**STEP 3 – SUPPORTING DOCUMENTATION (QUALIFYING PROJECTS ONLY)**

Applicants with the most competitive projects after field visits will be required to submit supporting documentation further demonstrating their ability to carry out the project.

The following required supporting materials must be uploaded as attachments in SOAR. If an item is not applicable to the project but is required in SOAR, upload an attachment with a brief explanation of why it is not applicable. Templates for some materials can be found at <http://resources.ca.gov/grants/environmental-enhancement-and-mitigation-eem/>.

**For All Projects**

1. **Signed Authorizing Resolution or Certification Letter** – Provide a signed authorizing resolution from the applicant’s governing board or a certification letter (only for entities without a governing board). See Appendix H or I for the required format and content. The resolution or certification letter must include all assurances contained in the template.

2. **Eligibility for Nonprofit Applicants** – Provide evidence of a through c below:

a. The corporation is qualified under Section 501 (c)(3) of the Internal Revenue Service Code. An IRS 501(c)(3) Determination letter or a printout from the IRS tax-exempt organization search tool on the official IRS website is sufficient. See <https://apps.irs.gov/app/eos/>; and

b. The corporation has an active status with the Secretary of State. A printout from the Secretary of State business search web page showing the corporation is Active is sufficient. See <https://bizfileonline.sos.ca.gov/search/business>; and

c. The corporation is current with the Attorney General’s Registry of Charitable Trusts. A printout from the Department of Justice Registry verification search page showing the corporation’s registration is Current is sufficient.

See <https://rct.doj.ca.gov/Verification/Web/Search.aspx?facility=Y>.

3. **Project Timeline** – Provide an estimated timeline for major project milestones.

4. **Funding Plan** – Provide a plan with specific information about the status of other funding needed to complete the project, including where applicant is in the process with each funder and a timeline for funding decisions.

5. **Property Data Sheet** – Provide the completed Property Data Sheet for all parcels included in the project (see Appendix J). Be sure to include properties that do not have parcel numbers, e.g., rights-of-way, etc.

6. **Proof of Ownership** – Provide copies of documents verifying current ownership of each parcel listed on the Property Data Sheet. Examples of such documents include tax records, owner data sheets from county records, recorded deeds, title reports, etc. All documents verifying ownership must have the parcel numbers clearly indicated on the document (handwritten acceptable).

7. **Payee Data Record/Government Agency Taxpayer ID Form** – Nonprofit applicants must provide a completed and signed STD 204 Payee Data Record form. Government Agency applicants must provide a completed and signed Government Agency Taxpayer ID Form. (See Appendix P for links to both forms.) These forms are required to receive payment from the State of California.

**For Development Projects**

8. **Plant Palette** – For projects with any plantings, provide genus, species, common name, and stock size (if known). Plantings should be low water, drought tolerant, and native. Provide justification for the use of non-natives in the palette. Trees must not be larger than 15-gallon, regardless of funding source. (See Appendix Q for resources to aid in plant selection and planting standards)

9. **Adequate Site Control/Land Tenure** – For parcels not owned by the applicant, provide a copy of an agreement giving the applicant legal access to and permission to construct and maintain the project on the property. If applicable, the agreement should also permit public access to the project for the required number of years (see Appendix K).

If an agreement has not yet been executed at the time of submitting supporting documentation, the applicant may submit a signed letter from each landowner identifying the affected parcel(s) and indicating that, if awarded funding, the owner is willing to enter into an agreement with the applicant to allow long-term access for construction, maintenance, and public use of the project.

**For encroachment permits, provide evidence that the entity with jurisdiction (including Caltrans) is aware of the project and willing to work with the applicant to issue the permit.**

10. **Operation and Maintenance** – If operation and maintenance will be performed by an entity other than the applicant, explain and provide evidence of the entity’s concurrence (e.g., operational agreements, letters of intent, memoranda of understanding signed by all parties, etc.). If an agreement has not yet been executed at the time of project proposal, the applicant may submit a signed letter by the entity indicating its intent to enter into such an agreement.

11. **Project Permit Approval Status** – Indicate the types of permits necessary to complete the project, timeline for permitting submittal, and potential project delays due to permitting (see Appendix L).

**For Acquisition Projects**

12. **Conservation Easement** – If acquiring a conservation easement, provide a description of the proposed restrictions and reservations for the easement and the funding mechanism to support long-term stewardship.

13. **Appraisal** – If available.

14. **Preliminary Title Report** – If available.

**END OF STEP 3 – SUPPORTING DOCUMENTATION INFORMATION**