“Community Technology Grant Agreement: NW Documentary”

Recommendation
Staff recommends that the Commission approve the 2018 Community Technology Grant agreement with NW Documentary for $47,200.

Background
At its January meeting, the Commission selected 8 Pre-Applications to invite to apply for funding. Following the Commission’s decision, MHCRC staff engaged all 8 applicants in a process to complete full grant applications and contracts.

MHCRC staff has reached agreement on a final grant application and contract with NW Documentary and recommends approval at the April meeting. NW Documentary is launching a series of new programs that will provide advanced video production tools, training, and on-going support services to emerging filmmakers. In follow up to Commissioner comments at the January meeting, staff worked with NW Documentary to more clearly define the project purpose, including clearly identifying the beneficiaries and the proposed solution and detailing outcomes specific to the impact of technology on the youth involved (see project purpose section).

There are no significant changes to the grant request.

As part of the normal grantmaking process, Comcast is given the opportunity to review all final grant applications and contracts prior to staff moving the contracts forward for Commission consideration.

Attachment: Draft Community Technology Grant Agreement: NW Documentary
Prepared By: Rebecca Gibbons
April 18, 2018
AGREEMENT FOR COMMUNITY TECHNOLOGY GRANT

This Agreement is between the Mt. Hood Cable Regulatory Commission (Commission), through the Office for Community Technology (OCT), and NW Documentary (Grantee) (together referred to as the “Parties”).

RECITALS:

This Agreement is entered into for the purpose of providing the Commission's 2018 grant funds for the Grantee's Black Filmmaker Fellowship Project.

AGREEMENT:

1. Grant Amount, Use of Grant

Grantee is awarded a total amount of $47,200.00 for specific capital costs related to the Grant project. Grantee shall use the Grant funds exclusively for the purposes outlined in its Grant Application (the "Grant"). The Grant Application is attached to this Agreement as Attachment 1. Grantee shall not use the Grant funds for any purposes other than those set forth in Attachment 1.

2. Project Manager

The Commission's Project Manager shall be Rebecca Gibbons or such other person as shall be designated in writing by the OCT Community Technology Program Manager.

3. Payments

Upon submission of an invoice from Grantee, and upon certification by the Project Manager that the invoice is in accordance with this Agreement, the Commission shall pay to the Grantee $47,200.00 as specified in the invoice within thirty (30) days after receipt of the invoice.

Grantee shall submit the invoice online through the Commission’s online grants management system using the claims module. The invoice, uploaded as an attachment to the grants management system claims module, shall be on Grantee’s letterhead, signed and dated by an authorized representative of Grantee and addressed to “MHCRC c/o City of Portland.” The invoice shall include an invoice number, the title of the Grant project and the total grant amount authorized by the Grant. If the Project Manager finds that the invoice is not in accordance with this Agreement, the Project Manager shall notify the Grantee of the reason(s) for the disallowance and non-payment.

All expenditures made from Grant funds for Grant project capital costs must be made at least sixty (60) days prior to the expiration of this Agreement.

Grantee shall repay to the Commission, thirty (30) days prior to the expiration date of this Agreement, any Grant funds that have not been expended for Grant purposes.

4. Financial Records

Grantee shall account for the Grant funds separately in its books of accounts. Grantee shall
charge only Grant-related expenditures against Grant funds.

Grantee agrees to keep accurate and complete financial records that will enable the Commission to easily determine the use of Grant funds and the allocation method of Matching Funds committed by Grantee and Project Partners in the Grant for the project. Grantee shall maintain all financial records related to the Grant for one (1) year after the termination of this Agreement. Grantee shall provide the Commission prompt access to these records upon request and permit copying as the Commission may require.

5. **Reports**

Grantee shall submit Interim Status Reports and a Final Status Report (collectively referred to as ‘Report(s)’) to the Project Manager using the Commission’s online grants management system. The Reports shall include both programmatic and financial information as established by the Commission. An example of the range of report information collected is attached to this Agreement as Attachment 2. For a Report to be acceptable to the Project Manager, the Grantee shall document and clearly describe the progress of the grant scope in accordance with the reporting schedule defined below.

Interim Status Reporting periods are May 1, 2018 through December 31, 2018; January 1, 2019 through June 30, 2019; July 1, 2019 through December 31, 2019. Interim Status Reports are due within thirty (30) days of the end of each reporting period.


