



Metro

# Community Placemaking

What to expect if you're awarded a  
Community Placemaking grant

Spring 2020

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.

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## TABLE OF CONTENTS

<b>INTRODUCTION</b> .....	<b>5</b>
Phases of your Community Placemaking grant.....	5
Staff assistance.....	5
ZoomGrants.....	5
<b>SETTING UP YOUR PROJECT</b> .....	<b>6</b>
Orientation.....	6
Developing your project scope.....	6
Making adjustments during the project .....	7
Legal agreement with Metro .....	7
Insurance coverage .....	7
Role of a fiscal sponsor .....	8
Accounting assistance.....	8
Receiving your grant money .....	8
Progress report and verification of money spent.....	8
Evaluating the impacts of your project.....	9

<b>DURING YOUR PROJECT.....</b>	<b>9</b>
Grantee gathering.....	9
Communications coordination.....	9
Evaluation check in.....	10
Optional partnership opportunities.....	10
<b>CLOSING OUT YOUR PROJECT .....</b>	<b>11</b>
Accounting close out.....	11
Finalizing your evaluation.....	11
Debrief meeting with your key team members.....	11
<b>APPENDIX .....</b>	<b>12</b>
Project scope template.....	12
Sample legal agreement.....	13
Start-of-project evaluation form: goal setting.....	17
Progress report and verification of grant money spent form.....	20



## INTRODUCTION

The Community Placemaking program helps people tackle community challenges or opportunities through creative, arts-based, equity-focused projects. Grants range from \$5,000 to \$25,000 and support projects that foster connection to place, strengthen social fabric and involve and benefit communities of color and other historically marginalized communities. This program helps local communities create or sustain the vibrant places and efficient land use envisioned in the Region’s 2040 Growth Concept and advances the outcomes described in our adopted equity, diversity and inclusion plans.

This guide describes what comes along with a Metro Community Placemaking grant. Please know that staff will do everything we can to make this simple, clear and enjoyable.

## PHASES OF YOUR COMMUNITY PLACEMAKING GRANT

Your Community Placemaking grant activities occur in three general phases – setting up your grant, implementing your project and closing out your grant.

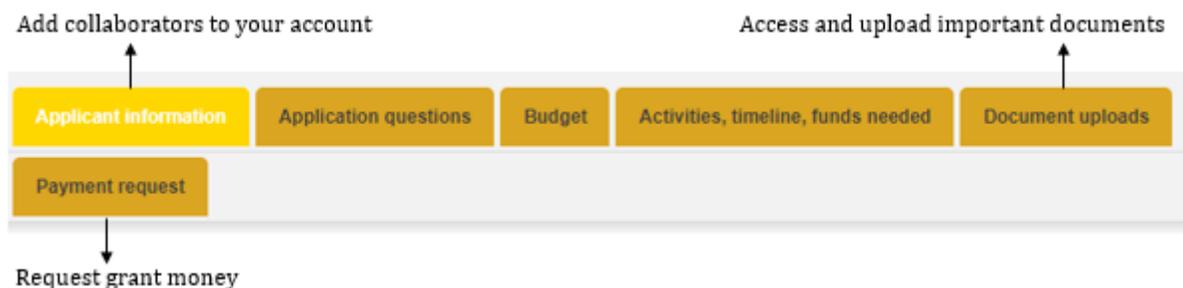


## STAFF ASSISTANCE

Metro staff is here to help you through all the stages of your grant project. The grant program manager, Dana Lucero, is your main support and will connect you to other areas of Metro, such as the finance analyst who will manage your payments and accounting and your Metro Councilor who will be interested in participating in your project. You can reach Dana at 503-797-1755 or [dana.lucero@oregonmetro.gov](mailto:dana.lucero@oregonmetro.gov).

## ZOOMGRANTS

You submitted your application using ZoomGrants, and your team will continue to use the online system to request grant money, submit progress reports and access important documents. Access to ZoomGrants is controlled by the person who submitted your application. They are the application owner and can give members of your team permissions to submit invoices and upload documents or simply view the account. Learn more at [help.zoomgrants.com/index.php/zgu/app-owners-collaborators-addl-contacts](http://help.zoomgrants.com/index.php/zgu/app-owners-collaborators-addl-contacts).



