

**COMMONWEALTH OF MASSACHUSETTS**

**MASSACHUSETTS ENVIRONMENTAL TRUST**

**100 Cambridge Street, 9<sup>th</sup> Floor  
Boston, MA 02114**



**REQUEST FOR RESPONSE (RFR)**

**FOR**

**MASSACHUSETTS ENVIRONMENTAL TRUST  
FY20 GRANTS**

**RFR# ENV 19 MET 01**

**CONTACT PERSON:  
Telephone:  
e-mail:**

**Kim Tilas, Program Manager  
617.626.1037  
kim.tilas@mass.gov**

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**EXECUTIVE OFFICE OF ENERGY & ENVIRONMENTAL AFFAIRS (EEA)**  
**Matthew A. Beaton, Secretary**

**GRANT ANNOUNCEMENT**  
**Request for Response (RFR) for Full Proposals ENV 19 MET 01**  
**Dated: November 1, 2018**

**Massachusetts Environmental Trust**  
**FY20 *Drive for a Better Environment* Grants Program**

**1. GRANT OPPORTUNITY SUMMARY**

**A. PROPOSALS SOUGHT FOR:** The Massachusetts Environmental Trust (MET or Trust) is soliciting proposals under the FY20 *Drive for a Better Environment* Grants Program (DFBE) for projects that protect endangered marine animals, and activities that restore and improve critical aquatic ecosystems.

MET was established as a state trust by the Legislature in Chapter 236, Section 7 of the Acts of 1988 to support the waters and water-related resources of the Commonwealth. The Trust is governed by a board of trustees appointed by the Secretary for Energy and Environmental Affairs. Grant awards are made subject to 815 CMR 2.00.

**Mission Statement:** *The Massachusetts Environment Trust fund supports projects that restore, protect and improve the quality of all commonwealth waterways and that increase understanding of them and the effect of human activities upon them by encouraging public involvement in activities which promote them as living resources and public treasures for present and future citizens of the commonwealth of Massachusetts. In particular, the Trust seeks projects that advance conservation measures and understanding of endangered marine animals and the preservation and restoration of aquatic ecosystems.*

**B. OVERVIEW AND GOALS:** The DFBE Grants Program provides funding to novel and evident projects that support the advancement of marine animal conservation efforts and restoration and enhancement of aquatic ecosystems within Massachusetts. Revenues for the grants program are generated from the sale of the Trust's three environmentally-themed license plates issued by the Registry of Motor Vehicles – the Right Whale Tail, Leaping Brook Trout, and Blackstone Valley Mill. Grantees will be required to fulfill certain conditions of funding to promote the sales of the license plates. **See Key Project Areas in 2B.**

**C. DEADLINES AND PROCUREMENT CALENDAR:** The schedule below is anticipated. The dates are subject to change. Respondents are responsible for checking for any updates on the COMMBUYS system.

RFR posted on COMMBUYS	<b>November 1, 2018</b>
Question and Answer Period Closes	<b>December 7, 2018</b>
Full Proposals Due	<b>December 14, 2018 by 1:00 p.m.</b>
Grantee Notifications	<b>On or before May 1, 2019</b>
Awards Announced	<b>On or before June 1, 2019</b>
Contracts Commence	<b>July 1, 2019</b>
Projects Completed by	<b>June 30, 2020</b>

**D. ESTIMATED AWARD AND CONTRACT START DATES:** Awards are estimated to be announced on or around June 1, 2019, with contract negotiations to begin immediately thereafter. The estimated contract start date is July 1, 2019. However, the effective start date of a contract shall be the date of secretariat approval required by law or regulation, as specified in the Standard Contract Form.

