



2022 grantee Guelaguetza en Oregon



Metro

# Community Placemaking

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

Grantee handbook | 2025

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- Ashton Simpson, District 1
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- Mary Nolan, District 5
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2022 grantee Portland All Nation Canoe Family, photo credit Intisar Abioto

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## INTRODUCTION

Congratulations on receiving a Community Placemaking grant! This guide describes what grantees should expect during the course your grant with Metro. We are eager for you to get started, but there are a few important things that take place before grant-funded activities can begin.

### STAFF ASSISTANCE

The grant program manager, Dana Lucero (dana.lucero@oregonmetro.gov.), is your main support and will connect you to other areas of Metro, such as the finance analyst who will manage your payments and your Metro Councilor.

## YOUR SET-UP RESPONSIBILITIES

### REVIEW THE NEW GRANTEE CHECKLIST

The new grantee checklist (page 12) shows actions that must happen before you can begin your grant-funded work. Please review this with your team so you are aware of what you will need to do.

### SIGN UP FOR NEW GRANTEE MEETINGS

**New Grantee Preview Session** - In this 30-minute virtual meeting you will meet other grantees and preview through the steps of setting up your grant. This session should include members of your team (including your fiscal sponsor) that will be involved in the grant administration. The sessions will be recorded and can be shared with other members of your team.

**Orientation and Contract Session** - In this 60-minute virtual meeting, we will review the elements of setting up your contract and what to expect during the course of your grant. The session will be recorded and can be shared with other members of your team. If you are not ready to work on your contract and begin grant-funded activities within a month or two, later sessions can be offered.

### PROVIDE ACCESS TO YOUR TEAM IN 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. Your application can be found here, [www.zoomgrants.com/zgf/communityplacemaking2025](http://www.zoomgrants.com/zgf/communityplacemaking2025).

Access is controlled by the person who submitted your application, called the application owner in ZoomGrants. This person is the only one that can grant your team members access by inviting them to join as collaborators and checking the editing access boxes (see below). If the application owner will no longer play a role in your grant, it is very important they grant other team members full editing access or transfer ownership of the application. Metro's grant manager can help with the latter.

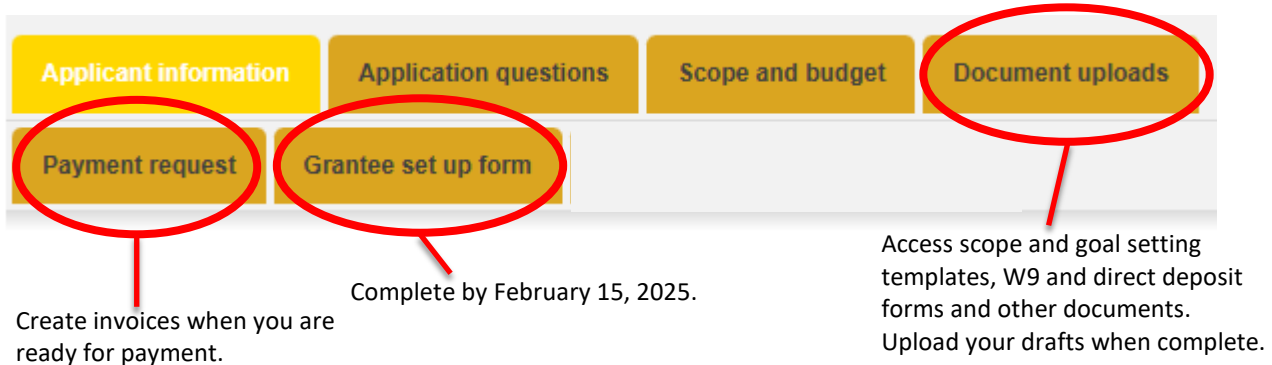
Collaborators

*Collaborators can only edit application data (answers). They cannot submit, archive, or delete this application.*

Email Address	First Name	Last Name	Title	Editing Access	Status
				Application   Report   Payment request   Contract	
Ann.Mendoza@email.org	Ann	Mendoza		<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	✓

## NAVIGATING ZOOMGRANTS

Use the tabs in ZoomGrants to access your scope template and other set up forms, request grant money after your contract is finalized and submit progress reports. The people responsible for those actions must have editing access to the application and payment request functions (see checkboxes on page 5).



