

## **GRANT AGREEMENT NO.**

This Grant Agreement is between the CITY OF PORTLAND, OREGON (hereinafter "CITY") and Metropolitan Family Service (hereinafter "MFS" or "GRANTEE") in an amount not to exceed \$200,000 to support Experience PDX program to improve reading and literacy proficiency for children at academic risk and enhance teacher outcomes at four low resourced Portland schools.

### **RECITALS:**

1. MFS helps people move beyond the limitations of poverty, inequity and social isolation. MFS is previously known as Family Counseling Service that opened its doors in 1950.
2. MFS Experience PDX project is an opportunity for the City of Portland to invest in an established, cost effective and scalable model that engages Older Adults (50+) in vital civic work to support Portland youth in reading at grade level by the end of third grade, and support the health and well-being of those who volunteer in this effort
3. MFS Experience PDX project connects the City's vision for educational equity in Portland with its initiative of Portland's Age Friendly City initiative that aims to build a community for all ages by offering opportunity to promote diversity and equity while strengthening inclusion of all ages and residents as assets in our community.
4. In accordance with resources available under the City's FY 2017-18 Budget, the City now desires to make a grant to MFS in an amount not to exceed \$200,000.

**THEREFORE**, in consideration of the mutual promises and covenants contained herein, the parties agree as follows:

### **ARTICLE I – SCOPE OF WORK/OUTCOME MEASURES**

MFS agrees to provide critical academic support to children at academic risk and other tangible benefits that enhance teacher outcomes at 4 low resourced Portland schools as describe in ATTACHMENT A: Scope of Work, Output Measures, and Budget hereto, which by this reference are incorporated herein and made a part hereof.

### **ARTICLE II – AGREEMENT PERIOD**

This Agreement shall become effective on the date of last signature through June 30, 2018. Expenses incurred starting July 1, 2017 shall be considered as eligible expenses for grant fund reimbursement.

### **ARTICLE III – SPECIFIC CONDITIONS OF THE GRANT**

- A. Publicity: During the term of this Grant Agreement, MFS shall use its best efforts to mention the City's grant funding in publicity regarding the program(s) that will be supported by the grant funds.
- B. Records: MFS shall maintain all books, general organizational and administrative information, documents, papers, and records of MFS that are related to this Agreement or MFS' performance of work or services, for ten (10) years after CITY makes final grant payment, MFS has made final report, or the termination date of this Agreement, whichever is later. MFS shall provide CITY prompt access to these records upon request and permit copying as CITY may require.
- C. CITY Grant Manager: CITY hereby appoints Antoinette Toku to act as its Project Manager with regard to this Agreement. CITY may, from time to time, designate another person to act as the City Project Manager and will inform MFS in writing of any change in Project Manager.

Antoinette Toku  
City of Portland, OMF/Grants Management Division  
1001 SW 5<sup>th</sup> Ave., Suite 2200  
Portland Oregon, 97204  
phone: 503-823-6819  
email: [antoinette.toku@portlandoregon.gov](mailto:antoinette.toku@portlandoregon.gov)

- D. MFS Project Manager: MFS hereby appoints Brendon Bassett to act as its Project Manager with regard to this Agreement. MFS may, from time to time, designate another person to act as the MFS Project Manager and will inform CITY in writing of any change in Project Manager.

Brendon Bassett  
Metropolitan Family Service  
1808 SE Belmont Street  
Portland, OR 97214  
phone: 503.232.0007. ext. 151  
email: [brendonb@mfs.email](mailto:brendonb@mfs.email)

- E. Amendment: The CITY Grant Manager is authorized to amend the terms and conditions of the grant provided such changes do not increase the City's financial risk. If approved, such changes shall be incorporated into a formal grant amendment and signed by the GRANTEE and the CITY Grant Manager before such changes are effective. Any change to the amount of the Grant must be approved by the City Council unless the City Council delegated authority to amend the amount of the grant to a specific grantee in the ordinance authorizing the grant.
- F. Billings/Invoices/Payment: The CITY Grant Manager is authorized to approve work, billings, and invoices submitted pursuant to this grant and to carry out all other CITY actions referred to herein in accordance with this Agreement.
- G. Report: MFS will complete and submit to the CITY Grant Manager a signed interim progress report by January 15, 2018 for July 1, 2017 to December 31, 2017 activities, and a signed **Final Special Appropriation Report**, using Attachment C. The final report is due by June 30, 2018.