**E. ANTICIPATED DURATION OF THE CONTRACT:** The contract is anticipated to last approximately 12 months, with an anticipated start date of July 1, 2019 and a completion date of June 30, 2020. **See further details in Section 2D.**

**F. FUNDING AVAILABILITY:** It is anticipated that up to **\$400,000** may be available for this grant round. Should the amount of available funding change, MET reserves the right to increase or decrease the amount of available grant funding. Funding amounts generally range from \$10,000 to \$50,000 (exceptions may be made at the discretion of the Massachusetts Environmental Trust Board of Trustees and Secretary of Energy and Environmental Affairs) based on the limits noted in section 1B above. Respondents are strongly encouraged to identify and incorporate efficiencies and cost-saving measures as much as possible. **See further details in Section 2B.**

**G. MATCH REQUIREMENT:** Matching funds are a preferred but not a mandatory proposal specification. Quantity and quality of the match is an aspect of the proposal evaluation criteria. **See further details in section 2C.**

**CONTACT INFORMATION:**

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Massachusetts Environmental Trust  
100 Cambridge Street, Suite 900  
Boston, MA 02114  
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Email: [Kim.Tilas@mass.gov](mailto:Kim.Tilas@mass.gov)  
[www.mass.gov/eea/met](http://www.mass.gov/eea/met)

*\*\* Please note the Trust recognizes that some of the proposal elements described in the RFR may not apply to organizations seeking funding. The proposal description is a generalized overview to offer applicants insight into the proposal process.*

## 2. PERFORMANCE AND CONTRACT SPECIFICATIONS

**A. ELIGIBLE APPLICANTS:** This solicitation is open to certified (501(c)(3) nonprofit organizations, and Massachusetts municipalities, including fiscal partnerships with 501(c)(3) organizations. Where multiple entities are collaborating on a project, a single grantee will be the recipient of funds, and partners receiving funds through the grantee will be considered subcontractors. State and federal agencies and commercial organizations are ineligible to apply. Organizations based outside Massachusetts may apply provided that the proposed project takes place in Massachusetts. All organizations must have a tax identification number and the authority to enter into a contract with the Commonwealth of Massachusetts, but partners and subcontractors need not be. Subcontractors may include for-profit organizations and state agencies. Only one grant proposal per organization will be awarded.

State laws require that no state funds can be used to aid or maintain political or religious organizations. Non-public entities should consult 815 CMR 2.00 (state regulations governing grant funding to non-public entities at: <http://www.mass.gov/osc/docs/ctrinfo/comptroller-regulations/815/815-2-grants.pdf>).

**Multiple Applications:** The Trust will fund only one project per organization per year. If a grantee-organization has a current grant with the Trust, it may only apply for funding for the next grant round if the terms of the established grant will be achieved on-time through completion.

### B. KEY PROJECT AREAS:

- **Marine Mammal and Sea Turtle Conservation – Combined Grant Awards totaling no more than \$200,000**
- **Aquatic Ecosystem Restoration and Enhancement – Combined Grant Awards totaling no more than \$200,000**

#### Marine Mammal and Sea Turtle Conservation

MET is the primary sponsor and the only state funding for the Atlantic Large Whale (and Sea Turtle) Disentanglement Network (ALWDN). The ALWDN program fulfills a mandate of the state to protect and help ensure the survival of endangered marine animals under the federal Endangered Species Act, the Marine Mammal Protection Act, and the Massachusetts Endangered Species Act. MET achieves this objective by partnering with the Division of Marine Fisheries (DMF), the Center for Coastal Studies (CCS) and the National Oceanographic and Atmospheric Administration (NOAA) to respond to a timely and critical need to ensure the survival of at-risk marine animals dependent on safe habitat and healthy ecosystems for feeding, places to breed, and migration stopovers.

The Trust encourages project applications that advance and fortify the efforts of this decades-long partnership of working to protect marine animals and habitat and contribute to the management and conservation of marine mammals and sea turtles that are endangered, threatened, or of critical concern.

