

# Grantee Orientation Webinar

NOVEMBER 2021



The Colorado Health Foundation™



# Agenda

- **Introduction and How We Work Together**

Erin Brown, Vice President, Community Investment and Impact

- **Grant Agreement and Reporting Requirements**

Sara Guillaume, Senior Director of Grantmaking Operations

- **Communications**

Taryn Fort, Senior Director of Communications and External Influence

- **Frequently Asked Questions**



# 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:



Equity is at  
the heart of  
our strategy  
and our  
work.



# Connect with Program Staff

Contact our Program Officers

Email: [funding@coloradohealth.org](mailto:funding@coloradohealth.org)

Phone: 303-953-3600



# 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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# 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 reach
- Key grantee activities and target milestones
- Reporting schedule and payment schedule



# 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 and preferred by the Foundation
- To request form, email [grants@coloradohealth.org](mailto:grants@coloradohealth.org)



# 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



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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](mailto:grants@coloradohealth.org) for questions





# 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 reach**
  - Report exact number achieved to date
- Give update on **key grantee activities and target milestones**
- Summarize **successes and challenges**
- Include **financial statements**
- Provide updated **demographic information** as requested and if available
- Include **optional attachments** (evaluation results)



# Sample Report Response

## MILESTONE ONE FROM GRANT AGREEMENT: RECRUIT AND HIRE PROGRAM DIRECTOR IN DECEMBER 2020

### Grantee Response:

Hired program director, Jane Doe, in January 2021. 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 Coloradans living on low income 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.



# Communications

Taryn Fort

Senior Director of Communications and External Influence

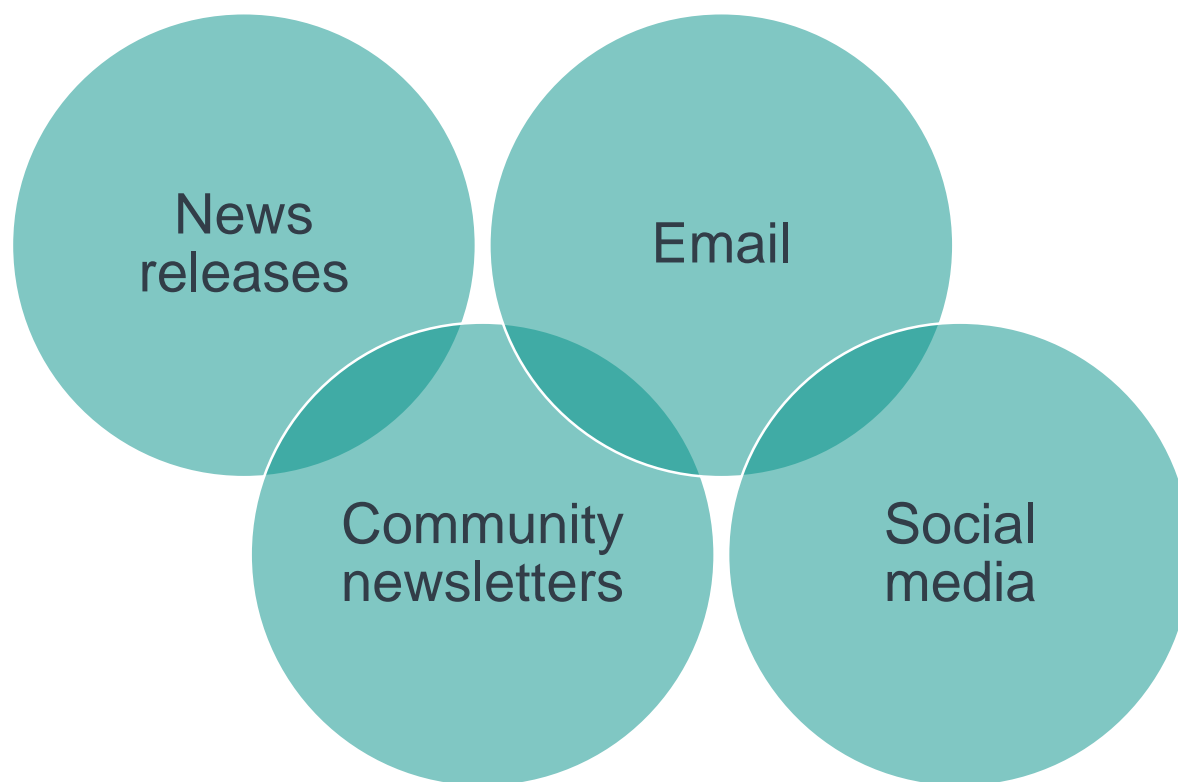


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# Communicating about the Grant

## GRANT AGREEMENT SUGGESTIONS



# Communicating About Your Grant

## SHARING THE NEWS WITH YOUR NETWORK



Visit [www.coloradohealth.org/communicating-about-grant](http://www.coloradohealth.org/communicating-about-grant) for complete communications guidance



# Representing the Foundation

- **Name usage**
  - “The Colorado Health Foundation” on first reference
  - “The Foundation” on second reference
- **Logo usage:** Available for download on our website
- **Organization description**
  - [The Colorado Health Foundation](#) is bringing health in reach for all Coloradans by engaging closely with communities across the state through investing, policy advocacy, learning and capacity building.
- **Press releases:** A template is available on our website for your to repurpose

Visit [www.coloradohealth.org/communicating-about-grant](http://www.coloradohealth.org/communicating-about-grant) for complete communications guidance



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# Email and Social Media

## Receiving email from us

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

## Follow us on our social media channels:

- Twitter: @COHealthFDN
- Facebook:  
[www.facebook.com/ColoradoHealth](http://www.facebook.com/ColoradoHealth)
- Instagram: @COHealthFDN
- YouTube:  
[www.youtube.com/user/ColoradoHealth](http://www.youtube.com/user/ColoradoHealth)



# Communications Resources

Communications Network

ComNetDenver

Ragan Communications

Nonprofit Technology  
Network



# Frequently Asked Questions

- 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?



# Frequently Asked Questions

- 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?

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