

GRANT AGREEMENT NO.

This Grant Agreement is between the CITY OF PORTLAND, OREGON ("CITY" or "GRANTOR") and THE MICRO ENTERPRISE SERVICES OF OREGON (MESO or "GRANTEE") in an amount not to exceed \$85,000, to support their access to capital for African-American entrepreneurs' initiative.

RECITALS:

1. GRANTEE's mission is to improve the economic opportunities of underserved individuals through empowerment, education and entrepreneurship for the benefit of the greater community.
2. GRANTEE's access to capital for African-American entrepreneurs' initiative will address challenges and disparities that sometimes hinder The African-American community from achieving economic prosperity.
3. GRANTEE has over 12 years of experience helping small-scale entrepreneurs succeed. MESO'S staff has technical expertise in all areas of micro enterprise development and small business growth. MESO emphasizes development of a core business foundation and implementation of strategies focused on financial management, basic and advanced business planning, marketing, customer service, and streamlined and effective operations. Services are based on proven models that are shaped for the local community and individual entrepreneurs, including: one-on-one and small group technical assistance and support, mentoring/networking, business planning and goal-setting assistance, access to capital/financing that is fair and realistic for MESO's unique borrowers, credit history development and repair, access to markets, financial literacy and management skills-building, asset development, business education and training, and referrals to resources to meet business needs such as legal assistance, accountants, tax preparers, distributors, and bankers
4. GRANTEE's mission is consistent with the Council's desire for equity and inclusion, resident satisfaction, prosperous households, growing business, job growth and complete neighborhoods.
5. GRANTEE submitted a grant application for the FY 2017-18 special appropriation competitive grants process and was selected as one of the seventeen recommended to be awarded a grant.
6. In accordance with the FY 2017-18 Budget, the City now desires to make a special appropriation grant to GRANTEE in an amount not to exceed \$85,000.

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 access to capital for African-American entrepreneurs' initiative as described in ATTACHMENT A: Scope of Work, ATTACHMENT B: 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 and will terminate on June 30, 2018 unless extended in conformance with Article V, Section G or terminated in conformance with Article V, Sections A-E. Expenses incurred starting July 1, 2017 are eligible expenses for the grant funds reimbursement.

ARTICLE III – SPECIFIC CONDITIONS OF THE GRANT

- A. Publicity: During the term of this Grant Agreement, GRANTEE 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: GRANTEE shall maintain all books, 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, for ten (10) years after CITY makes final grant payment, GRANTEE has made final report, or the termination date of this Agreement, whichever is later. GRANTEE shall provide CITY prompt access to these records upon request and permit copying as CITY may require.
- C. CITY Grant Manager: CITY hereby appoints Craig Haynes to act as its Project Manager about 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.

Craig Haynes
City of Portland, OMF/Grants Management Division
1120 SW 5th Ave., Suite 1250
Portland, OR 97204
phone: 503-823-4306
email: craig.haynes@portlandoregon.gov

- D. GRANTEE Project Manager: GRANTEE hereby appoints Nita Shah to act as its Project Manager regarding 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.

Nita Shah, Executive Director
Micro Enterprise Services of Oregon
4008 NE MLK Jr. Blvd
Portland Oregon, 97212

phone: 503-841-3351
email: nshah@mesopdx.org

- E. 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.
- F. Report: GRANTEE will complete and submit to the CITY Grant Manager the signed **Final Special Appropriation Reporting Form**, included as Attachment D, no later than thirty (30) days after the completion of the project.