Interim and Final Status Reports shall include an accurate and complete financial report of Grant fund and Matching fund expenditures. The Report shall include copies of receipts or other evidence of payment for actual grant funded capital costs incurred by Grantee related to the Grant.

The Project Manager, at her/his sole discretion, may require additional programmatic information or financial documentation of Grant project expenditures. Grantee shall make its books, general organizational and administrative information, documents, papers and records that are related to this Agreement or Grantee’s performance of services related to this Agreement available for inspection by the Project Manager or other Commission representatives during reasonable business hours following five (5) business days advance written notification from the Project Manager.

Grantee shall immediately provide notice in writing by electronic mail to the Project Manager when Grantee anticipates or realizes any deviation in the Grant project which may result in Grantee’s inability to complete the Grant project as originally submitted and approved by the Commission.

6. **Project and Fiscal Monitoring**

The Commission and the Project Manager shall monitor the Grantee’s performance on an as needed basis to assure compliance with this Agreement. Such monitoring may include, but are not limited to, on site visits at reasonable times, telephone interviews and review of required reports. Monitoring will cover both programmatic and fiscal aspects of the Grant. The frequency and level of monitoring will be determined by the Project Manager. Grantee shall remain fully responsible at all times for performing the requirements of this Agreement.
7. **Audit**

Because grant funds are derived from the cable franchises, the cable companies may conduct a financial review or audit of Grantee for the purpose of verifying whether use of capital grant funds is in accordance with the requirements of cable franchises related to use of capital grant funds. If the Commission receives notice from a cable company in accordance with the terms of the cable franchises of such audit or review, the Commission’s Project Manager shall notify Grantee within 5 business days of receiving the notice, and shall identify to Grantee the relevant financial records of Grantee that the cable company seeks to review. The scope of such audit or review of Grantee shall be consistent with the terms of the applicable cable franchise. Grantee agrees to make such relevant financial records available to cable company’s authorized representative for inspection and copying. Such records shall be reviewed during normal business hours at a time and place made available by Grantee. The Commission’s Project Manager shall promptly provide Grantee with written notice of the audit or review’s conclusions.

8. **Publicity**

Any publicity regarding the project shall indicate that the project was made possible by a Grant from the Commission through funds provided by the cable companies. Grantee shall notify the Project Manager before releasing information about the Grant to the press or other news media. The Commission may include information regarding the Grant in periodic public reports.

9. **No Other Obligations/Complete Agreement**

Grantee acknowledges that, except for the Grant, the Commission has no obligation to provide, and the Commission has not led Grantee to believe in any way (whether expressly or by implication) that the Commission will provide any additional or future assistance, financial or otherwise, either to Grantee or for the Grant project.

This Agreement contains the complete agreement of the parties. This Agreement may not be assigned, nor may any of the Commission's rights be waived, except in writing signed by a duly authorized representative of the Commission. The Commission may specifically enforce, or enjoin a breach of, the provisions of this Agreement, and such rights may be freely assigned or transferred to any other governmental entity by the Commission.

10. **Representations**

Grantee represents that it has full power and authority, and has obtained all necessary approvals, to accept the Grant, to carry out the terms of the Grant and this Agreement, and to conduct the Grant project in compliance with all applicable laws.

11. **Indemnification**

Subject to the limitations and conditions of the Oregon Constitution, Article XI, Sections 7 and 9, and the Oregon Tort Claims Act (ORS 30.260 through 30.300), the parties agree to indemnify and hold one another harmless from any loss, damage, injury, claim, or demand arising from their respective activities in connection with this Grant. Neither party shall be liable for any loss, damage, claim, or demand arising from the negligence of the other party or its agents or employees.
12. Compliance with Laws

The Commission and Grantee agree to comply with all applicable local, state and federal laws and regulations that apply to the subject matter of this Agreement.

13. Amendment

The Project Manager is authorized to amend the terms and conditions of this Agreement, provided such changes do not increase the Grant amount or the Commission’s financial risks or change the purpose of the Grant. If approved such amendments shall only be effective if in writing, and signed by duly authorized representatives of both Parties. Any change in the amount of the Grant funds or the financial risks under this Agreement must be approved by vote of the Commission.

14. Term of the Agreement

This Agreement becomes effective on May 1, 2018, unless Grantee fails to sign and return the Agreement to the Commission within thirty (30) days of Commission action to approve the Agreement, in which event this Agreement shall be null and void. The term of this Agreement is through, and including, September 30, 2020.

