



Metro Central Community Enhancement Grantee handbook

A guide for 2019 grantees

Public service

*We are here to serve the public
with the highest level of
integrity.*

Excellence

*We aspire to achieve exceptional
results*

Teamwork

*We engage others in ways that foster
respect and trust.*

Respect

*We encourage and appreciate
diversity in people and ideas.*

Innovation

*We take pride in coming up with
innovative solutions.*

Sustainability

*We are leaders in demonstrating
resource use and protection.*

Metro's values and purpose

We inspire, engage, teach and invite people to preserve and enhance the quality of life and the environment for current and future generations.

If you picnic at Blue Lake or take your kids to the Oregon Zoo, enjoy symphonies at the Schnitz or auto shows at the convention center, put out your trash or drive your car – we’ve already crossed paths.

So, hello. We’re Metro – nice to meet you.

In a metropolitan area as big as Portland, we can do a lot of things better together. Join us to help the region prepare for a happy, healthy future.

Stay in touch with news, stories and things to do.

oregonmetro.gov/news

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Congratulations! You've been awarded a grant – this is your guide to setting up your grant contract/agreement and getting reimbursed for your approved grant project expenses.

If you have questions or concerns, please contact:

<p>Rob Nathan Solid Waste Community Enhancement Grants Coordinator 503-797-1691 Rob.Nathan@oregonmetro.gov</p>	<p>Eric Crandall Program Assistant SWICC and cPMO Offices 503-797-1662 Eric.Crandall@oregonmetro.gov</p>
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CONTRACTING BASICS

Contract execution

- A successful grant applicant is required to enter into a contract with Metro. This legally-binding agreement outlines the responsibilities of each party and is signed by individuals with signatory authority.
- Grantees must provide proof of insurance to Metro (see details in section below).
- An applicant has 15 days upon receipt of the Agreement to sign and return the documents to Metro.
- Once Metro signs the Agreement, a fully-executed (signed) version of the Agreement will be sent to the grantee.

Insurance Requirements

In order to complete the contract, the Grantee must submit to Metro their certificates of insurance and substitute W9 form. **Metro will not execute the grant contract until it receives this W9 and insurance documentation.** Please see below for more information and details about the required certificates of insurance and W9 for the Community Enhancement Grant Program grants.

- Commercial general liability insurance covering personal injury, property damage, and bodily injury with automatic coverage for premises and operation and product liability with a minimum of \$1,000,000 per occurrence is required. The Agreement is conditional upon review and approval of Metro's Risk Manager.
 - Grantee must provide Metro with a certificate of insurance that names Metro, its elected officials, departments, employees and agents as additional insured.
- Automobile bodily injury and property damage liability insurance with a minimum of \$1,000,000 per occurrence. If this is not included in your general liability certificate of insurance, a separate certificate will be needed.

- Proof of worker's compensation insurance with a minimum of \$500,000 per occurrence is required for agencies with staff. A worker's compensation exemption form (provided by Metro) is required for agencies without staff or who are otherwise exempt from carrying this insurance.
- Certificates of insurance do not need to be original hard copies. They can be faxed or emailed to Metro by the agencies named on the contract or by their insurance agents.
- As certificates of insurance are usually issued annually, the grantee must send updated certificates meeting the standards above throughout the term of the grant contract.
- A copy of the grantee agency's substitute W9 is required if this is their first contract with Metro.

After contract is executed

- Once a Grant Agreement is fully executed (signed by the Grantee and Metro) and certificates of insurance are approved, the Grantee can submit invoices to Metro for reimbursement of approved costs. Invoices may include expenses incurred after January 1, 2019. **Invoices may take Metro up to 30 days to process and pay once approved.**
- Grantees are responsible for fulfilling the terms and conditions of the Agreement within the contract period. Grantees who fail to do so are ineligible to apply for additional Metro grant funds until terms and conditions are met.

REIMBURSEMENT REQUESTS

The contract must be finalized before requests can be processed for payment. All requests for reimbursement must be submitted to Metro via Zoom Grants. **Substitutions or changes in the project that have not been approved by Metro are not eligible for reimbursement.**

- Metro will reimburse grantees for approved costs listed in the contract scope of work (Attachment A in contract or the full application as submitted).
- Metro cannot reimburse any costs incurred prior to the performance period of the contract.
- Metro has the option to pay 30 percent of the grant (up to \$30,000) to grantees upfront after the grant contract is fully executed (signed by grantee and Metro). The grantee will not be required to provide receipts or other proof of expenditure for this upfront payment.
- **Invoices will be paid within 30 days of when Metro staff receive and approve the request and all required documentation.**
- At least two (2) reimbursement requests must be submitted per year. **A progress report submitted via Zoom Grants is required with each reimbursement request.**
- Grant staff will contact grantees with any questions or concerns if a reimbursement request cannot be processed as submitted.
- **10 percent of grant funds held until final grant report received and approved.**

Please note: Metro requires that reimbursement requests are made within the fiscal year the expenses were accrued. Metro's fiscal year begins on July 1 and ends on June 30 which means ***all requests for reimbursement of funds spent between Jan. 1, 2019 and June 30, 2019 must be submitted for reimbursement by July 10, 2019. Notify your grant program contact if you have any concerns about meeting this deadline.***

Request format

To receive reimbursement, a grantee must submit a request as described below:

1. Submit a signed, completed **request for release of funds cover sheet and grant reimbursement worksheet** (Exhibit A of contract).
2. Submit an **invoice using the reimbursement form in your Zoom Grants account** for your 2019 Metro Central Community Enhancement Grant: www.zoomgrants.com.
3. **Fiscal agents** must include a letter stating that they have read and approved charges submitted on their behalf.

