



GRANT AGREEMENT No. 32002750

FOR

SOUTHEAST UPLIFT NEIGHBORHOOD PROGRAM DISTRICT COALITION PROGRAM

As authorized by Ordinance No. 190937 this Grant Agreement (“Agreement”) is made effective on July 1, 2022 (“Effective Date”) by and between the City of Portland (“City”), a municipal corporation of the State of Oregon, and Southeast Uplift Neighborhood Program (“Grantee”), an organization of the State of Oregon by and through their duly authorized representatives. This Agreement may refer to the City and Grantee individually as a “Party” or jointly as the “Parties”.

The total not-to-exceed amount under this Agreement shall be **\$555,389** which consists of \$493,418 for core program operations and \$61,971 for the Neighborhood Small Grant program.

The initial term of this Agreement implementation shall be for the Fiscal Year 2022-23 (ending June 30, 2023, with the reporting period on the Neighborhood Small Grant program through February 28, 2024.) Thus the effective (end) date of the Agreement is set to February 28, 2024.

RECITALS:

1. The Office of Community & Civic Life (“Civic Life”) mission is to promote a culture of civic engagement by connecting and supporting all Portlanders working together and with government to build inclusive, safe, and livable neighborhoods and communities. Civic Life grant programs foster its long-term goals:
 - a. **Inclusive Structures**. Modeling the inclusive practices and processes we seek to promote, we will partner with diverse, self-identifying communities to:
 - Champion institutional practices for inclusion and transformational change within government structures;
 - Increase community building and civic engagement opportunities for communities working toward equitable outcomes for all Portlanders.
 - b. **Adaptive Governance**. To realize more adaptive decision-making in community and government, we will:
 - Support inclusive cross-cultural, cross-issue organizing in community to reflect the ability of resilient communities to address complex, inter-connected issues;
 - Lead internal capacity development within City government, particularly as it pertains to engaging communities toward equitable outcomes;
 - Create and hold shared space where community and government join together to identify opportunities and address shared challenges;
 - Support communities in pursuing forms of governance that reflect their lived experience, values, and aspirations.
 - c. **Fulfilled and Empowered Portlanders**. A progressive change in culture of civic engagement is foundational to long-term systemic community building and government

change. We will:

- Prioritize resources that support communities in building resilience both with and without their government;
 - Practice equitable sharing of resources;
 - Promote inclusive education, art, and play;
 - Create an environment for respectful dialogue and problem solving that acknowledges our differences as we work toward shared goals.
2. The District Coalition is a Civic Life program. District Coalition Offices have been the sole contractors with the City of Portland for this program since 1974.
 3. This Agreement shall comply with city policy ADM-4.03 – Standards for Neighborhood Associations, District Coalitions, Business District Associations and the Office of Neighborhood Involvement.
 4. This Agreement provides financial and limited staff resources from Civic Life to the recognized District Coalition Offices per City Code 3.96 to provide such services by which the people of City of Portland may effectively participate in civic affairs and work to improve the livability and character of their neighborhoods and the City.
 5. Grantee, established in 1968, has been building grassroots civic engagement.
 6. Grantee’s mission is to collaborate with the SE Portland community to build informed, inclusive, and participatory neighborhoods that support the social and ecological wellbeing.
 7. In accordance with the Fiscal Year 2022-2023 Budget, the City now desires to make a grant award to Grantee in an amount not-to-exceed **\$555,389**. THEREFORE, in consideration of the mutual promises and covenants contained herein, the parties agree as follows:

ARTICLE I SCOPE OF WORK/OUTCOME MEASURES

Grantee agrees to implement the work as described in Attachment A (Scope of Work), Attachment B (Budget), which is incorporated by reference.

ARTICLE II AGREEMENT PERIOD

The Agreement shall begin on the Effective Date and end upon the expiration date set forth on page one of this Agreement unless terminated or extended under the applicable Agreement provisions. Expenses incurred starting on Effective Date are eligible expenses for the grant funds reimbursement.

ARTICLE III SPECIFIC CONDITIONS OF THE GRANT

III.1 **Publicity**. Civic Life requires public acknowledgement for the projects and programs it supports, as outlined in the terms and conditions of your award. Unless otherwise advised in writing, an acknowledgment of Civic Life support must appear on all materials publicizing or resulting from award activities in the form of a Policy Statement. Civic Life Logo and credit line should also be used in acknowledging its support whenever possible.

An acknowledgement must be included in any materials resulting from or related to grant

award, such as articles, reports, advertisements, databases, web resources, events, fliers, other written documents, or publicity. The prominence of the acknowledgement should be in direct relationship to the level of funding provided for the project relative to other sources of funding. Where possible, Civic Life support will be mentioned in newspaper articles, radio interviews, and other media activities to extent related to Grantee's work.

III.1.a Logo: Current logo, with correct spacing, color or black and white shall be requested directly from Civic Life communications staff or assigned program staff.

III.1.b Policy Statement: The acknowledgement of Civic Life support must also include the following statement:

“Any views, findings, conclusions, or recommendations expressed in this [describe the publication: article, book, exhibition, film, program, database, report, web resource, etc.] do not necessarily represent those of the City of Portland.”

The policy statement requirement will be waived in instances when it is not feasible or appropriate to include it, such as on building plaques.

III.1.c Credit Lines: A portion of the funding for the program/project comes from Civic Life:

“The [title of this project/program/web resource/database etc.] has been made possible in part by a grant from the City of Portland, Office of Community & Civic Life.”

All funding for the program/project comes from Civic Life:

“The [title of this project/program] has been made possible through funding entirely by the City of Portland, Office of Community & Civic Life.”

III.2 City Grant Manager. City hereby appoints the following Civic Life staff 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 Grantee in writing of any change in Project Manager.