#### ARTICLE IV -- PAYMENTS

- A. GRANTEE will receive its funding as follows: After the Grant Agreement becomes effective, GRANTEE will submit an invoice using CITY'S template included as Attachment D for one-half (\$100,000) of the grant award to the CITY Grant Manager for approval. The City of Portland will pay GRANTEE the amount of the invoice within thirty (30) days of the approval date. This will be a direct payment, not an advance, to the GRANTEE. A second, and final payment of \$100,000 will be made after review and approval of the final progress and expenditure reports Attachment C and D, due to the City project manager on June 15, 2018.
- B. If for any reason GRANTEE receives a grant payment under this Grant Agreement and does not use grant funds, provide required services or take any actions required by the Grant Agreement the CITY may, at its option terminate, reduce or suspend any grant funds that have not been paid and may, at its option, require GRANTEE to immediately refund to the CITY the amount improperly expended or received by GRANTEE.
- C. Grant payments under this Agreement may be used only to provide the services or take the actions identified in this Grant Agreement and shall not be used for any other purpose.
- D. If, for any reason, GRANTEE's anticipated services or actions are terminated, discontinued or interrupted, the CITY's payment of funds under this Grant may be terminated, suspended or reduced.
- E. GRANTEE will keep vendor receipts and evidence of payment for materials and services and time records and evidence of payment for program wages, salaries, and benefits, and GRANTEE services. All such receipts and evidence of payments will promptly be made available to the Grant Manager or other designated persons, upon request. At a minimum, such records shall be made available and will be reviewed as part of the annual monitoring process. See Article III B. Records for retention period.
- F. Prevailing wages. State of Oregon, Bureau of Labor and Industries (BOLI) wage rates are required for certain contracts that total \$50,000 and above. If GRANTEE's project is subject to the prevailing wage requirements, GRANTEE will comply with the prevailing wage requirements of ORS 279C.800 through 279C.870 and any other applicable prevailing wage requirements contained in ORS Chapter 279C and related Oregon administrative rules, or in Portland City Code.
- G. Prevailing wage indemnity. GRANTEE AGREES TO INDEMNIFY, DEFEND, AND HOLD HARMLESS CITY, ITS EMPLOYEES, OFFICERS, AND AGENTS, FROM AND AGAINST ANY CLAIM, SUIT, OR ACTION, INCLUDING ADMINISTRATIVE ACTIONS, THAT ARISE OUT OF GRANTEE'S FAILURE TO COMPLY WITH ORS 279C.800 TO 279C.870 AND ANY APPLICABLE ADMINISTRATIVE RULES OR POLICIES.

**ARTICLE V -- GENERAL GRANT PROVISIONS**

- A. Cause for Termination; Cure. It shall be a material breach and cause for termination of this Agreement if GRANTEE uses grant funds outside of the scope of this Agreement, or if GRANTEE fails to comply with any other term or condition or to perform any obligations under this Agreement within thirty (30) days after written notice from CITY. If the breach is of such nature that it cannot be completely remedied within the thirty (30) day cure period, GRANTEE shall commence cure within the thirty (30) days, notify CITY of GRANTEE's steps for cure and estimated time table for full correction and compliance, proceed with diligence and good faith to correct any failure or noncompliance, and obtain written consent from CITY for a reasonable extension of the cure period.
- B. No Payment or Further Services Authorized During Cure Period. During the cure period, CITY is under no obligation to continue providing additional grant funds notwithstanding any payment schedule indicated in this Agreement. GRANTEE shall not perform services or take actions that would require CITY to pay additional grant funds to GRANTEE. GRANTEE shall not spend unused grant funds and such unused funds shall be deemed held in trust for CITY. GRANTEE shall be solely responsible for any expenses associated with cure of its noncompliance or failure to perform.
- C. Termination for Cause. Termination for cause based on GRANTEE's misuse of grant funds shall be effective upon notice of termination. Termination for cause based on failure to comply or perform other obligations shall be effective at the end of the 30-day period unless a written extension of cure period is granted by CITY. GRANTEE shall return all grant funds that had not been expended as of the date of the termination notice. All finished or unfinished documents, data, studies, and reports prepared by GRANTEE under this Agreement shall, at the option of CITY, become the property of CITY; and GRANTEE may be entitled to receive just and equitable compensation for any satisfactory work completed on such documents up until the time of notice of termination, in a sum not to exceed the grant funds already expended.
- D. Penalty for Termination for Cause. If this Agreement is terminated for cause, CITY, at its sole discretion, may seek repayment of any or all grant funds tendered under this Agreement, and decline to approve or award future grant funding requests to GRANTEE.
- E. Termination by Agreement or for Convenience of City. CITY and GRANTEE may terminate this Agreement at any time by mutual written agreement. Alternatively, CITY may, upon thirty (30) days written notice, terminate this agreement for any reason deemed appropriate in its sole discretion. If the Agreement is terminated as provided in this paragraph, GRANTEE shall return any grant funds that would have been used to provide services after the effective date of termination. Unless the Parties agree otherwise, GRANTEE shall finish any work and services covered by any grant funds already paid and shall not commence any new work or services which would require payment from any unused grant funds.
- F. Changes in Anticipated Services. If, for any reason, GRANTEE's anticipated services or actions are terminated, discontinued or interrupted, CITY's payment of grant funds may be terminated, suspended or reduced. GRANTEE shall immediately refund to CITY any unexpended grant funds received by



