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.
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:

- We serve Coloradans who have low income and have historically had less power or privilege.
- We do everything with the intent of creating health equity.
- We are informed by the community and those we exist to serve.
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
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
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
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](http://www.coloradohealth.org/grant-reporting-and-maintenance), and include:
  - Sample Report Guide
  - FAQs
  - Online Reporting Archived Webinar
- Email [grants@coloradohealth.org](mailto: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

<table>
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<tr>
<th></th>
<th>Year 1</th>
<th>Year 2</th>
<th>Total</th>
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</thead>
<tbody>
<tr>
<td><strong>Direct Costs</strong></td>
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<td>General Operating</td>
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<tr>
<td>Program/Project</td>
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<tr>
<td>Capital</td>
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<td>$ -</td>
<td>$ -</td>
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<tr>
<td><strong>Total Direct Costs</strong></td>
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<td>$ 70,000.00</td>
<td>$ 120,000.00</td>
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| **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

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<td><strong>Total Direct Costs</strong></td>
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| **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
Communicating about the Grant

GRANT AGREEMENT SUGGESTIONS

News releases
Community newsletters
Email
Social media
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

- 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

Amy Latham
alatham@coloradohealth.org
303-953-3670

Sara Guillaume
sguillaume@coloradohealth.org
303-953-3672

Taryn Fort
tfort@coloradohealth.org
303-953-3666