

# Montana Native Plant Society Grants and Giving Program Policy and Procedures

## **Background:**

With a substantial and steadily growing financial reserve, MNPS can now provide increased financial support to entities that further its mission. Until 2023, MNPS grants and gifts were limited to the Small Grants program (which annually awarded between \$1000 and \$5000) and biennial gifts to MONTU Herbarium and Montana Audubon, with occasional grants for various projects upon request. At its fall 2022 meeting, the MNPS Board of Directors (Board) determined that it should restructure the grants program by more clearly defining granting opportunities and increasing the amount given annually. An ad hoc committee was formed to design and propose a new structure for Board review and approval.

This document is based on the Proposal and Policy Framework adopted by the Board in February 2023; prepared by the ad hoc committee. It describes the adopted structure of the Grants and Giving program, along with policy for its subprograms. The Small Grants Program, established in 1996, was expanded and renamed “Grants”, as a subprogram. Policy detail for all subprograms was added in winter 2024 by the Grants and Giving Committee.

## **Program Overview**

### **Purpose**

The Grants and Giving program provides financial support to entities that advance MNPS’s mission. This will replace the previous Small Grants program and *MNPS Funding Proposal Guidelines*. All grants and gifts from MNPS assets will follow the protocol outlined below.

### **Subprograms**

The Grants and Giving Program consists of four subprograms that are defined below: Grants, Scholarships, Gifts, and Chapter Support. Grants and Scholarships may each have a subcommittee.

**Grants** - (definition: a grant is funds *requested* by an entity for projects or non-academic support). Grants will only be awarded to projects that align with MNPS’s mission.

**Grant Categories:** Grant applications will be placed into predefined categories listed below. Some projects will span more than one category; if necessary, the subcommittee will determine the primary purpose of the project. The Grants Subcommittee will determine how the grant allocation is distributed among the categories and may recommend to the Board that funding be preferential for a particular category based on current issues or priorities for MNPS. Grant categories include Research, Education, Conservation, Native Plant Restoration, Native Plant Garden, and Other (projects that don’t fit into one of the listed categories).

Small Funding Requests: Requests to the Board from an external entity for support  $\leq$ \$250 will be evaluated separately from the above process. If there is a time-sensitive need for funds, this is the one exception that could be decided with an email vote by the Board, but only if the funds are needed before the next full board meeting.

**Scholarships** - (definition: funds *requested* by students for educational and professional development opportunities.) Scholarships are for students only. A student is defined as any person who embarks on a Board-approved program to obtain knowledge or awareness of Montana's native plants and plant communities. There are two categories of scholarships: 1. Academic Scholarship for students enrolled in an academic program in Montana's university system and 2. Professional Development Scholarship for persons participating in a Board approved professional development opportunity.

**Gifts** – (definition: *unsolicited* gifts initiated by the MNPS Board to an organization or individual.) The Board will determine recipients based on recommendations from individuals and society committees. These gifts are given each year and are to be determined at the fall board meeting when preparing the budget. Examples are the \$1000 gifts given to active Montana University Herbaria (MONT, MONTU, MSUB) and Montana Audubon. Moving forward, the Board should encourage giving to more organizations.

**Chapter Support** – (definition: MNPS funds *requested* by a Chapter for projects the chapter is undertaking.) Chapter Support is determined by the Board and funded from the General Operation Fund. Chapter support does not extend to MNPS committees. If a committee wants funding, the committee chair should submit the funding request during annual budgeting in the fall to be funded from the MNPS general fund.

Chapters can apply for grants offered by other organizations and businesses using the state MNPS 501(c)(3) status. According to the By-laws, Article 10, Section 12, chapters that apply for such grants need Board approval. The grant money will be paid to the state MNPS Treasurer. Upon completion of the project and submission of a final report to the grantor, the state will forward funds to the chapter. The Chapters will be responsible for bookkeeping and reporting on the grants.

### **Summary of Grant Cycle and Frequency**

**Grants** – Once OR twice a year based on capacity of Administrative Assistant (AA) and Grants Subcommittee membership. Application deadlines would allow for decisions at the fall and spring board meetings.