GRANTEE.

- G. Amendment. The Grant Manager is authorized to execute amendments to the scope of the services or the terms and conditions of this Agreement, provided the changes do not increase CITY's financial risk. Increases to the grant amount must be approved by the City Council unless the City Council delegated authority to amend the grant amount in the ordinance authorizing this Agreement. Amendments to this Agreement, including any increase or decrease in the grant amount, must be in writing and executed by the authorized representatives of the Parties and approved to form by the City Attorney.
- H. Non-discrimination; Civil Rights. In carrying out activities under this Agreement, GRANTEE shall not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, handicap, familial status, sexual orientation or national origin. GRANTEE shall take actions to ensure that applicants for employment are employed, and that employees are treated during employment, without regard to their race, color, religion, sex, age, handicap, familial status, sexual orientation or national origin. Actions shall include but not be limited to, the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship.
- GRANTEE shall post in conspicuous places, available to employees and applicants for employment, notices, which state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, or national origin. GRANTEE shall incorporate the foregoing requirements of this section in all of other agreements for work funded under this Agreement, except agreements governed by Section 104 of Executive Order 11246.
- I. Audit. CITY, either directly or through a designated representative, may conduct financial or performance audit of the billings and services under this Agreement or GRANTEE records at any time in the course of this Agreement and during the ten (10) year period established above in Article III.B. As applicable, audits will be conducted in accordance with generally accepted auditing standards as promulgated in *Government Auditing Standards* by the Comptroller General of the United States General Accounting Office. If an audit discloses that payments to GRANTEE exceeded the amount to which GRANTEE was entitled, then GRANTEE shall repay the amount of the excess to CITY.
- J. Indemnification. Subject to the limits of the Oregon Tort Claims Act, GRANTEE shall hold harmless, defend, and indemnify CITY, and its officers, agents and employees against all claims, demands, actions, and suits (including all costs) brought against any of them arising from actions or omissions of GRANTEE and/or its contractors in the performance of this Agreement.
- K. Insurance. GRANTEE shall obtain and maintain in full force at its expense, throughout the duration of the Agreement and any extension periods, the required insurance identified below. CITY reserves the right to require additional insurance coverage as required by statutory or legal changes to the maximum liability that may be imposed on Oregon cities during the term of this Agreement.
1. Workers' Compensation Insurance. GRANTEE, its contractors and all employers working under this Agreement shall comply with ORS Chapter 656 and as it may be amended from time to time. Unless exempt

under ORS Chapter 656, GRANTEE, its contractors and any employers working under this Agreement shall maintain coverage for all subject workers for the duration of this Agreement.

In the event worker's compensation insurance coverage is due to expire during the term of this Agreement for any employers working under this agreement, GRANTEE agrees to require timely renewal of that insurance, either as a carrier-insured employer or a self-insured employer as provided by Chapter 656 of the Oregon Revised Statutes, before its expiration, and GRANTEE agrees to provide the CITY such further certification of worker's compensation insurance as renewals of said insurance occur.