Shuk Arifdjanov
City of Portland, Office of Community & Civic Life
Address: 1120 SW Fifth, Portland OR 97212
Phone: 503-823-5917
Email: shuk.arifdjanov@portlandoregon.gov

III.3 Grantee Project Manager. Grantee hereby appoints the following staff to act as its Project Manager with regard to this Agreement. Grantee may, from time to time, designate another person to act as the Grantee Project Manager and will inform City in writing of any change in Project Manager.

Nanci Champlin
Southeast Uplift Neighborhood Program
Address: 3534 SE Main Street, Portland OR
Phone: 503-232-0010
Email: nanci@seuplift.org

- III.4 Billings/Invoices/Payment. The City Grant Manager is authorized to approve work, billings, and invoices submitted pursuant to this Agreement and to carry out all other City actions referred to herein in accordance with this Agreement.
- III.5 Report. Grantee will complete and submit to the City Grant Manager the following reports and documents:
- III.5.a Annual Report: a program narrative Annual Reporting, template included as Attachment C, no later than 30 days after 30th day of June 2023.
- III.5.b Neighborhood Small Grant Program report: upon completion of the grant projects and no later than February 28, 2024 grantee shall provide City with copies of visual documentation and evaluation reports completed by community grant recipients. Grantee shall include a cover memo confirming the completion of all grant projects.

ARTICLE IV PAYMENTS

- IV.1 The City will fund the work described in Attachment A in an amount not-to-exceed **\$555,389** for Fiscal Year 2022-23. Of this amount, (1) \$493,418 is for core program operations, and (2) \$61,971 is for distribution as part of the Neighborhood Small Grants program.

City may advance the Grantee **up to one-third of the (1) \$493,418** for core program operations. The city may advance **up to the to full amount of the (2) \$61,971** for the Neighborhood Small Grants program upon execution of this Agreement and receipt of a request.

The grantee will submit quarterly invoices using Attachment D (Invoice/Request for Payment Template) and include itemized expenses report per approved budget (Attachment B) to the City Grant Manager for approval. Reported expenses will be charged against the advance. City will pay Grantee the amount of the invoice within 10 days of the invoice date. Payments will be made after City review and approval of Grantee's invoice and periodic progress reports using Attachment C, which is due on a twice-annual basis. Grantee may submit periodic progress reports and requests for reimbursement of approved expenses in advance of the due dates. If Grantee received funds in advance which exceed actual expenditures under this Agreement, all such funds shall remain property of the City and shall be returned to the City with the full annual cost accounting.

- IV.2 If for any reason Grantee receives a grant payment under this Agreement and does not use grant funds, provide required services, or take any actions required by the 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.
- IV.3 Grant payments under this Agreement may be used only to provide the services or take the actions listed in Attachment A and expenses listed on Attachment B and shall not be used for any other purpose. Any changes to the Scope of Work (Attachment A) and approved Budget (Attachment B) must be authorized in writing by the City Grant Manager before any expenditure of funds in new amounts or line items.
- IV.4 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.

- IV.5 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 279C, Oregon administrative rules, or city code.
- IV.6 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

- V.1 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 30 days after written notice from City. If the breach is of such nature that it cannot be completely remedied within the 30-day cure period, Grantee shall commence cure within the 30 days, notify City of Grantee 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.
- V.2 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.
- V.3 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.
- V.4 Non-Inclusive Remedy 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.
- V.5 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

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.

- V.6 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.
- V.7 Amendments and/or extending Agreements. Amendments and/or extending grant agreements may be agreed to and executed by the Director of the Office of Community & Civic Life or their designee, including but not limited to adjustments approved by City Council during the Fall Budget Monitoring Process, provided such amendments have been approved as to form by the City Attorney. Civic Life 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. Civic Life is also authorized to amend the grant agreements outlined in the Ordinance # 190937 and extend the Agreement by including new annual allocations for the following fiscal year, FY 2023-24 pending availability of funds and adoption of the FY 2023-24 budget by Council.
- V.8 Respectful Workplace Behavior, Non-discrimination; Civil Rights. The City is committed to a respectful work environment free of harassment, discrimination, and retaliation and other inappropriate conduct. Each individual has right to a work in a professional atmosphere where all individuals are treated with respect and dignity. The City Human Resources Administrative Rule 2.02 covers all employees of the City as well as Contractors, vendors, or consultants who provide services to the City. Grantee shall comply with HRAR 2.02 Prohibition Against Workplace Harassment, Discrimination and Retaliation (Documents is maintained in the Auditor's Office Portland Policy Documents)

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, disability status, familial status, sexual orientation, gender identity or expression, 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 other agreements for work funded under this Agreement, except agreements governed by Section 104 of Executive Order 11246.

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 other agreements for work funded under this Agreement, except agreements governed by Section 104 of Executive Order 11246.

- V.9 Maintenance of and Access to Records. Grantee shall maintain all books, vendor receipts, and evidence of payment for materials and services, time records and evidence of payment for program wages, salaries and benefits, general organizational and administrative information, documents, papers, and records of Grantee that are related to this Agreement or Grantee's performance of work or services related to the fund opportunity, for four years after City makes final grant payment or the termination date of this Agreement, whichever is later. The City may examine, audit, and copy Grantee's books, documents, papers, and records relating to this Agreement at any time during the records retention period listed above upon reasonable notice. Copies of applicable records shall be made available upon request.
- V.10 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 during this Agreement and during the four-year period established above. 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.
- V.11 Indemnification. 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.
- V.12 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. Grantee shall not commence work until Grantee has met the insurance requirements in this section and Grantee has provided insurance certificates approved by the City Attorney. Grantee shall acquire insurance issued by insurance companies or financial institutions with an AM Best rating of A- or better and duly licensed, admitted and authorized to do business in the State of Oregon.
- V.12.a Insurance Certificate. As evidence of the required insurance coverage, Grantee shall provide compliant insurance certificates, including required endorsements, to the City prior to execution of the Agreement. The certificates shall list the City as certificate holder. Grantee shall maintain continuous, uninterrupted coverage for the Term of this Agreement and to provide insurance certificates demonstrating the required coverage for the Term of this Agreement. Grantee's failure to maintain insurance as required by this Agreement constitutes a Material Breach of this Agreement. Grantee must notify the City in writing 30-calendar days prior to a cancellation, non-renewal, or changes to the insurance policy.

