



Metro Central Community Enhancement Grants

2022 Grantee Handbook

January 2022

TABLE OF CONTENTS

Important Dates	2
Contact Information	2
Terms and Abbreviations	3
Reimbursement Checklist	5
Basic Steps to a Reimbursement	5
Reimbursement Guidelines	5
What’s in a Reimbursement	6
Contracting and Reimbursement Process	8
Frequently Asked Questions	9

IMPORTANT DATES

- **Jan. 18** – Mandatory grantee info session
- June 10 – 2023 grant cycle RFP open
- **July 5** – Mid-year reimbursement and/or mid-year report due (page 7 of your grant agreement)
 - If you have expended **any** funds toward your program between Jan. 1 and June 30, 2022, you must request reimbursement by July 5. After July 5, you will not be able to request funds for work between Jan. 1 and June 30.
 - If you have not expended funds toward your program between Jan. 1 and June 30, 2022, you do not need to submit a mid-year reimbursement – just a mid-year progress report is due.
- **Jul 11** – Mid-year report due
 - If you are only submitting a mid-year report, with no reimbursement, your report can be submitted via email to Eric.Crandall@oregonmetro.gov
- Mid-August – 2023 grant cycle info session
- Sept. 16 – 2023 grant cycle RFP close
- **December 31** – Last day for billable work of 1-year grants.
- **Jan. 15, 2023** – Final reimbursement and progress reports due for 1-year grants.

Bold dates indicate 2022 grant cycle specific dates

Non-bold dates indicate 2023 grant cycle RFP dates

CONTACT INFORMATION

Noelle Dobson – Community Enhancement Grants Program Manager

- Noelle.Dobson@oregonmetro.gov

Eric Crandall – Metro Central Community Enhancement Grants Program Coordinator

- Eric.Crandall@oregonmetro.gov

ZoomGrants Help – Email help desk for ZG, very prompt responses

- questions@ZoomGrants.com
- You will need to reference your ZG application ID in your email to ZG help desk.
- After you log in to ZG, and access your grant, the application ID is located at the bottom of the page, in the footer, and is labelled as “ZoomGrants Application ID: #####”.

Metro Accounts Payable – Contact this group to inquire about status of payments, change of payment address, and update your W-9 or to establish ACH (electronic) payments for reimbursements

- MetroAccountsPayable@oregonmetro.gov

TERMS AND ABBREVIATIONS

ZoomGrants (ZG)

- The web-based software used to apply for Enhancement Grant funds and request reimbursements.

Reimbursement request

- Used to request funds for work that has been done, or will be done, in your grant agreement term.
- Reimbursements are submitted via ZG by filling out the ZG pop-out invoice, attaching the required documents, and submitting to Metro staff.
- See “Contracting and reimbursement process” below for specifics.

ZG pop-out invoice

- When starting a new invoice in ZG, the system will launch a pop-out window for you to fill out and submit, along with the required documents, as your reimbursement request.
- You can download templates for required documents from the bottom of your ZG pop-out invoice under “Documents Requested”.
- Required document templates are also attached to the end of this handbook.
- To start a new ZG pop-out invoice:
 - Login in to ZoomGrants.com
 - Click the “financial” tab
 - Start a new invoice - This will launch the ZG pop-out invoice window
 - Fill in ZG pop-out invoice budgetary and contact information
 - Download, complete and re-attach the required documents to the ZG pop-out window
 - Click “submit”

Initiation payment

- Used to request up to 30% of your grant award, the initiation payment is meant to get your project rolling without having to expend funds.
- This is a one-time request and is best utilized in the first months of your project term.
- Do not use the initiation payment if you have previously requested reimbursement or if your initiation request is greater than 30% of your total award
- Contact Eric.Crandall@oregonmetro.gov for additional information.

NET 30

- Reimbursement payments are made 30 days upon Metro’s Enhancement Grant Manager (Noelle Dobson) approval of the reimbursement request.