Small Funding Requests ( $\leq$ \$250) – twice a year to be considered at fall and spring board meetings, unless time sensitive.

**Scholarships** – Academic scholarships - once a year in the spring. Professional development scholarships - once a year in the fall.

**Gifts** – once a year as part of annual MNPS budget preparation in the fall.

**Chapter Support** – once a year as part of annual MNPS budget preparation in fall.

### **On-line Application Process**

Applications for Grants and Scholarships will be submitted through on-line application forms. Small Funding Requests and Chapter Support requests may be submitted directly to the Board. The application development and processing can be done by our Administrative Assistant, an intern, webmaster, and/or volunteer. The option to upload attachments is important.

### **Committee Framework – Positions**

The Grants and Giving Committee will consist of the following positions and responsibilities: Grants and Giving Chair will be a Board member who oversees the committee and coordinates all aspects of the grants and giving subprograms. **Grants** and **Scholarships** subprograms will have subcommittees to oversee their operations. The Grants and Giving Chair may lead these subcommittees or assign a subcommittee chair. Committee members may serve on one or both subcommittees. The MNPS President and other Officers may serve as voting members of the committee. Committee members must be current MNPS members. Individual committee member terms are two years, without term limits. Committee members may not receive grants or scholarships during their committee appointment. See Committee list at end.

- **Grants** – 5-7 people; obtain a mix of skills with at least one person with experience in each category.
- **Scholarships** – 3-4 people. Includes an educator or academic.
- **Gifts** – determined by the Board, not a Grants and Giving subcommittee.
- **Chapter Support** – determined by the Board, not a Grants and Giving subcommittee.

### **Program Budgeting and Funding**

Funding for Grants, Scholarships, and Gifts will come primarily from donations to MNPS. Funds from the General Operating Fund may also be used. The annual budget for Grants and Gifts will be proposed by the Grants and Giving Committee, ratified by the Board during the annual budget process. The projected end-of-year balance of the Grants and Giving Fund plus the projected revenue for the budget year will be considered available funds to grant or gift during the budget year.

For example: If the projected balance in the Grants and Giving Fund at the start of the budget year is \$1000 and the projected income from donations for the budget year is \$9000, then \$10,000 would be available for the budget year. If the board approves budgeting \$10,000 a suggested split of these funds by category is given below:

**Grants:** ~70% of projected donations (e.g. ~\$7000)

**Scholarships:** ~15% of projected donations (e.g. ~\$1500)

**Gifts:** ~15% of projected donations (e.g. ~\$1500)

**Chapter Support:** Although Chapter Support Grants fall into this framework, those funds will come from the General Operating Fund, not Grants and Giving Fund. Approval of funds would be determined at budget time in fall considering State's financial position.

### **Grants and Giving Fund**

In January of 2024, the state budget was separated into two funds – the General Operating Fund (GOF) and the Grants and Giving Fund (GGF). Unless specified otherwise, all donations received are placed into the GGF and tracked separately and/or held in a separate banking account. Any interest accrued becomes part of the GGF. These funds will remain in the GGF across fiscal years, unless the Board specifically directs a transfer of them to the GOF for society purposes. The Grants and Giving Committee could request augmentation to the GGF from state assets if donations don't cover all that the committee wants to fund in a given year.

# MNPS Grants and Giving Program

## Policy and Procedures for Subprograms

### Grants

Definition: a grant is funds *requested* by an entity for projects or non-academic support.

The Grants and Giving Committee will determine the number of Grants and the maximum amount per Grant, based on the Grants and Giving Fund budget each year. For example, they may plan for one grant up to the total available or multiple grants that together amount to the total available. The Grants announcement will state the maximum amount per grant. It is not necessary to state the total funding or the number of grants that will be awarded.

### **Objectives**

- 1) To stimulate research, conservation, and educational activities which help foster an appreciation of Montana's native plants and plant communities.
- 2) To promote native plant conservation through a better understanding of Montana's native flora and vegetation and the factors affecting their survival.

### **Qualifications**

Anyone may apply for a Grant, except active Committee members.

