Metro Central Enhancement Grant

Grantee Handbook

For grants beginning January 1, 2023

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INTRODUCTION

Congratulations! You have been awarded a Metro Central Community Enhancement Grant and we are looking forward to working together. For decades, the Metro Central Enhancement Grant program has funded local organizations to invest in the communities surrounding the Metro Central Transfer Station. You and the other Metro Central grantees are collectively working to improve livability, support non-profit infrastructure, restore and engage with natural spaces and serve diverse communities.

We've created this handbook to share information about the grant contracting process and insurance requirements and explain the reimbursement and reporting procedures.

STAFF ASSISTANCE

Metro staff are here to help you through all the stages of your grant project. These staff will be your contacts for all questions regarding contracts, invoicing, reporting and your ongoing program implementation. Don't hesitate to reach out if you have questions.

Noelle Dobson
Noelle.Dobson@oregonmetro.gov

Alejandra Cortes
Alejandra.Cortes@oregonmetro.gov

IMPORTANT DATES

- December 1, 2022: Mandatory grantee information session 2:00-3:00pm. Please contact Alejandra Cortes if you did not receive an invitation to this information session.

- January 1, 2023: Grant term begins.

- July 5, 2023: Mid-year reimbursement due for any expenses prior to June 30, 2023.

- December 31, 2023: Grant term ends for 12-month grants. Grantees will not be reimbursed for any expenses after this date.

- January 15, 2024: All final invoices and final reporting must be submitted by this date.

SETTING UP A CONTRACT

Grantees who are approved for funding must enter into a contractual agreement with Metro and agree to legal and contractual obligations, including insurance requirements outlined below.

The grant term will be from January 1, 2023-December 31, 2023 unless a grantee requested a 24-month grant. Grantees cannot incur any costs prior to January 1, 2023 or after December 31, 2023. The contract

terms will be six months beyond the grant term through June 30, 2023 to allow for any unforeseeable delays in closing out contracts. All contracts must be completed and signed by January 15, 2023.

The first step in establishing the contract is to work with Metro staff to finalize a scope of work based on your proposal. The scope describes the tasks, budget and project evaluation measures, as well as reimbursement and reporting requirements that the Grantee shall undertake as part of the grant agreement.

Next, the scope of work and contract are finalized and Metro will email a grant agreement to the authorized signer via the online platform DocuSign. The agreement includes the scope of work and insurance requirements, lays out any additional conditions of the grant, and describes both the Grantee's responsibilities and Metro's responsibilities. Primary grant contracts and anyone on your team who will handle accounting and reporting should carefully review the grant terms. The authorized signer from your organization will sign the document and it will be automatically routed to Metro for final signatures.

Lastly, Metro will then counter-sign the agreement and send you a fully executed copy electronically once we have received your insurance and W-9 forms (see below).

> Review the grant agreement to understand the required levels of insurance and language for adding Metro.

CERTIFICATES OF INSURANCE AND W-9 REQUIREMENTS

Metro requires that grantees carry insurance for the duration of the project. You will need to send Metro staff certificates of insurance from your insurance provider(s) that show the following coverage, with Metro, its elected officials, departments, employees and agents named as additional insured and evidence of a blanket or additional insured endorsement. The coverage levels will be identified in the contact.

- Commercial general liability
- Automobile bodily injury and property damage liability insurance
- Workers' compensation

In addition, for Metro to issue payments to your organization or business, you will need to complete and return a current IRS W-9 form to Metro, if it is not already on file with Metro. You should have submitted that with your proposal; if not (or if it needs to be updated), please provide it.

AMENDMENTS

Your project may evolve during the course of the grant term and require an amendment to the scope, schedule or budget. Metro can usually approve amendments if the change is consistent with the original grant purpose. Amendments cannot increase funding amounts of the grant.

It is very important that you talk with the Metro grant manager if you anticipate your project scope, schedule or budget shifting. Submit requests for an amendment by email to noelle.dobson@oregonmetro.gov.

