



# East Portland Action Plan

## Grantee Orientation Packet (3)

2015 East Portland Action Plan (EPAP)

General Grants Program

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## Part 1: Introduction

Congratulations on having your project selected by the East Portland Action Plan (EPAP) Grants Review Committee for funding in the 2015 cycle! THANK YOU for bringing such great projects to East Portland.

The purpose of this information is to help you keep your project on track and document the results, for a successful project and final grant report.

### **Project Delivery Location:**

MOST participants in your project MUST be residents within the East Portland Neighborhood Coalition area (see the Map on page 3). Your EPAP funded project MUST take place in the above referenced area.

### **EPAP Grant Manager/Advocate Is Here To Help:**

The East Portland Action Plan Advocate and Grant Manager is lore wintergreen. She has the responsibility of supporting grantees during the time they prepare for their projects, put them on, and report on them.

If you have questions about any part of your project, or how you'll report it, you're always better off asking sooner, than later! If you get "stuck" or need to make project adjustments, contact The Grant Manager, as she will provide direction and assistance.

The Grant Manager/EPAP Advocate, lore wintergreen, can be contacted in the following ways:

**Location:** East Portland Neighborhood Office  
1017 NE 117<sup>th</sup>, Portland, Oregon 97220  
(between NE Halsey and NE Glisan Streets, at the foot of the "HAZELWOOD" water tower)

**Phone:** 503.823.4035 **Email:** [lore.wintergreen@portlandoregon.gov](mailto:lore.wintergreen@portlandoregon.gov)

- **Make sure your e-mail system will accept messages from [lore.wintergreen@portlandoregon.gov](mailto:lore.wintergreen@portlandoregon.gov)**

You will receive most communication from the Grant Manager/EPAP Advocate using the e-mail address you gave on your application. Make sure our messages don't get routed into your SPAM Box!



## Part 2: Successful Grant Program Checklist

### □ Plan *now* to take good photos

You are required to supply at least two digital photographs, in jpg format (do NOT embed them in a 'Word' document) of your project with your final report. If you need to borrow a camera, let your Grant Manager/EPAP Advocate know and arrangements will be made.

The best way to end up with the required photos is to **take a lot of pictures along the way!** Usually, the person in charge of the project is too busy to take the photos – so it's important that at least one person on your project agree to serve as photographer.

Make sure to "rename" your digital photos, and save them in a (computer) file folder, so you'll have plenty of images from which to choose when preparing your final report (we welcome getting several photographs and may very well be publishing them to demonstrate the work you did on behalf of the East Portland Action Plan ).

### □ Prepare to gather information needed to write your 'Evaluation Report Form' (see Appendix 'A') narrative and fill-out the 'Project Accounting Invoice' (see Appendix 'B')

Many successful grantees agree: It's much easier to gather data about your project while it is being planned and executed, instead of trying to reconstruct it all from memory. Make an electronic or paper file folder and keep your receipts, committee meetings notes and other information organized and available for the report.

### □ Prepare to identify progress on the EPAP website Action Item Updates page

You are required to report on the project's success per Action item you identified in your grant application on the East Portland Action Plan website under 'Updates' at:

[www.eastportlandactionplan.org/updates](http://www.eastportlandactionplan.org/updates)

It is easiest to copy and paste the information from your 'Evaluation Report Form'. If you have any questions, contact the EPAP Advocate/Grant Manager.

## Part 3: Throughout Your Grant Project

### □ Track any additional donations and partnerships

You will need this information on the interim June 1, 2016 'Project Accounting Invoice' and the final 'Project Accounting Invoice' due no later than December 29, 2016. **The 'Project Accounting Invoice' (see Appendix B) must be transferred to Agency letterhead.**

This information helps highlight the contribution provided by the volunteers who participated – whether for 1 hour or 100 hours, this adds value to the investment in your project.

### □ Place acknowledgement of the EPAP sponsorship on all promotional materials

Either state: "This program is made possible, in part by a grant from the East Portland Action Plan." (*Don't actually print the "" marks!*) **OR** include the EPAP logo (*your Grant Manager will provide this electronically when scheduling the Grant Orientation meeting*):



### □ Keep receipts to document your expenses for reimbursement

The contract stipulates that receipts are to be kept for review for four (4) years.

### □ Keep the East Portland Action Plan and other partners involved

Keep your partner organization informed of your project's process and invite them to classes/events when appropriate. Consider ways to involve them in the project.

