

# PROJECT REPORTS POLICY

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## PURPOSE

The Sacramento-San Joaquin Delta Conservancy (Conservancy) funds a variety of projects through grants and contracts that result in draft and final reports summarizing results and outcomes of the expenditures. This policy describes the standard report types generated by the Conservancy and recipients of Conservancy funding, and the level of oversight and review of associated reports by the Conservancy Board.

## POLICY

The Conservancy is committed to ensuring that project results are appropriately documented and resulting reports are reviewed and considered by the Conservancy Board, in accordance with the description herein.

## GENERAL INFORMATION

Conservancy projects fall into three major categories: those supported by Conservancy grant funds; those supported by external funds; and Conservancy funded planning efforts. The following describes each category of projects and the level of Conservancy Board review and consideration of draft and final reports where appropriate for each category.

### 1) Projects Supported by Conservancy Grant Funds.

These are projects that are solicited through Board approved processes. Examples include Proposition 1 grants and possible future bond funded grant programs.

- The Board approves grant guidelines and solicitation processes.
- Board makes awards based on approved review process and evaluation criteria.
- Conservancy staff provides regular updates on the progress of grant funded projects at Board meetings.
- Conservancy staff notifies the Board when projects are complete and final project reports are available.

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### 2) Projects Supported by External Funds.

These are projects for which the Conservancy has received grant funding for discrete tasks from state, federal, or philanthropic sources. Examples include grants for development of EcoAtlas, invasive species control, and education and outreach.

- Conservancy staff notifies the Board of the purpose and objectives when submitting proposals for external funding.
- The Board approves agreements that include detailed scopes of work to receive awarded funding for projects above the delegated authority of \$50,000.
- Conservancy staff provides regular updates on the status of the projects at Board meetings.
- Conservancy staff notifies the Board when projects are complete and final project reports are available.

### 3) Conservancy Funded Planning Efforts.

Planning efforts supported by the Conservancy are intended to collaboratively identify priority investments and implementation strategies for subject areas. Examples include Cache Slough Regional Planning, the Central Delta Corridor Partnership, and the Delta Tourism Awareness 5-year Marketing Plan, and the Delta Sign Plan.

- For those planning efforts with a budget of more than \$50,000, the Board approves expenditure of funding to support collaborative planning processes based on detailed scopes of work.
- Conservancy staff provides regular updates on project progress and policy issues the groups are encountering at Board meetings.
- Conservancy staff notifies the Board when a draft report is available for public review.
- The Board reviews and considers a final report at a Board meeting. To the extent possible, it is important that these processes belong to participants and as such, any associated reports should not be viewed as Conservancy products.

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Participant willingness to invest time and effort in a process is to a large degree dependent on their expectations of the integrity of the open and collaborative process.

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