GRANT PAYMENTS

Upon execution of the grant agreement, grantee can request a grant initiation payment of up to thirty percent (30%) of maximum award amount, up to thirty thousand dollars ($30,000.00). The Request for

Grant Initiation Payment can be downloaded from the grantee's ZoomGrants account and can also be provided by Metro staff.

You can submit ongoing requests for reimbursement at any time but cannot submit more frequently than once per month. For each reimbursement grantees will submit a Request for Reimbursement of Grant Funds and a Reimbursement and Reporting Worksheet that includes an itemized statement of expenses and responses to two progress reporting questions. These documents are available for download from the grantee's ZoomGrants account and can also be provided by Metro staff.

Grantee must submit a request for reimbursement by July 5th 2023 for any expenses through the end of Metro's fiscal year on June 30, 2023. Metro cannot reimburse for any expenses incurred in a past fiscal year.

Grant funds cannot be used for expenses incurred prior to, or after, the grant term. Substitutions or changes in the project that have not been approved by Metro are not eligible for reimbursement.

Payment shall be made by Metro within 30 days of approval of grantee reimbursement request by Metro's Community Enhancement Grant Program Manager.

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 six years after the end of your grant agreement. Section 6 of your grant agreement has more specifics on this.

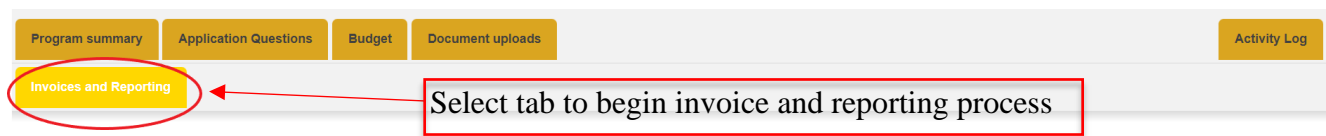Metro cannot process reimbursements if the grantee's required insurance is not up to date.

HOW TO SUBMIT A REIMBURSEMENT REQUEST IN ZOOMGRANTS

Reimbursement requests (including grant initiation payments) are submitted via ZoomGrants. All required reimbursement forms can be downloaded from the grantee's ZoomGrant account. Reimbursement requests require the submission of the following:

- ZoomGrants fillable invoice
- Request for Reimbursement of Grant Funds form, electronically signed by grantee
- Reimbursement and Reporting Worksheet

To access and submit the reimbursement forms:

- Login in to ZoomGrants.com
- Select the grant year you want to submit a reimbursement towards (this applies only to grantees who have previously received funds)
- Select the orange "Invoices and Reporting" tab

| Program summary | Application Questions | Budget | Document uploads | | Activity Log |

| Invoices and Reporting | ← Select tab to begin invoice and reporting process |

- Start a new invoice by clicking the "Create a new invoice" button in the Invoice and Reporting tab. This will launch a pop-up window with the fillable invoice.

Invoices and Reporting

(click on column headers to sort on that column)

Ask a Invoices and Reporting Question

Invoice

Invoice Number	Date Submitted	Status	Requested	Funding Amount Approved	Paid Payment
			-none-		
		Total	$ 0.00	$ 0.00	$ 0.00

Create a New Invoice ← Click button to access Invoice and required Reimbursement and Reporting documents

- Fill in all the required details in the ZoomGrants pop-up invoice
- Reimbursement forms are located in the Document Requested section

Documents Requested *	Required?	Uploaded Documents *
Request for Reimbursement of Grant Funds 2023 . Please upload your signed Request for Reimbursement of Grant Funds form. Use attached template. download template	☑	-none-
Reimbursement and Reporting worksheet. Please submit a list of reimbursement request documentation and its budget category and answer both progress report questions. Use and upload the attached template. download template	☑	-none-
Attachments. Include copies of any grant products including but not limited to photos, curriculum, videos, guides and brochures. You may either include attachments here or include them as part of your progress report upload.	☐	-none-
Request for Grant Initiation Payment 2023. Please upload your signed Request for Grant Initiation Payment form. This form is only to be used once, for the initiation payment. Use and upload the attached template. download template	☐	-none-
Final Report Template 2023. Required when submitting final invoice. Use and upload the attached templatte. download template	☐	-none-
	☐	-none-

