Grantee Orientation Webinar

OCTOBER 2019

The Colorado Health Foundation™

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

We Believe that Health is a Basic Human Right

We are bringing health in reach for all Coloradans by engaging closely with communities across the state through investing, policy advocacy, learning and capacity building.

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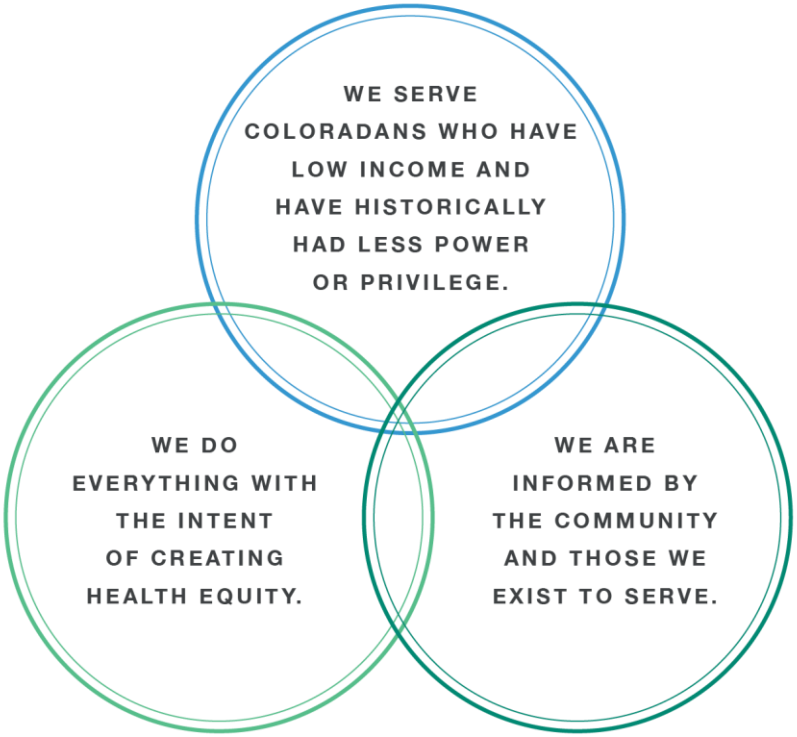
Cornerstones of How We Work

THE FOLLOWING ARE CORNERSTONES UPON WHICH OUR WORK IS BASED, AND THAT WE EXPECT IN THE WORK OF OUR PARTNERS:



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Our organizational strategy is designed with equity at the heart of our work.

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

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

Connect with Program Staff

Contact our Program Officers

Email: funding@coloradohealth.org

Phone: 303-953-3600

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Grantee Survey Results

COMPARED TO GRANTEES OF A TYPICAL FUNDER, COLORADO HEALTH FOUNDATION 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

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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

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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
- 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

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

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 the following sections:
    - Publicity
    - 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 Bradshaw at sbradshaw@coloradohealth.org or at 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

- Log in to your Grantee portal and select the “Request an Amendment” option from the directory
- 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
- Should you wish to include additional attachments, they can be uploaded to the Documents section
- Save, then Submit your request through the system

Reporting Requirements

Reporting Requirements

- Progress Report (annually)
- Final Report (end of grant term)
- Some grants will have additional deliverables
- 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 ONE FROM GRANT AGREEMENT: RECRUIT AND HIRE PROGRAM DIRECTOR IN DECEMBER 2018

Grantee Response:

Hired program director, Jane Doe, in January 2019. 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

MILESTONE TWO FROM GRANT AGREEMENT: PROVIDE MAKING COLORADO 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

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Communications

Taryn Fort

Senior Director of Communications

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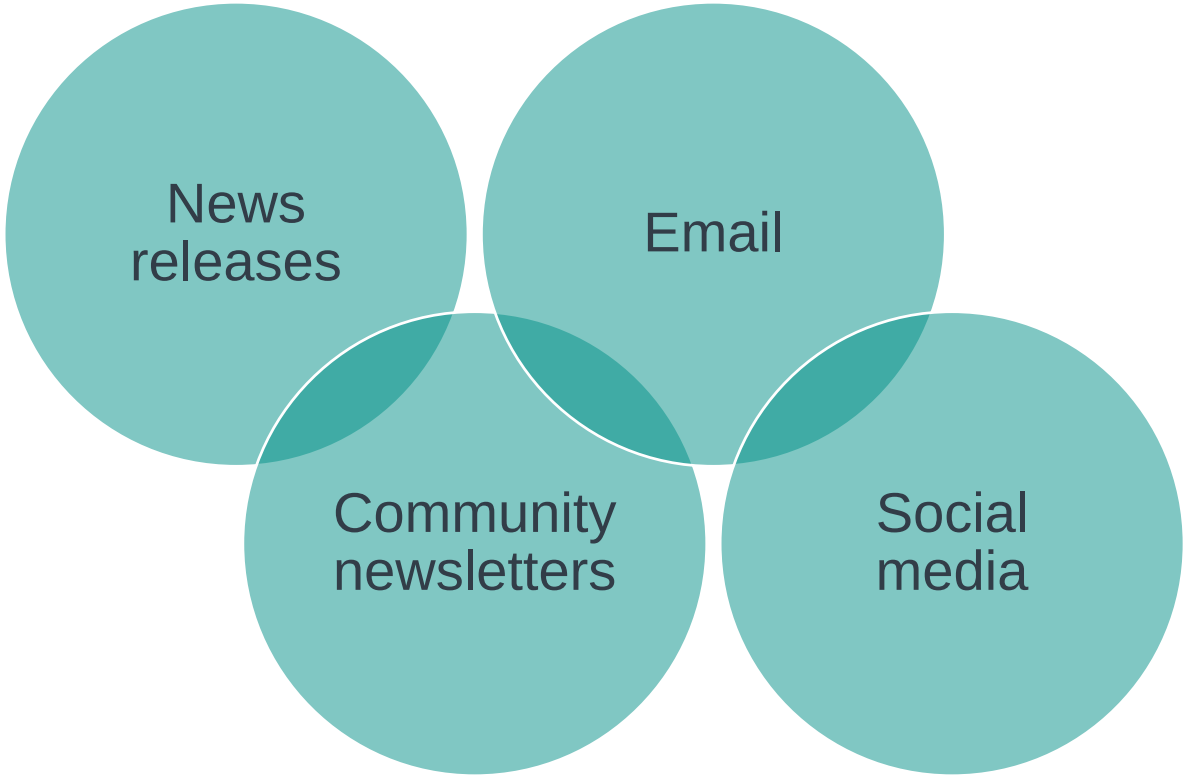
Communicating about the Grant

GRANT AGREEMENT SUGGESTIONS



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Communicating about the Grant

GRANT AGREEMENT OUTLINES OTHER GUIDELINES

- Obtain written approval of any content promoting information related to the grant, CHF or our staff prior to release
- General operating support funds require sponsorship recognition at major events
- Sharing photos with us
- How we use your information as a grantee

Representing the Foundation

Refer to us as “The Colorado Health Foundation”

- Lowercase “the” unless name begins a sentence
- If you require the use of an acronym in the second reference, refer to us as “CHF” or “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

Receiving email from us

- Hear about new funding opportunities
- Read our blog
- Events

Follow us on our social media channels:

- Twitter: @COHealthFDN
- Facebook
- Instagram: @cohealthfdn
- YouTube

Communications Resources

- Communications Network
- ComNetDenver
- Ragan Communications
- Nonprofit Technology Network

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?

Questions?

CONTACT US FOR MORE INFORMATION

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