V.12.b Additional Insured. For commercial general liability coverage, Grantee shall provide City with a blanket additional insured endorsement form that names the City of Portland, Oregon, and its officers, agents, and employees, as an additional insured. The additional insured endorsement must be attached to the general liability certificate of insurance.

V.12.c Insurance Costs. Grantee shall be financially responsible for all premiums, deductibles, self-insured retentions, and self-insurance.

V.12.d Coverage Requirements. Grantee shall comply with the following insurance requirements:

V.12.d.1 Commercial General Liability. Grantee shall acquire commercial general liability (“CGL”) and property damage insurance coverage in an amount not less than **\$2 million per occurrence** for damage to property or personal injury arising from Grantee’s work under this Agreement.

- Required and attached
- Reduced by Authorized Bureau Director
- Waived by Authorized Bureau Director

V.12.d.2 Automobile Liability. Grantee shall acquire automobile liability insurance to cover bodily injury and property damage in an amount not less than **\$2 million for each accident**. Grantee’s insurance must cover damages or injuries arising out of Grantee’s use of any vehicle.

- Required and attached
- Reduced by Authorized Bureau Director
- Waived by Authorized Bureau Director

V.12.d.3 Workers’ Compensation. Grantee shall comply with Oregon workers’ compensation law, ORS Chapter 656, as it may be amended. If Grantee is required by ORS Chapter 656 to carry workers’ compensation insurance, Grantee shall acquire workers’ compensation coverage for all subject workers as defined by ORS Chapter 656 and shall maintain a current, valid certificate of workers’ compensation insurance on file with the City for the entire period during which work is performed under this Agreement. Grantee shall acquire workers compensation coverage in an amount not less than **\$1 million each accident, \$1 million disease each employee, and \$1 million disease policy limit**.

- Required and attached
- Reduced by Authorized Bureau Director
- Proof of exemption (Complete Independent Certification Statement)

V.12.d.4 Physical abuse and sexual molestation liability. Grantee shall acquire and keep in effect during the term of this Agreement, Physical abuse and sexual molestation liability insurance as an endorsement to the commercial general liability policy in a form and with coverage that are satisfactory to the City covering damages arising out of actual or threatened physical abuse, mental injury, sexual molestation, negligent hiring, employment, supervision, investigation, reporting to proper authorities, and retention of any person for whom the Grantee is responsible including but not limited to Grantee and Grantee’s

employees and volunteers. Policy endorsement's definition of an insured shall include the Grantee, and the Grantee's employees and volunteers. Coverage shall be written on an occurrence basis in an amount of not less than **\$ 1 million per occurrence**. Any annual aggregate limit shall not be less than **\$3 million**. These limits shall be exclusive to this required coverage. Incidents related to or arising out of physical abuse, mental injury, or sexual molestation, whether committed by one or more individuals, and irrespective of the number of incidents or injuries or the time period or area over which the incidents or injuries occur, shall be treated as a separate occurrence for each victim. Coverage shall include the cost of defense and the cost of defense shall be provided outside the coverage limit.

Required and attached

Waived by Authorized Bureau Director

- V.13 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.
- V.14 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.
- V.15 Conflict of Interest. No City officer or employee, during his, her, or their tenure or for two years thereafter, shall have any interest, direct or indirect, in 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.
- V.16 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.
- V.17 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 Equal Employment Opportunity (EEO) and Equal Benefits (EB) certified by City to be eligible to receive grant funds.
- V.18 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 City Grant Manager within 30 days of audit completion or upon request by the City Grant Manager.

- V.19 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.
- V.20 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.
- V.21 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 City 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.
- V.22 Third Party Beneficiaries. There are no third-party beneficiaries to this Agreement and may only be enforced by the Parties.
- V.23 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.
- V.24 NOTICE: All notices to, and other written communication between the Parties shall be deemed received five-business days after being sent by first class mail, or upon receipt when sent by courier services, or by e-mail. All notices and written communications shall be sent to the Parties set forth on Article III.2 and III.3 of the Agreement, or to such other places as they may designate by like notice from time to time. Each Party shall provide written notice of any changes to the Party's contacts within 30-calendar days.
- V.25 Termination or amendment by failure to receive adequate funding. The City may terminate or amend these grants if it fails to receive funding, appropriations, limitations or other expenditure authority sufficient to allow the City, in the exercise of its administrative discretion, to continue to make payments for the performance of this Agreement.

GRANTEE



Authorized Signature

September 8, 2022

Date

Nanci Champlin – Executive Director

Address: 3354 SE Main, Portland, OR 97214.

Phone: 503-232-0010

Email: nanci@seuplift.org



CITY OF PORTLAND, OREGON

Contract No. 32002750

Contract Description: SE UPLIFT DCO BASE +SMALL GRANTS FY22/23

CITY OF PORTLAND SIGNATURES:

By:  Date: 09/14/2022

Bureau Director

By: N/A Date: _____

Purchasing Agent

By: N/A Date: _____

Elected Official

Approved:

By:  Date: 09/14/2022

Office of the City Auditor

Approved as to Form:

By:  Date: 09/14/2022

Office of City Attorney

**ATTACHMENT A:
SCOPE OF WORK & EXPECTED OUTCOMES**

ORGANIZATIONAL GOALS

Does your DCO have a focus diversity, equity, or inclusion project, or historically under-served population or goals for the current grant year? Enter any organization goals or focus areas that will help tell the story of your work plan for grant year 2022/23. (This is optional, no more than 150 words).

