

Partner Grant



Guidebook

2024 – 2025

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About

Partner Grants is proposed as a three-year pilot program. The amount of funds available for awarding is determined on an annual basis and is appropriated and adopted by the Board of Directors. Funding is based on available funds, there is no guarantee of annual funding.

For the second year of the pilot program, 2024-2025 Fiscal Year, there is \$255,000 budgeted.

Purpose

The purpose of the Partner Grant Program is to provide an equitable opportunity for eligible entities (Partner) to request funds from the District that are used to “protect, conserve, and improve the quality of soil and water in Marion County through planning, technical assistance and education.”

Scope of Funding

Requests must advance the mission of the Marion SWCD "to protect, conserve and improve the quality of soil and water in Marion County through planning, technical assistance and education."

Requests for Funding must be located within and be used for the benefit of the residents of Marion SWCD.

Eligible Project Types*

Partner Capacity Support

- Support the operations of entities that encourage people and communities to participate in collaborative, voluntary efforts which advance the mission of Marion SWCD

Education

- Support for projects and efforts that demonstrate and/or deliver natural resource conservation education.

Outreach

- Support for projects that help entities interface with groups or communities and focus on conservation messaging and opportunities.

Technical Assistance

- Conservation Planning and Technical Assistance
 - Technical design and engineering
 - Development of a technical design for a conservation project
 - Resource Assessments and planning
 - Development of an implementation plan for conservation activities

Project implementation

- Support for on the ground priority projects that protect, conserve, or improve the quality of soil and water in Marion County.

* A project may cover more than one project type.

Application Period(s)

For the 2024-2025 Fiscal Year, the application periods will be:

- June 17, 2024 - August 15, 2024
- December 17, 2024 - February 15, 2025 (*subject to board discretion and available funding*)

In subsequent year(s), there is anticipated to be two (2) periods per fiscal year application deadlines of:

- June 17 - August 15
- December 17 - February 15 (*subject to board discretion and available funding*)

All funding is available for allocation on the first application deadline, any remaining funding may be allocated at the next application deadline.

Marion SWCD has the right to not offer the grant, reduce the available funding, and to adjust the application deadlines.

Applications are accepted through the [District's on-line grant application portal](#)

Who can apply? Eligible include:

- Watershed Councils
- Nonprofit Organization or group
- Neighborhood Association
- Native American tribes
- Government Agency
- Educational Institution
- Community Organization

Private individuals and businesses are not eligible to apply directly for this funding and are encouraged to partner with an eligible entity to apply for the funding.

Organization, User and Authorized Representative

The Organization is the entity applying for the grant funds.

The User is the individual with the Organization that is completing the Application.

The Authorized Representative is an individual with the Organization who is authorized to represent the Organization, submit the grant application, and sign contracts on its behalf.

A User, who is not an Authorized Representative, may create an Organization, start an Application, then Invite an Authorized Representative to join the Organization as a User; you then must contact the Marion SWCD Grants Coordinator, Susan Ortiz, to reassign the Application to the Authorized Representative for signature/submission.

Contact Susan Ortiz at susan.ortiz@marionswcd.net or 503-871-4760

Tax Exempt Status and Fiscal Sponsor

Tax-Exempt organizations are not for profit organizations, including government entities, that are exempt from some federal income taxes. They are organized and operated exclusively for exempt purposes, such as religious, charitable, scientific, educational, or public safety activities. They must also meet certain requirements set out in the Internal Revenue Code, such as Section 501(c)(3) or other sections. None of their earnings may benefit any private shareholder or individual.

Partner Entities who are not tax-exempt may apply for a Marion SWCD grant with a fiscal sponsor.

A fiscal sponsor is an eligible governmental or non-profit organization that provides organizational infrastructure, insurance coverage and administrative support for managing a grant.

Fiscal Sponsorship – shall demonstrate at least one of the following:

- Is registered with the State of Oregon (Secretary of State and OR Dept of Justice, Charitable Activities, when applicable).
- Has a written fiscal sponsorship agreement with a 501(c)(3) organization.
- Has a written fiscal sponsorship agreement with a SWCD, city, county or tribal government.

If a group has neither federal tax exemption nor a fiscal sponsor, contact Marion SWCD.