## SETTING UP YOUR PROJECT

We are eager for you to get started, but there are a few important things that take place before you can begin working on your Community Placemaking project. ***Your grant will cover costs incurred only after these steps are complete.***

### ORIENTATION

We will kick things off with a meeting to walk through important elements including the legal agreement, insurance requirements, your project scope and a way to evaluate your project's impacts. People who should participate include your project's main point of contact for the grant, other key people on your team, your fiscal sponsor and/or the person who will be responsible for your financial accounting.

### DEVELOPING YOUR PROJECT SCOPE

The first thing you will do is work with your team to write a project scope that describes the major elements of your project and breaks it into two to three sequential parts. This step helps your team agree on what you will be doing and shows Metro how you will spend your grant money. You will send your draft scope to Metro's grant manager, who will work with you to resolve any issues. After we resolve any issues, the scope will be included in your legal agreement with Metro, and your grant money can be disbursed based in advance of each part of your project. A project scope template appears on page 12.

**Breaking your project into parts** - Divide the duration of your project into 2 or 3 parts so that Metro can provide grant money before the start of each part. For each part of your project, you will describe your activities and budget, as seen in the example below.

#### **Scope example**

Break your project into 2 to 3 parts. Your scope will be a part of your legal agreement and serves as the basis for distributing your grant money.

Part 1	
Activities involved	<ul style="list-style-type: none"><li>• Hold planning sessions with team</li><li>• Hold 3 workshops</li><li>• Solicit and hire artist</li><li>• Begin installation</li></ul>
Categories of expenses	<ul style="list-style-type: none"><li>• Web conferencing subscription - \$100</li><li>• Facilitator for 3 workshops - \$1,500</li><li>• Food for 3 workshops with 10 workshop participants per workshop - \$300</li><li>• Stipends for participants, 3 workshops with 10 participants - \$1,500</li><li>• Stipend for artist - \$2,000</li><li>• Materials for art installation - \$1,800</li><li>• Project management - \$750</li><li>• Fiscal sponsor administration - \$1,000</li></ul>
Amount of grant \$	\$8,950
Approx. start/finish dates	July to November 2020

**Activities involved** - List the activities or tasks that your team and participants will do in each part of your project. Be inclusive so your scope covers the full set of activities you hope to do.

**Categories of expenses** - These are your anticipated costs for what you hope to do and helps Metro understand your budget. Be as specific as you can and/or use your best guess. Your expenses may shift as your project evolves, so you are not beholden to your estimates.

**Amount of grant \$** - This is how much grant money you need for each part of your project. This may also shift as your project evolves. For example, if part 1 costs less than you estimated, you can use the leftover money in parts 2 or 3.

## **MAKING ADJUSTMENTS DURING THE PROJECT**

Your project may evolve during the course of the grant period. We understand and have room to be flexible. It is very important that you talk with the grant program manager if you find your project scope or budget shifting. Metro can find ways to accommodate change as long as we can prepare for it. If the change is significant, we will work together to amend your agreement with an updated project scope.

## **LEGAL AGREEMENT WITH METRO**

While you are working on your project scope, Metro will send a draft legal agreement for your team to review; you will also find this draft in ZoomGrants' document uploads. The agreement lays out the conditions of the grant. It describes your responsibilities and Metro's responsibilities. We will work with you and your fiscal sponsor to make sure you understand each part of the agreement. And, if there is an area that you cannot fulfill, we will work with you to find a solution. A sample legal agreement appears on page 13.

### **Steps to finalize your legal agreement**

1. Carefully read through the draft legal agreement. Include the people on your team who will handle accounting. If you have a fiscal sponsor, they are an important part of this review. You will not sign the agreement until step 4.
2. Provide the companion items that accompany your legal agreement by uploading to ZoomGrants. These documents include:
  - a. a signed W-9 form
  - b. certificate(s) of insurance coverage (see next section)
  - c. your finalized project scope
3. Work with Metro if you have questions or concerns. With your questions and concerns addressed, you will confirm by email that you can comply with the draft agreement.
4. You will receive the final agreement from Metro's finance analyst. Your grant's project manager, and fiscal sponsor if you have one, will sign the final agreement and send it back to Metro.
5. Metro is the last to sign the agreement and then it will be entered into our system. From that point forward, you can begin to incur costs against your grant.