Required documents

- Refers to the attachments required to be submitted as part of reimbursement requests. All required documents can be found at the bottom of ZG pop-out invoice window and are also attached to the end of this handbook.
- Required documents need to be filled out and uploaded to your ZG pop-out invoice.
- Required attachments are:
 - Reimbursement cover sheet
 - Budget worksheet
 - Progress report
 - Pictures of your project

REIMBURSEMENT CHECK LIST

- **ZG pop-out invoice completed**
 - Requested amount matches the amount indicated on your reimbursement cover sheet, budget worksheet total, ZG pop-out invoice total and ZG pop-out expense line items.
 - Contact information, Metro grant contract number, invoice number/name (this is up to you), type of request (initiation payment or regular reimbursement) are completed.
- **Fill out required documents and attach to ZG pop-out invoice under “Documents Requested”**
 - Reimbursement cover sheet
 - Progress report
 - Budget worksheet
 - Pictures
- **All budget line items equal your total reimbursement request amount.**

BASIC STEPS TO A REIMBURSEMENT

- Login in to ZoomGrants.com
- Click the grant year you want to submit a reimbursement towards (applies to grantees to have previously received funds only)
- Click the “financial” tab
- Start a new invoice
 - This launches a ZG pop-out invoice window
- Fill in ZG pop-out invoice budgetary, contract and contact information
- Download, fill-out and attach the required documents to the ZG pop-out window
- Click submit

REIMBURSEMENT GUIDELINES

- Reimbursements, and required attachments, must be submitted via ZG.
- Reimbursements can only be submitted once per month.
- Progress report, budget worksheet and photos of your project are due with each reimbursement request.
- Metro staff will not process your reimbursement request until all required documents have been submitted via ZG and approved by the Enhancement Grant Program Manager.
- Reimbursements are paid net 30 upon approval of your reimbursement by Metro’s Enhancement Grant Program Coordinator.
- You are not required to provide proof of payment (E.g. receipts, invoices, etc.) with reimbursements but are required to keep proof of payment at your site 6-years after the end of your grant agreement. Section 6 of your grant agreement has more specifics on this.

WHAT'S IN A REIMBURSEMENT?

ZG pop-out invoice (required)

- Accessed via ZomGrants.com and started by logging in, accessing the “financial” tab and starting a new invoice.
- Fill out expense line items and contact information.
 - Expense line items here need to match those listed in the budget worksheet.
- Fill out and attach required documents as listed in terms and abbreviations and outlined below.

Reimbursement request cover sheet (required)

- Form downloaded from the bottom of the ZG pop-out invoice and attached to the end of this handbook.
- This is the form that Metro routes internally to process payments.
- Form needs to be attached to ZG invoice under “Required Documents”.

Grant initiation payment (optional)

- A one-time, up front, payment of up to 30% of your grant award designed to get your project moving without having to expend funds in advance.
- Use the initiation payment ONLY if you have not previously requested a reimbursement.
- The required attachments still need to be submitted as part of your initiation payment – Instead of reporting on what you have done, you’ll report on what parts of your project the initiation payment will be applied towards.
- Template downloaded from the bottom of the ZG pop-out invoice.

Budget worksheet (required)

- Template downloaded from the bottom of the ZG pop-out invoice.
- Budget expense line items need to match expense line items listed on ZG pop-out invoice.
- Form needs to be attached to ZG invoice under “Required Documents”.

Progress report (required)

- Form downloaded from the bottom of the ZG pop-out invoice.
- Fill out questions 1-5 for all non-final reimbursements including grant initiation payments.
- Fill out questions 1-13 for your final reimbursement report only.
- Form needs to be attached to ZG invoice under “Required Documents”.

Project pictures (required)

- Pictures of your project need to be attached to ZG invoice under “Required Documents”.
 - If your pictures exceed file size limits, you can submit them via email to Eric.Crandall@oregonmetro.gov or host them on-line using a service like DropBox.
- You are welcome to optionally submit project pictures at any time during the course of your project, just email them to Eric.Crandall@oregonmetro.gov.
- Your final report is required to include pictures of your project. Metro uses this for Metro News stories, to recruit potential applicants and share-out your grant program success.

CONTRACTING AND REIMBURSEMENT PROCESS

Grantees who are approved for funding must enter into a contractual agreement with Metro that specifies legal and contractual obligations, including insurance requirements and the use of a fiscal agent. Grantee must not pre-commit or spend funds before the grant agreement is signed by both parties.

Funding is available on a reimbursement basis only (except your first initiation payment request of up to 30% of your total grant award).

Reimbursement requests Grantee submits to Metro must represent both payment and grant work that is, or will be, completed during the defined term of the grant agreement. Reimbursement requests include but are not limited to:

- Capital improvement projects
- Subcontractor services
- Events and other services
- Programmatic and staffing costs
- Product procurement

When external factors impact deliverables being completed within timeline, grantees may request a contract amendment or extension. In some cases, Metro may consult the grant committee for approval. Metro will not reimburse for work that has been paid for but not completed during the contract cycle without an approved amendment/extension.