## COMPLETE THE NEW GRANTEE SET UP FORM IN ZOOMGRANTS

Metro needs to collect the following information from you to set up your contract. Please submit the form in ZoomGrants no later than February 15, 2025.

### Your organization's information

- Lead person for grant administration
- Person who will sign contract and paperwork

### Fiscal sponsor information (if applicable)

- Lead person for grant administration
- Person who will sign contract and paperwork

### Payment of grant money

- Timeline for payment
- Direct deposit authorization
- Person within your team that can be contacted by phone to verify banking information

### Electronic signatures

- DocuSign contacts

### Insurance

- Commercial general liability coverage level
- Automobile coverage level or waiver
- Workers' compensation coverage level or exemption

### Your timeline to begin

- When you would like to be under contract and eligible to spend grant money

## ROLE OF A FISCAL SPONSOR

Fiscal sponsors should expect to participate in the following ways. At least one member of the fiscal sponsor team should be granted full editing access in ZoomGrants.

- Complete and upload the W-9 and direct deposit (ACH) forms to Metro's SharePoint site
- Carefully review and sign the legal agreement
- Provide insurance coverage for the duration of the grant
- Receive payments from Metro, distribute funds appropriately and keep financial records as described in the legal agreement
- Review and sign progress report forms

## SETTING UP YOUR CONTRACT

### DEVELOPING YOUR SCOPE

Your scope should describe the major elements of your grant-funded work, showing Metro what you plan to do, how you expect to spend grant money and the accomplishments you plan to achieve. The scope is a party of your legal agreement, and grant money can be requested in advance of each scope part. A blank scope form is downloadable in the document uploads tab of ZoomGrants and a template appears on page 13. The following sample shows the level of detail to include.

#### Sample scope

The following describes the expected the outcome of Metro grant-funded activities.

Grant deliverable	
Support three youth artist residencies and hold celebration event to share their work with our community	

Part 1	
Activities involved	<ul style="list-style-type: none"> <li>Recruit and select youth artists</li> <li>Support youth artists as they engage with community members</li> </ul>
Categories of expenses	<ul style="list-style-type: none"> <li>Stipends for youth artists</li> <li>Food for meetings and gatherings</li> <li>Art materials</li> <li>Fiscal sponsor fee</li> </ul>
Amount of grant \$	\$6,000
Approx. start/finish dates	April to August 2025
Deliverable or milestone for part 1	Three youth artists are selected and begin their residency

Part 2	
Activities involved	<ul style="list-style-type: none"> <li>Artists create work based on what they heard from community members</li> <li>Planning meetings for celebration event</li> <li>Put on celebration event</li> </ul>
Categories of expenses	<ul style="list-style-type: none"> <li>Stipend for youth artists</li> <li>Event volunteer stipends</li> <li>Food and rentals for event</li> <li>Publicity</li> </ul>
Amount of grant \$	\$12,000
Approx. start/finish dates	September 2025 to May 2026
Deliverable or milestone for part 2	Youth-created art and celebration event

#### Grant deliverable

This is what your overall activities will have accomplished at the close of your grant.

**Scope parts** - Divide your work into two parts so Metro can provide grant money before the start of each part.

#### Activities involved

List activities or tasks will take place in each part of your project.

#### Categories of expenses

List what you expect to spend grant money on.

#### Scope part deliverable

Describe what will be accomplished at the close of each part.

What you plan to do may evolve during the course of the grant period. We understand and have room to be flexible. It is important that you talk with Metro's grant manager if you find your scope or budget shifting. Small changes are expected. For example, your expenses may shift as your project evolves, so you are not beholden to your estimates. If the change is significant, we will work together to amend your legal agreement with an updated scope so that you may continue to rightfully access grant money.

## LEGAL AGREEMENT

The legal agreement lays out the conditions of your grant. You will receive your draft legal agreement by email and will review it section by section with Metro's grant manager. If there is an area you cannot fulfill, we will work with you to find a solution. A sample legal agreement begins on page 14.

After confirming that you can comply with the legal agreement and providing the documents described in the next sections, we begin the process to approve your contract. The person(s) responsible for signing the agreement on your (and your fiscal sponsor's) behalf will receive the final agreement from Metro's finance analyst. Metro is the last to sign. Once you receive the fully executed agreement from Metro, you can begin to incur costs against your grant.

