



## Friends of Pheasant Branch Conservancy

### Grants Management Policy

- 1. Purpose:** This document is the policy of the Friends of Pheasant Branch Conservancy (FOPBC) with respect to obtaining and managing grants. This Policy supports and is integral to other FOPBC policies including those related to fiscal management, advocacy, and receiving and managing gifts. The Board of Directors will review and, if necessary, amend this policy at least once every three years.
- 2. Administration**
  - Responsibilities of the Administrator:** The Treasurer shall be the Administrator of this Policy. The Administrator's responsibilities include maintaining the most current approved version of the Policy and bringing it to the Board for renewal or revision within 3 years or less.
  - Responsibilities of the parties involved in this policy and process:** A committee or work group developing a grant proposal shall designate a Sponsor, who will act as a champion or primary manager for the project.
- 3. Process for grants not exceeding \$1,000:** The FOPBC board members, contracted staff, and committees applying for a grant not exceeding \$1,000 shall use the following procedures:
  - a. Applications for funding shall be developed in collaboration with the appropriate FOPBC committee.
  - b. The committee chair shall email a copy of the final version of the application to Board members and file a copy of the application in current year Dropbox folder entitled, "Grant Applications not exceeding \$1,000".
  - c. If the application is recommended for funding, the Board shall review the grant contract and accept it as is or negotiate with the grantor to modify the terms and conditions of the grant if necessary. The Board President or another officer of the Board shall sign the contract. The signed contract will be returned to the grantor within the specified time period along with a cover letter thanking the grantor and providing contact information for the project Sponsor.
  - d. The original version of the signed grant contract, being a legal document, shall be in the possession of the Treasurer
  - e. The designated committee shall oversee the implementation of the grant, including required reporting to granting agency.
  - f. Upon completion of the grant, the chair of the designated committee will provide the Board with a summary of the accomplishments of the grant and the board president will send a letter of appreciation to the granting organization.
  - g. The sponsor shall submit all required paperwork to the committee chair and President, who shall review and approve the final report and forward it to the Treasurer for final payment.
- 4. Process for grants exceeding \$1,000:** FOPBC board board members, contracted staff, and committees applying for a grant exceeding \$1,000 shall use the following procedures:

- a. The Sponsor (individual or committee representative) shall submit the final draft of grant proposal, including estimated financial and labor commitments, to the Executive Committee or Board for review and authorization to submit the grant proposal.
- b. Once authorized, the Board President shall submit the application to the granting organization.
- c. If the application is recommended for funding, the Board shall review the grant contract and accept it as is or negotiate with the grantor to modify the terms and conditions of the grant if necessary. The Board President or another officer of the Board shall sign the contract. The signed contract will be returned to the grantor within the specified time period along with a cover letter thanking the grantor and providing contact information for the project Sponsor.
- d. The original version of the signed grant contract, being a legal document, shall be in the possession of the Treasurer
- e. The decision regarding the grant shall be recorded in Board of Director's meeting minutes.
- f. The sponsoring committee or designated individual shall oversee the grant, including required reporting to grant agency. Sponsor periodically reports progress to Committee chair for conveyance to the Board. Requests for payment are submitted to and processed by the Treasurer.
- g. The Sponsor shall submit all required paperwork to committee chair and President, who shall review and approve the final report and forward to the Treasurer for final payment.
- h. The Sponsor shall provide the Board with a summary of the accomplishments of the grant and the board president will send a letter of appreciation to the granting organization.

**5. Attachments and/or related documents - Insert relevant references or attachments listing here:**  
(Reserved)

**Version History:**

- Adopted and approved by Board of Directors on May 21, 2018.
- Reviewed by BOD and accepted as still valid and current in 2020
- Revised and approved by Board of Directors on August 18, 2025 – formatting updates