

Delta Conservancy Grant Modifications and Amendments Process

- 1) **Request.** Grantee submits a formal, justified request to change their grant agreement in writing to Grant Manager.
- 2) **Review.** Grant manager reviews the formal change request, identifies the type of change, and routes the request through the Ecological and Community Programs Manager, Administrative Supervisor, Deputy Executive Officer, Executive Officer, and the Board to obtain approval as indicated below.
- 3) **Approve.**
 - a) Minute Modifications
 - i) Ecological and Community Programs Manager will review and consider for approval:
 - (1) Small changes to the agreement that do not involve the budget, changing the grant term, or scope of the project e.g. changing the deliverable timeline, changing contacts for the project.
 - b) Budget Modifications
 - i) Ecological and Community Programs Manager will review and consider for approval:
 - (1) Budget modifications that do not increase the total agreement and do not exceed the threshold listed in the grant agreement (e.g. shifting funds from one budget line item to another).
 - c) Amendments
 - i) The Board will consider approval as an agenda item:
 - (1) Amendments to the budget that increase the total agreement by an amount equal to or greater than \$50,000 or equal to or more than 10 percent, whichever is less.
 - (2) Amendments to the scope of work that significantly change the scope.
 - ii) The Board will consider approval on the consent calendar:
 - (1) Amendments to the budget that increase the total agreement by an amount less than \$50,000 and less than 10 percent.
 - (2) Amendments to the scope of work that do not significantly change the scope and that are not time-sensitive.
 - (3) Amendments to grant term that are not time-sensitive.
 - iii) Delta Conservancy Executive Officer will consider approval for:
 - (1) Amendments to the budget that exceed the threshold listed in the grant agreement, but do not increase the agreement amount (e.g. shifting funds from one budget line item to another).
 - (2) Amendments to the scope of work that do not significantly change the scope and are time-sensitive.
 - (3) Amendments to the grant term that are time-sensitive.

- (4) Other changes that are in response to time-sensitive situations in which project failure is imminent due to forces beyond the control of the grantee; the Executive Officer will coordinate with Board Chair and/or Vice Chair prior to approving a change.
- 4) **Execute.** Upon receiving appropriate approval, Grant Manager will draft and route the modification or amendment agreement for execution.