## INSURANCE COVERAGE

Metro requires you or your fiscal sponsor to carry insurance for the duration of your grant. Grant money may be used to cover the cost of insurance. The types of insurance required are listed below. Some coverage may be waived if conditions described below are met. For each, you will request a certificate of insurance from your insurance providers that includes the following language:

*Metro, its elected officials, departments, employees, and agents shall be named as ADDITIONAL INSUREDS related to grant number: [insert your grant number].*

You will find a link to provide to your insurance agent in the document uploads tab in ZoomGrants. They can use this link to upload the certificate(s) of insurance without being logged into your ZoomGrants account.

Coverage amounts appear in the sample legal agreement in section 10 on page 15. If your project is a one-time event, you may work with Metro's grant manager to opt for event insurance in place of what is described below.

- General liability coverage
- Workers' compensation coverage – If you or your fiscal sponsor is not required by law to carry this, Metro can provide a waiver.
- Automobile coverage – If you do not carry auto coverage, Metro can waive the requirement but grant-funded activities *must not* include driving vehicles.

## FINANCIAL DOCUMENTS

In the document uploads tab in ZoomGrants, you will find a template called *New grantee set up W9-ACH-portal*. From here, you will find a direct deposit authorization form and a link to the IRS W-9 form. Both forms should be saved as PDFs with your organization in the file name and uploaded to Metro's secure portal, which is linked to on the template.

These documents must be uploaded to Metro's secure portal - link appears in the template.

Save as YourOrgName-W9.pdf and YourOrgName-ACH.pdf.

## SETTING GOALS TO EVALUATE YOUR IMPACTS

Metro asks your team to set a few goals for your grant-funded work and the reason is twofold. First, evaluation helps us understand the value of what we do and shows us how to get better at doing it. As such, we hope this is a worthwhile exercise for your team and future efforts. Secondly, it is important for the continuation of this grant program to clearly demonstrate the positive community impacts of funding efforts like yours.

The goal setting form is downloadable from ZoomGrants and appears on page 20. In addition to setting goals, the form also asks you to share something you hope Metro – its elected decision-makers and staff –



can learn about your community as a result of your grant-funded work. When working on this form, it is important to keep in mind the difference between goals and tasks. Goals are why you are doing this work and what you hope results from your efforts. Tasks are the activities themselves. For example:

*Sample goal: Youth artists are more connected to and invested in their community.*

*This is a task, not a goal: Hold three gatherings with youth artists and community members.*

And at the close of your grant, you will submit an evaluation form that asks you to share what you learned about each goal, as well as answer a few questions about working with Metro. That form is also available in ZoomGrants and appears on page 21.

## REQUESTING AND REPORTING GRANT MONEY

After receiving your fully executed contract from Metro, you may begin spending grant money.

### 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. Mary can be reached at [mary.anderson@oregonmetro.gov](mailto:mary.anderson@oregonmetro.gov).

### REQUESTING GRANT MONEY

Metro can provide grant money in advance of your work based on the amounts in your scope. For example, if part 1 of your scope lists \$6,000, you can request that amount as soon as you receive your fully executed contract. Request money by creating an invoice in the payment request tab in ZoomGrants; preview the invoice on page 23. The next portion of grant money will be available after you submit a progress report for the first portion.

Alternately, you can opt to be reimbursed as you complete parts of your scope. To receive reimbursement, you will submit a progress report as described in the next section and then create an invoice in ZoomGrants. Metro will review the progress report and issue reimbursement.

Direct deposit is the quickest way to receive payment. If you prefer to receive paper checks by mail, it may take three to four weeks to receive payment. If you have a fiscal sponsor, your grant money will be paid directly to them.

### PROGRESS REPORTS

Your progress reports tell Metro how your work is coming along and documents how grant money was spent. The progress report form is downloadable in ZoomGrants and appears on page 18.

Your team will complete a progress report when you are ready to receive your next payment. You should refer to your scope, describe progress made toward the deliverable(s) and list how grant money was spent. While Metro will not ask for your receipts and invoices, you will substantiate grant money spent by showing progress on your milestones and deliverables, which will include a written description in your progress report (as seen in the sample) and can be supplemented by sharing photos, materials created or other products of your grant-funded work. The following example shows the level of detail you should include.