15. Early Termination of Agreement

This Agreement may be terminated prior to the expiration of its term by:

(a) Written notice provided to Grantee from the Commission before any obligations are incurred; or

(b) Mutual written agreement of the Parties.

Termination of this Grant shall be without prejudice to any obligations or liabilities of either party already accrued prior to such termination. However, upon receiving a notice of termination, Grantee shall immediately cease all activities under this Grant, unless expressly directed otherwise in writing from the Commission in the notice of termination. Further, upon termination, the Commission and/or Grantee shall deliver to the other party all works-in-progress and other property that are or would be deliverables had the Grant been completed. Grantee shall be entitled to receive reasonable compensation as provided for under this Agreement for any satisfactory work completed up until the time of notice of termination.

16. Material Failure to Perform

The Project Manager may terminate this Agreement after determining that Grantee has failed to comply with any material term or condition of this Agreement. It shall be a material breach and cause for termination of this Agreement if Grantee uses grant funds outside the scope of this Agreement.

Notice and Opportunity to Cure. The Project Manager shall give Grantee written notice of the intent to terminate this Agreement, identifying the reasons for such action. Grantee shall have thirty (30) days from the date of the written notice to cure the breach. If the breach is of such nature
that it cannot be completely cured by Grantee within the thirty (30) day period, then Grantee shall submit a cure plan to the Project Manager no later than fifteen (15) days from the date of the written notice. Grantee’s cure plan shall include actions, steps, and a time period to cure the breach. Grantee must obtain written consent from the Project Manager to proceed with a cure plan under an extended cure period.

No Payment During Cure Period. During the cure period or extended cure period, the Commission is under no obligation to accept or pay invoices submitted by Grantee under this Agreement. Grantee shall not perform services or take actions that would require the Commission to pay grant funds to Grantee without the written consent of the Project Manager. Grantee shall not spend unused grant funds and such unused funds shall be solely held in trust for the Commission. Grantee shall be solely responsible for any expenses associated with cure of its noncompliance or failure to perform.

Cause for Termination. If Grantee fails to cure the material breach within thirty (30) days of the written notice of termination, or if Grantee does not receive consent from the Project Manager to proceed with a cure plan and executes the cure plan satisfactory to the Project Manager, then the Commission may, at its sole discretion, require Grantee to refund to the Commission any amounts improperly expended, any unexpended amounts or the full amount of Grant funds paid by the Commission to Grantee for the Grant project in compliance with the terms and conditions of this Agreement.

17. Suspension of Work

The Project Manager may at any time give notice in writing to Grantee to suspend work and expenditure of funds provided under this Agreement. The notice of suspension shall specify the date of suspension and the estimated duration of the suspension. Grantee shall immediately suspend work and expenditure of funds to the extent specified. During the period of the suspension Grantee shall properly care for and protect all projects in progress including materials, supplies, and equipment that are on hand for performance of the Grant. The Project Manager may, at any time, withdraw the suspension of work as to all or part of the suspension in written, by electronic mail, notice to Grantee specifying the effective date and scope of withdrawal. Grantee shall then resume diligent performance of the work. In no event shall Grantee be entitled to any incidental or consequential damages because of suspension.

The causes for suspension of work include, but are not be limited to, Project Manager’s concerns about Grantee’s ability to complete the Grant in accordance with this Agreement or any other non-compliance with the Agreement.

18. Non-Discrimination

In carrying out activities under this Agreement, Grantee shall not discriminate against any employee or applicant for employment on the basis of race, color, religion, age, sex, marital or economic status, familial status, national origin, sexual orientation, disability or source of income. Grantee shall take actions to insure that applicants for employment are employed, and that employees are treated during employment, without regard to their race, color, religion, age, sex, marital or economic status, familial status, national origin, sexual orientation, or disability. Such action 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 state that all
qualified applicants will receive consideration for employment without regard to race, color, religion, age, sex, marital or economic status, familial status, national origin, sexual orientation, disability or source of income. In regard to carrying out activities under this Agreement, Grantee shall further not arbitrarily refuse to provide services to any person and shall not discriminate in offering services on the basis of race, color, religion, age, sex, marital or economic status, national origin, sexual orientation, disability or source of income.

19. **Severability**

Commission 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.