## **INSURANCE COVERAGE**

Metro requires that you or your fiscal sponsor carry insurance for the duration of your project, and you will provide a certificate from your policy holder(s) listing Metro as additional insureds. Insurance coverage amounts appear in the sample legal agreement. If you or your fiscal sponsor carry different levels of insurance, we can work with you to modify the requirements. For instance, if your organization does not have auto insurance, we will remove that language from the agreement. Or if your organization is not required to carry workers compensation insurance, we will provide a waiver.

If your project is a one-time event, you can opt for event insurance instead. Grant money can be used to reimburse the expense of event insurance.

## ROLE OF A FISCAL SPONSOR

A fiscal sponsor plays an important role in a Community Placemaking project. Fiscal sponsors should expect to participate in the following ways.

- Complete and return a W-9 form
- Carefully review and sign the legal agreement
- Provide insurance coverage for the duration of the grant project
- Receive payments from Metro and distribute funds appropriately
- Review and sign task advance request and progress report forms, and submit to Metro
- Participate in grantee gatherings and evaluation activities

## ACCOUNTING ASSISTANCE

Our finance analyst, Mary Anderson, is here to help your team. She will be your primary point of contact for all things money-related and when finalizing the legal agreement. We suggest that Mary and the person responsible for your project's accounting have a conversation before starting your project. Mary can be reached at [mary.anderson@oregonmetro.gov](mailto:mary.anderson@oregonmetro.gov).

## RECEIVING YOUR GRANT MONEY

**Payment in advance** - Metro can provide portions of your grant money upfront based on your project scope. You will request payment by completing the invoice in ZoomGrants. Metro will review the invoice and issue payment. It is critical that you track your activities and how you spend grant money so that you can complete a progress report, as described in the next section. Your next portion of grant money is available only after you submit a progress report, which Metro will review and approve.

**Reimbursement** - You can opt to be reimbursed as you complete parts of your project scope. To receive reimbursement, you will submit a progress report, as described in the next section. Metro will review and approve the progress report and then issue reimbursement.

**Method of payment** - Direct deposit is the quickest way to receive payment. You will find a direct deposit authorization form in ZoomGrants' document uploads. You can opt to receive paper checks instead. After Metro approves payment, it takes approximately two weeks to produce a check that will then be mailed to the address in ZoomGrants. If you have a fiscal sponsor, your grant money will be paid directly to them.

## PROGRESS REPORTS AND VERIFICATION OF MONEY SPENT

Your progress reports are a very important part of your grantee responsibilities. They tell Metro how your project is coming along and documents how grant money was spent. A progress report form appears on page 20. Metro does not require you to provide receipts or invoices, so it is important that your progress reports include the who, what and why of your grant expenditures. For people, list who was paid and the amount they received. Include their contact information and what they did for the project. For other expenses, list the expense and amount and its relation to the project. For example:

- Mike Gutierrez - \$500 - mike@email.com - Mike facilitated three 1-hour workshops and wrote a summary of the community feedback.
- H and K Market - \$150 - Food for three workshops at \$50 per workshop.

Metro will review your progress report, resolve outstanding questions and either issue payment if you are operating on a reimbursement-basis or accept an invoice for the next portion of advance-paid grant money. ***Metro can only authorize payment of grant money after approving your progress report.***

- You should expect that we will work together on your first progress report, as there may be additional information or clarification needed.
- Please anticipate the time it takes for Metro to review your progress report and issue your money, especially if your project is running on a tight schedule. Setting up direct-deposit to your bank is the quickest way to receive money. If you prefer to receive a check, once your progress report is approved, it will take two weeks to produce a check before it is mailed.
- Metro will select one of your progress reports at random to audit to verify your expenditures.

## EVALUATING THE IMPACTS OF YOUR PROJECT

Evaluation helps us understand the value of what we do and shows us how to get better at doing it. Before you get started, you and your team will create a few goals for your project and ways to assess how well it meets your goals. During the course of your project, Metro and your team will check in on the progress of your evaluation. And at the close, you will submit a final assessment that shares what you've learned. Both the start-of-project assessment and end-of-project assessment forms are found on ZoomGrants' document uploads.

