



East Portland Action Plan

Grantee Orientation Packet

**2017 East Portland Action Plan (EPAP)
Civic Engagement Grants Program
Revised**

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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 2017 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 4). 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

Should your Grant Manager change, you will be informed in writing.

- **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 ‘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 a physical or digital file folder and keep your receipts, committee meetings notes and other information in the folder.

□ Prepare to identify progress by EPAP website Action strategy or item tracking

You are required to report on the project’s success per Action strategy or 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, 2018 interim and final “Project Accounting Invoice” (see *Appendix 'B'*) due December 15, 2018 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. Donations and partnerships identified on your interim and final “Project Accounting Invoice” will be compared to your grant application projected numbers and significant discrepancies 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 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 what you are going to do on 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/standards.

□ **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 (4)
- Speaker systems (2)
- Tables (14)
- Chairs (13)
- Toy box
- Projector
- Projector screen
- Laptop
- Video camera
- Canopies (9)
- Barricades (4)
- 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)
- Cones (14)

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.
- 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 two (2) 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”. 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 .

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 material samples and sign-in sheets:

This includes **one** each of any samples of all outreach material you used (e.g. flyers, posters, sign-in sheets, etc.). Provide a copy of each sign-in sheet. Label all evaluation materials with “EPAP Civic Engagement 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.**

Appendix A



East Portland Action Plan

2017 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 application criteria:

- 1) Which race and ethnically specific communities with underrepresented and under-supported cultural specific populations with language appropriate communication did you work with/address through your project.
- 2) Where in East Portland did your project take place?
- 3) Identify the number and length of events/meeting/trainings, and the number of people served from East Portland and describe how people were engaged.
- 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 address the Action Plan strategies and/or items identified on the 'Cover Page' of your application?
- 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.
- 8) How partners were involved in the project.

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 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.
- Clearly title or label all photographs and project materials with the title of your project and 'EPAP Civic Engagement 2017'.
- 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 participants in next steps for community involvement and leadership placement opportunities. 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 15, 2018 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 B

Project Accounting Invoice East Portland Action Plan 2017 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 \$24.15 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.