20. **Choice of Law and Choice of Forum**

This Agreement shall be construed according to the laws of the State of Oregon, without regard to its provisions regarding conflict of laws. Any litigation between the Commission and Grantee arising under this Agreement or out of work performed under this Agreement shall occur, if in the state courts, in the Multnomah County court having jurisdiction thereof, and if in the federal courts, in the United States District Court for the State of Oregon.

21. **Survival**

As of the date of termination of this Agreement, any pre-existing unresolved claim or dispute by either Party, including but not limited to, money owed, performance due, or any other obligations of the Parties, that is the result of the other Party's performance or non-performance, will, by their terms, survive termination of this Agreement and will be resolved in accordance with the terms and conditions of this Agreement. All indemnity and unperformed obligations will survive termination of this Agreement. The obligation under Section 5 to submit a Final Report shall also survive termination of this Agreement.

22. **Assignment**

This Agreement or any interest therein may not be assigned or subcontracted without the prior written consent of the Project Manager. In the event of transfer without prior written consent, the Commission may refuse to carry out this Agreement with either the transferor or the transferee and yet retain and reserve all rights of action for any breach of contract committed by Grantee.

Notwithstanding Grantee’s use of any subcontractor for performance of this Agreement, Grantee shall remain obligated for full performance hereunder, and the Commission shall incur no obligation other than its obligations to Grantee under this Agreement. Grantee agrees that if subcontractors are employed in the performance of this Agreement, the Grantee and its subcontractors are subject to the requirements and sanctions of ORS Chapter 656, Workers’ Compensation.
23. **Electronic Means**

The parties agree the Commission and Grantee may conduct this transaction, including any contract amendments, by electronic means, including the use of electronic signatures.

24. **Notice**

Any notice provided for under this Agreement shall be sufficient if in writing and (1) delivered personally to the following addressee, (2) deposited in the United States mail, postage prepaid, certified mail, return receipt requested, (3) sent by overnight or commercial air courier (such as Federal Express), or (4) email addressed as follows, or to such other address as the receiving party hereafter shall specify in writing:

If to the Commission:
   Attn: Rebecca Gibbons, Project Manager:
   Mt. Hood Cable Regulatory Commission
   c/o City of Portland/ OCT
   PO Box 745
   Portland, OR 97207-0745
   Email: rgibbons@mhcrc.org

If to Grantee:
   Attn: Sam Gaty
   NW Documentary
   6 NE Tillamook, Portland, OR 97212
   Email: sam@nwdocumentary.org

Any such notice, communication or delivery shall be deemed effective and delivered upon the earliest to occur of actual delivery, three (3) business days after depositing in the United States mail as aforesaid, one (1) business day after shipment by commercial air courier as aforesaid or the same day an email transmission is sent (or the first business day thereafter if sent on a Saturday, Sunday or legal holiday).
AGREEMENT FOR COMMUNITY TECHNOLOGY GRANT: Advanced Equipment and New Tools For Community Development and Emerging Documentary Filmmaker Support

GRANTEE: NW Documentary

BY: _____________________________ Date: ______________

Name: _____________________________

Title: _____________________________

MT. HOOD CABLE REGULATORY COMMISSION SIGNATURES:

By: _____________________________ Date: ____________
       Mt. Hood Cable Regulatory Commission Chair

Approved as to Form:

By: _____________________________ Date: ____________
       Mt. Hood Cable Regulatory Commission Attorney
00738 - 2018 Community Technology Grants

00886 - Advanced Equipment and New Tools For Community Development and Emerging Documentary Filmmaker Support

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<tr>
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<tr>
<td>Name:</td>
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<tr>
<td>Mr. Sam Gaty</td>
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<tr>
<td>Email:</td>
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<td><a href="mailto:sam@nwdocumentary.org">sam@nwdocumentary.org</a></td>
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The Executive Summary is your opportunity to introduce your project.

Short documentary films have become increasingly popular and reach ever-larger audiences through social media and traditional broadcast. It is more important than ever before that everyone is given access to the tools needed to tell stories in this growing medium. NW Documentary is launching a series of new projects that will provide advanced tools, training, and ongoing support services to emerging filmmakers.

This community of “emerging filmmakers” is comprised of people who have started to develop their skills and are serious about their work and the development of their craft, but can’t justify or afford the cost of equipment. The tools provided by this grant would give these filmmakers the support they need to continue to their personal development, and this support will allow them to tell stories about their communities that are personal, honest, and fully independent. The programs that NW Documentary has developed over the years have been most effective at providing an entry point into the world of documentary filmmaking for anyone who is interested. These new tools will provide more robust and longer lasting support for new and emerging filmmakers.