## DURING YOUR PROJECT

### GRANTEE GATHERING

You are not alone in doing great things for your community! Toward the beginning of the project period you will come together with the other Community Placemaking grantees to share who you are, what you are doing and why it's important. This is an opportunity to connect, support and learn from each other, and for Metro to learn how we can continue to improve the grant program. Your team's participation is very important, and we will work with you to find a day and time most team members can attend.

### COMMUNICATIONS COORDINATION

Metro offers a number of ways to support your project through our communication channels.

***Storytelling opportunities*** - We want everyone to know about the good work you are doing, and Metro has a great team of writers that can share your story. As part of the grant process, we ask that you be willing to spend some time with our storytellers so that they can learn about the project and document it. Plan to strategize with Metro about timing. We will look for opportunities to talk to your team and will publish stories to share via our website, email lists and social media channels. We invite you to reuse these in whatever way is helpful. To see examples of past grantee stories, scroll to the related news section of the program's homepage.

***Calendar of events and publicity*** - Metro will create a calendar of the Community Placemaking events. As soon as you have dates confirmed, we ask you to share them with the grant manager. We will publicize the events through Metro's social media channels and the Community Placemaking email list.

***Acknowledgement of Metro support*** - Try as we might, not everyone knows what Metro is and what we do. By acknowledging Metro's support of your Community Placemaking project, you help us show that

Metro cares about the community you serve. This acknowledgment can take different forms in order to suit your project, and Metro will work with you to find appropriate ways to acknowledge our support. Examples could include: a message from your Councilor printed in an event program; verbal acknowledgment at events; written acknowledgment on permanent installations; or including @oregonmetro in your social media posts and our logo in your email publicity.

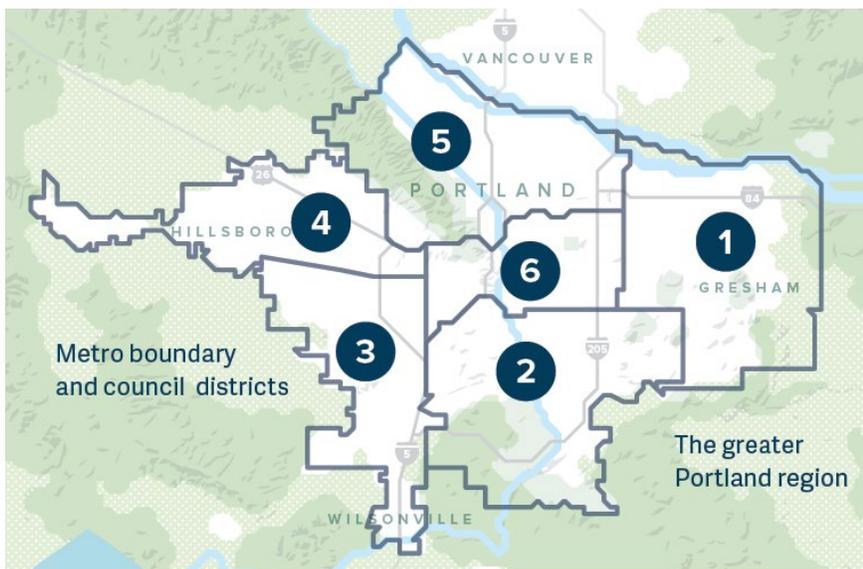
## EVALUATION CHECK IN

You and Metro will check in on the progress of your evaluation at least once during your project. We will talk about your goals and measures and see how Metro can assist your efforts.

## OPTIONAL PARTNERSHIP OPPORTUNITIES

Metro sees the Community Placemaking program as a means of growing partnerships with communities. We want to support and get to know the people and communities you serve, and we want to open our resources to you.

**Involving Metro Councilors** - Metro Councilors are elected by the public and are charged with representing community interests on regional issues. Your Community Placemaking project is a great way for your district's councilor to get to know what's important to you. We will introduce you to your councilor at your project's start, and encourage you to personally invite your councilor to participate in your project's events or other activities. We can also make sure the entire Council and staff know about your significant public events.



**Metro Council President**  
Lynn Peterson

**Metro Councilors**  
Shirley Craddick, District 1  
Christine Lewis, District 2  
Craig Dirksen, District 3  
Juan Carlos González, District 4  
Sam Chase, District 5  
Bob Stacey, District 6

**Participating in presentations and small group discussions** - You were selected for a Community Placemaking grant out of a very competitive pool of applications because the work you do is compelling, impactful and is of regional significance. There will be opportunities to share this work with elected and community leaders, planning staff and others who regularly make decisions that affect the lives of people who live and work in this region. Your participation in these events means decision-makers will walk away with awareness of your community and a deeper understanding of their needs and aspirations.