While equity is at the heart of all SE Uplift activities, during this period we will prioritize outreach, engagement and partnership-building efforts with four communities: renters, the disabled, young adults, and Indigenous community groups and individuals. Working in collaboration with these constituencies, we will uplift their efforts, collaborate on projects, and design tools to help the 20 Neighborhood Associations (NAs) in our district diversify their programming and leadership to include more voices from these underserved communities. Recognizing that many NAs in our district are not sure where to start in diversifying participation in their efforts, we seek to collaborate with organizations and individuals representing disability and tenant rights to produce toolkits for helping NAs better reach these populations, provide welcoming and accessible programming that serves their interests, and commit to ensuring a seat at the table for them among NA board and committee structures. We will also launch an initiative to amplify Indigenous voices throughout the district and develop and disseminate best practices for the adoption of land acknowledgements throughout the district. Our small grants program will invite applications for projects that serve these communities.

ACTIVITIES, DELIVERABLES + RESULTS

List activities, deliverables, and anticipated result or short-term outcomes in each engagement category below that is appropriate for your DCO.

A) OUTREACH AND COMMUNICATION: *SE Uplift will maintain and expand robust communication channels across their coalition area which allows important information to be shared widely and for community to engage with city government. SE Uplift will also conduct outreach and public involvement on behalf of Civic Life and other City Bureaus and support other volunteer-led groups to conduct engagement to advance the common good.*

| ACTIVITY | DELIVERABLES | ANTICIPATED RESULT |
|--|---|--|
| Sustain existing and build new partnerships with underserved communities to identify opportunities for collaboration and engagement in civic activities, and to support and amplify their presence in the district community | Promote at least 24 events, trainings, or announcements from underserved communities across our communications channels Provide a stipend for a houseless neighbor to participate in SEUL’s Houselessness Action Committee | An increase in diversity of stakeholders engaging in and sharing information within the DCO ecosystem An increase in diversity and type of content being shared via DCO |

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| | | <p>communications channels</p> <p>Increase in diversity of DCO audience receiving our communications across channels</p> |
| <p>Amplify Native voices, activities, businesses and issues throughout the district.</p> | <p>Partner with at least 2 Indigenous-led organizations or leaders to inform a SEUL action plan for deepening support for this community</p> <p>Promote free use of SE Uplift’s conference room for Indigenous-led events / host at least 2 Indigenous-led events (<i>also see Office Space</i>)</p> | <p>Visibility of the Indigenous community is increased throughout the district and a pathway is created toward SEUL modeling the authentic use of its land acknowledgment</p> |
| <p>Strengthen relationship with Black & Beyond the Binary Collective and Portland United Against Hate</p> | <p>Partner with these organizations through one joint program activity each, and through our fiscal sponsorship services</p> | <p>Stronger relationships with stakeholder organizations from underserved communities</p> |
| <p>Collaborate on programming with at least 1 group representing the disabled community</p> | <p>Produce a hybrid meeting toolkit that promotes accessibility best practices (<i>Also see Training and Skill Building</i>)</p> <p>Increase accessibility signage at SE Uplift’s headquarters</p> <p>Expand free access to conference space at SE Uplift to disability-led events / host at least 2 disabled-led events</p> | <p>Greater understanding of accessibility best practices among stakeholder organizations</p> <p>SE Uplift strengthens its relationship with the disability community</p> |
| <p>Collaborate with renter groups and NAs to develop a toolkit to help NAs boost engagement among renters in their activities and leadership</p> | <p>Produce 1 toolkit outlining strategies for reaching renters (<i>also see Training and Skill Building</i>)</p> | <p>NAs have implementable strategies for increasing participation among renters in their neighborhoods</p> |
| <p>Attend district partner organization events, activities, and meetings to share information, provide</p> | <p>Attend at least 50 NA meetings and events</p> <p>Attend at least 3 street fairs and other business district activities in the coalition area</p> | <p>Stronger relationships with district stakeholders</p> |

| | | |
|---|---|--|
| <p>support, and build relationships</p> | <p>Attend at least 10 activities hosted by our tenants, grantees, and fiscally sponsored projects</p> | <p>A more interconnected, informed, and engaged district</p> <p>Greater awareness of the support SEUL offers to community stakeholders</p> |
| <p>Maintain Civic Life online directory with current contacts, meeting schedules, and governing documents for District Coalition and NAs <i>(required)</i></p> | <p>Survey NAs 3 times during the FY</p> <p>Promote the Civic Life directory in SEUL monthly e-news</p> | <p>Community has access to accurate DCO and NA contacts, bylaws and meeting details in order to participate in the system</p> |
| <p>Provide regular communications to the community to publicize the dates, times and locations of meetings, community events, civic engagement opportunities and other related activities in the community. <i>(required)</i></p> | <p>Publish 12 district-wide e-newsletters with a 40% open rate, 12 Hey Neighbor flyers (specifically for NA boards) with a 40% open rate, and at least 25 social posts that grow our channels by 5% and do the following:</p> <ul style="list-style-type: none"> - Direct audiences to our online district-wide calendar of NA and DCO meetings and events - Promote City, DCO and NA efforts to recruit participation on boards, commissions, advisory groups, committees, and task forces - Promote events, activities, annual elections, voices, organizations, and issues of importance to all stakeholders throughout the District Coalition area - Contribute relevant content to Civic Life’s website, e-news and social channels at least 6 times | <p>A more informed and civically engaged district in community and city-wide affairs</p> |
| <p>Maintain a District Coalition website <i>(required)</i></p> | <p>Evaluate site map to improve user experience</p> <p>Publish DCO meeting agendas and minutes</p> <p>Maintain DCO and NA meetings calendar and promote new feature for submitting events for promotion</p> <p>Maintain online repository of tools, trainings and resources</p> | <p>District stakeholders and community members have anytime-access to our support resources</p> <p>Audiences understand who SEUL is, what we do, and the value we add to the community</p> |

| | | |
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| | Pilot the creation of an online learning module on at least one topic | |
|--|---|--|

Explain. How do the activities and deliverables listed above align with and advance Civic Life’s long-term goals? Specifically, does your work plan strategy include support for and participation from historically underserved groups and individuals? Anticipated results should support your explanation (200 words).

