



The Colorado Health Foundation™

Together

Grantee Orientation Webinar

April 27, 2016



Agenda

- **Introduction**
- **How We Work Together**
 - Amy Latham, Vice President of Philanthropy
- **Grant Agreement and Amendments**
- **Reporting on Your Grant**
 - Sara Guillaume, Director of Grantmaking Operations



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



How do we work together? (cont.)

Communicating about Your Grant

- Sharing news and information about your new grant and the work being funded is key
 - Press releases, social media or email
- Find tips for communicating about your grant at www.ColoradoHealth.org/grantcommunications
- Request logos by emailing info@coloradohealth.org
- Follow or like us on social media



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 Agreement, Amendments and Reporting

Sara Guillaume
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



New Online Grant Reporting

- The Foundation recently implemented a new online grant reporting system
- Benefits include:
 - Minimizes use of paper
 - Consistent with our online application process
 - Consistency of grant reports



New 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:
http://www.coloradohealth.org/grant_reports.aspx and include:
 - **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)
- The Foundation is rolling-out online reporting later this year
- 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 2015.

Grantee Response:

Hired program director, Jane Doe, in January 2016.

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



Q&A

- **Does a no-cost extension need to be completed for changes to milestones in our grant agreement?**

No, a formal amendment isn't required in this case.

- **Can you give me an example of what kind of program challenges we would document in a progress report?**

Things that have impacted your plans or outcomes (e.g. program started late, challenges recruiting participants, etc.).

- **If there are funds left over, can we add some additional components to our project? How do we seek approval for that?**

Call your program officer to discuss.



Q&A

- **How long does it take to get approval for a grant amendment?**

We strive to review and finalize grant amendments within two weeks of receipt of the request.

- **Can we apply for additional funds to expand our existing program? For how many years at a time?**

Call your program officer to discuss.

- **I've heard that Foundation grantees can participate in a storytelling program and receive an unrestricted donation – is that accurate?**

Visit www.ColoradoKaleidoscope.org for more info.



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Thank you!