**Other ways Metro can be helpful** - We have a team at Metro that is ready to help make your project a success. The grant manager can connect you with staff that can assist you in any of the following. Is there something else you may need help with? Don't hesitate to ask.

- Getting ready to reach out to print or television media
- Planning a social media campaign or ideas for your outreach strategy
- Connecting with your city's staff or elected officials
- Providing meeting space

## **CLOSING OUT YOUR PROJECT**

### **ACCOUNTING CLOSE OUT**

Metro will close your legal agreement once we approve your final progress report. This is also the final step to close the accounting on your project. Even if you've received your money in advance, it's essential that we receive your last progress report.

### **FINALIZING YOUR EVALUATION**

Your end-of-project evaluation worksheet asks you to describe the extent to which the project met your goals and what you learned through the process. Our regional efforts can be informed and improved by understanding how your project was a solution to the specific challenge your Community Placemaking project addressed, so please be generous in sharing your experience. The worksheet will close with a few questions about working with Metro. What worked well? What could have worked better? And, beyond grant money, how can Metro support your efforts in the future?

### **DEBRIEF MEETING WITH YOUR KEY TEAM MEMBERS**

This final in-person meeting is an opportunity for us to reflect on the overall experience – your team working together toward achieving the goals you set out and the experience of partnering with Metro through the Community Placemaking program. People who should participate include your project's main point of contact for the grant, other key people on your team, your fiscal sponsor and/or the person who was responsible for your financial accounting. The meeting will last 60 to 90 minutes and can take place at a time and location convenient to your team.

## APPENDIX: PROJECT SCOPE TEMPLATE

**Metro grant number:**  
**Grant title:**  
**Grant applicant:**  
**Fiscal sponsor:**  
**Grantee coordinator:**  
**Maximum grant amount:**

This project will [insert a 2-3 sentence description of your grant project]. The scope of the project includes the following parts. Changes to the project scope can be agreed upon by email with the consent of grantee coordinator and Metro’s grant manager.

Part 1	
Activities involved	•
Categories of expenses	•
Amount of grant \$	
Approx. start/finish dates	

Part 2	
Activities involved	•
Categories of expenses	•
Amount of grant \$	
Approx. start/finish dates	

Part 3	
Activities involved	•
Categories of expenses	•
Amount of grant \$	
Approx. start/finish dates	

## APPENDIX: SAMPLE LEGAL AGREEMENT

Metro grant number:  
Grant title:  
Grant applicant:  
Fiscal sponsor:  
Grantee coordinator:  
Maximum grant amount:     \$

This Community Placemaking Grant Agreement (the “Agreement”), is between Metro, a metropolitan service district organized under the laws of the State of Oregon and the Metro Charter; and **Grant Applicant and Fiscal Sponsor**, an **Oregon 501(c)(3) non-profit corporation**, referred to herein **collectively** as "Grantee" for the purpose of implementing a Community Placemaking project in **Location**. The parties agree to the following:

1.     **Grant Funded Activities.** Grantee is leading a community-driven placemaking effort entitled, “**Grant Title**” to **project overview**. This is described in more detail in Exhibit A: Project Scope.
2.     **Term of Agreement.** The term of this Agreement begins **MONTH, DAY, YEAR** and continues for approximately **eighteen (18)** months, ending **MONTH, DAY, YEAR**. The Agreement may be completed and paid in full earlier. The term may be extended by written agreement of Metro and Grantee.
3.     **Approved Costs.** Metro agrees to pay Grantee up to **DOLLAR AMOUNT NO/100TH DOLLARS (\$XXX.00)** (the “Grant Funds”) to carry out **Grant Title**. Metro is not responsible for payment for materials, expenses, services, costs or fees other than those associated with and described in the Project Scope. **Grantee agrees that the funds provided under this Agreement will only be used for the purposes specified in Exhibit A.**
4.     **Subcontractors.** Grantee will obtain Metro preapproval of any subcontractors not described in the Project Scope before entering into a subcontract for activities, services and/or supply of goods needed to fulfill this Agreement.
5.     **Payment, Billing and Reporting Requirements.** Grantee will certify its taxpayer status and taxpayer identification number via the IRS form W-9 submitted to Metro. Metro will pay Grant Funds to Grantee in one or both of the ways described in sections 5.1 and 5.2. Grantee and Metro Grant Manager will mutually determine the preferred method(s) of payment. No Grant Funds can be paid for expenses incurred before **MONTH, DAY, YEAR**.
  - 5.1     **Payment in advance.** Grantee will request payment to receive grant funds after this Agreement is signed. Metro will provide a portion of the grant funds following of approval the request. Grantee must substantiate the spending of grant funds by submitting a Progress Report and Verification of Grant Money Spent form for Metro review and approval. Once approved, Grantee may request the next payment and so forth until all grant funds are disbursed and verified.
  - 5.2     **Reimbursement.** Grantee will substantiate money spent on the project scope by submitting a Progress Report and Verification of Grant Money Spent form. Metro will review, work with Grantee to resolve any outstanding issues and then approve payment.

