitted by email or as a phone conversation. Contact your Grant Manager with any questions.

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 Coastal Commission and these two funding sources, including using the funding credit graphic where possible. 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 or scope of work, please contact your Grant Manager immediately.

CONTACT INFORMATION
Annie Kohut Frankel
Grants and Education Programs Manager
Annie.Frankel@coastal.ca.gov

Chris Parry
Public Education Manager
Chris.Parry@coastal.ca.gov
EXAMPLE INVOICE FORMAT

Your invoice should include the relevant information found in this example, with the budget categories that reflect your project budget and what you’re invoicing for. The highlighted sections represent text or dollar amounts for you to insert. Attach all appropriate itemized receipts. If invoicing for a purchase from an online store, please include the receipt that says the product has already shipped (not one that just says it was ordered). If you’re invoicing for travel, include a Travel Expense Claim with your invoice. If available, please use your organization’s letterhead for invoices. Please submit your invoices by email to Annie.Frankel@coastal.ca.gov.

Date: **Date** *(THIS IS THE DATE YOU’RE SIGNING/SUBMITTING YOUR INVOICE.)*  
Invoice # **X** *(THIS IS AN INTERNAL NUMBER ASSIGNED BY YOU.)*  
Grant # **XX-XX-XX-XX** *(THIS NUMBER IS FOUND ON YOUR GRANT AGREEMENT.)*  
Invoice Period: **Date - Date** *(DATE RANGE COVERS THE HOURS BEING BILLED AND THE DATES ON ENCLOSED RECEIPTS.)*

California Coastal Commission  
Attn: Annie Kohut Frankel  
455 Market Street, Suite 200, Room 228  
San Francisco, CA 94105

Remit payment to **My Organization** for the following amount:

**Salary and Wages**

<table>
<thead>
<tr>
<th>Position Title</th>
<th>Xhrs x $X/hr = $XXX</th>
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Subtotal Salary and Wages **$XXX**

**Benefits** **$XXX**

Subtotal Personnel Services **$XXX**

**Operating Expenses**

| General Expenses | $XXX |
| Postage/Shipping | $XXX |
| Travel | $XXX |
| External Contracts | $XXX |

Subtotal Operating Expenses **$XXX**

**Administrative Overhead** **$XXX**

**Total** **$XXX**

**Signature**

My Name  
My Organization  
Address  
Phone number  
Email