Once Grantee submits a reimbursement request, Metro will issue the payment within 30 days of Metro's approval of the reimbursement request.

Grant projects are subject to Metro audits and reviews.

The Grantee must acknowledge Metro and the Metro Central Enhancement Program as grant sponsors on any written or published material, grant product and/or project signage.

Grantee must make reasonable progress towards the project goals and objectives within the first six months of award.

Program progress reports are required with each reimbursement request, including grant initiation payments.

A mid-term progress report is due six months in to the project.

A final report is due upon project completion. If no final report is received, Metro will hold 10% of the total grant award until the final report is received.

Grantee must provide Metro with copies of any grant products including but not limited to curriculum, videos, guides and brochures, upon request.

FREQUENTLY ASKED QUESTIONS

What happens after I click submit on a ZG invoice?

- Metro staff receives an automated email from ZG notifying them of a new reimbursement.
- Metro staff reviews the reimbursement in ZG and confirms, via email, with Grantee that the reimbursement has been received and/or works with grantee to resolve any issues.
- Metro staff routes reimbursement request to Community Enhancement Grant program manager for approval.
 - Approval by program managers starts the net 30 payment terms.
- Payment to grantee is applied net 30 after program manager approval.

What are my payment options?

- Standard payments are made by check and mailed via USPS.
- ACH (electronic payments) are also available – contact Metro staff for more information.
 - If due to COVID-19, your office is working from home, you are highly encouraged to utilize ACH payments.

What happens if I accidentally submitted a reimbursement request?

- This is not a problem at all - Contact Eric.Crandall@oregonmetro.gov to return the erroneously submitted reimbursement request for revisions.

What happens if I submit a reimbursement request without one of the required documents?

- Metro staff will return the invoice in ZG, email you directly and work with you to find a resolution to the missing document(s).
- Metro staff will not process your reimbursement request until all required documents have been attached to your ZG pop-out invoice.
 - Missing required documents cannot be submitted via email.

Can Metro staff access my ZG account to help resolve challenges?

- Unfortunately, no. ZG does not allow grant administrators (Metro staff) to access, edit or make any changes to grantee accounts.
- Metro staff happy to help resolve ZG challenges via Zoom call or by emailing help requests to ZG support team on your behalf.

How often are progress report due?

- Progress reports are due with every reimbursement request.
- A final progress report is due with your final reimbursement request. If you submit a final reimbursement request without a report, Metro will hold 10% of your total grant award until a final report is received.
- You are also required to submit a reimbursement by July 5, 2022 for all expenses incurred between Jan. 1, 2022 and June 30, 2022. After July 5, 2022, you can no longer seek reimbursement for these funds.

- July 5, 2022, will likely be the first reimbursement and progress report you submit via ZG.
- If you have not incurred any expenses, between Jan. 1 and June 30, 2022 a progress report can be submitted directly to:
Eric.Crandall@oregonmetro.gov

What is the email for ZG help?

- questions@ZoomGrants.com

Does ZG have any training or help documents?

- <http://help.ZoomGrants.com/>

Are there any trainings or documents specific to reimbursement requests?

- <http://help.ZoomGrants.com/index.php/zgu/approved-applicants-submitting-reports-invoices-and-adjustment-requests/#instructions-for-applicants>

What are collaborators and how do I add them to my ZG account?

- Collaborators are people you have given permission to access your ZG account. Only the account(s) that created your approved grant application can add collaborators.
- Collaborators are a great way to expand ZG access to program staff or give a back-up means to access your ZG grant in the event of staff turn-over or a lost password.
- Collaborators can be assigned several account permissions based on your needs.
- Information on how to add ZG collaborators to your grant can be found on [ZG's help page](#).

Are there any ZG training videos available?

- <https://www.youtube.com/watch?v=GjxSnU4QhdQ&feature=youtu.be>

I don't see a "reporting" tab in my ZG account – What's up with this?

- This is by design. Since reports are due with each reimbursement request, reporting has been centralized with the other required documents and moved to the ZG pop-out invoice under "Requested Documents".
 - E.g. you are unable to submit a reimbursement request without having attached a progress report.

I have a very large reimbursement request, what should I do?

- As long as your request amount is under, or equal, to your grant award, there is no min/max of funds you can request at a single time.
- Do keep in mind final reporting requirements apply if you are requesting your total grant award amount.

It's last minute before a deadline, can I email my reimbursement to Metro Staff?

- Unfortunately, no. All reimbursements and required documents need to be submitted via ZG.
- If you need to make accommodations, please email Eric.Crandall@oregonmetro.gov to discuss options.