

Archdiocese of San Antonio Grant Policy & Procedures

Purpose

To publish the Archdiocesan policies and procedures for the preparation, submission, and administration of grant requests originating from the offices of Archdiocese of San Antonio Pastoral Center, diocesan agencies, schools, and parishes and missions of the Archdiocese of San Antonio. It is not the intent of this policy, however, to subvert the authority of pastors or principals to submit grants requesting support for projects. This policy is designed solely to ensure that grant requests submitted from all archdiocesan entities are properly coordinated and that reporting requirements from granting agencies are met.

Background

Grant monies can be a valuable source of the financial resources needed to assist the diocese in fulfilling its pastoral mandate throughout South Central Texas. Grants are particularly useful for accomplishing this mandate because the Archdiocese is has identified a number of funding needs that cannot be met by revenues and must seek other available resources. It is critical that all grants originating from all agencies within the archdiocese be coordinated. Most foundations limit the number of grants awarded to a single entity each year. Having a single coordinator and repository of data on all grant requests originating in the diocese will preclude conflicting grant requests and will allow for more credibility on the part of the Archdiocese of San Antonio.

Policy

Grant Coordination. The Office of Archbishop's Appeal and Grants (OAAG) will coordinate all grants originating from the offices of Archdiocese of San Antonio Pastoral Center, diocesan agencies, schools, and parishes and missions of the Archdiocese of San Antonio agencies, offices, and parishes of the archdiocese in accordance with the procedures outlined below.

- a) **Grant Signatures.** Unless otherwise approved by the Archbishop, the Archbishop will sign all grant requests originating from the diocesan offices, with all requests subject to review and approval by the OAAG prior to any signature.
- b) **Originator.** The originating agency, office, or parish is responsible for drafting the technical section of each grant request. The OAAG will then review the draft for final copy, and provide any technical assistance or resources as requested.
- c) **Informal Coordination.** In many cases the originating agency, office, or parish can facilitate grant requests by directly and informally coordinating with certain grant agencies before submitting a formal grant request, (i.e., someone may have a personal relationship with a board member or executive director of a particular foundation). However, before any informal contact is made with a grantor, the originating office must inform the OAAG of the grantor or foundation to be contacted, what the purpose of the grant will be, and what the amount requested will be.
- d) **Grant Request/Follow Up.** Copies of all correspondence pertaining to grants will be provided to the OAAG. If an originating agency, office, or parish receives notification of a change of grant status or notice of grant approval or disapproval, the office receiving such notification will notify the OAAG immediately and will provide a copy of the relevant correspondence.
- e) **Grant Limitations.** ***For the duration of the Archdiocesan Capital Campaign, all offices of the Archdiocese of San Antonio Pastoral Center, diocesan agencies, schools, parishes and missions of the Archdiocese of San Antonio are required to coordinate with the Office of Development in regards to capital improvement or brick and mortar fundraising projects.***
- f) All entities under the direction of the Archdiocese of San Antonio are the sole property of the Archdiocese and therefore must seek permission to initiate any capital or brick and mortar projects of \$10,000 or more. All construction work (brick and mortar) projects costing more than \$10,000 shall be signed by the Archbishop. **It is not acceptable to break work into smaller projects solely to avoid the appropriate approval process.**

Procedures

Grants originating from offices, agencies, schools, and parishes of the Archdiocese will be processed and/or coordinated as follows:

- a) The OAAG will provide technical information regarding grant submission requirements to agencies, offices, and parishes of the diocese requesting this information.
- b) The OAAG will assist and oversee the organization of information supporting the technical description portion of each grant request.
- c) All final grant requests will be reviewed for completeness and accuracy by the OAAG prior to submission to the Archbishop for signature.
- d) A log containing basic information pertaining to each grant request and the current status of the request will be maintained by the OAAG.
- e) The OAAG will coordinate with the Business Office regarding grant receipts and future accounting and reporting required by the grant provider.
- f) The OAAG will oversee and coordinate the review of the appropriate thank you letter (original draft to be written by the receiving agency or archdiocesan office) so it can be later signed by the Archbishop, after the grant has been awarded to the receiving agency.
- g) The office or agency receiving a grant will complete any reporting or other grant requirements directed by the granting authority. The OAAG will keep a record of all grant report requirements and ensure that grant reports are submitted in a timely manner. The office originating the grant request and receiving the grant is responsible for completing any reporting requirements requested by the grantor. That office or agency is also responsible for providing a copy of the completed report to the OAAG for review, before forwarding it to the grantor. All such reports will be forwarded to the grantor when requested.

Conclusion

This policy is not intended to make grant requests restrictive or difficult to prepare in any way. Rather, **the primary purpose of this policy is to ensure that the target grantor can see the utmost of professionalism relative to all requests for grants.** Additionally, this will allow for proper coordination of each grant request, eliminate duplication, and provide for a single point of repository. This policy should also ensure proper reporting and preclude alienating the grantor due to too many requests within their given time frames of application.

FROM THE PERSPECTIVE OF THE GRANTOR FOUNDATIONS, PARISHES, SCHOOLS, MINISTRIES AND PROGRAMS OF THE ARCHDIOCESE ARE ALL ONE LEGAL ENTITY, namely, "THE ROMAN CATHOLIC ARCHBISHOP OF SAN ANTONIO, AND HIS SUCCESSOR, A SOLE CORPORATION."

Even though a certain parish or school may be applying for a grant specifically limited to that parish or school, **the targeted foundation will NOT see it that way legally.** Therefore, unless the grant request is from the Archdiocesan Pastoral Center, **the applicant should be "The Roman Catholic Archbishop of San Antonio, and His Successors, a Sole Corporation,** fbo Our Lady of Guadalupe Parish, Holy Spirit School, etc." This policy will also allow the OAAG to prevent too many application requests to be submitted by any one given foundation at any given time. Since at times there may, in fact, be multiple requests to one foundation, the "Final Benefitting Organization" ("fbo") will act as a point of reference in the event of a question for clarification from a foundation.

Agencies that are separately incorporated are an exception.