Currently the Northeast Atlantic region is experiencing Unusual Mortality Events (UMEs) of minke and humpback whales and the critically endangered North Atlantic right whales. A UME is an unexpected stranding event or significant die-off of any marine mammal population that when designated as such authorizes a federal investigation into causes and recovery plans. The causes of the UMEs are yet to be fully determined by the National Oceanographic and Atmospheric Administration (NOAA) and the Trust recognizes that trans-boundary cooperation and collaborations on this multi-species large whale death is inherent to preventing further mortality. For more information visit [www.fisheries.noaa.gov/insight/frequent-questions-unusual-mortality-events#what\\_criteria\\_define\\_an\\_ume?](http://www.fisheries.noaa.gov/insight/frequent-questions-unusual-mortality-events#what_criteria_define_an_ume?).

Examples eligible project concepts:

- Collection, analyses, and sharing of scientific data regarding at-risk sea turtle and whale populations that inhabit, utilize, or migrate in state waters; primarily the North Atlantic right whales and humpback whales;
- Advancement of conservation measures and the understanding of marine mammal ecology;
- Advancement of progress in developing fishing gear that is safer for marine life;
- Dissemination of information for the purpose of preserving and safeguarding whale populations;
- Expansion of methods of monitoring whale movements that may provide additional early-warning detection systems and advance notification that will help prevent accidental boat/ship strikes to marine animals;
- Marine animal rescue and rehabilitation and research on the best practices for reintroduction of rescued and/or rehabilitated mammals into the wild;
- Mitigation of impacts to nesting, foraging, and staging habitat for endangered shorebirds;

### **Aquatic Ecosystem Restoration and Enhancement**

The Trust seeks project applications that will restore and improve aquatic ecosystems that benefit estuarine and river habitat and species coupled with enhancement of recreational fishing areas; and increased understanding of the aquatic environment and the effects of human activities upon them. Some preference will be given to cold-water species and rivers of concern in the central and western regions of the state and underserved areas of the commonwealth.

Examples of the kinds of eligible project concepts:

- Addressing factors affecting areas that support nurseries, feeding, migration and spawning for at-risk fish;
- Advancement of the revival of urban rivers and rural rivers that go through mill towns;
- Collection, removal, and recycling of harmful marine and aquatic debris
- Construction of signage for public paths bordering a waterbody;
- River and estuary continuity and restoration efforts to restore natural biodiversity and habitat;
- Documentation and dissemination of results of monitoring and modifying marine, estuarine, and freshwater systems.

### **C. FUNDING LIMITATIONS, AVAILABILITY, BUDGETING GUIDELINES & ALLOWABLE EXPENDITURES:**

- Contract funds will be disbursed on a reimbursement basis for expenditures. **See Section F: Invoicing and Reimbursements.**
- **Subcontracting:** The grantee (the direct recipient of the grant) may subcontract a portion of the grant award for activities deemed eligible and which are completed under a mutually agreed scope of work. These costs must be identified in the proposal. Examples of such eligible costs include: laboratory analytical work, engineering or survey services, printing, etc.
- The Trust will fund only those costs directly associated with project activities. Staff time, fringe benefits, and general operating expenses may be funded only if incurred as a direct result of the project work. This program does not fund capital purchases, defined as those with a lifespan of longer than five years.
- The Trust will consider providing overhead on a case-by-case basis, but will not exceed 25 percent of the proposal request. In general, the Trust considers proposals without overhead more competitive than

those that include overhead expenses. The contribution of overhead expenses to the project by the applicant organization is considered a demonstration of the applicant's commitment to the proposed project and willingness to assume some of the risk involved in a new venture.

