

SHEPHERDSTOWN GRANT COMMITTEE GUIDELINES

OVERVIEW:

Grant funds awarded to the Corporation of Shepherdstown support essential programs and services, allowing the Town to maintain existing services and fund new projects or purchase needed goods and services. Grant agreements are legal contracts. When a grant is awarded, the Town is obligated to carry out the activities associated with the funded project and to accomplish its objectives while adhering to all of the terms and conditions prescribed by the grantor.

These Grant Guidelines create a protocol for application, approval, accounting, financial administration, and reporting for grant and other funding opportunities. This protocol will facilitate grant oversight and coordination, foster consistency with applications, and help ensure grant compliance. It will also foster good stewardship of the public trust. The goal of uniformity in the grant seeking process is to increase grant revenue, thereby elevating the impact of programs and services funded through grants.

SPECIFIC OBJECTIVES:

1. Facilitate prioritized needs identification;
2. Create a standard approval process for projects and grant applications;
3. Establish a protocol for inter-departmental communication regarding the grant application process;
4. Support transparency and public engagement with regard to planning and funding;
5. Ensure the Town's readiness to apply for funding opportunities as they arrive; and
6. Establish the sustainability of projects beyond grant periods.

SCOPE:

These Guidelines recognize two types of approvals related to grant seeking:

1. Project approval and
2. Approval of complete grant applications.

All Town entities that seek to apply for federal, state, local, public, and private funding must adhere to these Guidelines. Town entities are defined as town-operated departments, offices, and town-owned infrastructure. Preliminary steps to grant proposals, such as initial letters of inquiry or pre-application submissions that do not require budgets, will not need Town Council approval. Grant renewal and/or grant continuation forms are considered applications.

COMMITTEE RESPONSIBILITIES:

The Grant committee will be responsible for the following:

- Drafting proposals to include narrative and budget;
- Submitting draft proposals to Town Council for approval;

- Confirming matching funding as needed;
- Developing the draft to meet identified funding opportunity, other development support like additional documents;
- Sharing the complete grant proposals with Town Council, if possible before submission, and if necessary for next available meeting post-submission;
- Filing both draft and complete proposals on the centralized Grants Sharepoint.

INTERNALLY COMPETING APPLICATIONS:

In some instances, grantors will not consider multiple applications from the same entity during the same application period. Coordination is vital among all Town entities. It is not in the Town's best interest to compete against itself or to risk the possibility of duplicating a request for funds.

SIGNATORY AUTHORITY:

Following the Town's approval process, applying entities will obtain Mayoral approval and signature on all funding applications.

LETTERS OF SUPPORT:

If the Town is requested to offer letters of support for grants submitted by entities outside of the Town, such a letter shall not conflict with the Town's positions or policies.

NEEDS IDENTIFICATION:

The Town will take a strategic approach to the grant seeking and application process to enhance the Town's ability to coordinate grant activity on a department-wide basis and to provide an overview of needs that could be met through grant funding. Town commissions, committees, and boards should work together when identifying and applying for grants. Members of committees or supportive community groups may act as subject matter expert liaisons to the sponsored project. Projects should be selected from the Comprehensive Plan to be developed and ready should an appropriate funding opportunity arise. Drafted project proposals should include 1) a Narrative including a needs and impact assessment, alignment with Comprehensive Plan, and sustainability and assessment plans; and 2) A simplified Budget with amounts per category, such as personnel, construction, supplies, and equipment. These drafted proposals should be stored in a centralized virtual location to be modified as needed for funding opportunities as they become available. The drafted proposal titles will be included on a streamlined sheet to track progress of applications.

GRANTS MANAGEMENT DATABASE AND DOCUMENT RETENTION:

The Grants Committee will maintain a master tracking list of grants, including both awarded and pending applications, stored on a centralized Sharepoint. Pending grant information such as proposal drafts and resources will be organized in the Sharepoint by the committee. Active grant documents such as contracts and reports will be organized by the Town staff. Grant applications

in process or pending as of the adoption of this policy will be added retroactively to the tracking list. A list of priority projects and awarded grants shall be made available to the public via the website and to all Town entities. The creation of this list will improve coordination, enhance oversight, and provide a snapshot of the Town's funding priorities.

REQUIRED APPROVALS:

Project Approval: All Town projects in need of funding shall obtain Project Approval from the Town Council. The two components – narrative and general budget – will be submitted to the Town Council for review and approval. Approvals are valid as long as the project remains a priority as outlined in the Comprehensive Plan and so long as no project variables have changed. Cost share commitments for projects are valid for one calendar year from initial approval. Variables include significant budget change or significant project scope changes. If full proposals cannot be reviewed during a regularly scheduled Town Council meeting due to timeline constraints, the full proposal as submitted will be submitted for review at the next scheduled meeting.

If the developed project is deemed to require public engagement, the Town Council will arrange the standard and process for that public engagement and provide feedback to the Grants Committee based on that engagement.

If a time sensitive priority funding opportunity becomes available and the Project Approval for that priority project has not yet been secured, a special Town Council meeting should be called.

Complete Grant Application Approval: When the timeline allows, the committee will share the complete proposal with the Town Council for review. Otherwise, share the complete proposal with the Council for review at the next available meeting.

AWARD NOTIFICATION AND REVIEW:

Grant award notifications will come in various forms and should be sent to the signing/authorized representative of the Town. This is currently the Town Clerk. Such award letters and grant contracts must be routed to the Program Manager after signature for processing and filing. The Program Manager shall:

- Save award letters electronically;
- Share copy of award with responsible department(s) and Finance Committee;
- Obtain legal review of grant award contract as indicated or needed;
- Review grant contracts for terms and conditions and prepare a list of requirements in an easy-to-follow format for the responsible department(s);
- Obtain signatures for a fully executed contract as required;
- Set up timelines for reports and other tasks.

TOWN COUNCIL AWARD APPROVAL:

If local, state or federal regulations change such that the awarded project cannot be successfully implemented OR

The awarded amount is significantly lower than the requested amount, the Town Council may reject the grant award.

This option should be taken with the greatest of consideration as rejecting awards can impact future awards and grantor-grantee relationship.

REVIEW AND REVISIONS:

These Guidelines will be reviewed and revised as necessary to ensure that they are following existing rules and regulations and that they serve the public effectively. Any such revisions will be executed with Town Council approval

(FINAL VERSION APPROVED BY TOWN COUNCIL November 2025)