Grantee will request payment and submit progress reports using ZoomGrants. For assistance, contact Metro Grant Manager, Dana Lucero at [dana.lucero@oregonmetro.gov](mailto:dana.lucero@oregonmetro.gov).

6. **Recordkeeping.** Grantee will create and maintain, according to generally accepted accounting principles, records of how all Grant Funds are spent with sufficient detail to allow Metro to verify the expenditures. Grantee will allow Metro access to these records. Grantee will keep all records related to these Grant Funds for a minimum of three (3) years following the close of the Agreement. If there are unresolved audit questions at the end of the three (3) year period, Grantee will keep records until the questions are resolved.

7. **Right to Withhold Payments.** Metro may withhold payments to protect against any loss, damage, or claim which may result from Grantee's performance or failure to perform under this Agreement, including failure of Grantee to make proper payment to suppliers or subcontractors. Any Grant Funds spent in violation of this Agreement, or that remain unspent upon grant completion or earlier of termination of this Agreement must be returned to Metro within 15 days of Metro's written request, except as otherwise provided in Section 12.

8. **Funding Acknowledgement.** Grantee will work with Metro to determine appropriate ways to acknowledge Metro as grant funder. Grantee will allow Metro to review and approve the form of the Grantee's acknowledgement.

9. **Project Goals and Impacts.** Grantee will work with Metro to create goals and measures for the project at the beginning of the project period. Upon grant completion, Grantee will submit a retrospective of the goals and feedback about working with Metro.

10. **Insurance.** Grantee will have and maintain at the Grantee's expense, the following types of insurance covering the Grantee, its employees and agents:

- 10.1 The most recently approved ISO (Insurance Services Office) Commercial General Liability policy, or its equivalent, written on an occurrence basis, with limits not less than \$1,000,000 per occurrence and \$1,000,000 aggregate. The policy will include coverage for bodily injury, property damage, personal injury, contractual liability, premises and products/completed operations. Grantee's coverage will be primary as respects Metro;
- 10.2 Workers' Compensation insurance meeting Oregon statutory requirements, including Employer's Liability with limits not less than \$1,000,000 per accident or disease;
- 10.3 Automobile insurance with coverage for bodily injury and property damage and with limits not less than minimum of \$500,000 per occurrence; and
- 10.4 Metro, its elected officials, departments, employees, and agents shall be named as ADDITIONAL INSUREDS on the Commercial General Liability and Automobile insurance policies.

Grantee will provide Metro a Certificate of Insurance complying with this section when returning the signed Agreement. The Certificate of Insurance will identify this Metro contract number. Grantee will give Metro 30 days notice of any changes or policy cancellations.

11. **Indemnification.** Grantee expressly assumes full responsibility and liability for the conduct of all persons participating in the Project Scope, including all Grantee's employees, agents, members, invitees and contractors. Grantee assumes full responsibility for the Grant Funded Activities including,

but not limited to all liability for bodily injury or physical damage to persons or property arising out of or related to this Agreement. Grantee will indemnify and hold Metro, its agents, employees and elected officials harmless from any and all claims, demands, damages, actions, losses and expenses arising out of, or connected with this Agreement, or with any patent infringement or copyright claims arising out of the use of Grantee's designs or other materials by Metro and for any claims or disputes involving subcontractors.

