**Baltimore Yearly Meeting**

**Grants Policy**

**Background**

Baltimore Yearly Meeting (BYM) relies on a wide range of sources of financial support to provide its programs and services. The primary sources are: apportionment (contributions from member Monthly Meetings), contributions from individuals, and fees for activities. In addition to these main sources, grants are sought and accepted to support program initiatives.

Grants differ from other sources of support in several ways:

1. Grantors are generally private foundations, non-profit organizations, or governmental agencies, rather than individuals or constituent Meetings.
2. Grant funds are typically restricted by the grantor to be used for specific program activities, and may include more narrow specifications regarding the use of funds (e.g., that funds be used only to provide scholarships, or that funds not be used for administrative overhead expenses).
3. Grants typically require submission of a written proposal that describes the proposed program activities and how the requested funds will be used, and, if awarded, often require that BYM enter into a detailed grant agreement that defines management and reporting requirements. In addition, grants often require submission of reports to the funder describing the use of the funds and impact of the program.

Because of these characteristics, the submission of grant proposals and acceptance and management of grant funds places significant administrative and fiduciary obligations on BYM. In addition, because BYM may seek funds from a grantor for multiple program activities over time, the cultivation and stewardship of BYM’s relationship with the grantor is an important organizational priority. Therefore, it is essential that BYM staff be involved centrally in the grant process, from proposal submission, to acceptance, to management and reporting. This policy is intended to guide staff, committees, and leadership throughout this process. Further details about how the process works are provided in a Grants Process document, which is periodically revised by the BYM Development Committee.

The BYM Development Committee, as the administrative body with stewardship of all fundraising activities, exercises general oversight to assure that grants align with grants policy.

The General Secretary is responsible for the submission, acceptance, and management of grants. The General Secretary may delegate the administration of this process to the Development Director[[1]](#footnote-1) or other BYM staff but must personally approve grant applications and the acceptance of grants.

In every case, grant seekers and BYM staff consider how a decision to seek or not seek a grant affects any who are harmed by racist behavior and how the grant promotes diversity, equity and inclusiveness within BYM activities, in accordance with the “Declaration by Baltimore Yearly Meeting As An Anti-racist Faith Community” that was approved at Annual Session in 2019. This consideration includes testing the decisions in light of the Anti-Racist Queries listed in the Declaration.

**Decisions to seek grants**

Inquiries into potential grant sources may be initiated by a committee, working group, special group, or ad hoc group of BYM, by BYM program staff, or by the Development Director.

The decision to seek a grant to support program activities should be made in a spirit of discernment. The Grant Process document lists several considerations and queries that should be considered in deciding whether to pursue a grant opportunity. Regardless of who initiates a grant inquiry, the Development Director and/or General Secretary must approve the decision to prepare a proposal.

This requirement for pre-approval does not apply if a group is applying again for a grant received within the past three years. In this case, the group must inform the Development Director and should be in communication throughout the process, but does not need formal approval to reapply. However, to facilitate communication and coordination, all members of the grant preparation team should identify themselves to the Development Director, especially those who prepare the grant narrative. Sharing this information will enhance communications among all concerned with the effort.

**Preparation and submission of grant applications**

If the grant application was initiated by a committee or other group, or by BYM program staff, that group or staff member(s) (“grant initiators”) will work with the Development Director to prepare the application. On some occasions, the Development Director may prepare a grant application in its entirety.

The Grants Process document contains a list of considerations for guidance in the preparation of a strong application. BYM also has many experienced grant writers within our community who may assist with this process.

The Development Director ensures that BYM submits appropriate and high-quality grant applications by reviewing all proposals prior to submission. The General Secretary must approve the submission of each application. In determining whether to approve submission, the General Secretary will consider whether the activity to be financed by the grant has the requisite program and budget approvals within BYM and whether BYM has, or is in a position to acquire, the human and material resources needed to carry out the proposed activities in accordance with the grant terms.

The Development Director consults with the grant initiators before making any changes to the grant application.

**Acceptance of Grant awards**

The Development Director, in consultation with the grant initiators, reviews the final terms of any awarded grant for appropriateness to BYM. If the terms of the award differ significantly from the proposal (e.g., funds awarded in an amount significantly less than the request, or only a portion of the proposed activities funded), the Development Director will consult with the grant initiators to determine appropriate action. After this review, the General Secretary accepts the award on behalf of BYM and notifies the grant initiators and any other interested committees.

**Grant management and reporting**

Once the award has been accepted, the proposed program activities will be carried out by the grant initiators. These individuals will coordinate closely with BYM administrative staff to ensure proper tracking and recording of grant expenditures and to prepare reports as required by the grantor. The Development Director will coordinate with the grant initiators at the outset to ensure that they understand all reporting requirements, fiduciary responsibilities, and deadlines.

At times, changes to the terms of the grant (e.g., the timeframe for spending the funds or completing project activities) or the allocation of grant funds may be warranted, due to changing circumstances. Any proposed changes require the approval of both the grant initiators and the Development Director/General Secretary. The Development Director/General Secretary will communicate with the grantor to request such changes and inform the grant initiators of the results. The Development Director reviews and approves all interim reports to the grantor. The General Secretary approves any final report to the grantor.

1. In this document, “Development Director” in relation to a grant, includes any other BYM staff assigned responsibility for that grant by the General Secretary. [↑](#footnote-ref-1)