## Sample progress report

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

Part 1     Part 2

How much money is accounted for in this progress report?

**Describe your progress toward achieving the grant deliverable included your contract's scope.**

We identified three young artists of color to participate in the residency. They met with our team six times to plan how they want to engage with community members and collaborate on the art they want to create. With our support they've hosted three gatherings of community members.

**List how you have spent this grant money.**

Youth artist stipends - 3 stipends at \$1,000/person - \$3,000  
Food and beverages - 6 planning meetings and 3 community gatherings - \$1,200  
Art materials - \$800  
Fiscal sponsor fee - \$1,000

## DURING YOUR GRANT

Metro envisions your grant period as a unique and valuable time to get to know you and your community better. The following are meant to create opportunities to develop that relationship.

### ACKNOWLEDGEMENT OF METRO SUPPORT

Try as we might, not everyone knows what Metro is and what we do. By acknowledging Metro's support, you help us connect to the community you serve. Acknowledgment can take different forms to suit your project, and Metro will work with you to find appropriate ways. Examples could include tagging *@oregonmetro* in your social media posts, an announcement in your email publicity, verbal acknowledgment at events, written acknowledgment on permanent installations and so forth. Metro can provide you with logos and acknowledgement text.

### STORYTELLING

We want everyone to know about the good work you are doing, and we love showing the different forms Community Placemaking can take. If you would like to have a story written about your grant-funded work, let's work together to create a plan and timeline to work with Metro's storytellers. These stories are published and shared on our website, email lists and social media channels. We invite grantees to reuse these in whatever way is helpful. To see examples of grantee stories, scroll to the related news section of the Community Placemaking program's homepage.

### PUBLICIZING YOUR EVENTS

We want to share any grant-funded (or related) events that are open to the public. Metro can use our email lists and social media channels to encourage participation.

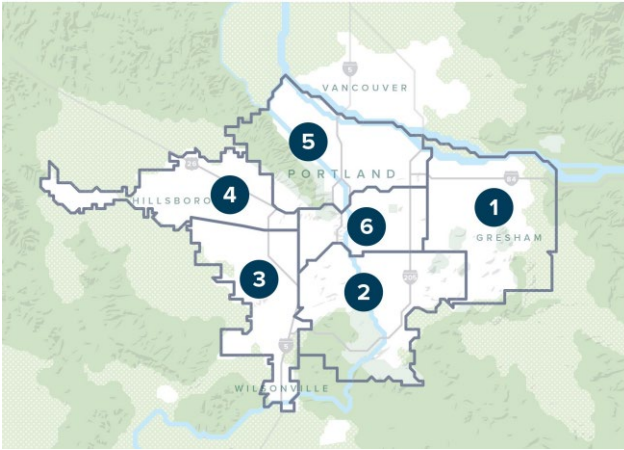
### SPEAKING OPPORTUNITIES

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. Metro's grant manager will share opportunities as they emerge. Speakers will receive a stipend for their participation.

## INVOLVING METRO COUNCILORS

Metro Councilors are elected by the public and are charged with representing community interests on regional issues. Your Community Placemaking grant is a great way for your district's councilor to get to know what's important to you. We are happy to introduce you to your councilor and encourage you to invite them to participate when appropriate.



### **Metro Council President**

Lynn Peterson

### **Metro Councilors**

Ashton Simpson, District 1  
Christine Lewis, District 2  
Gerritt Rosenthal, District 3  
Juan Carlos González, District 4  
Mary Nolan, District 5  
Duncan Hwang, District 6

## CLOSING YOUR GRANT

### PROGRESS REPORT AND EVALUATION

Metro can close your contract once we approve your final progress report that accounts for the last portion of grant money spent and progress on your overall grant deliverable. You will also complete the final evaluation (page 21) that asks you to reflect on the goals you set. We ask you to be generous in sharing what you learned about your goals because we want to learn from you. The evaluation closes 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?

## APPENDIX: NEW GRANTEE CHECKLIST

Before you can begin your grant-funded work or start spending against your grant, the following steps must be complete.