- **Match Requirement:** A longstanding priority of the Trust is to leverage grant funds to stimulate public, non-profit and private sector investment in the protection and restoration of Massachusetts' marine and aquatic resources through matching grants, loans, and grants. The Trust recognizes that grant funding for environmental projects is limited; however, proposals that augment the Trust's investment by leveraging funds from other sources are strongly **preferred**. MET does not require a minimum match for participation in this grant program; however, proposals that can demonstrate multiple funding sources and include a commitment of local resources are generally considered more competitive than those projects that will rely solely on MET funds. Partnerships and collaborations between organizations that can bring many resources to bear on the project are strongly preferred. Quality of matching commitment is a factor in proposal evaluation and may include cash from external sources, or may be from in-kind sources including time of municipal or nonprofit organization employees. **Written commitment of any match is required in the Full Proposal Application Package.**

**D. ANTICIPATED DURATION OF CONTRACTS:** The contract period will begin on or about July 1, 2019. Grants are generally awarded on a fiscal year basis, beginning July 1st and ending June 30th. The Trust cannot disburse grant funds for any work done outside of the grant contract period (i.e. although the grant recipient may be notified of the grant award in May, the Trust cannot fund work done in May or June because the grant period does not begin until July). Work performed following the close of the contract period cannot be funded. Contracts are anticipated to last approximately 12 months, with an anticipated start date of July 1, 2019 and a completion date of June 30, 2020. The contracts and associated scopes of work must be completed by their contract end date. Awarded contracts will be reviewed during their course, and upon written request, may be extended, at the sole discretion of EEA and will be subject to constraints of the funding source. **Contract extension requests must be submitted no later than 60 days prior to contract expiration date.**

Proposals may be submitted as either single year or multi-year projects that span two or three fiscal years. Multi-year requests will only be considered if there is a compelling need for multi-year funding (those projects that need more than one year to complete). No awards will be made for projects longer than 36 months in duration.

Applicants proposing projects for multi-year funding must provide a clear program design for multiple years, and a clear, step-by-step progression of activities and corresponding goals, objectives, and outcomes. Renewal of the second or third year of a contract is contingent upon timely reporting and satisfactory completion of first and second year obligations.

**E. PROJECT TERMS:** If awarded, projects will be required to abide by the Standard Commonwealth of Massachusetts Terms and Conditions. A final contract is subject to successful negotiation of a Final Scope of Work. Please note that MET does not guarantee that any contracts may result from this RFR or that any particular funding level will be awarded.

**Additional requirements for funded projects:**

For projects involving data collection and analyses, a Quality Assurance Project Plan (QAPP) may be required. A QAPP is a document that outlines the components of a monitoring program including the steps taken to assure the quality of the data generated set forth by the Massachusetts Department of Environmental Protection (MassDEP). More information can be found at <https://www.mass.gov/guides/water-quality->

[monitoring-for-volunteers.](#)

Upon completion of the project, the project team must submit project outcomes and all accompanying documentation in a detailed final report describing the activities completed under the contract, including data, results and findings, and management recommendations.

Grantees are also required to describe and implement a comprehensive media and outreach plan inclusive of project highlights and acknowledgement of MET's support via the sales of the Trust's three environmental license plates.

## F. INVOICING AND REIMBURSEMENT

**1. Invoicing:** Contract funds will be disbursed on a reimbursement basis for expenditures made during the period of the contract. Only those tasks/deliverables completed after the contract start date and identified in the Scope of Work, are eligible for reimbursement. Expenditures made outside of the period of the executed contract cannot be reimbursed. The Scope of Work should include a delivery/reporting schedule.

**2. Reimbursement:** To receive grant funding, the applicant must agree to the following:

- Funding is provided on a reimbursement basis only, upon receipt of a **reimbursement package** as described below.
- Invoices for work conducted prior to contract end date must be received by no later than 60 days after the contract end date.
- No funds will be granted for work performed after the contract end date.
- No payments will be made for Massachusetts sales tax.
- Work done prior to the project start shall not be reimbursed.

**The reimbursement package should contain the following items:**

1. An **original** letter from the contractor with the contractor's authorized signatory requesting reimbursement.
2. Invoices with a running total (year-to-date) for expenditures. Invoices must itemize costs consistent with the agreed upon scope of work and must demonstrate sufficient information for MET to determine that the services were performed and/or products were received and that the invoiced items meet all contractual performance requirements. **See Attachment C: MET Reimbursement Form.**

A brief progress report should accompany the submission of invoices, describing progress status or impediments. Reimbursement packages should be submitted to MET quarterly, preferably monthly. Reimbursement is generally made within 45 days subsequent to approval of a reimbursement package.