Grant Guidelines

Applications will be completed on the [District's on-line grant application portal](#)

An eligible entity may submit one application that includes multiple project types and may submit more than one application per funding cycle.

Separate Applications shall be submitted for each Project, e.g. Capacity grant is one application, culvert replacement is one application, and educational field tours is one application.

Total award(s) may not exceed the Partner Grant funding limitations – *see limitations for more information*.

Applicants must be in good standing (up to date with reports and reimbursement requests) to be eligible.

Duration of Grant award

Grants may be awarded for a maximum duration of:

- Capacity Grant – 1 year
- Education, Outreach, Technical Assistance, Implementation Grants– 2 years

Term of grant will begin on date of award by Marion SWCD Board.

Project development and application assistance

There is a limit of 2 hours of Marion SWCD staff assistance for each entity for project development and application assistance.

Non-discrimination

For work related to a Marion SWCD funded project, the grantee agrees to comply with Marion SWCD's policy of prohibiting discrimination based on race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, and marital or family status.

Ineligible entities and project types

- Private business and landowners (funding and technical assistance from Marion SWCD may be available for these entities under other Marion SWCD programs).
- Buildings and capital projects.
- Capital campaigns.
- Political campaigns (Marion SWCD is statutorily prohibited from supporting such activity)
- Required mitigation projects.

Funding, Limitations, and Match Requirements

For the 2024-2025 Fiscal Year there is \$255,000 budgeted for this grant program.

Maximum Funding Limitation

Maximum of \$45,000 in combined Marion SWCD grant funds in any fiscal year or \$135,000 in any five consecutive fiscal year period; grant funds include Partner Grants, Conservation Assistance Grants, CLEAR, Salmon Watch, Special Projects Grants, Cover Crop Program, and any other grant solicited by the Marion SWCD.

Partner Grants

For FY 24-25 there is \$205,000 of available funding for:

- Education
- Outreach
- Technical Assistance
- Project implementation

Limitation

- A maximum of \$35,000 in grant funds from the Partner Grants per entity during each fiscal year.
- A maximum of \$105,000 in grant funds from the Partner Grants per entity during any five consecutive fiscal year period.

Partner Capacity Support Grants

For FY 24-25, there is \$50,000 in funding available for Partner Capacity Support

Limitation

- A maximum of \$10,000 in grant funds from the Partner Capacity Support per entity during each fiscal year.
- A maximum of \$30,000 in grant funds from the Partner Capacity Support per entity during any five consecutive fiscal year period.

Match requirement

Marion SWCD Partner Grants require a minimum of 25% match funding based on the total grant award; match includes cash and in-kind. An applicant may not use another Marion SWCD grant to match a Marion SWCD grant.

Applicants will be required to document match funds applied for and secured at the time of application.

Evidence of at least 25% (of the Marion SWCD awarded funds) secured match funding must be provided prior to grant funds being released.

Budget

The budget is your statement for how the Capacity Support funds will be utilized and to demonstrate your 25% matching funds.

Your budget should include categories such as:

- Personnel (Salaries, Wages, Benefits)
- Contracted Services • Materials and Supplies
- Travel and Transportation
- Other

Administrative Overhead

Administrative Overheads costs exceeding those listed below will need to be justified in the application.

- Limit of no more than 10% for Education, Outreach, Technical Assistance, and Project Implementation applications.
- No Administrative Overhead Cost allowed in Capacity Grant applications.

Funding for Administrative Overhead Costs is at the discretion of the Board and may be reduced or excluded from funding.

You may upload your budget in any file format.

Example budget template is available in an Excel file format. [Excel - Budget Template](#)

File Size Limit: 1 MiB

File Uploads

Only one file can be uploaded per question; combine multiple documents into one file if necessary.

Files can be uploaded using file tree selection OR drag and drop.

The maximum file size for upload will be listed at the question.

A MiB (Mebibyte) is slightly larger than a MB (Megabyte). Refer to the suggested ranges below when considering file size limits:

- 1-2 MiBs for documents up to about 10 pages.
- 3-5 MiBs for documents above 10 pages, or those that include images.
- 2-4 MiBs for a high-resolution photo.