### □ Promptly notify your Grant Manager/EPAP Advocate regarding:

- Any change in project leadership
- Any change in contact information (e-mail or phone number)
- Any change in the scope or nature of the grant project:

- If after you begin the project, you realize that you need to make changes that affect the list of “Actions To Be Taken” in your contract, make sure to contact the EPAP Advocate/Grant Manager. Together you can work to responsibly address any changes and get approval from the EPAP Grants Review Committee. If you wait until submitting the ‘Evaluation Report Form’, it is possible your project will be identified by the EPAP ‘Grants Review Committee’ as having failed to accomplish reasonable success and there will possibly be a directive to return funds equal to the lack of contractual performance.

□ **Partnership with the East Portland Neighborhood Office**

As an East Portland Action Plan (EPAP) grant recipient, you are recognized as an active EPAP partner. This also means that you have access to the following resources as they are available:

- Barricades (4)
- Canopies (5)
- Chairs (8)
- Digital Camera
- Easel stands (6)
- East Portland Neighborhood Office Community room (seats 25), kitchen, bathroom
- East Portland Neighborhood Office Foyer (seats 6)
- Interpreting sets (2)
- Laptop
- Projector
- Projector screen
- Speaker systems (2)
- Tables (8)
- Toy box
- Video camera



## Part 4: Reporting Requirements

### □ **Grant Funds must be encumbered by June 30, 2015**

This means that all documents were to have been submitted, approved by the City Attorney and the Office of Neighborhood Involvement Director, and the “Request for Advance Payment” submitted (on fiscal sponsor letterhead).

As stipulated in the Grant Application, to be approved by the City of Portland for funding you **MUST** have provided the following:

#### **A. State of Oregon Business Registration:** registration as an Oregon corporation forms or on-line:

<http://sos.oregon.gov/business/Pages/register.aspx>

#### **B. City of Portland registered business.** Forms for online business registration and tax exemption request can be found at:

<https://www.portlandoregon.gov/revenue/29558>. Questions can best be answered by Allen Buller, City of Portland Revenue Bureau coordinator for unregistered vendor compliance, at 503.865.2475.

#### **C. Substitute W-9 Form:**

This form must be submitted to the East Portland Action Plan Grants Manager AND to the City Address designated on the form, if you have not submitted this form in the past. You may get a copy of the form from your Grant Manager. Remember to include your fiscal sponsor Tax ID number.

#### **D. General Liability Insurance** policy documentation **MUST** be provided: a policy covering bodily injury, personal injury, property damage, including coverage for independent contractor’s protection in a per-occurrence limit of not less than \$1,000,000 and aggregate limit of not less than \$2,000,000.

1. In the box on the Liability Insurance form titled “Description of Operations/Locations/Vehicles/Exclusions Added by Endorsement/Special Provisions”, it **MUST** read:

“City of Portland, its officers, agents and employees are recognized as additional insureds as regards general liability as required by written contract subject to policy conditions, limitation and exclusions per attached CG 20 26.”



2. You **MUST** also submit a copy of the actual additional insured endorsement on form 'CG 20 26' that the insurer has issued for this contract.

**E. Automobile Liability Insurance Policy**

1. If you will be providing vehicle transportation as part of your project, you must provide **Automobile Liability Insurance** policy documentation proving that you have automobile liability insurance with coverage of not less than \$1,000,000 each accident. The insurance shall include coverage for any auto or all owned, scheduled, hired and non-owned auto. This coverage may be combined with the commercial general liability insurance policy.
2. If you will **not** be providing vehicle transportation, you can submit a brief written statement:
  - a. On fiscal sponsor letterhead, signed by the fiscal sponsor representative that
  - b. Declares you will not be providing any project related automobile transportation and you request a waiver for this requirement.

**F. 'Independent Contractor Certification' form statement:**

1. A document [separate from an insurance statement \(see attached example\)](#) that shows proof of Workers Compensation must be provided if you (you meaning the authorized fiscal sponsor representative) sign 'Section A' on the 'Independent Contractor Certification' that states that you have current Workers Compensation coverage.
2. If you are not providing Workers Compensation, your fiscal sponsor representative must be able to sign 'Section B' and check 4 or more of the items listed in 'Section B #3'. *Talk with me if this is confusing.*

**G. 'Advance Payment' Invoice** requesting "**Advance Payment**" for your East Portland Action Plan awarded project. **This must be on fiscal sponsor letterhead and include:**

1. Must be on the fiscal sponsor's letterhead
2. Be titled 'Request for Advance Payment'
3. Provide the name of the fiscal sponsor

4. Provide the project name
5. Declare the amount being recommended for the grant award
6. Provide the name and address where the check is to be sent.