Reimbursement forms are located in this section

Template downloads for required documents for Reimbursement

- Download each template for required documents by selecting the orange lettered "download template" link, as seen above.
- Fill-out and upload the required documents into the "Uploaded Documents" section of the Documents Requested segment in the ZoomGrants pop-out window, as seen above.
- Select "Submit"

REPORTING

Metro requires grantees to submit brief progress reports with each reimbursement request and a final report at the end of the grant period.

Grantees will respond to two Progress reporting questions each time you submit a request for reimbursement of grant funds. The questions are located on the 2nd tab of the Reimbursement and Reporting Worksheet that you will download from ZoomGrants when you request reimbursement. For 24-month grants, if no requests for funding have been submitted in the first 12 months the grantee will be ask to fill out Progress Reporting questions at 12 months.

Progress reporting questions

1. Please provide a summary of activities conducted during this invoice period, including any events or milestones reached.
2. Please describe any unexpected challenges or changes to your program that you'd like to share.

Grantees will submit a Final Report by January 15, 2024, or the final expenditure of the grant funds, whichever is soonest. You will download the Final Report Template when you submit your final invoice in ZoomGrants.

1. Please provide a summary of activities completed related to this grant.
2. What impacts and outcomes did your grant project achieve? Please refer to the impacts and outcomes table included in your grant agreement's scope of work.
3. Is there anything else about your project that you would like to share?
4. Do you have any feedback for the Metro Central Enhancement Grant committee or Metro staff regarding how to improve the application process, grantee contracting process, or ongoing management of the program?

The final project report is due to Metro by January 15, 2024. We hope final reports can include copies of any grant products including but not limited to curriculum, videos, guides and brochures.

Project pictures and materials

Metro would love to receive any pictures or grant products such as curriculum, videos, brochures. You can upload these documents to ZoomGrants as part of the reimbursement and reporting process or email any time to Alejandra Cortes, Alejandra.cortes@oregonmetro.gov.

MEDIA, PROMOTIONS AND ACKNOWLEDGING METRO

The Community Enhancement Program is funded with public dollars, and Metro is eager to share stories about how these funds are being used to make a positive impact on the community. Therefore, if you have news stories about your project or have project-related events, please share those with the grant program manager so we can promote your project through our communications channels.

As part of this grant, please acknowledge Metro as a supporter for your program or project when and where possible—it helps us promote the grant program and public investments. This includes newsletters, social media, signs, event mailings, annual reports, print or film media, websites and news

releases. For social media, please tag Metro using @OregonMetro on Twitter, Instagram, or Facebook (www.facebook.com/oregonmetro), and/or link to Metro's website at www.oregonmetro.gov.

For written material, please include the Metro logo shown below. To request an electronic copy of the logo and guidance on logo placement please contact Alejandra Cortes at Alejandra.cortes@oregonmetro.gov.

ZOOMGRANTS RESOURCES

ZoomGrants Help email
- questions@ZoomGrants.com
- You can also access the ZoomGrants Help button at the top of your ZoomGrants account page
- Requests for help need to reference your ZoomGrants application ID. The application ID is located at the bottom on your grant page and is labelled as "ZoomGrants Application ID: ######".

ZoomGrants training links

- http://help.ZoomGrants.com/
- http://help.ZoomGrants.com/index.php/zgu/approved-applicants-submitting-reports-invoices-and-adjustment-requests/#instructions-for-applicants
- https://www.youtube.com/watch?v=GjxSnU4QhdQ&feature=youtu.be

What are collaborators and how do I add them to my ZoomGrants account?
- Collaborators are people you have given permission to access your ZoomGrants 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.