Evaluation and Award Process

Minimum Requirements Review

Grants Coordinator will review applications according to the following guidelines:

- Protect, conserve, and improve the quality of soil and water in Marion County through planning, technical assistance and education.
- In the District or for the benefit of the constituents of the District
- Must be current on all District grant reporting (completion reports, financial reports)
- Technical Assistance and Project Implementation:
 - On the ground project implementation must be within the boundaries of the District
 - For TA and Implementation
 - Must solve a natural resource issue
 - Must address one or more of the District's Natural Resource Concerns
- Capacity Grants
 - Must certify that they meet minimum eligibility standards as provided in Appendix A-Partner Capacity Grant Eligibility Standards.
- Budget – completeness, addition, allowed expenses, and related
- Must meet the match requirements
- Within funding limitations – request total
 - All grant funds count toward limitation

Completeness of Applications

- Incomplete Applications will not be considered
 - For example, if a design is needed for a project, then it must be included as it is necessary to develop and understand the timeline and budget.
- Applications are reviewed for completeness and may be reverted to draft to allow the Applicant to supplement the Application or for corrections; Applications reverted to draft will have a limited time to provide requested information / revisions.

Partner Grant Review Criteria

Proposal Clarity:

- Project is ready to implement
- Project is clearly defined
- Scope and scale of project is feasible
- Project uses appropriate methods
- Can be completed in proposed timeframe

Budget and Cost Effectiveness

- Represents proposal
- Budget is cost effective,
- Budget is reasonable,
- Costs are aligned with the work necessary to accomplish the proposed components.

Applicant

- Capacity to complete the project,
- Capacity for stewardship and maintenance,
- Past projects completed as proposed,
- Engages appropriate partners.

Site Visits

The Marion SWCD will work with Applicants to schedule site visits for applicable projects during the Evaluation Process.

Committee Review

Committee assignments for review and evaluation

- Partner Capacity Support
 - Applications are reviewed by 1) staff, 2) Admin Committee, 3) Board
- Education, Outreach, Technical Assistance, and Project implementation
 - Applications are reviewed by 1) staff, 2) Committee, 3) Board

Committee Member Review

1. Each committee member shall review and evaluate each application individually based on how well the proposed project meets the Review Criteria.
2. Each committee member shall recommend each project, with written justification of the recommendation, as one of the following:
 - Do Fund
 - Do Fund with conditions.
 - Do Not Fund
 - Defer to staff or the Board with an explanation if there is a policy issue or budget issue that needs to be addressed.
3. Each committee member shall rank order all recommended (Do Fund & Do Fund with Conditions) applications
 - Rank based on how well the application meets the Review criteria, with the following preferences:
 - Applications with direct evidence of collaboration between stakeholders and agencies over single part projects
 - Certainty of success based on organizational capacity of applicant and likelihood of meeting application objectives
 - Expected benefits to District constituents and/or natural resources
 - Project cost relative to anticipated benefits / outcomes
 - Applications with Do Not Fund or Defer will be considered as ranked at the lowest level, i.e. zero or equivalent

Compilation of Rankings

Staff compiles ranking results

- Applications with Do Fund and Do Fund with conditions, will have their ranks averaged.
- Applications receiving three (3) or more Do Not Fund, or Defer, will automatically be denied

Committee Review

Committee will review Rankings and make any recommendations for conditions or stipulations.

The Committee may revise Ranking order.

- Individual committee members may choose to change their decision and ranking

The Committee will

- Provide recommendations to the Board based on ranking
- Provide recommendations to the Board for application funding amount (i.e. Requested amount and recommended amount)

Staff review of the rankings and funding

- Clarify any issues

Award

Board will review Committee Recommendations

- May revise funding amounts for any application prior to approval
- May deny an application funding based upon available District funding
- Receives list of all applications, both those recommended for funding and those denied funding

If a application is funded, the decision will be formalized with a written agreement that will include Marion SWCD and grantee responsibilities, a description of reporting and monitoring requirements, procedures for requesting payments, etc.

