

Lancaster County Community Foundation
POLICIES AND PROCEDURAL GUIDELINES FOR GRANTEE ORGANIZATIONS

I. PUBLIC ANNOUNCEMENT

A. As a community foundation, it is important that the public remains aware of The Lancaster County Community Foundation's (LCCF) funding decisions. Any publicity that results (press releases, interviews, etc.) from our grant to your organization should identify The Lancaster County Community Foundation as a partnering agency.

B. LCCF also requires identification as a funding/partnering entity in any public communication produced by your organization that relates to the LCCF funding during the grant period. LCCF staff are available to address questions and provide advice on this matter.

II. GRANT PAYMENT AND REPORTING RESPONSIBILITIES TO THE LANCASTER COUNTY COMMUNITY FOUNDATION

A. The awarded organization's designated staff must sign and return the attached contract acknowledging acceptance of the policies and conditions stipulated in this document and the contract document(s) before LCCF disburses funds.

B. LCCF will determine one of the following payment options:

1. **FULL PAYMENT:** After careful review, LCCF may opt to pay an organization the total award in one payment upon receipt of the signed contract. In general, full payment will be applied to grants \$50,000 and less.

2. **INSTALLMENT PAYMENTS:** After careful evaluation, LCCF may opt to pay an organization in two or more installments. Only one installment payment will be made prior to the submission of a financial report. Subsequent payments will be available upon a request from the grantee, and upon review of financial reporting by LCCF. In general, installment payment will be applied to grants of more than \$50,000.

C. The awarded organization is responsible for completing progress reports and completion reports (including financial documentation) to LCCF.

1. Organizations are required to provide a progress report every 180 days until the program has been completed, at which time a completion report and financial documentation must be submitted.

2. The 180-day period begins on the date of the grant award, regardless of when the organization returns the signed contract.

3. If an organization completes a program prior to the deadline for submission of a progress report, or between progress reports, a completion report should be submitted in lieu of a progress report.

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4. If an organization fails to provide a progress or completion report within the required timeframe, LCCF reserves the right to deny the remainder of the grant award, request the return of funds already distributed, and/or refuse to fund future requests from the organization.

5. A completion report and expense report must be received by LCCF prior to the end of the contractual due date. Copies of all invoices \$500 or greater should be included with the expense report.

--OR--

LCCF must receive a written extension request prior to the contractual end date. LCCF will evaluate requests to determine whether an extension is warranted.

6. Organizations meeting grant criteria and in good standing with current grant(s) may apply for additional funding from LCCF. Organizations with outstanding reporting responsibilities are not able to apply for funds. **Completion of a program includes the submission of a completion report and the required financial documentation.** Good standing includes meeting the most recent reporting requirements and grant fiscal responsibilities.

7. LCCF reserves the right to follow up on both progress and completion reports at any time through appropriate means, including site visits, written communication and telephone inquiries by staff, board directors, and volunteers.

III. EXPENDITURE OF FUNDS

A. As this grant is to be used only for the purpose described in the grant proposal and related grant award materials, and in accordance with the approved budget, the program is subject to modification only with the advanced written approval of LCCF.

Exception: LCCF will allow reallocations of up to 10% of the total award amount without written consent, provided that the reallocation will in good faith allow the organization to more effectively achieve the outcomes of the grant.

B. Funds must be expended with charitable intent as outlined in the contracted agreement executed between the LCCF and the grantee organization.

C. Funds must be expended within the timeframe outlined in the grant contract or specified extension period.

D. The grantee organization shall return funds to LCCF in any of the following situations:

1. If LCCF determines that the grantee organization has not performed in accordance with this agreement.

2. If the organization loses its exemption from federal income taxes under Section 501 of the Internal Revenue Code or is no longer an organization described in Section 170 (c) of the Internal Revenue Code.

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3. If excess funds exist at the completion of the contract or extension period. The awarded organization is encouraged to contact the Community Foundation before funds are returned.

E. Expenditures may be incurred only as is necessary to carry out the purposes and activities of the approved program.

F. The grantee organization is responsible for the expenditure of funds and for maintaining adequate supporting records consistent with generally accepted accounting practices.

G. The grantee organization must provide documentation of expenses related to the program funded by LCCF upon request and with the submission of a completion report. Further information on this requirement can be found on our website

(http://www.lancastercountyfoundation.org/ProgramInitiatives/grantee_reporting)

IV. OTHER

A. Unless otherwise stipulated in writing, this grant is made with the understanding that LCCF has no obligation to provide additional support to the grantee organization for this program or any future programs.

B. LCCF reserves the right to amend these guidelines at any time. The most current Policies and Procedural Guidelines will always be posted on our website

(http://www.lancastercountyfoundation.org/ProgramInitiatives/grantee_reporting)