**H. Authorization Agreement form with a voided check as**

described when you click on the following link:

<http://www.portlandoregon.gov/bfs/article/409834>. Do not send your Grant Manager this information, but when you send the information to the email address provided on the form, follow-up by sending an email to your Grant Manager that copies the email you sent without the attachments. This allows your Grant Manager to confirm that you sent the information.

**I. Signed Contract:** Funds for the grant project will be released as soon as possible after the contracts are signed, submitted to the City Attorney with all the forms above, and approved by the Director of the Office of Neighborhood Involvement.

□ **Submission of Interim “Project Accounting Invoice” (See appendix ‘B’) on the Fiscal Sponsor’s letterhead by June 1, 2016**

You must submit a “Project Accounting Invoice”:

- Interim form on June 1, 2016 (documenting project expenses and donation/volunteer match to-date) unless you have submitted a completed final evaluation.
- Final accounting form at the end of the project with you final evaluation – by December 29, 2016 at the latest.

□ **To complete this funded project:**

The following **MUST** be submitted by December 29, 2016, though we recommend that you submit each item as soon as possible after completing the project.

**‘Evaluation Report Form’ (See Appendix ‘A’)**

The feedback we get from you about your project verifies the importance of your contribution and helps strengthen the importance of funding your project and the East Portland Action Plan Grants program. The more measures of success you supply with your

“Evaluation Report Form”, the stronger your project looks and the more likely you and EPAP will get funding in the future.

You may submit a handwritten “Evaluation Report Form”. If possible, submit the final “Evaluation Report Form” in an electronic word processing format. Microsoft WORD is preferred, but any “.rtf” computer document is acceptable. Limit the narrative about your project to no more than three (3) pages (12-point font, 1-inch margins).

You may submit the “Evaluation Report Form” in a language other than English.

In the “Evaluation Report Form” narrative you **MUST** address what your contract refers to as “Actions To Be Taken By Grantee” and the Action Plan strategies and items you said you would address. I have provided each of you with a one-page list of “Actions To Be Taken By Grantee” specific to your grant project for quick reference.

In addition, you need to address the questions outlined in the “Evaluation Report Form”.

### **“Project Accounting Invoice” form (See Appendix 'B')**

Transfer the “Project Accounting Invoice” form to the Fiscal Sponsor’s letterhead as documentation of how you spent the grant. This form documents how you spent the EPAP grant funds and tracks all:

- Leveraged Funds (monies from sources other than EPAP for the project),
- Donated Services & Items (stated as \$), and
- Volunteer Hours (stated as \$).

### **Two (2) project digital jpg format photos via email or on a CDr disk**

Do **NOT** submit embedded photos in a Word document. A “PowerPoint” or DVD will be welcomed, but the presentation will not replace the photo requirement.

**EPAP website "Updates":**

Document your project's work on the East Portland Action Plan Action items you identified in your grant proposal on the East Portland Action Plan website "Updates" page at:

[www.eastportlandactionplan.org/updates](http://www.eastportlandactionplan.org/updates) .

If you need access to a computer, one is available at the East Portland Neighborhood Office. The EPAP Advocate/Grant Manager will gladly assist you in the process to access the correct web page/Action Item and provide your update (remember to identify your project and agency).

**Printed materials samples:**

This includes **one** each of any samples of all outreach materials you used (e.g. flyers, posters, sign-in sheets, etc.). Label all evaluation materials with "EPAP General Grant 2015" and your project's name. We want to make sure your project is appropriately credited.

**All of the above must be submitted by:  
December 29, 2016 at the latest.**

**It is easiest for everyone if you complete these  
when you complete your project, instead of  
waiting for the due date.**



# East Portland Action Plan

## 2015 General Grant Program

### EVALUATION REPORT FORM

Project Name: \_\_\_\_\_

Project Contact Name: \_\_\_\_\_

Contact information (phone; email): \_\_\_\_\_

Fiscal Sponsor Agency: \_\_\_\_\_

Action Plan Item(s) addressed: \_\_\_\_\_

Grant award amount: \$ \_\_\_\_\_

The information you provide in this evaluation will be used by the East Portland Action Plan (EPAP) to “tell the story”, explain, or give us a word movie of your project and show the value of the East Portland Action Plan Grant program.

If possible, send us your evaluation information in an electronic format (e.g. in MS Word on a CD or by email), though handwritten is acceptable. Submitting in a language other than English is also acceptable.

Limit the following Evaluation Report narrative about your project to no more than two (2) pages (12-point font, 1-inch margins).