Funding and Follow-Up reporting

Grant Funding Terms and Conditions

- Maximum Grant term: no more than x years from award date:
 - Capacity – 1 year
 - Restoration – 2 years
 - Technical Assistance – 2 years
 - Education and Outreach – 2 years
- Extensions – for up to 1 additional year may be requested.
- All Reporting due by no later than 30 days after grant end date
- Entity is ineligible for future grant funds if they are not current on all reporting – completion report, financial, etc.
- Funds not used are required to be reimbursed to Marion SWCD
- Payments totaling \$600 or more in a calendar year may be considered by the IRS to be reportable income. Applicants who receive Marion SWCD funding will be required to complete an IRS Form W-9. If applicable, Marion SWCD will report the income to the IRS and the applicant on a Form 1099. The applicant should consult a tax advisor regarding income reporting requirements and whether project-related expenses may be included as a deduction on the applicant's tax returns to offset this income.

Payment and Reporting

Payment Terms

- Capacity Grants
 - Award payment subsequent to Approval
 - Secured Match Form - Required
 - Payment made as one lump sum
 - Completion reporting due at end of grant term
- Education, Outreach, Technical Assistance, and Restoration Grants:
 - Secured Match Form – Required prior to release of Funds
 - Receipts / Invoices for expenses are required
 - Installments
 - Advances
 - Up to half of the grant award
 - Must submit adequate receipts within 120 days
 - Can request up to 50% of the remaining funds each year
 - On receipts/ invoices, tracking sheets
 - Completion reporting due not later than end of grant term

Completion Reporting

- Financial
 - Invoices / Receipts, tracking sheets for District funds
 - Match funding documented
- Project Completion Report
- A Final Site Visit will be required for grants implementing on the ground projects
- Must be current on all reporting to receive future funding

Appendix A – Partner Capacity Support Grant Eligibility Standards

The recommended Partner Capacity Grant Eligibility Standards listed below are in alignment with Oregon Revised Statute ORS Chapter 65 – Nonprofit Corporations, ORS Chapter 128 – Oregon Charitable Trust and Corporation Act, Oregon Administrative Rule OAR-137-010-0005 – General Charitable Organization Registration and Reporting Requirements, and OAR 695-040-0030 OWEB Eligibility for Council Capacity Grants.

To be eligible for a Marion SWCD Partner Capacity Support Grant, an entity must certify that they meet eligibility standards as provided below.

Marion SWCD reserves the right to request any entity applying for or receiving a Partner Capacity Grant to provide documentation as support for compliance with any or all of the eligibility standards required herein.

- Be located within Marion SWCD or provide services for the benefit of constituents of Marion SWCD
- Fiscal Sponsorship – shall demonstrate at least one of the following:
 - Is registered with the State of Oregon (Secretary of State and OR Dept of Justice, Charitable Activities, when applicable)
 - Has a written fiscal sponsorship agreement with a 501(c)(3) organization
 - Has a written fiscal sponsorship agreement with a SWCD, city, county or tribal government.
- Has an organizational structure and business operations. Must first meet the criteria above.
 - Adopted bylaws or charter which includes:
 - Mission that aligns with the Marion SWCD’s statutory authorities and mission
 - How the governing body is selected
 - Titles of officers, e.g. Chair, President Secretary, treasurer,
 - How officers are selected
 - Who is eligible for the governing body
 - Who is eligible to be an officer
 - Length of service on governing body
 - Powers of governing body
 - Powers of officers
 - Minimum number or frequency of governing body meetings
 - Decision making process of governing body
 - Statement that organization and its governing body intends to include a diverse range of interests.
 - A process for amending the bylaws or charter
 - If a membership organization, in addition to the above the bylaws or charter shall include the following:
 - Who is eligible for membership
 - When membership meetings will occur
 - The decision making role of the membership; and

- A process to remove members or terminate the voting rights of members
- The entity's governing body has adopted policies and/or procedures that include the following:
 - A list of the geographic areas and community interests the entity intends to include on its governing body in order to engage a balance of interested and affected persons within the area served by the entity.
 - A policy that the entity operates as an open and inclusive organization, including inviting the public to entity meetings, and, upon request, providing the public with records of its meetings and decisions;
 - A policy that the entity, or its fiscal sponsor, uses Generally Accepted Accounting Principles; and
 - A policy that the entity does not rely on litigation to compel regulatory enforcement as a means to implement its mission.