## 3. INSTRUCTIONS FOR APPLICATION SUBMISSION

**A. APPLICATION CONTENT AND FORMAT:** Full proposals for the *DFBE* Grants Program must be received by **December 14, 2018 by 1:00 P.M.** Complete proposals must include all components (cover sheet, project description, budget, brief resumes of proposed staff, letters of support, and other relevant information) as described in **Attachment A: Full Proposal Cover Sheet and Narrative**, and must be submitted as instructed.

Full proposals must be single-spaced and should be composed in at least 11-point font. The project description may not exceed ten (10) pages, exclusive of cover sheet/letter, literature cited, and budget



information. The project summary on the cover page should be succinct and easily transferrable to other MET documents. **This summary, as written, will be used to describe the project in all MET grant documents, EEA internal communications, and in outreach documents and press releases.**

If you have any questions, please contact the Program Coordinator at 617.626.1075 or email [kathleen.mcdermott@mass.gov](mailto:kathleen.mcdermott@mass.gov) or [kim.tilas@mass.gov](mailto:kim.tilas@mass.gov). The question and answer period will end on **December 7, 2018**. Responses to questions or concerns thereafter will be limited.

**B. EVALUATION CRITERIA:** Applications for funding from the Massachusetts Environmental Trust will be the submission of a **Full Proposal**. A Review Committee will be convened to evaluate all proposals on a competitive basis. The Review Committee is composed of MET staff, EEA policymakers, scientists, educators, foundation representatives, and members of the non-profit community. Experts may be included to serve in an additional advisory role to the Committee to assist in review of the scientific validity and technical merit of the proposals.

Each full proposal will be reviewed and ranked in a competitive process by the Review Committee who will assign a score to each full proposal, and based on these scores, assign a rank order to each. Only the highest ranked full proposals will be awarded a grant. The number of applicants approved will be recommended to the Board of Trustees for further review. The goal of the Review Committee is to ensure that the most promising proposals are considered for funding. The Review Committee reserves the right to reject any or all proposals that do not meet the goals and terms of this RFR. A Scoring Reference Form will be added to the grant resources materials on COMMBUYS.

Note: Incomplete or incorrectly submitted applications will be disqualified prior to the review process.

**C. APPLICATION SUBMISSION INSTRUCTIONS:** Applicants must submit one (1) original signed cover sheet and full proposal (clearly marked as such) by mail. In addition, it is recommended that applicants include a digital storage device or CD containing a copy of all the separate individual documents for the full proposal. The full proposal must clearly identify the RFR number (RFR# ENV 19 MET 01) on the proposal cover sheet and on the outside envelope used in delivering the response. **Full proposals must be RECEIVED BY December 14, 2018 by 1:00 P.M.**

A postmark will **NOT** be accepted for verification of date of submission, though responses will be accepted by regular mail and courier in advance of the submission date and time. Responses will **NOT** be accepted electronically or by fax. **All proposals shall be submitted to the following address:**

**Program Coordinator  
Re: RFR ENV 19 MET 01  
Massachusetts Environmental Trust  
100 Cambridge Street, Suite 900  
Boston, MA 02114 (617) 626-1075**

**D. ADDITIONAL REQUIRED DOCUMENTATION:** If selected, the grantee will be required to submit the following forms to complete a contract. These forms can be found at:

<https://www.mass.gov/lists/osd-forms>.

- Commonwealth Standard Contract Form, signed and dated by the grantee;
- Commonwealth Terms and Conditions, completed and signed by the grantee;
- Commonwealth W-9 Tax Identification Form completed and signed by the grantee;
- Completed Contractor Authorized Signature Verification Form;
- Electronic Funds Transfer (EFT) Authorization Form (including voided check);
- Massachusetts Environmental Trust Conditions of Funding agreement.