Timeline before you can begin grant-funded work	More detail in handbook
<b>(1)</b> Read the <b>grantee handbook</b> .	
<b>(2)</b> Sign up for a <b>New Grantee Preview Session</b> (30 minutes) and an <b>Orientation and Contract Session</b> (60 minutes) with members of your team that will be involved in grant administration, including your fiscal sponsor if you have one.	page 5
<b>(3)</b> Provide access to your <a href="#">ZoomGrants application</a> for anyone involved in the grant's administration. Add them as collaborators, checking all editing access boxes.	page 5
<b>(4)</b> Gather the information required in the <b>grantee set up form</b> in your ZoomGrants and submit the form in ZoomGrants by February 15, 2025.	page 6
<b>(5a)</b> Fill in the <b>W-9 and direct deposit authorization (ACH) forms</b> which are on the document uploads tab in your ZoomGrants. Save the forms as PDFs with your organization in the file names.	page 8
<b>(5b)</b> Upload forms to <b>Metro's secure portal</b> , which is linked to on the ACH form.	
<b>(6)</b> Download your <b>scope form</b> and <b>goal setting form</b> from the document uploads tab in ZoomGrants. Upload your drafts to ZoomGrants.	pages 7-9, 13, 20
<b>(7)</b> Review your draft <b>legal agreement</b> .	pages 8, 14-17
<b>(8)</b> Request <b>certificates of insurance</b> adding Metro as additional insured from your insurance provider(s). Give your agents your Metro contract number and the link under Certificates of insurance in the document uploads tab of ZoomGrants.  <ul style="list-style-type: none"> <li>(a) General liability</li> <li>(b) Automotive (if using vehicles for grant-funded activities)</li> <li>(c) Workers' compensation (if required of your organization)</li> </ul>	page 8
<b>(9)</b> Sign the <b>legal agreement</b> (usually via DocuSign) sent by finance lead, Mary Anderson.	N/A
<b>(10)</b> After receiving the executed legal agreement from Mary Anderson, <b>request your first grant payment</b> by creating an invoice in the payment request tab in ZoomGrants.	pages 9, 23

By the time your contract is finalized, you will have submitted the following paperwork to Metro.

- W9 (upload to Metro SharePoint site)
- Direct deposit form (upload to Metro SharePoint site)
- Certificates of insurance - general liability and (if applicable) auto and workers' compensation
- Scope form
- Goal setting form

## APPENDIX: SCOPE TEMPLATE

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

The following describes the expected the outcome of Metro grant-funded activities.

Grant deliverable

The scope of the grant 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	
Deliverable or milestone for part 1	

Part 2	
Activities involved	•
Categories of expenses	•
Amount of grant \$	
Approx. start/finish dates	
Deliverable or milestone for part 2	

## 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 **Grantee 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 description**. This is described in more detail in Exhibit A: Project Scope.
2.     **Term of Agreement.** The term of this Agreement begins **Month, Date, Year** and continues for approximately **Number (X)** months, ending **Month, Date, 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 **AMOUNT NO/100TH DOLLARS (\$XXXX.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, Date, Year**. Grantee will request payment and submit progress reports using ZoomGrants.
  - 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 approval of the request. Grantee must substantiate the spending of grant funds by submitting a progress report 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. Metro will review, work with Grantee to resolve any outstanding issues and then approve payment.
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;

*Alternate language when Event Insurance is used: "Notwithstanding this requirement, Grants for public events may be insured using one-time event insurance at the limits set forth above, which must include liquor liability coverage if liquor is to be sold or served. Metro, its elected officials, departments, employees, and agents must be named as ADDITIONAL INSUREDS on the policy of event insurance. Grantee must provide Metro a Certificate of Insurance complying with this section."*

- 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;

*Alternate language when waiving Workers Compensation Insurance: "Metro waives the requirement for Workers' Compensation Insurance Coverage based on Grantee's representations in the attached exemption form."*

- 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

*Alternate language when automobile insurance requirements have been waived: "Grantee covenants and agrees that no motor vehicles will be used by Grantee, its officers, employees, volunteers, or agents to accomplish or in support of the Project Scope to be conducted by Grantee under this Agreement, excluding deliveries by common carriers and independently contracted for services."*

- 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 must provide Metro a Certificate of Insurance complying with this section when returning the signed Agreement. The Certificate of Insurance must 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.