12. **Termination.** This Agreement may be terminated by mutual consent of the parties. In addition, Metro may terminate this Agreement by providing Grantee seven (7) days prior written notice of intent to terminate. Metro will pay Grantee for expenses properly incurred prior to notice of termination. All other funds paid by Metro to Grantee will be returned by Grantee. Grantee hereby waives and releases Metro from any claim for indirect, special or consequential damages, on account of such termination.

13. **Modification and Assignment.** Any modifications to this Agreement must be made in writing and signed by both parties. This Agreement may not be assigned or transferred by Grantee without Metro's written consent.

14. **Independent Contractor Status.** Grantee agrees it is an independent contractor. Nothing contained in this Agreement or any acts of the parties shall be deemed or construed by the parties, or by any third person, to create the relationship of principal and agent, or of partnership, joint venture or employer/employee between Metro and Grantee. Grantee agrees that it has sole and exclusive control of the Project Scope.

15. **Grantee Ownership of Intellectual Property.** All intellectual property of any nature produced by Grantee pursuant to this Agreement is the property of Grantee. Grantee gives Metro permission to reproduce and publish said materials for noncommercial purposes.

16. **Compliance with Laws.** Grantee and its employees, agents, contractors, exhibitors, patrons, and invitees agree to comply with all federal, state, county and city laws, ordinances, orders, rules, regulations, including rules and regulations of the local police and fire departments.

17. **Copyrights and Proprietary Material.** Grantee agrees that no copyrighted music, written or artistic work will be performed, reproduced or used, nor will the name of any entity protected by trademark be reproduced or used during the Project Scope unless Grantee has written permission from the copyright or trademark holder. Grantee agrees that it will not infringe on any statutory, common law, or other copyright of any person during the Project Scope. Grantee will indemnify and hold Metro and its elected officials, agents and employees harmless from all claims, losses, attorneys' fees, court costs, and damages with respect to violations of such rights or laws.

18. **Non-Discrimination; Americans with Disabilities Act.** Grantee agrees not to discriminate against any persons in connection with Grant Funded Activities because of age, creed, ancestry, sexual orientation, gender identity, disability, color, sex, marital status, familial status, source of income, religion, or national origin. Grantee will comply with all federal and state civil rights, rehabilitation statutes and applicable regulations implementing the requirements of Title III of the Americans with Disabilities Act.

19. **Law and Venue.** Any litigation over this Agreement will be governed by State of Oregon laws and conducted in the Circuit Court of the State of Oregon for Multnomah County.

20. **Entire Agreement.** This Agreement and Exhibits constitute the entire agreement between Grantee and Metro, and supersede any and all other implied or express, oral or written agreements between the parties with regard to this subject matter.

21. **Force Majeure.** If either parties' performance under this Agreement becomes impractical or impossible due to fire, earthquake, epidemic, war, act of terror or any other casualty or unforeseen occurrence, either party may terminate this Agreement by providing seven (7) days prior written notice of intent to terminate to the other party. Metro will pay Grantee for expenses properly incurred prior to receipt of notice of termination. All other funds paid by Metro to Grantee will be returned by Grantee. Grantee hereby waives and releases Metro from any claim for indirect, special or consequential damages, on account of such termination.

22. **Survival.** The obligations in this Agreement regarding indemnification, limitation of liability, and any general provisions which by their nature extend beyond Grant termination or full performance, will survive any termination of the Agreement.

**Grantee**

BY \_\_\_\_\_  
NAME \_\_\_\_\_  
TITLE \_\_\_\_\_  
DATE \_\_\_\_\_

**Metro**

BY \_\_\_\_\_  
NAME \_\_\_\_\_  
TITLE \_\_\_\_\_  
DATE \_\_\_\_\_

**Fiscal sponsor**

BY \_\_\_\_\_  
NAME \_\_\_\_\_  
TITLE \_\_\_\_\_  
DATE \_\_\_\_\_

## APPENDIX: EVALUATION FORM

### Grant project assessment: Goal setting

Project team member(s) responsible for assessment:

#### Setting goals

**Think about goals for the activities that Metro is funding.** Your mission is likely bigger than the grant-funded activities, but in this exercise, be specific about the Community Placemaking supported work.