The SE Uplift deliverables proposed above will support Civic Life’s commitment to fostering **Inclusive Structures** through activities that build a more interconnected, informed, and engaged district. We will:

- Model communications best practices for promoting civic engagement opportunities with and among a diverse array of underserved groups;
- Create pathways to leadership for historically underserved groups – specifically the disabled, renters, and Indigenous peoples – to become active in their neighborhood and at the City level; and
- Equipping Neighborhood Associations with tools for diversify their programming and who is seated at their board and committee tables.

Our efforts will reflect the City’s Adaptive Governance priority by supporting inclusive, cross-cultural, cross issue organizing in community top reflect the ability of resilient communities to address complex, inter-connected issues.

B) ORGANIZATIONAL SUPPORT: Support volunteer-led groups, including historically-underserved groups, to follow state and local laws and best practices to operate, develop, and implement projects and activities that facilitate civic engagement and benefit the community.

| ACTIVITY | DELIVERABLE(S) | ANTICIPATED RESULT(S) |
|---|---|--|
| Assist stakeholder organizations with limited reproduction and distribution of print and/or electronic newsletters, meeting notices and minutes | Print and/or design materials for at least 10 NA or fiscally-sponsored events, elections or meetings | Stakeholder groups better equipped to communicate with and serve their communities |
| Offer General Liability and Directors and Officers insurance coverage to NAs. (GL is required) | 20 NAs have \$2M liability coverage for each of their events At least 15 NAs have insurance for their Directors and Officers (some 501c3s already have) Explore expanding liability coverage to fiscally-sponsored projects / Encourage NAs to partner with fiscally-sponsored projects on events | NAs have insurance that allows them to host events Increased collaboration between NAs and other community groups |

| | | |
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| | | |
| Provide \$20,000 in communications funds to help stakeholders promote activities in the district | 20 NAs and/or 10 other community-based organization increase awareness in their activities and/or make investments in their communications capacity | The communications capacity of district stakeholders is increased |
| Provide guidance to NAs seeking to update their bylaws | Host 1 Q+A session for NAs to consult the Center for Nonprofit Law on changes to their bylaws that is attended reps from at least 5 NAs Recommend updates to the City's outdated NA bylaws template based on changes in state law | NA bylaws are informed by nonprofit best practices, ONI Standards and state law |
| Provide board election support and oversight for NAs | Provide 20 NAs with access to neutral guidance and assistance on election promotion, ballot creation, facilitation, tallying and oversight for their annual board election. Attend at least 15 NA elections. | The community trusts the integrity of the NA election process |
| Provide training on board roles and responsibilities to key stakeholders | Distribute board member and officer orientation packets and hold 2 orientations on NA board member roles and responsibilities (<i>also see Document Management</i>) 3 fiscally sponsored projects receive training on how to build their boards Share the Board Roles + Responsibilities training provided to SE Uplift with other DCOs and district stakeholders | The leadership bodies of district stakeholders is strengthened |
| Provide capacity-building support and resources to grantees, fiscally sponsored projects, partners, NAs and other community groups | Support 3 fiscally sponsored organizations representing marginalized communities in becoming a 501c3 organization Produce a 4-part organizational development workshop series based on stakeholder needs and attended by at least 10 stakeholder organizations (e.g. board development, budgeting, governance policies, etc) | Volunteer led groups are in compliance with state laws and have solid governing structures and practices to guide them |

| | | |
|--|---|--|
| | <i>Also see Small Grants Program.</i> | |
| Incubate grassroots organizations through a robust and inclusive fiscal sponsorship program | 3 new organizations from historically underrepresented groups become fiscally sponsored by SEUL Establish an e-newsletter for communicating to our Fiscally Sponsored Projects | Our fiscal sponsorship program serves more diverse community groups and helps them to grow their efforts |
| Offer fiscally sponsored projects a robust online fundraising platform to grow support for their cause | 10 fiscally-sponsored organizations adopt the new fundraising tool Provide at least one training on how to utilize the new tool attended by 10 organizations | District stakeholder groups increase their development capacity |

Explain. *How do the activities and deliverables listed above align with and advance Civic Life’s long-term goals? Specifically, does your work plan strategy include support for and participation from historically underserved groups and individuals? Anticipated results should support your explanation (200 words).*

The activities above will support communities in pursuing forms of governance that reflect their lived experience, values, and aspirations by equipping them with internal capacity-building support for growing their efforts and achieving equitable outcomes. Through our fiscal sponsorship program especially, SE Uplift incubates nascent grassroots-driven solutions to community needs. Increasingly, we are attracting groups outside of our Small Grants Program from underserved communities that seek a trusted fiscal sponsor to help them adopt nonprofit organizational best practices. Additionally, some of the groups that we currently fiscally sponsor (e.g. Portland Through a Latinx Lens, and Portland United Against Hate) are moving toward becoming independent 501c3 nonprofit organizations and SE Uplift intends to guide them on that path.

C) TRAINING & SKILL BUILDING: *Ongoing education cultivates leadership at all levels in the community, supports neighborhood and community volunteers in building personal knowledge of relevant community issues, and builds capacity for inclusive public engagement and equitable community building.*

| ACTIVITIES | DELIVERABLES | ANTICIPATED RESULT |
|--|---|---|
| Foster collaboration among groups and volunteers around community issues | Produce 10 district-wide Land Use + Transportation Committee meetings to build knowledge, skills and collaborate on current topics (Community Initiated Safe Streets, climate resilience) Produce 10 district-wide Houselessness Action Committee meetings and convene a | Greater alignment and momentum among groups and volunteers for solutions and resources that improve communities |

