



Grantee Orientation Webinar

February 2018

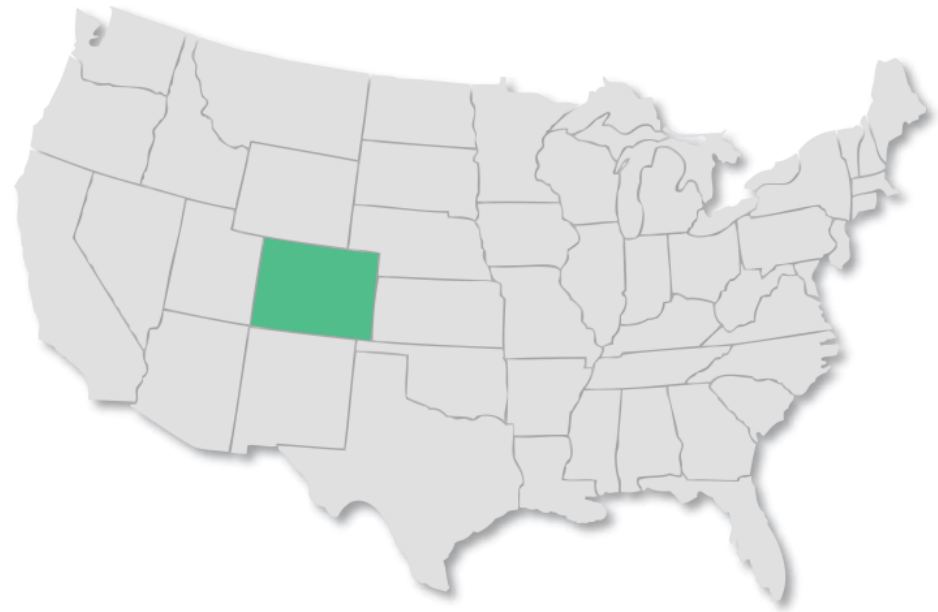


Agenda

- **Introduction and How We Work Together**
 - Amy Latham, Vice President of Philanthropy
- **Grant Agreement and Amendments**
- **Reporting Requirements**
 - Sara Guillaume, Senior Director of Grantmaking Operations
- **Communications**
 - Taryn Fort, Senior Director of Communications



Our Vision



That across Colorado each of us
can say: “ We have all we need to
live healthy lives.”



How do we work together?

Communication is Key

- Primary contact is your program officer (PO)
 - Your PO will contact you at least one time per year
 - Share good news
 - Let us know when things are not going as planned
 - Alert us to staff changes



How do we work together? (cont.)

Communication is Key

- We may call on you to share your expertise with us on pursuits outside of the grant
- We may offer to connect you with organizations doing similar work



Connect with Program Officers



Grantee Survey Results

Compared to grantees of the typical funder, CO Health grantees in 2015 had:

More Positive perceptions regarding the Foundation's:

- Impact on their fields
- Impact on their organizations

Similarly Positive perceptions regarding the Foundation's:

- Impact on their local communities
- Selection process

Less Positive perceptions regarding the Foundation's:

- Relationships with grantees
- Reporting/evaluation process



Grantee Relations

- We provide a response to grantee reports within 60 days of receiving the report. In the response, we acknowledge and comment briefly on the substance of the work.
- We respond to grantee email or phone inquiries within one business day (or send a notification that the Foundation staff member contacted is out of the office).
- We communicate internally to be coordinated in our contacts with grantees.



Grant Agreements and Amendments

Sara Guillaume

Senior Director of Grantmaking Operations



Grant Agreement

Key Information:

- Contact information
- Award amount
- Term
- Who checks are payable to and where they will be sent



Grant Agreement

Key Information:

- Purpose of project
- Contingencies
- Measurable results
- Intermediate milestones
- Reporting schedule and payment schedule
- Approved budget



Grant Agreement

- Read grant agreement in its entirety
- Please note:
 - Section 9, Publicity
 - Section 16, Intellectual Property



Payments

- Timeframe for release of first payment
- For multi-year grants, *generally* expect payment to be released 45 days after submitting your progress report
- Electronic transfer of funds as option
 - To request form, contact Sarah Hughes via email at shughes@coloradohealth.org or 303.953.3654



Grant Amendments

Budget Revisions

- Refer to Section 2
- *Generally*, budget revision requests are required if the answer is yes to **all** of the following:
 - Is the grant greater than \$50,000?
 - Are changes to individual line items greater than 25 percent of that line item?
 - Are changes to individual line items greater than \$1,000?



Grant Amendments

No-cost Extensions

- Refer to Section 2 of grant agreement
- **With prior written approval** from the Foundation, the grant period may be extended



Grant Amendments

How to Request

- Form available at: www.coloradohealth.org, located in the “For Grantees” section
- Please provide all requested information and give adequate details so that we may consider your request
- Include timeframes and dates for all extensions and revisions



Reporting Requirements



Online Grant Reporting

- The Foundation uses an online grant reporting system
- Benefits include:
 - Minimizes use of paper
 - Consistent with our online application process
 - Consistency of grant reports



Online Grant Reporting (cont.)