Applications must meet the following criteria:

- 1) Proposals must pertain to native plants of Montana and align with MNPS's mission. 2) Non-revenue generating projects will be given preference. If a revenue-generating project is funded, MNPS may require a portion of the proceeds be returned to the MNPS Grants and Giving Program.
- 2) Funding requests must meet the eligible expenses as described below.
- 3) Applications must include all required information and be formatted as described in below in Application and selection procedure.

### **Expenses eligible for coverage**

- 1) Direct cost of travel, meals, and lodging.
- 2) Supply, equipment, and service expenses used for the sole purpose of the project (e.g., consumable supplies such as media storage, laboratory chemicals, soil, nursery stock; project-specific equipment such as hand tools, water system, storage structure; and services such as phone, computer time, and design contracts).
- 3) Printing costs for public outreach projects or research publications.
- 4) Wages or contract labor costs for work directly related to the project.

**Non-eligible expenses** include wages for overhead or unrelated support and any expenses nonessential to the project.

### **Grant Categories**

All grant applications will be placed into one of the categories described below. The applicant will apply to a primary category, recognizing that most projects have more than one objective. The Grants Subcommittee may reassign a category after consultation with the applicant. The Grants Subcommittee will determine how the grant allocation is distributed among the categories. The Grants Subcommittee may recommend to the Board that funding be preferential for a particular category each year based on current issues or priorities for MNPS.

- Research: Projects in support of scientific study of Montana’s native plants or plant communities, or other topics that align with MNPS’s mission with the goal of publishing the results. Publication at a minimum would be an article in the Kelsey.
- Education – Projects that promote knowledge of Montana’s native plants or plant communities, or other education topics that align with MNPS’s mission. There could be subgroups under education. Additional criteria for this category are incorporated listed below under Application and selection procedure.
- Conservation – Projects that promote conservation of Montana’s native plants or plant communities, or other conservation topics that align with MNPS’s mission.
- Native Plant Restoration – Projects that promote the restoration of Montana’s native plants or plant communities.
- Native Plant Garden - Projects that establish or maintain an existing native plant garden whose purpose aligns with MNPS’s mission. Additional criteria for this category are incorporated listed below under Application and selection procedure.
- Other – Projects that don’t fit into one of the aforementioned categories but still align with MNPS’s mission.
- Small Funding Requests - Requests to the Board from an external entity for support <=\$250 will be evaluated separately from the above process. If there is a time-sensitive need for funds, this is the one exception that could be decided with an email vote by the Board, but only if the funds are needed before the next full board meeting.

### **Application and selection process**

- 1) Proposals shall be submitted by online forms that include:
  - Primary grant category
  - Project title
  - Contact person and organizational affiliation, as appropriate
  - Mailing address, telephone number, e-mail, and fax number (if applicable)
  - Short project abstract (2-5 sentences)
  - Project description: objectives, methods, final product, dissemination of results, etc. (limit 1000 words)
  - How the proposed project will benefit native plant conservation in Montana • Budget showing amount requested from MNPS as well as other funding sources, and how the funds will be used (e.g. Personnel, Travel, Supplies and Equipment, Printing) • Time frames for completion of the proposed project
  - Brief statement of applicant's qualifications or biography
  - Attachments (3) may be uploaded for appendices with species lists, literature cited, and diagrams.
  - Garden and native plant restoration projects shall also include:
    - short- and long-term maintenance plan
    - advisor or lead planner expertise and experience
    - species list and/or types of plant materials and sourcing
    - statement that applicant owns the property or can secure a Memorandum of Understanding with the landowner allowing for long-term maintenance
  - Education projects shall also include:
    - age groups and numbers of target audience
    - advisor or lead educator expertise and experience
    - expected lifespan of product
    - outreach, maintenance, and revision plans, if applicable