| | | |
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| | <p>district-wide summit to spotlight successful neighborhood solutions to the crisis, share resources, and collaborate</p> <p>Host a webinar that promotes neighborhood-level strategies for addressing hate violence</p> <p>Establish a Civic Engagement Committee that develops at least 2 civic-themed webinars attended by at least 40 people, and that tracks and promotes opportunities for the public to engage with City, County and Metro government</p> | <p>Greater representation among underserved communities in decision-making bodies</p> <p>Greater fluency around civic issues and how to become engaged</p> |
| <p>Deliver tools and trainings that build core nonprofit skills, promote sector best practices, and develop the capacity for inclusive public engagement</p> | <p>Iterate upon the successful FY21-22 Land Use Leadership Academy by providing a comprehensive training curriculum for 12 emerging diverse community leaders</p> <p>Provide one Land Use 101 training on Land use policies and practices attended by 10 neighborhoods</p> <p>Provide Land Use consultations to individuals and groups throughout the district as needed</p> <p>Provide 2 trainings on conducting hybrid meetings that are accessed by at least 10 organizations</p> <p>Provide a 4-webinar series on outreach and communication best practices attended by at least 10 organizations (<i>topics TBD by survey</i>)</p> <p>Provide a 4-webinar series on Diversity, Equity, Inclusion and Access topics and promote SEUL’s Equity Lens and DEIA Code of Ethics tools attended by at least 10 organizations (<i>topics TBD by survey</i>)</p> <p>Provide a 3-webinar series on fundraising best practices attended by at least 10 organizations (<i>topics TBD by survey</i>)</p> <p>Provide customized technical support that helps scale up the efforts of 3 fiscally sponsored organizations serving marginalized communities</p> | <p>Emerging diverse leaders gain skills to navigate Portland’s land use and transportation system in their community</p> <p>District groups adopt best practices for more welcoming, inclusive and accessible meetings that boosts attendance</p> <p>Increased knowledge of participants on DEIA concepts and why it’s important</p> <p>Community groups to build their capacity to fundraise and conduct effective communications</p> |

| | | |
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| | | |
| Provide tools, methods and best practices to assist community groups in increasing involvement by underrepresented groups in their activities and leadership | Support 1 internship that presents at least 10 NAs with demographic data about who is living in their community 10 Neighborhood Associations adopt plans for diversifying their outreach and leadership Produce and disseminate 1 toolkit on strategies for engaging renters utilized by at least 10 district NAs | Neighborhood associations become more inclusive and diverse in membership Neighborhood Associations create a culture of belonging for renters and young adults living in the neighborhood. |

Explain. *How do the activities and deliverables listed above align with and advance Civic Life’s long-term goals? Specifically, does your work plan strategy include support for and participation from historically underserved groups and individuals? Anticipated results should support your explanation (200 words).*

These training and skill-building activities and deliverables above align with Civic Life’s Inclusive Structures, Adaptive Governance, and Fulfilled and Empowered Portlanders goals by:

- *Increasing community building and civic engagement opportunities for communities working toward equitable outcomes for all Portlanders;*
- *Supporting inclusive cross-cultural, cross-issue organizing in community to reflect the ability of resilient communities to address complex, inter-connected issues such as housing and economic stability;*
- *Creating and holding shared space where community and government join together to identify opportunities and shared challenges; and*
- *Creating an environment for respectful dialogue and problem solving that acknowledges our differences as we work toward shared goals.*

D) DOCUMENT MANAGEMENT: *DCOs are tasked with specific document management for neighborhood associations for transparency purposes. All the activities in this section are required.*

| ACTIVITY | DELIVERABLES | ANTICIPATED RESULT |
|---|--|--|
| Promote document retention best practices for Neighborhood Associations and the District Coalition: Collect and store Neighborhood Association election ballots for 60 days post-election. <i>(required)</i> | Documents saved for 20 Neighborhood Associations. 20 Neighborhood Associations are in good standing with DOJ and SOS. | ONI Standards, State and Federal regulations are met |

| | | |
|---|--|--|
| <p>Collect and archive Neighborhood Associations and District Coalition meeting notes and sign-in sheets. <i>(required)</i></p> <p>Collect and deliver to Civic Life copies of updated District Coalition and Neighborhood Association bylaws, articles of incorporation, and records of tax-exempt status as provided to the coalition office. <i>(required)</i></p> <p>Assist member Neighborhood Associations, as requested, with tracking deadlines, completing, and filing of annual reports with the Oregon Secretary of State Corporation Division, the Oregon State Department of Justice, and the IRS. <i>(required)</i></p> <p>Maintain and file development notices and notify NAs as needed</p> | | |
|---|--|--|

Explain. *N/A, these activities are required.*

OFFICE SPACE: *Maintain an office within the District Coalition Office area that can accommodate the district staff and that is open and accessible to the community with reasonably accessible, safe, and healthy workspaces.*

| ACTIVITY | DELIVERABLES | ANTICIPATED RESULT/S |
|---|--|--|
| <p>Maintain an office within the District Coalition area that accommodates district staff and that is open and accessible to the community with reasonably affordable, safe, and healthy workspaces</p> | <p>At least 80% of office space is rented to groups who support underserved communities (e.g United Congolese Community Organization, Portland United Against Hate, Black & Beyond the Binary Collective, Farmland Produce Distribution Project.)</p> <p>Accept mail for at least 20 district NAs and 2 BDAs</p> | <p>Office space meets the needs of DCO staff, stakeholders and the community</p> |

| | | |
|---|---|--|
| | | |
| <p>Offer meeting and storage space to community-based organizations that prioritizes the needs of underserved communities</p> | <p>Waive conference room fees for all Black, Indigenous and disabled-led events</p> <p>Equip and promote our 2 conference rooms as hybrid-ready meeting spaces</p> <p>Provide no-cost storage units to 2 community groups that distribute equipment to houseless, immigrant, and disabled neighbors</p> <p>Install wayfinding signage that draws attention to the building’s accessibility features</p> | <p>Communities hardest hit by COVID-19 have a low-barrier space to convene and store necessities as hybrid meetings become the new post-pandemic norm for community gatherings</p> |
| <p>Partner with the Energy Trust of Oregon to upgrade our HVAC system</p> | <p>100% of tenant offices and conference spaces have efficient heating and cooling</p> | <p>A smaller building carbon footprint that supports climate resiliency goals</p> |
| <p>Coordinate at least 2 environmental education and stewardship events that engage the public in learning about our native landscape</p> | <p>20 volunteers attend 2 events</p> | <p>Greater public awareness of the benefits of native landscapes and improved habitat for wildlife, and control of stormwater runoff</p> |
| <p>Prioritize service contracts with businesses that are locally-owned and run by women, BIPOC and LGBTQ+ community members</p> | <p>1 rubric is developed for evaluating vendors</p> <p>At least 60% of SE Uplift’s vendors are run by people from marginalized communities</p> | <p>Enhanced economic prosperity for marginalized communities</p> |