Complete the ‘Project Accounting Invoice’ (see *Appendix ‘B’*).

**Address the following:** Limit the narrative to no more than three (3) total pages (12-point font, 1-inch margins).

## **1. Describe your project**

**A.** Be sure your response includes how this project addressed the following criteria:

- 1) Where in East Portland did the project take place? Did you address an area of East Portland that is under-resourced?
- 2) How did the project serve the people living and working in East Portland?
- 3) How did the project address the Action Plan strategies and items referenced in your application?
- 4) How did you address the “Actions To Be Taken By Grantee” in your contract?
- 5) How did the project build community by leading to more community involvement?
- 6) What was the impact of the project had on vulnerable populations?
- 7) How did the project involve underrepresented/vulnerable populations?
- 8) Identify the number of people involved in the project, the amount of project time spent with them, and describe the way(s) they were engaged.

## **2. Describe how the budget supported the project:**

**A.** Describe how the money you requested from EPAP was spent.

**B.** Describe leveraged and donated resources. This can include volunteer time, facility usage, partnership contributions, in-kind donations, and other funds being used for this project.

## **3. Describe how you promoted your project, including acknowledgement of the East Portland Action Plan.**

### **To further describe your project:**

- You must include at least two (2) digital photographs in a jpg format. You can submit a short video of your project activities in

electronic format or PowerPoint, but these do not replace the photographs. Clearly title or label all photographs and project materials with the title of your project and “EPAP 2015 General Grants”. Include the names of any people in the photographs and a sentence telling us what’s happening in the photograph.

- Attach samples of any outreach materials you developed and used (e.g. flyers, posters, sign-in sheets, etc.)
- You are also required to provide Action Plan Updates on the East Portland Action Plan webpage under each of the Action items you identified in your proposal and above:  
[www.eastportlandactionplan.org/updates](http://www.eastportlandactionplan.org/updates)

Return your completed ‘Evaluation Report Form’, outreach material samples, photographs, the ‘Project Accounting Invoice’, and copies of the East Portland Action Plan website Action Plan Updates made to the East Portland Action Plan: [lore.wintergreen@portlandoregon.gov](mailto:lore.wintergreen@portlandoregon.gov) or 1017 NE 117<sup>th</sup>, Portland, Oregon, 97220 by December 29, 2016 at the latest.

If you have questions about filling out this form, please contact the East Portland Action Plan Advocate, lore wintergreen: 503.823.4035 or [lore.wintergreen@portlandoregon.gov](mailto:lore.wintergreen@portlandoregon.gov) .

Thank you for this community contribution to East Portland!

**EAST PORTLAND ACTION PLAN**

[www.eastportlandactionplan.org](http://www.eastportlandactionplan.org)

East Portland Neighborhood Office 1017 NE 117<sup>th</sup> Ave. Portland, OR 97220  
503.823.4035 or [lore.wintergreen@portlandoregon.gov](mailto:lore.wintergreen@portlandoregon.gov)



## Project Accounting Invoice East Portland Action Plan 2015 General Grant

(Submit this form on the Fiscal Sponsor's letterhead)

Item	EPAP \$ Spent	Leveraged Funds and/or Grants \$ *	Donated Services or Items expressed as \$	Volunteer Hours expressed as \$**
<b>Personnel</b> (Direct project management, contracting for special services, volunteer time**, etc.)				
<b>Promotional Materials/Printing</b> (Flyers, brochures, advertisements, etc.)				
<b>Event Related Expenses</b> (Renting table/chairs, reserving space, food, paper cups, etc)				
<b>Permitting &amp; Fees</b> (Reserving park space, noise variances, capping meters, street closures, etc.)				
<b>Participant Support</b> (Travel costs, stipends, etc)				
<b>Project Materials</b> (Wood, paints, flowers, bags, etc—the materials needed to complete the project.)				
<b>Additional Expenses</b>				
<b>Subtotals (add total from above)</b>				
<b>Administration***</b> (Fiscal sponsorship, administrative project management, accounting)				
<b>TOTALS (add all above together)</b>				

\* Leveraged Funds includes additional dollars supporting this project—for example, additional grants or direct support from your organization.

Donated services and time can include estimated dollar amount of in-kind donations.

\*\* Volunteer hours can be estimated at \$18 per hour. For professional or skilled volunteer work, visit [www.bls.gov/oes/current/oes\\_or.htm](http://www.bls.gov/oes/current/oes_or.htm) to identify a median per hour volunteer rate.

\*\*\* Administration cannot exceed 10% of the project related request. Talk to your fiscal sponsor about administration costs as you develop your budget.