2. Commercial General Liability Insurance: GRANTEE shall maintain commercial general liability and property damage insurance that protects GRANTEE and the CITY and its officers, agents, and employees from any and all claims, demands, actions, and suits for damage to property or personal injury, including death, arising from GRANTEE's work under this Grant Agreement. The insurance shall provide coverage for not less than \$2,000,000 per occurrence.
3. Automobile Liability Insurance: GRANTEE shall have automobile liability insurance with coverage of not less than \$2,000,000 each accident. The insurance shall include coverage for any auto or all owned, scheduled, hired and non-owned auto. This coverage may be combined with the commercial general liability insurance policy.
4. Additional Insured: The liability insurance coverages, except Professional Liability, Errors and Omissions, or Workers' Compensation where applicable, shall be without prejudice to coverage otherwise existing, and shall name the City of Portland and its bureaus/divisions, officers, agents and employees as Additional Insureds, with respect to the GRANTEE's or its contractor's activities to be performed or services to be provided. Grantee shall provide proof of additional insured coverage in the form of an additional insured endorsement form or a policy coverage document acceptable to City. Coverage shall be primary and non-contributory with any other insurance and self-insurance. Notwithstanding the naming of additional insureds, the insurance shall protect each additional insured in the same manner as though a separate policy had been issued to each, but nothing herein shall operate to increase the insurer's liability as set forth elsewhere in the policy beyond the amount or amounts for which the insurer would have been liable if only one person or interest had been named as insured.
5. Continuous Coverage; Notice of Cancellation: GRANTEE shall maintain continuous, uninterrupted coverage for the duration of the Agreement. There shall be no termination, cancelation, material change, potential exhaustion of aggregate limits, or non-renewal of coverage without thirty (30) days written notice from GRANTEE to CITY. If the insurance is canceled or terminated prior to termination of the Agreement, GRANTEE shall immediately notify CITY and provide a new policy with the same terms. Any failure to comply with this clause shall constitute a material

breach of the Agreement and shall be grounds for immediate termination of this Agreement.

6. Certificate(s) of Insurance: GRANTEE shall provide proof of insurance through acceptable certificates of insurance and a CG 2026 additional insured endorsement form (or an equivalent blanket additional insured form) to CITY on or before execution of the Agreement and prior to any commencement of work or delivery of goods or services under the Agreement or initial payment of grant funds. The certificate(s) will specify all of the parties who are endorsed on the policy as Additional Insureds (or Loss Payees). Insurance coverages required under this Agreement shall be obtained from insurance companies acceptable to CITY. GRANTEE shall pay for all deductibles and premium from its non-grant funds. CITY reserves the right to require, at any time, complete and certified copies of the required insurance policies evidencing the coverage required. In lieu of filing the certificate of insurance required herein, if GRANTEE is a public body, GRANTEE may furnish a declaration that GRANTEE is self-insured for public liability and property damage for a minimum of the amounts set forth in the Oregon Tort Claims Act (ORS 30.260 to 30.300).
- L. Grantee's Contractor; Non-Assignment. If GRANTEE utilizes contractors to complete its work under this Agreement, in whole or in part, GRANTEE shall require any of its contractors to agree, as to the portion contracted, to fulfill all obligations of the Agreement as specified in this Agreement. However, GRANTEE shall remain obligated for full performance hereunder, and CITY shall incur no obligation other than its obligations to GRANTEE hereunder. This Agreement shall not be assigned or transferred in whole or in part or any right or obligation hereunder, without prior written approval of CITY.
- M. Independent Contractor Status. GRANTEE, and its contractors and employees are not employees of CITY and are not eligible for any benefits through CITY, including without limitation, federal social security, health benefits, workers' compensation, unemployment compensation, and retirement benefits. GRANTEE will be responsible for any federal, state, or local taxes and fees applicable to payments hereunder.
- N. Conflict of Interest. No CITY officer or employee, during his or her tenure or for two (2) years thereafter, shall have any interest, direct or indirect, in Grant Agreement or the proceeds thereof. CITY officer or employee who selected GRANTEE, participated in the award of this Agreement or managed this Agreement shall not seek the promise of employment from GRANTEE or be employed by GRANTEE during the term of the Agreement, unless waiver is obtained from CITY in writing.
- O. Oregon Laws and Forum. This Agreement shall be construed according to the laws of the State of Oregon without regard to its provisions regarding conflicts of law. Any litigation between CITY and GRANTEE arising under this Agreement or out of work performed under this Agreement shall occur in Multnomah County court having jurisdiction thereof, and if in the federal courts, in the United States District Court for the State of Oregon.
- P. Compliance with Law. GRANTEE and all persons performing work under this Agreement shall comply with all applicable federal, state, and local laws and