- 2) Grants Subcommittee members will review each proposal, and rate according to three selection criteria (listed below). A maximum of 5 points will be granted for each criterion (for a total maximum score of 15 points).
  - Proposals will be rated and ranked by category. Final selection may include proposals from a single or from more than one category, depending on funding, subcommittee recommendation, and any emphasis previously provided by the Board.
  - The rating will be a basis for discussion by the Grants Subcommittee who is responsible for making a recommendation to the Board. A simple majority will decide if it cannot be made by consensus; in case of a tie the Grants Subcommittee Chair's vote shall decide.
  - The Grants and Giving Committee Chairperson will present the Subcommittee recommendation to the Board for approval. The Board and Grants Subcommittee may suggest proposal modifications with funding contingent upon the modification. The Board has the discretion to fund fewer proposals than budgeted for or to fund additional proposals if budget allows.
- 3) Applicants will be notified by e-mail whether their project is approved or not. If requested, unsuccessful applicants will be provided information on the considerations for not receiving funding.
- 4) Grant awards will be announced in the *Kelsey* Newsletter.

## **SELECTION CRITERIA FOR PROPOSALS**

### **Project Qualifications and Adequacy of Resources:**

- Demonstrated qualifications adequate for successful project completion, e.g. track record, realistic objectives.
- Budget suitable for achieving objectives.
- Preference will be given to proposals demonstrating cooperation with others.
- For school or community gardens, native plant restoration projects, and education projects: specialists or expertise are identified and qualified.

### **Merit of Project:**

- Preference will be given to proposals that generate data or public support that advances the conservation of native plants in the wild.
- Project directly leads to conservation, appreciation, or understanding of native plants.
- Project shows an evident and current need (urgency).
- Project reaches a broad audience, is distinctive and imaginative, and results extend beyond the grant year.
- Projects emphasizing operational costs, such as utilities or rent, will be less preferred.

### **Methods:**

- Purpose and methods are clearly described.
- Procedures are appropriate to the proposed problem.
- Methods have a negligible negative impact on native plant communities.
- A plan for the dissemination of results is included.
- For school or community garden or native plant restoration projects: Maintenance plan (water and weed management) is clearly defined; species list or types of plants and sources are described and appropriate for planting location, goals, and intended audience or users.
- For education projects: Target audience, maintenance plan, outreach, and lifespan are described and appropriate.

## Reporting and Payment Schedule

- 1) First payment of 50% of the grant award will be made at the request of the awardee to the Grants Subcommittee Chair any time after notification of award. The Subcommittee Chair will notify the Treasurer of the total award, payment amount, and contact information for the awardee.
- 2) Final payment will be made at the request of the awardee to the Subcommittee Chair after or along with submission of a final report or product to the Subcommittee Chair (see the following stipulations). The Subcommittee Chair will notify the Treasurer of receipt of the acceptable report and request for payment.
- 3) A final report is due within one year of the award notification. The Subcommittee Chair will monitor the receipt of the final report and make efforts to encourage awardee to respond in a timely manner. Final reimbursement cannot be made without the awardee submitting a final report. Awardees may request an extension by describing the extenuating circumstances to the Subcommittee Chair. If the report is more than six months past the deadline or extension date, the awardee will be reimbursed for no more than 50% of the remaining eligible expenses. Reports submitted over twelve months late will result in forfeiture of further reimbursement. Awardees who fail to submit a final report within twelve months of the deadline will be ineligible for further grants, unless an extension or exception is granted.
- 4) In some circumstances it will be necessary to provide most or all the funding up front. This would be the case for projects that require the funding to produce or print the product (e.g., brochure, educational trunk). Payment for these types of projects will be handled on a case by-case basis.

## Final Report and Resulting Publications

- 1) Awardees will submit a final report documenting the study or project accomplishments to the Montana Native Plant Society. This report should be suitable for publication in the *Kelsey* newsletter. Submission will be by e-mail or online if web procedures allow.
- 2) Research data are the property of the researcher and may not be published or distributed without written permission from the researcher.
- 3) The Montana Native Plant Society's support should be acknowledged in any publication resulting from research or other projects.