**Grant Applicant**

BY \_\_\_\_\_

NAME \_\_\_\_\_

TITLE \_\_\_\_\_

DATE \_\_\_\_\_

**Metro**

BY \_\_\_\_\_

NAME \_\_\_\_\_

TITLE \_\_\_\_\_

DATE \_\_\_\_\_

**Fiscal Sponsor**

BY \_\_\_\_\_

NAME \_\_\_\_\_

TITLE \_\_\_\_\_

DATE \_\_\_\_\_

Exhibit A    Scope

## APPENDIX: PROGRESS REPORT FORM

Metro grant number:

Grant title:

Your name:

Fiscal sponsor:

**This report describes our progress on our Community Placemaking grant.**

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

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

Part 1

Part 2

How much money is accounted for in this progress report?

**Describe your progress toward achieving the milestone and/or deliverable included your scope.**

**List how you have spent this grant money. For example:**

- Youth artist stipends - 3 stipends at \$1,000/person - \$3,000
- Food and beverages - 6 planning meetings and 3 community gatherings - \$1,200
- Art materials - \$800
- Fiscal sponsor fee - \$2,500

(Progress report form continued)

**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**

The grant manager has reviewed and approved this progress report.

Name

Title

Date

## APPENDIX: GOAL SETTING FORM

Community Placemaking grant title

Grant team member(s) contributing to the goals

Your goals should describe outcomes, not tasks.

Sample goal	<i>Youth artists are more connected to and invested in their community.</i>
This is a task, not a goal	<i>Hold three gatherings with youth artists and community members.</i>

Write two to four goals you hope to achieve through the activities funded with your Metro Community Placemaking grant. At the close of your grant, you share with Metro what you learned about each goal.

Goal A	
Goal B	
Goal C	
Goal D	

In what way(s) do you hope your community will be more stable and/or resilient because of your grant-funded work?

# APPENDIX: EVALUATION FORM

Project team member(s) responsible for assessment:

## Your goals

Goal A	
--------	--

Describe what you learned about this goal.

Goal B	
--------	--

Describe what you learned about this goal.

Goal C	
--------	--

Describe what you learned about this goal.

Goal D	
--------	--

Describe what you learned about this goal.

*(Evaluation form continued)*

## **Community Placemaking objectives**

- **Placemaking:** People's connections to each other and to places they care about are strengthened.
- **Equity:** People of color and members of historically marginalized communities have power and resources to influence their neighborhoods and communities.
- **Partnerships:** People's efforts are maximized because they work in partnership with each other and with Metro.
- **Leadership:** People participate in projects and decisions that affect them.

**Did the project help you achieve some or all of these objectives? Please describe.**

## **Working with Metro**

**What did you like about this partnership with Metro?**

**What do you think could be improved?**

**Beyond grant funding, how can Metro support your efforts in the future?**

**Is there anything else you would like to share?**

## APPENDIX: ZOOMGRANTS INVOICE FORM

To request payment, log into ZoomGrants and click the payment request tab. You will see a yellow button to create a new invoice. Fill in the invoice and click submit. For invoice number, this is for your purposes only. If you don't have a numeric system for invoices, you can just put 1. For requested amount, put amounts that correspond with scope.

### Invoice

#### Instructions [show/hide](#)

To request payment of grant money, fill in the invoice below. If this is for Part 2 or 3 of your project, you must first submit a progress report for the previous grant money. The progress report form appears at the bottom of this page. Add your completed progress report to the document uploads tab above.

Submit Invoice

#### Date Submitted

Invoice Number (your invoice number)

#### Requested Amount

Invoice Contact Name

Invoice Contact Phone

Invoice Contact Email

Payment Instructions

#### Which part of your project scope is this invoice for?

- Part 1
- Part 2
- Part 3

If this invoice is for parts 2 or 3 of your project scope, Metro needs your progress report from your previous payment to process this invoice. Have you uploaded your progress report?

- Yes
- No

#### Documents Requested \*

Progress report

#### Required? Uploaded Documents \*

-none-

#### Invoice Certification

I verify that Metro grant money will be spent in accordance with our grant agreement and project scope.