regulations, including reporting to and payment of all applicable federal, state and local taxes and filing of business license. If GRANTEE is a 501(c)(3) organization, GRANTEE shall maintain its nonprofit and tax exempt status during this Agreement. GRANTEE shall be EEO certified by CITY in order to be eligible to receive grant funds.

- Q. Independent Financial Audits/Reviews. Any grantee receiving \$300,000 or more in City funding, in any program year, is required to obtain an independent audit of the City-funded program(s). Any grantee receiving between \$25,000 and \$300,000 in City funds, in any program year, is required to obtain an independent financial review. One copy of all required financial audits or reviews shall be submitted to the Grant Manager within thirty days of audit completion or upon request by the Grant Manager.
- R. Severability. CITY and GRANTEE agree that if any term or provision of this Agreement is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected, and the rights and obligations of the Parties shall be construed and enforced as if the Agreement did not contain the particular term or provision held to be invalid.
- S. Merger. This Agreement contains the entire agreement between CITY and GRANTEE and supersedes all prior written or oral discussions or agreements. There are no oral or written understandings that vary or supplement the conditions of this Agreement that are not contained herein.
- T. Program and Fiscal Monitoring. CITY shall monitor on an as-needed basis to assure Agreement compliance. Monitoring may include, but are not limited to, on site visits, telephone interviews and review of required reports and will cover both programmatic and fiscal aspects of the Agreement. The frequency and level of monitoring will be determined by the Grant Manager. Notwithstanding such monitoring or lack thereof, GRANTEE remains fully responsible for performing the work, services or obligations required by this Agreement in accordance with its terms and conditions.
- U. Third Party Beneficiaries. There are no third party beneficiaries to this Agreement and may only be enforced by the Parties.
- V. Electronic Transaction; Counterparts. The Parties agree that they may conduct this transaction, including any amendments, by electronic means, including the use of electronic signatures. This Agreement, and any amendment, may be executed in any number of counterparts, each of which shall be deemed an original, but all of which together shall constitute a single instrument.
- W. NOTICE: All notices under this Grant Agreement shall be sent to GRANTEE at the following address:

**II. TERM OF GRANT:**


The terms of this Grant Agreement shall be effective when an ordinance is passed by CITY Council and the Grant Agreement is executed by all the parties, as shown by their signatures below, and shall remain in effect through June 30, 2018, unless subsequent time extension, supplement, addition, continuation, or renewal is mutually agreed upon in writing between the parties, or terminated earlier in accordance with the provisions hereof.

**CITY OF PORTLAND**

Name: Ted Wheeler  
Title: Mayor  
City of Portland, Oregon

Date: \_\_\_\_\_


**GRANTEE**

  
Name: Judy Strand  
Title: Chief Executive Officer

Date: 10/31/17

**APPROVED AS TO FORM:**

APPROVED AS TO FORM

  
City Attorney, City of Portland  
CITY ATTORNEY 11/7/17





## **City of Portland Special Appropriations - Scope of Work**

### **Expected Activities:**

Experience PDX will strengthen the Experience Corps model so that it is more culturally responsive, replace negative stereotypes of aging with positive, cross cultural asset-based aging concepts, and build connections between young and old to confront racial equity in a new way. A successful Experience PDX program could serve as a replicable model for other regions, and become an integrated model within our school systems and civic engagement systems on a broader basis. This effort supports Mayor Wheeler's commitment to building a stronger, multigenerational, inclusive city; and helps keep Portland in a strong role as an innovator in aging. The program will provide critical academic support to over 80 children at academic risk as well as other tangible benefits that enhance teacher outcomes at 4 low resourced Portland schools. Key activities:

- Recruit, strengthen and support **4 Experience Corps Teams in 4 low resourced schools**
- Train and onboard **20** Experience Corps Mentors
- Provide **5000** hours of individual, group and classroom academic support in these schools
- Support over **700** children through in-classroom support and small group tutoring,

### **Data Collection To Show Progress:**

As 1:1 and sustained small group matches are made, classroom teachers will complete a Pre-Survey, providing basic demographic information, as well as initial academic and social/emotional assessments. When the match ends- ideally at the end of the year- teachers complete a Post-Survey, assessing progress. Volunteers receive teacher feedback twice yearly, in late fall/early winter, and again toward the end of the year. Teachers also have the opportunity to evaluate the overall impact of the program on the classroom, and to share whether or not they would opt to host the program again. Finally, volunteers themselves are invited to provide program feedback.