#### 4. MISCELLANEOUS

**A. TYPE OF PROCUREMENT:** Grant

**B. USE OF THIS PROCUREMENT BY SINGLE OR MULTIPLE DEPARTMENTS:** This RFR is a single department procurement. All contracts awarded under this RFR will be utilized solely by EEA.

**C. RFR DISTRIBUTION METHOD:** This RFR is distributed electronically using the COMMBUYS system. It is the responsibility of every applicant to check COMMBUYS for any addenda or modifications to the RFR to which they intend to respond. The Commonwealth of Massachusetts and its subdivisions accept no liability and will provide no accommodations to respondents who fail to check for amended RFRs and submit inadequate or incorrect responses. Forms may be downloaded from the Grants category on [COMMBUYS](#), the Commonwealth of Massachusetts' Executive Departments procurement record system.

**D. LIST OF ATTACHMENTS WITH RFR:**

- 1) Full Proposal Cover Sheet and Narrative Form (Attachment A)
- 2) MET Budget Preparation Template (Attachment B)
- 3) MET Expense Reimbursement Template and Examples (Attachment C)

**E. REQUIRED SUPPORTING MATERIALS:** Project proposals must include the following supporting materials with the response:

1. Letters of support, submitted with the response and not separately and must be on letterhead and relevant to the proposed project. Generic letters of support will not be reviewed.
2. Partner letters: Statement of commitment on letterhead detailing the partner's intention to contribute to the project and/or provide matching funds as described in the proposal narrative.

**ATTACHMENT A  
FULL PROPOSAL COVER SHEET AND NARRATIVE**

**MASSACHUSETTS ENVIRONMENTAL TRUST  
FY20 *DRIVE FOR A BETTER ENVIRONMENT* GRANTS PROGRAM**

Please complete and submit this Cover Sheet with your Full Proposal. Please be sure to include **ALL required documents as described in the RFR**. If you have any questions, please contact the Program Coordinator at 617.626.1075 or email [kathleen.mcdermott@mass.gov](mailto:kathleen.mcdermott@mass.gov) or [kim.tilas@mass.gov](mailto:kim.tilas@mass.gov).

DATE: \_\_\_\_\_

**ORGANIZATION INFORMATION**

Organization Name			
Address			
Main Phone		Fax	
Primary Contact and Position			
Contact phone			
Contact email			
Website			

**Check/Highlight:**

IRS 501(C) (3) NONPROFIT	MUNICIPALITY	OTHER
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**PROJECT INFORMATION:**

TITLE OF PROJECT	
BRIEF SUMMARY of PROJECT	

**Check/Highlight Region of Focus:**

Statewide	Coastal	Western Mass	Central Mass	Greater Boston	Northshore
Metro Boston	Metrowest	Southeast Mass	Southshore	Cape Cod & Islands	

TOTAL AMOUNT REQUESTED	\$	# of Years (1-3)	
TOTAL PROJECT COST (from all sources)			

**PROJECT PARTNERS** (if applicable)


**STATE YOUR ORGANIZATION'S MISSION:**

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NUMBER OF BOARD MEMBERS		TOTAL NUMBER OF VOLUNTEERS	
TOTAL NUMBER OF STAFF	Full time	Part time	

**LIST ALL PREVIOUS SUPPORT FROM MASSACHUSETTS ENVIRONMENTAL TRUST**  
(include fiscal year, title of project and amount granted):

Fiscal Year	Title of Project	Amount of Grant

**Signature of Chief Executive**



**Signature of Project Manager**



Print Name

Print Name


Print Title

Print Title

## **ATTACHMENT A (Continued)**

### **NARRATIVE**

#### **Problem Description**

- Describe the need(s) and/or challenges that this project will address. Cite previous work to document the problem and any management needs.
- If applicable, describe the location and region of where the work will be focused and the habitats/water bodies of concern. A map of the project may be included.