## Schedule for Grants

<b>DATE Spring Awards</b>	<b>DATE Fall Awards</b>	<b>ACTION</b>
September 10	June 10	Article regarding up-coming request for grant proposals submitted to <i>Kelsey</i> .
October - December	July - September	Request for grant proposals posted on the MNPS website and social media.
December 10	September 10	Article inviting grant proposals and directing potential applicants to the MNPS website submitted to <i>Kelsey</i> .
<b>January 31</b>	<b>October 31</b>	<b>Proposals due.</b>

March (winter) Board Meeting	December 15	Based on Subcommittee’s recommendation, Board approves recipient(s) and grant funding level.
March 15	December 31	All applicants notified of Board’s decision. First payment available to awardees at their request. Final Reports from previous year’s recipient(s) due (1 year from award date).
March 15	March 15	Updated versions of “Grants Award History” and “Grants Policy” posted on website.
April or June	December 10	Article on Awards submitted to <i>Kelsey</i> .
Annual Meeting	Annual Meeting	Awards announced at Annual Meeting.

## **Scholarships**

Definition: funds *requested* by students for educational and professional development opportunities. Scholarships are for students only. A student is defined as any person who embarks on a Board-approved program to obtain knowledge or awareness of Montana’s native plants and plant communities.

There are two categories of scholarships: 1. Academic Scholarship for students enrolled in an academic program at a Montana college or university and 2. Professional Development Scholarship for persons participating in a Board-approved professional development opportunity. Funds will only go toward educational expenses, not a student’s personal expenses. Support will not necessarily be project-specific, and financial need or academic achievement are not prerequisite criteria for scholarships.

### **Category 1: Academic Scholarship**

MNPS may offer one or more \$1000 Academic Scholarships each year. The number of scholarships awarded will be based on the Grants and Giving budget each year.

### **Objectives**

Academic Scholarships are to assist with educational opportunities for students enrolled or planning to be enrolled in an academic program in Montana with an interest in native plants.

### **Eligibility**

Applicants must be a graduate or undergraduate student in a Montana college or university, including tribal colleges, community colleges, training schools etc. The student must plan to be enrolled by Fall of the current year.

Applications must meet the following criteria:

1. Student should demonstrate interest in native plants of Montana.

2. Funding requests must meet eligible expenses as described below.
3. Applications must include all required information and be formatted as described below.

### Eligible expenses

Scholarships are to help to pay for direct educational expenses, including tuition, books, and supplies, also travel, food and lodging if for research. The awarded payment will be sent directly to the school's financial aid office, so the applicant does not need to itemize expenses.

### Application and Selection Process and Schedule for Academic Scholarships:

DATE (deadline)	ACTION
December 10	Article announcing Scholarships and directing potential applicants to the MNPS website submitted to <i>Kelsey</i> .
December - January 15	Advertise scholarships in <i>Kelsey</i> , MNPS webpage, social media, Montana schools, and online scholarship boards.
<b>April 1</b>	<p><b>Applications due.</b> Applications will be submitted through an online application form that includes:</p> <ul style="list-style-type: none"> <li>• Name, address, state, zip, phone, email.</li> <li>• Education level: (graduate or undergraduate)</li> <li>• Which school in the university system?</li> <li>• Major field of study GPA</li> <li>• 1 (or more) references: Include name, relationship, phone</li> <li>• Essay: (limit 300 words) explain your interest and history with native plants and educational aspirations in relation to native plants and ecosystems of Montana.</li> </ul>
May 1	Scholarship Subcommittee review, rank, and select one or more applications to recommend.
May 15	The Grants and Giving Committee Chair present the recommendation to the Board for approval by email.
June 1	All applicants notified of Board's selection.
August 1	MNPS Treasurer send payment to each awardee's account at their financial aid office.
September 10	Awards announced in <i>Kelsey</i> and social media.
Annual Meeting	Awards announced to the MNPS membership at Annual Meeting.

## **Category 2: Professional Development Scholarships**

MNPS may offer up to \$500 for a professional development scholarship. The number of scholarships awarded will be based on the Grants and Giving budget each year.

### **Objectives**

Professional Development Scholarships are to assist with educational opportunities to increase knowledge of Montana’s native plants and plant communities. These could be workshops, short courses, self-study, or other opportunities.