Explain. How do the activities and deliverables listed above align with and advance Civic Life’s long-term goals? Specifically, does your work plan strategy include support for and participation from historically underserved groups and individuals? Anticipated results should support your explanation (200 words).

The activities and deliverables outlined in the Office Space section above exemplify the practice of equitably sharing resources that is embodied in the City’s Fulfilled and Empowered Portlanders recital. By leveraging our building as a community asset, we extend to historically underserved and marginalized communities safe and accessible spaces to gather and work. Our office and meeting rental contracts are

crafted with a lens toward equity and accessibility, and we prioritize the needs of these populations in our decision-making. All of the organizations renting office space and borrowing storage space from SE Uplift represent and/or serve communities most marginalized in society.

As we emerge from the pandemic and begin returning to in-person meetings, one thing is becoming increasingly clear: Zoom is here to stay. Therefore, to accommodate participation from as many people as possible in meetings, events, and activities we will equip our two conference spaces with hybrid-ready technology. Outside of this grant, SE Uplift will seek grant and partnership support for upgrading our building systems, amenities and structure to make it more safe, comfortable, accessible and climate resilient.

E) COMMUNITY SMALL GRANTS PROGRAM: *This program is one of the most effective ways to directly support neighborhood, business, and community-based organizations with capacity building and engagement efforts. Priority should be given to projects that engage historically under-represented and under-served communities.*

| ACTIVITY | DELIVERABLES | ANTICIPATED RESULT/S |
|--|--|---|
| Design, launch and promote a small grant program that meets the required purpose and community need <i>(required)</i> | Promote the grant opportunity to 20 organizations, groups and contacts from historically underserved communities Host 2 webinars to explain the grant requirements, process, and scoring criteria Convene a 12-volunteer Grant Review Committee to evaluate proposals using an equity lens Provide coaching and grant support to at least 2 BIPOC, LGBTQIA, disability or renter groups | Groups and individuals with marginalized identities have an increased likelihood to apply for and receive a grant |
| Award and administer a grant program to support community building activities in the coalition area. <i>(required)</i> | Provide quality fiscal sponsorship services to at least 10 nascent organizations that would not otherwise qualify to apply Host a Grantee Mixer event to celebrate grantees and promote their efforts among district and City stakeholders Attend 10 grantee events throughout the year Provide additional capacity building training and support for 5 grantees <i>(see Organizational Support and Training + Skill-building sections above)</i> | Grassroot solutions to community challenges are incubated SEUL develops stronger relationship with marginalized groups and individuals in the coalition area Grantees gain skills to scale up their organizations |

Explain. How do the activities and deliverables listed above align with and advance Civic Life’s long-term goals? Specifically, does your work plan strategy include support for and participation from historically underserved groups and individuals? Anticipated results should support your explanation (200 words).

The activities and deliverables above foster Inclusive Structures and Fulfilled and Empowered Portlanders by providing direct financial support through partnerships among neighborhood, business, and community-based organizations. Targeted outreach and additional technical assistance is provided to historically under-represented and under-served communities to increase their likelihood of applying and being awarded a grant. The grant criteria will prioritize projects that engage historically under-represented communities and promote the social and ecological well-being of our neighborhoods. The volunteer-led Grant Review Committee will utilize an evaluation rubric that most heavily weights proposals which seek equitable outcomes.

F) ADD ADDITIONAL CATEGORY (OPTIONAL): DCOs may choose to add a category that outlines the work they plan to do to uplift and support systems change, social and racial justice, or your organization’s diversity, equity, and inclusion goals (reference the Diversity & Inclusion Benchmarks document).

SE Uplift has integrated DEIA activities throughout this Scope of Work. In addition, we would very much like to participate in the Civic Life Bureau’s strategic planning process, where appropriate.

| ACTIVITY | DELIVERABLES | ANTICIPATED RESULT/S |
|---|--|---|
| Collaborate with other DCOs to share approaches to mutual challenges and more efficiently leverage our limited capacity and financial resources | Participate in at least 4 meetings with DCO partners to collaborate and exchange information (e.g. policies, trainings, strategies) | Increased camaraderie among DCOs |
| Diversify our Board of Directors | At least 2 leaders from a marginalized community/our fiscally sponsored organizations join our board One board diversity survey is completed | An expanded range of perspectives to inform SE Uplift’s strategy and governance |
| Restart and re-envision our Diversity, Equity, Inclusion and Access working group | At least 5 board members participate in our DEIA working group Working group produces at least one new tool to share with other organizations | SE Uplift’s board members |

**ATTACHMENT B:
BUDGET**

| | |
|---------------------------|---------------|
| Donations | 250 |
| Fiscal Sponsorship Fees | 10742 |
| Interest | 13 |
| Meeting Room Rent | 1777 |
| Misc. Income | 250 |
| Civic Life Grant | 493418 |
| Community Grants (Income) | 61971 |
| Tenant Rent | 52000 |

620421

Expenses

Personnel

| | |
|-----------------------|-------|
| Salaries | |
| 291940 | |
| Benefits | 47868 |
| Payroll Taxes | 29194 |
| Payroll Fees | 3000 |
| Professional Develop. | 5000 |

