



East Portland Action Plan

Grantee Orientation Packet

**2015 East Portland Action Plan (EPAP)
Civic Engagement Grants Program**

TABLE OF CONTENTS

Part 1: Introduction and Map.....3 - 4

Part 2: Successful Grant Program Checklist.....5

Part 3: Throughout Your Grant Project6 -7

Part 4: Reporting Requirements.....8 - 12

Appendices

'A' Signed Statement of Partnership.....13

'B' Evaluation Report Form.....14 – 16

'C' Project Accounting Invoice.....17
This form must be submitted on the Fiscal Sponsors letterhead

Part 1: Introduction

Congratulations on having your project selected by the East Portland Action Plan Grants Review Committee for funding in the 2015 Civic Engagement Grant cycle! THANK YOU for bringing such great projects to the East Portland community!

The purpose of this information is to help you keep your project on track and to 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, do, and report on their projects.

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, for assistance and direction.

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

Location: East Portland Neighborhood Office
1017 NE 117th, 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

- **Make sure your e-mail system will accept messages from lore.wintergreen@portlandoregon.gov**

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

Map of East Portland Area



Part 2: Successful Grant Program Checklist

□ Plan *now* to take good digital photographs

You are required to supply at least two (2) digital photographs in jpg format (do not imbed 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 you're preparing your final report (we welcome getting several photographs).

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

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 a physical file folder and keep your receipts, committee meetings notes and other information in the folder.

□ Prepare to identify progress by EPAP website Action Item tracking

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

It is easiest to copy and paste this from your Evaluation Report.

Part 3: Throughout Your Grant Project

□ **Track any additional donations and partnerships.**

You will need this information before submitting the June 1, 2016 interim and final “Project Accounting Invoice” (see *Appendix 'C'*) due December 29, 2016 at the latest.

This information helps show the value provided by the project volunteers – whether for one (1) hour or 100 and 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 to you electronically*):



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

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

□ **Keep the East Portland Action Plan and other partners involved.**

Keep your partner organizations informed of your project's process. 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 contract stipulated "Actions To Be

Taken"/deliverables, make sure to contact the EPAP Advocate/Grant Manager. Together you can work to responsibly address any changes. 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.

□ **Partnership with the East Portland Action Plan (EPAP)**

As a 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:

- Digital camera
- Community room, kitchen, bathroom
- Easel stands (6)
- Interpreting sets (2)
- Speaker systems (2)
- Tables (8)
- Chairs (8)
- Toy box
- Projector
- Projector screen
- Laptop
- Video camera
- Canopies (4)
- Barricades (4)

Part 4: Reporting Requirements

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

This means that before June 30th, 2015, all documents must have been submitted and approved by the City Attorney, a presentation must have been made at City Council and received their approval, and the “Request for Advance Payment” had been submitted (on fiscal sponsor letterhead).

As stipulated in the Grant Application, to be considered by the City of Portland for funding you **MUST** provide the following before it will be scheduled to go before City Council:

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 at City Council.

J. Signed East Portland Action Plan designed statements of commitment: See *Appendix ‘A’* required statement of support, to be signed by each community partner you designated in your grant application.

□ **Submission of Interim “Project Accounting Invoice” (See appendix ‘C’) 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 'B')

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 two (2) 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”. 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 'C')

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 .

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 Civic Engagement 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.**

Appendix A



East Portland Action Plan

2015 Civic Engagement Grants Program

Signed Statement of Partnership

As a representative of _____, I
Agency Name
commit to partner with _____
Name of the 'Organization' on Cover Page
by providing individual, monetary, or resource support to their East
Portland Action Plan General Grant application project:

Project Title

Printed Name

Signed Name

Date

Appendix B



East Portland Action Plan

2015 Civic Engagement Grants Program

EVALUATION REPORT FORM

Project Name: _____

Project Contact Name: _____

Contact information (phone; email): _____

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 your first language is also acceptable. The description of how you spent the grant funds should be no more than one page narrative along with the ‘Appendix ‘B’ ‘Project Accounting Invoice’.

If you have questions about filling out this form, please contact the Grant Manager/East Portland Action Plan Advocate, lore wintergreen: 503.823.4035 or lore.wintergreen@portlandoregon.gov .

Address the following: Limit the narrative to no more than two (2) 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) Which cultural specific underserved population(s) with language appropriate communication did you address?
- 2) Where in East Portland did your project take place?
- 3) Describe how the project was structured to accomplish goals/outcomes, the number and length of events/meeting/trainings, and the number of people served.
- 4) How did you actively guide participants in next steps for community involvement and leadership placement opportunities for when the grant project was done?
- 5) How did the project will address the Action Plan strategies and/or items identified on your 'Cover Page'?
- 6) How you addressed the "Actions To Be Taken By Grantee" in your contract.
- 7) How you promoted health and well being of families, children, individuals, and communities.

2. Describe how the budget supported the project:

A. How was the money you requested spent?

B. Identify any 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:

- Include at least three (2) digital photographs in a jpg format. Include the names of any people in the photographs and a sentence telling us

what's happening in the photograph. You can borrow a camera from the Grant Manager/EPAP Advocate.

- You can submit a video or Power Point of your project activities in electronic format, but these do not replace the photographs requirement.
- Attach outreach materials you developed and used (e.g. flyers, posters, etc.), along with workshop sign-in sheets.
- Clearly title or label all photographs and project materials with the title of your project and 'EPAP Civic Engagement 2015'.
- Separately, you must provide Action Plan "Updates" on the East Portland Action Plan webpage (www.eastportlandactionplan.org/updates) under each of the Action items you identified in your proposal.
- Remember that your grant application stipulated that you **MUST** "actively guide East Portland community members to take advantage of opportunities for leadership building and civic engagement. Document how you did this.

Return your completed evaluation packet:

'Evaluation Report Form', "Project Accounting Invoice", outreach material samples, sign-in sheets, photographs, and copies of the East Portland Action Plan website Action Plan "Updates" by December 29, 2016 at the latest to:

Grant Manager/EPAP Advocate, lore wintergreen

By email: lore.wintergreen@portlandoregon.gov

Location: East Portland Neighborhood Office
1017 NE 117th, Portland, Oregon 97220

(Between NE Halsey and Glisan Streets, at the foot of the water tower)

Thank you for sharing the story of your community contribution!

EAST PORTLAND ACTION PLAN

www.eastportlandactionplan.org

East Portland Neighborhood Office 1017 NE 117th Ave. Portland, OR 97220
503.823.4035 or lore.wintergreen@portlandoregon.gov

Appendix C

Project Accounting Invoice East Portland Action Plan 2014 Civic Engagement Grant (Form to be submitted on the Fiscal Sponsor's letterhead)

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

- * 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 and/or general volunteer hours at \$18 per hour. For professional or skilled volunteer work, visit 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. This includes Neighborhoods speaking with the coalition office.