<b>Sample goal</b>	Partner with new people and organizations to implement our project.
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List 1 to 4 goals for your Community Placemaking project.

<b>Goal A</b>	
<b>Goal B</b>	
<b>Goal C</b>	
<b>Goal D</b>	

#### Assessing your goals

**How do you plan to find out if you achieved these goals?** Check as many as apply.

**Counting things** – This can include things such as the number of people who participated in your project or came to your events, new partnerships with people or organizations that played a role in your project, or other money you were able to get because of the Metro grant. Your end product could be a simple of list things that matter. It is helpful to describe if the numbers met your expectations.

**Self-assessment** – Your thoughts on how the project went are very important. What did you learn? How did the grant impact your team and community? Are things different as a result? What did you gain from this leadership opportunity? What worked well, and what could be better? Your end product could be a 1-2 page written summary.

**Interviews** – One-on-one discussions with project team members or participants reveal how others responded to your project. Questions can focus on things that matter most to you, but be open to things you may have not thought to ask. You can interview people yourself or ask Metro for assistance. Your end product could be a written summary, a video or other creative way to share what you heard.

**Surveys** – Short surveys, either in-person or online, can reach many people and give you immediate feedback on things that matter to you. Metro can create an online survey for your project. Your end product could be a summary of responses.

**Project debrief meetings** – Talking with your project team and/or participants after the project is a useful way to understand what worked well and what could be better. Were people satisfied with how things went? Do they want to do this again? What would they do differently? This could be a written summary or other creative way to share what you heard.

**Other ideas**

**Do you need help from Metro to do these things?** If yes or unsure, please explain.

Yes

No

Unsure

**Setting measures**

There are different ways to tell if the project is achieving your goals. Counting things that matter to you is a great start. Some examples include:

- Number of community members participating
- Number of partners involved in making the project happen
- Number of people of color involved in leadership roles and/or decision-making
- Other money brought in because of the Metro grant

Asking questions of yourself, your project team and/or participants is another important way to understand how well your goals have been met. Examples of areas you could reflect on include things such as:

- How easy was it for community members to participate
- Feelings of being welcome at project events
- Willingness of people to participate again (for team members or participants)
- Feelings of connectedness to your community
- Feelings of being valued, respected and acknowledged
- What safe spaces means to your community
- Personal experiences with leadership opportunities

<b>Measures for sample goal:</b> Partner with new people and organizations to implement our project.	Number of people on the project team who haven't worked together before
	Number of new organizations that played a role to making the project happen
	What people felt they gained from working together on this project

List 1 to 3 things that you can count or ask to understand if the project is meeting your goals.

<b>Measures for Goal A</b>	

<b>Measures for Goal B</b>	

<b>Measures for Goal C</b>	

<b>Measures for Goal D</b>	

## APPENDIX: PROGRESS REPORT AND VERIFICATION OF GRANT FUNDS SPENT FORM

Metro grant number:

Grant title:

Your name:

Fiscal sponsor:

**This progress report describes our progress and how grant money was spent.**

I verify that Metro grant money was spent in accordance with our grant agreement.

**This progress report is for the following part of our project scope.**

Part 1

Part 2

Part 3

**How much money is accounted for in this progress report?**

**Use the space below to share your progress by describing how grant money was spent on this part of your project.** Be sure your total \$ described adds up to the amount above. **For people** - List who was paid and the amount they received. Include their contact information and what they did for the project. **For other expenses** - List the expense and amount and its relation to the project.

*Example:*

- *Mike Gutierrez - \$500 - mike@email.com - Mike facilitated three 1-hour workshops and wrote a summary of the community feedback.*
- *H and K Market - \$150 - Food for three workshops at \$50 per workshop.*

**Submit your complete and certified form to Metro by uploading it to ZoomGrants.** For questions, ask Dana Lucero ([dana.lucero@oregonmetro.gov](mailto:dana.lucero@oregonmetro.gov)) or Mary Anderson ([mary.anderson@oregonmetro.gov](mailto:mary.anderson@oregonmetro.gov)).

**Grantee**

I certify this progress report is accurate.

Name

Affiliation

Date

**Fiscal sponsor (if applicable)**

I certify this progress report is accurate.

Name

Affiliation

Date

**Metro review and approval**

I certify that I approve this progress report and verification of grant money spent.

Name

Title

Date