Total Personnel 377002

| | |
|---|------|
| Administrative Bank Service Fees | 20 |
| Copies (In-House) | 500 |
| Hospitality/Mtg. Expense | 9000 |
| Internet/Email/Telephone | 3600 |
| Mileage & Travel | 500 |
| Misc. | 200 |
| Monthly Subscriptions | 4500 |
| Non-Capital Equipment | 1500 |
| Office Supplies | 3000 |
| Permits & Filing Fees | 500 |
| Postage | 300 |
| Printing | 500 |
| Recognition | 300 |
| Service Charges | 0 |

Total Administrative 24420

| | |
|----------------------------|-------|
| Insurance Insurance | 12000 |
| Volunteer Accident | 300 |
| Workers Comp Insurance | 500 |

Total Insurance **12800**

| | | |
|------------------|---------------------|------|
| Utilities | Electricity | 3200 |
| | Garbage & Recycling | 1500 |
| | Natural Gas | 3000 |
| | Water/Sewage | 2500 |

Total Utilities **10200**

| | | |
|-----------------------------------|-----------------------------|-------|
| Building & Maintenance | Alarm System | 1500 |
| | Equipment: Repairs & Rental | 500 |
| | Janitorial Services | 6500 |
| | Landscape Expense | 5820 |
| | Property Taxes | 800 |
| | Rent Expense | 21600 |
| | Repairs & Maintenance | 6000 |

Total Building & Maint. **42720**

Professional Services

| | | |
|-----------------------|------------------------------|-------|
| | Event/Accessibility Services | 3500 |
| | Fiscal Services | 34000 |
| | Community Trainings/Events | 6000 |
| Professional Services | | 14812 |

Total Prof. Services **58312**

| | | |
|-------------------------|--|-------|
| Program Expenses | Advertising | 500 |
| | NA Communications Funds | 10000 |
| | Partner Communications Funds | 1500 |
| | Donation (Expense) | 2000 |
| | Land Use & Transportation Leadership Stipend | 6000 |
| | NA Filing Fees | 1300 |
| | Community Grants (Expense) | 61971 |

Total Program Expenses

83271 Depreciation

Depreciation
11696

Total Depreciation **11696**

Total Expenses 620421

Net Income 0

ATTACHMENT C:

REPORTING FORM

| | | | |
|--|---|----------------------------------|--------------------------------|
| Progress Report: | | <input type="checkbox"/> PARTIAL | <input type="checkbox"/> FINAL |
| Grant Agreement | | | |
| Grantee Organization Name | | | |
| Project Title | | | |
| Fiscal Year | | | |
| Overall Project Status » | | | |
| Overall Grant Program Purpose | | | |
| Project Summary | <i>[Describe grant project]</i> | | |
| Successes | <i>[Briefly, what were your goals and 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> | | |
| Challenges | <i>[Briefly, describe any challenges encountered in your project so far, and how your organization has, or plans, to overcome those challenges.]</i> | | |
| Project Status Narrative | <i>[Describe project progress during this reporting period. Please include: latest news, overall project status, milestones accomplished, recruitment strategies, evaluations, data collected, and any additional comments or documents about the project you would like to share. Please report on all 6 areas outlined in the Scope of Work of this Agreement -Attachment A]</i> | | |
| Diversity, Equity & Inclusion | <i>[How has your organization implemented and demonstrated commitment to diversity, equity, and inclusion for your program or project within your organization or community? Please provide specific examples and applicable related metrics.]</i> | | |
| Next Steps | <i>[What are the next steps for this project and your organization? Capacity</i> | | |

| | | | | |
|-------------------------|----------------------------------|---|----------------------------------|---|
| | <i>Building, Sustainability]</i> | | | |
| Project Finances | Awarded: | \$ <i>[Insert total funds awarded by City]</i> | Grant Expenditure to Date | \$ <i>[Insert grant expenses incurred to date and submit with the expenditure report***]</i> |

Specific Project Metrics »

| | |
|-------------------------|--|
| Success measures | <i>[Please report on any applicable metrics]</i> |
|-------------------------|--|

Board, Staff, and Volunteer Demographics » [See attached demographic info collection form]

| | Percentage of organization's Board of Directors | Percentage of organization's staff | Percentage of organization's current volunteers |
|---------------------------------|---|------------------------------------|---|
| African American/Black | | | |
| Latinx/Hispanic | | | |
| Asian | | | |
| Pacific Islander | | | |
| American Indian/Alaska Native | | | |
| Middle Eastern/North African | | | |
| White | | | |
| Unknown race | | | |
| Individuals under 24 | | | |
| People Living with Disabilities | | | |
| LGBTQ+ | | | |
| Renters | | | |

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: | | |
| Telephone: | | |
| Email Address: | | |
| Date report submitted (month, day, year) | | |

ATTACHMENT D: INVOICE/REQUEST FOR PAYMENT TEMPLATE

Please add the following information to a document with your organization letterhead.

Invoice/Request for Payment

To:
 City of Portland
 Office of Community & Civic Life
 1120 SW 5th Ave, Room 110
 Portland, Ave 97204

| | | | |
|------------------------|--|-----------------|--|
| Grantee | | | |
| Address | | | |
| City, State | | Zip Code | |
| Project name | | | |
| Expenses period | | through | |
| Invoice Number | | | |

| Expenses | Item Description | Total FY 2020-21 Civic Life Budget | Agreement Year to Date Expenses | Remaining Budget | Current Amount Invoiced |
|----------------------|-------------------------|---|--|-------------------------|--------------------------------|
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| Administrative costs | | | | | |

| | | | | |
|-----------------------|--|--|----|----------------|
| | | | | |
| Total Expenses | | | \$ | \$ 0.00 |
| Net amount due | | | | \$ |

| | |
|---------------------|--------------|
| Prepared by: | |
| Signature: | |
| | Date: |

NOTE: Please attach itemized expense report and/or payroll report per approved budget to this invoice.

|