ARTICLE IV -- PAYMENTS

- A. GRANTEE will receive an amount not to exceed \$85,000: After the Grant Agreement becomes effective, GRANTEE will submit an invoice using CITY'S template included as Attachment D for a quarter (\$21,250.00) 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. Subsequent payments will be made after review and approval of the periodic progress reports, using Attachment C and Attachment D, due on a quarterly basis from the date of the final agreement signature. Grantee may submit periodic progress reports and requests for reimbursement of approved expenses in advance of the due dates, using templates included as Attachment C and Attachment D.
- 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 listed previously 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 279C, Oregon administrative rules, or 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. 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: Notices to Grantee under this Grant Agreement shall be sent to GRANTEE at the following address:

Nita Shah, Executive Director
Micro Enterprise Services of Oregon
4008 NE MLK Jr. Blvd
Portland Oregon, 97212
phone: 503-841-3351
email: nshah@mesopdx.org

NOTICE: Notices to Grantee under this Grant Agreement shall be sent to CITY at the following address:


Craig Haynes
City of Portland, OMF/Grants Management Division
1120 SW 5th Ave., Suite 1250
Portland, OR 97204
phone: 503-823-4306
email: craig.haynes@portlandoregon.gov

SIGNATURES:

CITY OF PORTLAND

GRANTEE

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



Name: Nita Shah
Title: Executive Director
Micro Enterprise Services of Oregon

Date: _____

Date: 1/19/18

APPROVED AS TO FORM:

APPROVED AS TO FORM


City Attorney, City of Portland
CITY ATTORNEY 1/26/18

4. Scope of Work

Please describe the following:

- What are the expected results for this project/program? This includes:

- Output measures – what are the activities to be completed? (max. 200 words)

1. Form a cohort and meet timetable for the year
2. Assist additional 50 African American Entrepreneurs with business services
3. Increase access to capital to 50 African American entrepreneurs. 25 will receive credit improvement loans, 10 will receive term loans of up to \$50,000
4. 10 will open savings accounts and MESO will match 3:1
5. 20 start-up businesses will receive market research, competitive analysis and market entry strategies
6. 10 will receive accounting, bookkeeping and tax assistance
7. 50 will participate in the survey to identify best practices to work within the community

What data will you collect to show progress? (For example, how many people do you plan to serve?) (max. 200 words)

Indicator	Measurement Tool
Number of entrepreneurs supported by technical assistance and demographics of these clients including race/ethnicity, zip code/neighborhood, and income level at start of program	Enrollment records for 50
Number of loans placed	Records for 35
Number of market research reports completed and utilized	20 reports
Number of matched savings placed	10 savings acct
Number of entrepreneurs receiving accounting support	10 records
Survey completed	30 records

- Outcome measures – what is the expected impact of these activities? (max. 200 words)

MESO expects to provide a 95% success rate in all of the above activities.

Entrepreneurship has always been a survival strategy among those who are poor, unemployed and unable to climb the economic ladders. By providing supportive and specific pathways to self-reliance, MESO entrepreneurs who are the most disadvantaged will be the new drivers of economic wealth and success, thereby altering the discourse of wealth and equity.

Outcome measures seek to quantify the outreach and impact of MESO's technical assistance programs. Impacts will also include qualitative and quantitative measures such as: numbers paying taxes, generating savings, increased assets, improved credit and bankability and inform interested parties on best practices to work in the African American community.

Community impacts include leased storefronts that lead to clean, vibrant and safe neighborhoods. William St. Market, Screw Loose, JD Shoe Repair and Jimmy Cleaners, all MESO served businesses, were the initial corner stores pocketing Fremont/Williams, Williams/Alberta, and Fremont/Vancouver. 10 years ago, before the new development they worked to secure the area from illegal activities and blight. These impacts oftentimes go unnoticed. They hired youth from the neighborhood and purchased from local businesses services such as signage, carpentry, printing etc.

MESO provides its clients the ability to be tenacious, innovative, and creative that positively impact future generations.

What data will you collect to show progress? (For example, what percent of participants reported a change in behavior before and after the activity?) (max. 200 words)

We expect the following results and will collect data via evaluation, surveys and quarterly assessments:

- 95% of the entrepreneurs will increase incomes by 25%
- 95% will receive access to capital
- 95% will improve their credit
- 95% will open matched savings accounts
- 95% will increase marketing activities through technology, and direct marketing
- 95% will have a business plan for future growth
- 95% will understand financial statements
- 95% will complete survey for best practices

- What are the major milestones that should be accomplished along the way? (max. 200 words)

A major milestone to be accomplished is establishing and enhancing credit of the entrepreneur and making financing available to grow their businesses. Besides the quantitative, we expect growth in confidence and empowerment.