Additionally, we collect disaggregated standardized reading assessment data for all classrooms served, pursuant with data sharing agreements in place with each district.

All data is collected and tracked in Salesforce and/or Efforts to Outcome software, allowing for accurate and consistent reporting and analysis.

### **Outcome measures:**

Our key outcome is improved overall **reading and literacy proficiency** and progress toward **3rd grade** benchmark for **80 students** at academic risk, as assessed by school staff. This outcome is determined by recording the student's assessed proficiency level at the beginning and end of the match.

We also look for improved **social/emotional learning skills**: Participation, Motivation, Concentration, and Self-Confidence. This information is also collected at the beginning and end of the match.

The Tutor Survey is used to measure improved **volunteer health and well-being**, self-reported.

Using a combination of teacher/tutor surveys, mentor reflection, and observation, MFS will also develop a set of of measurements related to the following over the course of the project (targeted for implementation in Spring 2018):

**Attitudinal and behavioral indicators of change** in perspective on race and age as a result of this work  
(*Data collection and targets under development*)

**Strengthened ability** of mentors to understand and approach children from communities of color through **intensified training and support in culturally responsive practices** (*Data collection and targets under development*)

Evaluation & Measurement:

- 80% of students served will demonstrate improved overall reading and literacy performance
- 80% of students served will demonstrate improved participation
- 80% of students served will demonstrate improved motivation
- 80% of students served will demonstrate improved concentration
- 85% of students served will demonstrate improved confidence
- 90% of volunteers will indicate improved health and well-being
- See above re: outcomes related to cultural responsiveness and equity- under development for Spring 2018 implementation.

Major Milestones for Project:

- Meet recruitment targets of 4 teams, 20 mentors -- **Met September/October, 2017**
- Screen, Train, and place volunteers at identified schools -- **Met September/October, 2017**
- Engage IRCO staff in conversations around volunteer engagement from communities they serve
- Participate in Age Friendly Portland conversations around increasing volunteer involvement of older adults
- Engage volunteers from immigrant and refugee communities in helping youth thrive in our 4 target schools
- Develop culturally responsive/specific framework for service delivery, including data development agenda for measuring increased cultural responsiveness, shifts in attitudes toward aging, and improved program outcomes in reducing disparities for students of color.

Anticipated Timeline:

YEAR ONE- FY17-18	Activities/Milestones
Q1 (July - Sept. 2017)	<ul style="list-style-type: none"> <li>- Volunteer Recruitment, screening, and placement.</li> <li>- Pre-Service Orientation (12 hours)</li> <li>- Program "kick-off" meetings at each school: involving volunteer team, school administration and program staff (into Q2)</li> <li>- Initial Meetings w/ IRCO leadership and staff</li> <li>- Post and recruit Community Engagement Coordinator Position</li> </ul>
Q2 (Oct. - Dec. 2017)	<ul style="list-style-type: none"> <li>- Hire and train Community Engagement Coordinator</li> <li>- Further engagement with IRCO leadership/staff/volunteers</li> <li>- Continued recruitment, screening, placement of mentors (particularly increasing recruitment in communities of color)</li> <li>- Begin development of culturally responsive/specific framework and data development agenda</li> <li>- Ongoing service delivery, team meetings, volunteer training</li> </ul>

Q3 (Jan. - Mar. 2018)	<ul style="list-style-type: none"><li>- Mid Year evaluations and volunteer meetings</li><li>- Continue development of culturally responsive/specific framework, including data collection on related outcomes</li><li>- Ongoing service delivery, team meetings, volunteer training</li><li>- Begin outreach and recruitment for '18-'19</li></ul>
Q4 (Apr. - Jun. 2018)	<ul style="list-style-type: none"><li>- Ongoing service delivery, team meetings, volunteer training</li><li>- End of year data collection and evaluation activity</li><li>- Outreach and recruitment for '18-'19</li></ul>