- We require that all grantees submit reports
 - Some grantees may have additional requirements.
- Refer to your grant agreement for details about your reporting schedule
- Approximately 30 days prior to the requirement being due, an email reminder will be sent from the Foundation providing a link to your grant and requires you to log in to complete the form



Online Grant Reporting Resources

- Resource to support you in submitting your online report can be accessed here and include:
<http://www.coloradohealth.org/grant-reporting-and-maintenance>
 - **Technical Tips Guide**
 - **Sample Report Guide**
 - **FAQs**
 - **Online Reporting Archived Webinar**
- Email grants@coloradohealth.org for questions



Reporting Requirements

- Progress Report (annually)
- Final Report (end of grant term)
- Due dates listed in grant agreement



Completing Progress / Final Reports

- Locate copy of grant agreement
- Summarize **grant progress** to date
 - Give update on **measurable results**
 - Report exact number achieved to date
 - Give update on **intermediate milestones**
- Summarize **successes and challenges**
- Include **financial statements**
- Include **optional attachments** (evaluation results)
- Include **actual grant expenses**



Sample Report Response

Milestone 1 from Grant Agreement:

Recruit and hire program director in December 2017.

Grantee Response:

Hired program director, Jane Doe, in January 2018. Jane Doe has several years of experience implementing health interventions in low-income communities. The recruitment and hiring process took longer than anticipated, however, the program implementation plan is still on track.



Sample Report Response (cont.)

Milestone 2 from Grant Agreement:

Provide Making CO Healthy intervention to 500 low-income Coloradans during year one of grant.

Grantee Response:

A total of 576 low-income Coloradans successfully completed the Making CO Healthy curriculum. The in-kind meal and childcare services helped to make the program successful at each of the community sites.



Approved Budget and Actual Expenditures

Approved Budget			
	Year 1	Year 2	Total
Direct Costs			
General Operating			\$ -
Program/Project			\$ -
Personnel	\$ 30,000.00	\$ 30,000.00	\$ 60,000.00
Programming/Project Costs	\$ 20,000.00	\$ 40,000.00	\$ 60,000.00
Administrative costs related to program			\$ -
Capital			\$ -
Total Direct Costs	\$ 50,000.00	\$ 70,000.00	\$120,000.00
Other Costs			
Consultants			\$ -
Other			\$ -
Fiscal Sponsor's Fee (If applicable)			\$ -
Indirect Costs (Max 10%)			\$ -
Total Other Costs	\$ -	\$ -	\$ -
GRAND TOTAL	\$ 50,000.00	\$ 70,000.00	\$120,000.00

Actual Grant Expenses			
	Year 1	Year 2	Total
Direct Costs			
General Operating			\$ -
Program/Project			\$ -
Personnel	\$ 29,000.00		\$ 29,000.00
Programming/Project Costs	\$ 18,000.00		\$ 18,000.00
Administrative costs related to program			\$ -
Capital			\$ -
Total Direct Costs	\$ 47,000.00	\$ -	\$ 47,000.00
Other Costs			
Consultants			\$ -
Other			\$ -
Fiscal Sponsor's Fee (If applicable)			\$ -
Indirect Costs (Max 10%)			\$ -
Total Other Costs	\$ -	\$ -	\$ -
GRAND TOTAL	\$ 47,000.00	\$ -	\$ 47,000.00



Communications

Taryn Fort

Senior Director of Communications



Communications Partnership

- Grant agreement memo outlines how we can partner to communicate about your grant
- Inform your constituents through such channels as:
 - News releases
 - Chamber and community newsletters
 - Email to stakeholders
 - Social media



Representing the Foundation

- Refer to us as “the Colorado Health Foundation”
 - Lowercase “the” unless name begins a sentence or stands alone
 - Please do not use an acronym in the second reference, instead refer to us as “the Foundation”
- Foundation logo use
 - Contact the Communications team via email at info@coloradohealth.org
 - Indicate use of logo for correct format



Email and Social Media

- Sign up for our monthly e-newsletter on our website
 - Hear about new funding opportunities
 - Read our blog
 - Events
- Follow us on our social media channels
 - Twitter: @COHealthFDN
 - Facebook: Facebook.com/coloradohealth
 - Instagram: @cohealthfdn
 - YouTube: <https://www.youtube.com/user/coloradohealth>



Communications Resources

One-Stop Shop

- Communications Network
- Ragan Communications
- Colorado Healthcare Communicators

Digital

- Nonprofit Technology Network
- Beth Kanter
- Knight Foundation
- Nonprofit Marketing Guide by Kivi Leroux Miller



Q & A

- Does a no-cost extension need to be completed for changes to milestones in our grant agreement?
- Can you give me an example of what kind of program challenges we would document in a progress report?
- If there are funds left over, can we add some additional components to our project? How do we seek approval for that?



Q & A

- How long does it take to get approval for a grant amendment?
- Can we apply for additional funds to expand our existing program? For how many years at a time?





Thank you!



The Colorado Health Foundation™

