



# East Portland Action Plan

## Grantee Orientation Packet

2017 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 2017 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 Map on page 3). Your EPAP funded project activities 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, carry them out, and report on them.

If you have questions about any part of your project, or how you'll report it, you are always better off asking sooner than later! If you get "stuck" or need to make project adjustments, contact the Grant Manager, for 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.

# Map of East Portland Area



## 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).

### □ 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 with the Action strategy or item you identified in your grant application. These are found on the East Portland Action Plan website under “Updates” at: <http://eastportlandactionplan.org/updates>.

It is easiest to copy and paste the information from your “Evaluation Report Form.”

## Part 3: Throughout Your Grant Project

### □ Track any additional donations and partnerships

You will need this information on the interim **June 1, 2018** “Project Accounting Invoice” and the final “Project Accounting Invoice” due no later than December 25, 2018. **The “Project Accounting Invoice” (see Appendix B) must be transferred to Agency letterhead.**

Tracking all donations and all time donated helps show the value provided by the project volunteers who participated – whether for 1 hour or 100 hours and adds value to the investment in your project.

Donations and partnerships identified on your interim and final “Project Accounting Invoice” will be compared to your grant application projected numbers and significant differences will be considered if funds are sought from EPAP in the future.

### □ 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 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 application submitted Budget or 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 “Project Accounting Invoice” or “Evaluation Report Form”, it is possible your project will be identified by the EPAP “Grants Review Committee” as having failed to meet reasonable standards and commitments you made 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:

- Digital camera
- Community room, kitchen, bathroom
- Easel stands (6)
- Interpreting sets (4)
- Speaker systems (2)
- Tables (14)
- Chairs (13)
- Toy box
- Projector
- Projector screen
- Laptop
- Video camera
- Canopies (9)
- Barricades (4)
- Cones (14)
- Garbage cans (6)
- 100-foot extension cord
- Leaf racks (2)
- Generator (2) - Stored off-site, contact office for pick up details
- Durable gloves (6 pairs)
- Tables (14)
- Toy box
- Video camera



## Part 4: Reporting Requirements

- **Submission of Interim “Project Accounting Invoice”** (See appendix “B”) **on the Fiscal Sponsor’s letterhead by June 1, 2018**

You must submit a “Project Accounting Invoice”:

- Interim form on June 1, 2018 (documenting project expenses and donation/volunteer match to-date) unless you have submitted a completed final evaluation, which is welcome early.
- Final accounting form at the end of the project with your final evaluation – by December 15, 2018 at the latest.

- **To complete this funded project:**

The following **MUST** be submitted by December 15, 2018, 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 the “Evaluation Report Form” in any language. 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).

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 will provide 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**

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:  
<http://eastportlandactionplan.org/updates>.

If you need access to a computer, one is available at the East Portland Action Plan office. The EPAP Advocate/Grant Manager will gladly assist you in the process to access the correct webpage/Action Item and provide your update. Remember to identify your project and agency.

### **Printed materials, samples and sign-in sheets:**

This includes **one** each of any samples of all outreach materials you used (e.g. flyers, posters, sign-in sheets, etc.). Provide a copy of each sign-in sheet. Label all evaluation materials with “EPAP General Grant 2017” and your project’s name. We want to make sure your project is appropriately credited.

**All of the above must be submitted by:  
December 15, 2018 at the latest.**



# East Portland Action Plan

## 2017 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/ 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 three (3) 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 or the handwritten equivalent).

**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? How did the project serve the people living and working in East Portland?
- 2) How did the project address the Action Plan strategies and items identified in your application?
- 3) How did you address the “Actions To Be Taken By Grantee” in your contract?
- 4) How did the project build community by leading to more community involvement?
- 5) What was the impact of the project had on vulnerable populations?
- 6) How did the project involve underrepresented/vulnerable populations?
- 7) 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:**

- Include at least two (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 may 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 (with at least zip codes of the participants).
- Clearly title or label all photographs and project materials with the title of your project and “EPAP General Grant 2017.
- Separately, you must provide Action Plan “Updates” on the East Portland Action Plan webpage (<http://eastportlandactionplan.org/updates>) under each of the Action items you identified in your proposal.

**Return your completed evaluation packet:**

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

“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” are due by December 15, 2018 at the latest to:

Grant Manager/EPAP Advocate, lore wintergreen

By email: [lore.wintergreen@portlandoregon.gov](mailto:lore.wintergreen@portlandoregon.gov)

Location: East Portland Neighborhood Office  
1017 NE 117<sup>th</sup>, 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**

<http://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 2017 General Grant

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

| Item   | EPAP<br>Money<br>Spent | Leveraged<br>Funds<br>and/or<br>Grants \$ * | Donated<br>Services<br>and Items<br>expressed<br>as \$ | Volunteer<br>Hours<br>expressed<br>as \$** |
|--|------------------------|---|--|--|
| <b>Personnel</b><br>(Direct project management, contracting for special services, volunteer time**, etc.)      |                        |   |  |  |
| <b>Promotional Materials/Printing</b><br>(Flyers, brochures, advertisements, etc.)                             |                        |   |  |  |
| <b>Event Related Expenses</b><br>(Renting table/chairs, reserving space, food, paper cups, etc)                |                        |   |  |  |
| <b>Permitting &amp; Fees</b><br>(Reserving park space, noise variances, capping meters, street closures, etc.) |                        |   |  |  |
| <b>Participant Support</b><br>(Travel costs, stipends, etc)  |                        |   |  |  |
| <b>Project Materials</b><br>(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><br>(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 \$24.15 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.