## PROJECT BUDGET

**EXPENSES:** please identify all expenses related to the project.

Wages	\$	135,086
Taxes & Fringe Benefits	\$	23,727
Volunteer Recognition	\$	1,250
Volunteer Training	\$	2,100
Volunteer Insurance	\$	50
Professional Fees	\$	2,500
Supplies	\$	3,600
Telephone	\$	1,200
Occupancy	\$	2,800
Local Travel	\$	600
Staff Training	\$	1,000
Administration @ 15%	\$	26,087
<b>TOTAL EXPENSES</b>	<b>\$</b>	<b>200,000</b>

**BUDGET NARRATIVE:** Please describe the anticipated costs and their role in carrying out the project.

**Personnel:**

Project Lead .50 FTE, Volunteer Recruitment Specialist .75 FTE, Program Associate .50 FTE, Volunteer Stipends Full Time Member 10 @ \$1,800 per year, Volunteer Stipends Part Time Member 10 @ \$900 Member, Encore Fellow 1000 hours per year

Benefits for the Project Lead, Volunteer Recruitment, and Program Associate include Medical, 401k, and Life & disability. Taxes include FICA, Workers Compensation, and State Unemployment. The Volunteer Stipends do not have any tax liability.

Volunteer Recognition is an annual luncheon held in May of each year to recognize the Experience Corps volunteers.

Volunteer Training, volunteers have in service trainings throughout the year on various topics to help them in working with the kids.

Volunteer Insurance is an additional policy to help cover any accidents the volunteer may have while at their site.

Professional Fees will be used for translation and interpretation services as well as guest speakers at their in service trainings.

Supplies includes office supplies and supplies needed to support volunteers.

Telephone, cell phones for Project Lead and Volunteer Recruiter and phone costs at office; land line and internet service.

Occupancy includes, rent, maintenance, utilities and insurance.

Local Travel reimbursed to staff at \$.50 per mile.

Staff Training for staff to attend local or travel to conferences.

Administration is calculated at 15% of project costs.

# Special Appropriations Grant

## Progress Report



**\*\*Please input reporting period\*\***

*[Check here if this is your FINAL Progress Report]*

☐ FINAL

<b>GRANTEE Organization Name</b>	
<b>Project Title</b>	
<b>City Program Area**</b>	

### Overall Project Status »

<b>Project Summary</b>	<i>[Describe grant project]</i>			
<b>Successes</b>	<i>[What are some of the key successes in your project so far? Is there a story you would like to share with Council and the public? Photos, graphics, and videos are encouraged! Any pictures submitted may be used on the website; please include your written permission for this use.]</i>			
<b>Challenges</b>	<i>[Describe any challenges encountered in your project so far, and how your organization has, or plans, to overcome those challenges.]</i>			
<b>Project Narrative</b>	<i>[Describe project progress during this reporting period. Please include: • latest news, • overall project status, • milestones accomplished, • data collected showing progress, • any additional comments about the project, additional photos, or supplementary documents you would like to share.]</i>			
<b>Project Finances</b>	<b>Awarded:</b>	<i>[Insert total funds awarded by City]</i>	<b>Grant Expenditures to Date:</b>	<i>[Insert grant expenses incurred to date and</i>

\* See your agreement document for project start and end dates

\*\* Refer to your application for the City Program Area

\*\*\* Use the approved budget line items from your application and agreement

## City of Portland Special Appropriations Grant Progress Report

			<i>submit with the expenditure report***]</i>
<b>Next Steps</b>	<i>[What are the next steps for this project and your organization?]</i>		

**Certification:** By signing this report, I certify that it is true, complete, and accurate to the best of my knowledge.  
*Typed or printed name and title:*

**Name:**

**Signature:**

**Date:**

*Telephone*

*Email Address*

*Date report submitted (month, day, year)*

## Invoice/Request for Payment

City Use Only	
Vendor No.	
Grant Agreement	

## Terms

Expense Period

**INVOICE TOTAL:**

\$0.00
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EEO

Approved By/Date





## Expenditure Report

Expenditure Report for Reporting Period:

[illegible]