**Eligibility** – Professional Development Scholarships are for any person who embarks on a program to obtain knowledge or awareness of Montana’s native plants and plant communities. Preference will be given to applicants and educational opportunities that lead to direct benefits for Montana native plants.

**Eligible Expenses** – Registration fees, books, supplies, travel, lodging.

### **Application & Selection Process and Schedule for Professional Development Scholarships:**

<b>DATE (deadline)</b>	<b>ACTION</b>
September 10	Article announcing Scholarships and directing potential applicants to the MNPS website submitted to <i>Kelsey</i> .
October 1	Advertise scholarships in <i>Kelsey</i> , MNPS webpage, and social media
<b>October 15</b>	<b>1. Applications due.</b> 2. Applications submitted through an online application form that includes: <ul style="list-style-type: none"><li>• Name, address, phone, email.</li><li>• Name and theme or purpose of educational opportunity (workshop or other).</li><li>• Location.</li><li>• Budget: including applicable registration fees, supplies, travel, and lodging.</li><li>• Essay: (limit 250 words) explain your interest in educational opportunities (conference, workshop, etc.), what you hope to accomplish through attending, how it relates to your professional development, and how it will contribute to MNPS goals and Montana’s native plants.</li></ul>
November 10	Scholarship Subcommittee review, rank, and select applications to recommend.

November 15	Grants and Giving Committee Chair present the recommendation to the Board for approval by email.
November 20	All applicants notified by email of Board's selection.
December 15	MNPS Treasurer send payments to the awardees.
December 10	Awards announced to the membership in the Kelsey and social media.
Annual Meeting	Awards announced to the MNPS membership at Annual Meeting.

**MNPS Gifts**

Definition: *unsolicited* gifts initiated by the MNPS Board to an organization or individual.

**How to Submit**

Funds are given based on Board approval, provided the gift will promote the mission of MNPS. The gift amount will be proposed to and voted upon by the Board at the fall board meeting each year. There is no set limit to the number or amount of gifts given in a year, provided the Grants and Giving Fund is adequate. Most gifts will be awarded at time of budgeting as a one-time gift or recurring annual gift.

**When to Submit**

Proposals for gifts can be submitted to the President (in electronic copy) at least one month before the fall board meeting. The President will send the proposals to the Board for review. Some requests may not fit this schedule, due to time or budget constraints of the recipient. In these cases, requests may be submitted to the President at another time of year, followed by an electronic vote from Board members.

**What to submit**

Proposals should be brief but contain information about the use and anticipated benefit to our mission, contact information, and timeline (single vs annual gift).

**Follow-up**

If appropriate, the recipient or MNPS contact could provide to the Board a brief description of how the gift was used. Reports may also be structured as an article for Kelsey. Follow-up expectations will be determined at the time the gift is made.

MNPS Board may wish to become members of an organization for which we gift funds.

**Chapter Support**

Definition: MNPS funds *requested* by a Chapter for projects the chapter is undertaking.

**How to Submit**

All requests for chapter support must be submitted to the Board by Chapter representatives or members. Members or nonmembers may propose projects to Chapters or At-Large representatives. The Board may adopt the proposal, refer it to a committee, or recommend it be submitted as a Grant proposal. If adopted, funding will come from the General Operating Fund (not the Grants and Giving Fund) and the money will be allocated to the Chapter after approval. The local Chapters will be responsible for bookkeeping and reporting.

**When to Submit**

Proposals for Chapter support should be submitted to the President (in electronic copy) at least one month before the fall board meeting. The President will send proposals to the Board for review.

There will be limited funds available for proposals submitted after the fall board meeting. If necessary, later submission should be a month prior to the winter Board meeting or Annual Membership meeting for consideration.

**What to submit**

Proposals submitted by Chapters should be brief but contain the following information: objectives, relevance of project, description of financial need, budget including Chapter cost sharing and how it will advance the mission of MNPS, contact information, and timeline.

**Follow-up**

If chapter funding is approved, adherence to timelines and reporting to the Board will be expected. This will include at a minimum a brief description of how funding was used, accomplishments, and if appropriate, an article should be submitted to the Kelsey newsletter.