#### **Project Goals and Anticipated Outcomes**

- Describe the goals of the proposed project. Goals should be explicitly connected to desired outcomes of the project and any anticipated management activities.
- Describe the anticipated short, medium, and long-term outcomes that will result from the completion of this project.

#### **Project Approach**

- Provide a detailed description of proposed methodology and approach, including the potential for transferability to other stakeholders.
- Identify project staff, partners, and subcontractors and describe their roles and responsibilities in the project.
- Provide a Scope of Work/Tasks to be completed under the grant request that includes a detailed step-by-step narrative for each task including supporting reference materials, plans, tables, or graphics, as well as an estimated cost associated with the task.
- Timeline and anticipated milestones, including written products and other clear and concise deliverables.
- Identify specific target audiences for the project approach and results, and describe plans for sharing methodologies, results, conclusions, and management implications with those audiences as relevant.

#### **Project Benefits**

- Articulate the direct benefits of the project to the Trust's mission.
- Describe how the project results and findings may be applied beyond the project area.

#### **Outreach/Publication and Promotion of MET:**

Every proposal must have a detailed plan to use the media to expand the results of their program by broadly relaying the message that their organization's work both benefits the public and depends on the public's support. Grantees must also display MET's logo on all media and printed materials and insert MET hyperlinks on the organizations' web page(s) and note MET as a contributing sponsor.

#### **Project Budget:**

Use the MET Budget Preparation template (**Attachment B**) to provide a detailed, itemized budget breakdown for the funds being requested. Clearly indicate the fringe benefits and indirect/direct overhead rates. Provide justification detail for travel, supplies, etc. Describe the source of matching contributions, including both cash and in-kind contributions.

**ATTACHMENT B**  
**MASSACHUSETTS ENVIRONMENTAL TRUST**  
**FY20 *Drive for a Better Environment* Grants Program**  
**Budget Preparation Template**

<b>Organization Name:</b>			
<b>Project Name:</b>			
<b>PROJECT EXPENSES</b>			
ITEM	MET AMOUNT	OTHER SOURCES <i>of funding</i>	TOTAL <i>(all sources)</i>
Salaries, wages and benefits			
Consultants and sub-contractors			
Travel			
Equipment			
Supplies			
Office supplies			
Indirect costs (not to exceed 25%)			
Other			
<b>TOTAL EXPENSES:</b>	\$	\$	\$

INCOME		
LIST OF FUNDING SOURCES <i>(e.g., Foundation X, in-kind)</i>	AMOUNT OF FUNDS	STATUS <i>(received, committed, pending review)</i>

<b>BUDGET NARRATIVE:</b> <i>Please provide text to supplement information provided in the above budget matrix.</i>
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(\*\* Examples of completed expense forms follow Attachment C)

**Dates of previous payments for internal purposes:**

**SAMPLE OF EXPENSE LETTER AND REPORT**

For Reference Purposes Only

**ORGANIZATION NAME – ADDRESS**

**INVOICE #**

**Date:**

**TO:** Program Coordinator - MET  
Executive Office of Energy and Environmental Affairs  
100 Cambridge Street, Ste. 900  
Boston, MA 02114

**FOR:** INSERT PROJECT NAME:

INSERT WHAT THE EXPENSES ARE FOR EXAMPLE: Design and Permitting

Dear:

Please find the attached documentation and request for reimbursement in the amount of **\$370.00**.