A second major milestone that will be accomplished is the survey results that will inform traditional funding sources to adjust practices and policies towards African American entrepreneurs and open additional sources of capital for this community.

- What is the anticipated timeline for accomplishing these milestones? (max. 200 words)

Hire 1 Staff representing the community	Month 1
Staff Training	Month 1 to 3
Rolling Enrollment	Month 1 to 12
Complete Pre-Assessments	Month 1 to 12
Customized Plans and Implementation	Month 1 to 12
Market Research, Matched Savings	Month 1 to 12
Financing	Month 1 to 12
Survey results compiled and shared	Month 12

- What are potential challenges to this project/program, and how do you plan to mitigate those risks?
(max. 200 words)

STAFFING

Risk: Having properly-trained staff to meet goals can be challenging. Deploying additional lending capital will depend on having enough qualified staff.

Mitigation: MESO has a history of stability in staffing.

DEPENDENCE ON GOVERNMENT FUNDS

Risk: Funding from government sources is subject to the congressional budgeting process and lending capital and other support can be cut or eliminated depending on the political climate.

Mitigation: We are working toward the launch of our Impact Fund, which will attract more private investors to provide lending capital for our borrowers, thus diversifying our lending pool dollars.

REPUTATION

Risk: It is our mission to improve the economic opportunities of underserved individuals. Toward that end, we are committed to increase the number of business starts for minorities. If we don't make good on this goal we may lose our reputation in the community which could result in a loss of referrals, as well as funding.

Mitigation: Our staff is drawn from the community we serve, ensuring their ability to communicate with and assist our minority clients.

- *Please note: If awarded funding, you will be required to include the status of your outcome measures and milestones on each progress report.*

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Attachment B

Special Appropriation MESO 2017-2018

Item	City of Portland	TOTALS
Personnel	\$50,000	\$50,000
Fringe	\$7,000	\$7,000
Lending Funds	\$15,000	\$15,000
Specialized Trainings	\$13,000	\$13,000
TOTALS	\$85,000	\$85,000

Special Appropriations Grant

Progress Report



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

[Check here if this is your FINAL Progress Report]

☐ FINAL

GRANTEE Organization Name	Micro Enterprise Services of Oregon
Project Title	Access to Capital for African American Entrepreneurs
City Program Area**	Expanding Economic Opportunities for Portlanders

Overall Project Status »

Project Summary	<i>[Describe grant project]</i>			
Successes	<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>			
Challenges	<i>[Describe any challenges encountered in your project so far, and how your organization has, or plans, to overcome those challenges.]</i>			
Project Narrative	<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>			
Project Finances	Awarded:	<i>[Insert total funds awarded by City]</i>	Grant Expenditures to Date:	<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

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

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)		

Special Appropriations Grant**Invoice/Request for Payment**

All items in bold must be completed

FY2017-18 Special Appropriations Grant

City Use Only	
Vendor No.	115960
Grant Agreement	3200XXXX

Invoice No. Date Terms **Project**Access to Capital for African American
Entrepreneurs**Grantee**

Micro Enterprise Services of Oregon (MESO)

Address

4008 NE MLK Jr. Blvd,

City

Portland

State, Zip

Oregon 97212

Contact Name

Nita Shah

Contact Info.

503-841-3351; nshah@mesopdx.org

Expense Period through

Description (Budget Line Items)	Budget	Current Expenses	Expenses Previously Billed	Expenses to Date
PERSONNEL	\$50,000.00	\$0.00	\$0.00	\$0.00
FRINGE	\$7,000.00	\$0.00	\$0.00	\$0.00
LENDING FUNDS	\$15,000.00	\$0.00	\$0.00	\$0.00
SPECIALIZED TRAININGS	\$13,000.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00
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	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00
	\$0.00	\$0.00	\$0.00	\$0.00
INVOICE TOTAL:	\$85,000.00	\$0.00	\$0.00	\$0.00

For City Use Only:

DPR	
DPO	
GR	
IO	
ACH	
EEO	

Approved By/Date _____