Eligible reimbursable grant expenses

Personal services

This includes salary or wage expenses of grantee staff directly related to the project. Do not include costs for consultants here; these are considered professional services.

Professional services

This is for contracted non-staff services.

Materials and supplies

This includes approved materials and supplies used in your project.

Transportation and travel

This covers mileage, transportation costs, and expenses associated with travel.

Indirect or overhead expenses

This includes utilities, rent, telephone, and fiscal administration fees **up to 10% of your grant award**. If you do not spend the entire award indirect overhead expense need to be prorated to 10% of funds used or the percentage rate approved in the contract of the total.

Other expenses

Any other type of expenses approved in your stated budget.

Contact your grant manager for if you have questions about eligible expenses for reimbursement.

PROJECT REPORTING

Reporting on how well community grants met their purpose and delivered on the intended outcomes will strengthen accountability with residents in the target area and the Metro region. Therefore, a progress report is due with each reimbursement request and a final report is due upon project completion. The report should include a summary of grant activities, the actual total expenses, photos and a qualitative and quantitative evaluation of the program or project's success. The contract spells out particulars for inclusion in these documents in the Reporting Requirements section.

A progress report is due to Metro at least every six months, if not submitted with a reimbursement request, during the term of this Agreement with the first due by June 30, 2019. **All reimbursement requests must be accompanied by a progress report.** The first progress report must include a description of how the initial thirty percent (30%), or thirty thousand dollar (\$30,000), payment was expended, as well as any additional reimbursement expenses to date.

Metro requires grantees to submit progress reports and final reports via Zoom Grants (www.ZoomGrants.com). In the event that a grantee does not have access to the internet to submit reports via Zoom Grants, the following format shall be used.

Progress report

Think of the progress report as a “snap-shot” of the project to date. It should be sent to Metro approximately mid-way into your project implementation. Progress reports will be submitted through Zoom Grants and will include the following:

- Summary of progress towards stated goals and outcomes from the full application
- Any unexpected challenges or successes
- List of related events, volunteer activities, milestones, challenges, successes, metrics (e.g., acres of invasive species removed, number of field trip attendees) during the reporting period
- Notes about upcoming activities (highlight media-worthy plans)
- Photos for use in Metro publications and on Metro's website (if possible these should be sent as individual files)

Final report

Final reports become a permanent record providing accountability to the public about the funding provided to the Grantee from Metro. Final reports will be submitted through Zoom Grants. 10 percent of your grant award will be held until final reports are received and approved by Metro. Final reports will be submitted through Zoom Grants and will include the following:

- Description of successes, challenges and how you met the goals of the enhancement grant program.
- Summary of deliverables as proposed in your grant application and provide a brief description of how each was completed.
- Performance measurement related to the project based on the outcomes outlined in your grant proposal.
- Project participants or people reached as a result of the grant funding
 The final report should clearly note the number of people from the Metro Central target area served by the grant period. (Click here for a map of the target area: www.oregonmetro.gov/tools-partners/grants-and-resources/community-enhancement-grants/metro-central-enhancement-grants). Include demographic information of people served, if data available.
- Volunteer contributions to the project. Include the # of work parties, # of volunteers, and total number of volunteer hours. To the extent possible, list organizations that “contributed” volunteers.
- Total budget for your project, including Metro enhancement grant funds awarded and spent clearly noted, volunteer contribution and total project value.
- Digital photos of the project, outreach materials or other documents related to the project. If applicable, include images that document conditions before, during and after the project.

CONTRACT AMENDMENTS

A grant contract amendment is required when there is a change in the **scope of work** or **date of the agreement**. Contact your grant program manager as soon as possible when you realize a change in scope, timeline, or budget is likely and they can determine whether the change you are requesting requires an amendment.

Examples include (but are not limited to) the following:

- Adding or removing a major project element thus meaningfully altering the scope of work of the project
- Changing the budget in such a way that it changes scope of work or deliverables
- Extending the contract expiration date

Metro's grant program manager will determine if the change requested requires an amendment. **Requests for an amendment must be submitted to Metro in writing 30 days prior to the expiration date of the grant contract.**

Most changes that do not affect the scope of work can be approved by the grant program manager in writing by email. Be sure to contact the program manager with any questions.

MEDIA AND PROMOTIONS

Metro seeks opportunities to draw attention to the visible aspects of Metro-supported grant programs to demonstrate to the public how these funds are being used in their communities and to generate ideas for future grant applications. Tactics used include earned media stories, stories posted to Metro's website and other digital and print publications, social media, and other communications activities.

Grantees are encouraged to submit any information about free or low cost public activities or events related to their grant program to Metro's online newsletter by emailing the grant manager. Please tag [@OregonMetro](https://twitter.com/OregonMetro) on Twitter, Instagram, or Facebook (www.facebook.com/oregonmetro), and/or link to our website at www.oregonmetro.gov.

Please include Metro logos to acknowledge Metro as a supporter on written or published material about the grant program. Email the grant manager for a print friendly logo file if needed for promotion or printing.

Grantees are asked to acknowledge Metro as a supporter on written or published material about the grant program. This includes but is not limited to, newsletters, social media, signs, event mailings, annual reports, print or film media, websites and news releases.