The reimbursement amounts shown in the table on the next page are for previously unbilled contractual expenses and **(Organization Name)** labor expended through **(MM/DD/YYYY)** on the **( Project Name)** project. The contractual expenses include:

**EXAMPLE of Expenses BELOW:**

**Engineering Company, Surveyors Company, Attorney at Law.**

Invoices and record of payment for contractual services are attached as follows:

<b>Company</b>	<b>Date of Service</b>	<b>Amount:</b>
• Engineering Co Invoice #	7/12/2019	\$100
o Documentation of payment: (Your Organization) Check #		
• Surveyors Company Invoice #	10/23/2019	\$195
o Documentation of payment: (Your Organization) Check #		
• Attorney at Law Invoice #	12/19/2019	\$175
o Documentation of payment. (Your Organization)Check #		

The associated tasks and products/deliverables are described in the progress report submitted with this invoice. Make all checks, or electronic transfers, payable to (Your Organization).

Submitted By:

Name

Title



**SAMPLE EXPENSES TABLE**  
For Reference Purposes Only

Contractual : List Organizations	Invoice \$	Your Organization Labor (Hrs@Rate)	Your Organization Labor \$	TOTAL Cost for Billing Period	MATCH\$	MET GRANT \$
Attorney at Law	\$175	0.5 @ \$175		\$175		\$175
Surveyor Co.	\$195			\$195		\$195
Engineering Co.	\$100			\$100		\$100
Organization Employee	\$400	Employee 8hrs @\$50	\$400	\$200	\$200	\$200
<b>TOTAL</b>	<b>\$870</b>		<b>\$400</b>	<b>\$670</b>	<b>\$200</b>	<b>\$670</b>

**EXAMPLES OF STATEMENTS FOR BILLING**

For Reference Purposes Only

*Example 1*

Company Logo		Billing Statement	Date	
			Statement #	
ENGINEERING COMPANY [Street Address] [City, ST ZIP Code Phone [000-000-0000] Fax [000-000-0000] [e-mail]	<b>BILL TO</b>	[Name] ORGANIZATION [Street Address] [City, ST ZIP Code] Phone [000-000-0000] Customer ID [ABC123]	<b>COMMENTS</b>	
		For Period Ending: MM/DD/YYYY		
Project Name				
Project Manager				
		Current Invoice Total \$		
<b>Date</b>	<b>Description</b>	<b>Amount</b>		
MM/DD/YYYY	SURVEY OF .....	\$195.00		
<b>Current</b>	<b>1-30 Days Past Due</b>	<b>31-60 Days Past Due</b>	<b>61-90 Days Past Due</b>	<b>Over 90 Days Past Due</b>
				<b>Amount Due</b>
				<b>\$195</b>

**PROOF OF PAYMENT: COPY OF THE CHECK TO THE CONTRACTOR FROM YOUR ORGANIZATION**

DATE _____	
PAY TO THE ORDER OF _____	\$ _____
DOLLARS	
FOR _____	
12 1 24 288964554 58984341 3 255	

### Example 2

Company Logo		Billing Statement	Date	
			Statement #	
ENGINEERING COMPANY [Street Address] [City, ST ZIP Code] Phone [000-000-0000] Fax [000-000-0000] [e-mail]	BILL TO	[Name] ORGANIZATION [Street Address] [City, ST ZIP Code] Phone [000-000-0000] Customer ID [ABC123]	COMMENTS	
			For Period Ending: MM/DD/YYYY	
Project Name				
Project Manager				
			Current Invoice Total \$	
Description	Hours/Qty		Rate	Amount
MM/DD/YYYY	LEGAL SERVICES  PERMITS, TITLE SEARCH	0.5	\$175.00	\$175.00
Current	1-30 Days Past Due	31-60 Days Past Due	61-90 Days Past Due	Over 90 Days Past Due
				\$175.00

**PROOF OF PAYMENT: COPY OF THE CHECK TO THE CONTRACTOR FROM YOUR ORGANIZATION**

0 1 0 2

DATE \_\_\_\_\_

PAY TO THE ORDER OF \_\_\_\_\_

\_\_\_\_\_ DOLLARS

FOR \_\_\_\_\_

12 1 2 4 2 6 8 9 5 4 5 5 4 9 8 4 3 4 1 1 3 2 5 5