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Solid Waste Community Enhancement Grants
Grant Initiation Payment Form

Metro
600 NE Grand Ave.
Portland, OR 97232-2736

REQUEST FOR GRANT INITIATION PAYMENT

Grantee Name: _____

Mailing Address*: _____

Project Name: _____

Request Amount (up to 30% of total award amount): _____

Contract #: _____

*Use the address of the agency that will receive the check (if there is a fiscal agent, use their address)

- Metro tracks grant expenses by the budget categories outlined in the grantee's application. Costs listed in the attached table should therefore reflect approved costs stated in the Scope of Work.
- All checks will be made payable to Grantee, Grantee is responsible for paying vendors directly.
- If you have any questions about grant billing, contact Noelle Dobson at: Noelle.Dobson@oregonmetro.gov
- In accordance with the term of the Grant Agreement, this form, progress report, itemized statement of expenses and relevant documentation are submitted to Metro via ZoomGrants online portal. Contact Alejandra Cortes with questions, Alejandra.Cortes@oregonmetro.gov.

I declare that this statement, the attached table and the accompanying documentation are, to the best of my knowledge, true, correct and complete.

Grantee's Authorized Signature: **Date:**

Please submit this document via ZoomGrants for processing of initiation payment

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TO BE COMPLETED BY METRO STAFF:

I find this request to be consistent with the Grant Agreement and all funding conditions have been met.

I approve this Reimbursement Request for $ _____

Metro Grant Coordinator: **Date:**

Solid Waste Community Enhancement
Fund Grant Agreement

Metro
600 NE Grand Ave.
Portland, OR 97232-2736

REQUEST FOR REIMBURSEMENT OF FUNDS

Grantee Name: _____

Request Amount: _____

Mailing Address*: _____

Contract #: _____

Project Name: _____

Invoice # (e.g. 1, 2, 3): _____

*Use the address of the agency that will receive the check (if there is a fiscal agent, use their address)

- Metro tracks grant expenses by the budget categories outlined in the grantee's application. Costs listed in the attached table should therefore reflect approved costs stated in the Scope of Work.
- Documentation must be attached in the Reimbursement and Reporting Worksheet for all project expenses for which reimbursement is being requested.
- All checks will be made payable to Grantee, Grantee is responsible for paying vendors directly.
- If you have any questions about grant billing, contact Alejandra Cortes at: Alejandra.Cortes@oregonmetro.gov

In accordance with the term of the Grant Agreement, this form, progress report, itemized statement of expenses and relevant documentation are submitted to Metro via ZoomGrants online portal. Contact Alejandra Cortes with any questions, Alejandra.Cortes@oregonmetro.gov.

I declare that this statement, the attached table and the accompanying documentation are, to the best of my knowledge, true, correct and complete.

Grantee's Authorized Signature: **Date:**

Please forward this request to Metro's Grant Coordinator for signature below.

TO BE COMPLETED BY METRO STAFF:

I find this request to be consistent with the Grant Agreement and all funding conditions have been met.

I approve this Reimbursement Request for $ _____

Metro Grant Coordinator: _____   Date:

METRO COMMUNITY ENHANCEMENT GRANT REIMBURSEMENT WORKSHEET

This form MUST accompany all requests for reimbursement.

Grantee: **Contract #:**

Date:

Budget Category	Brief description of how funds were used	Reimbursement request
Personal services List salaries and administration costs	**Example: Admin - General**	
Sub-total		$0.00
Professional services List activity and amount	**Example: Site Survey**	
Sub-total		$0.00
Materials, supplies, equipment List items, quantities, prices	**Example: Safety Gear for students**	
Sub-total		$0.00
Transportation costs Please itemize	**Example: Van rental for January class**	
Sub-total		$0.00
Indirect or overhead costs[1] E.g. utilities, rent, telephone, fiscal administration	**Example: Staging space for construction**	
Sub-total		$0.00
Other		

Budget Category	Brief description of how funds were used	Reimbursement request
Sub-total		$0.00
Total		**$0.00**

[1] Only for expenses directly related to program. Costs are reimbursable up to 10 percent of total award; match up to 10 percent of total program cost and documentation is required.