There are three programs NW Documentary will launch in the next two years that are designed to support and encourage the continued growth of emerging filmmakers: **Anthology Film Projects, Family Portrait Projects, 360 Video Workshops**

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### Project Narrative

- **Total Grant Funds:** $47,200.00
- **Total Match Funds:** $142,432.60
- **Total Funds:** $189,632.60

#### Cable System Technology Use
- Community Access Channels

#### Proposed Technology
- Video production equipment

#### Public Benefit Area
- Improving Service Delivery

**Project Purpose**

*In defining the project purpose, applicants must:*
NW Documentary was founded in 2003 with the core belief that everyone has a story and that storytelling is a fundamental part of how humans connect to people and place. As a non-profit arts organization NW Documentary’s mission is to provide everyone with a story to tell access to filmmaking tools, project based workshops and training, and a welcoming creative environment that helps lower the barrier of entry into documentary filmmaking.

Over the years the landscape of documentary filmmaking has changed significantly, short documentary films are now more popular than ever, as social media has made short form videos into one of the most important ways the public finds information and hears stories. The demand for this type of non-fiction content has never been greater, and the importance of making these communication tools broadly available has never been so clear.

For the past decade, the professional tools needed to create video content have been getting dramatically cheaper and easier to access, however the growing adoption of Ultra HD (resolution levels of 2k - 6k) and 360 video is reversing those democratic trends. These new formats require more expensive cameras, new skills, and access to new software. Ultra HD and 360 video are going to increasingly become the expected standard, and this creates a new challenge for “emerging filmmakers” in particular.

This community of “emerging filmmakers” is comprised of people who have started to develop their skills and are serious about their work and the development of their craft, but can’t justify or afford the cost of equipment. The tools provided by this grant would give these filmmakers the support they need to continue to their personal development, and this support will allow them to tell stories about their communities that are personal, honest, and fully independent. The programs that NW Documentary has developed over the years have been most effective at providing an entry point into the world of documentary filmmaking for anyone who is interested. These new tools will provide more robust and longer lasting support for new and emerging filmmakers.

The workshops and community that have developed at NW Documentary have produced many different outcomes for many different people. Students like John Waller and Sika Stanton and others took workshops at NW Documentary and continued to develop careers that now support them and their families. Students like Tom Parker and Josh Leake went on to create film festivals here in Portland. Many students have taken the core DIY Documentary workshops multiple times and each time produce a film, develop their skills, and explore their personal history and local community through documentary storytelling. The examples are too numerous and diverse to easily categorize but in almost every workshop there are one or two students who continue to develop their skills. This group is one that NW Documentary, and other community resources, struggle to support. They need access to professional tools and a creative safety net so that they can continue to grow. This grant would support three new programs that NW Documentary will launch in the next two years. The goal of this project is to bring new advanced filmmaking tools together with new programs that are focused specifically connecting and supporting the continued growth of emerging filmmakers:

There three new programs that NW Documentary will launch are detailed below:

**Anthology Film Projects**

This project will invite emerging filmmakers to collaborate on a collection of short documentaries with a common subject or theme. Examples might be: Oregon’s historical trees, board games of Portland, military veterans and their pets, horses, or stories of the Columbia River. NW Documentary will support the filmmakers as they work in parallel on their films by providing free access to equipment for their project; production support in the form of scheduling, networking, and research as needed; and some limited financial support to help cover possible travel expenses, licensing fees, and post production services like sound mixing and color correction. NW Documentary will also host regular meetings with all of the filmmakers providing an opportunity for the group to develop into a collaborative community. Each project will have visual package that coheres the short films into one project, but each filmmaker will have complete creative control over their own short film allowing them space for creative experimentation and growth.

In the period covered by this grant, NW Documentary will organize three Anthology Film Projects. These projects will be able to screen as a feature length program and NW Documentary will work promote the films and find community partners that give the projects a long and useful life. A Anthology project focused on Historical Trees, for example, could be used in class rooms, or at events put on by Friends of Trees or other similar organizations and in this way the filmmakers work will find a larger audience, the filmmaker will be able to associate with the larger project, and the public will benefit from the conversations and diversity of stories contained with in each Anthology Film.

These films will also be broadcast either as part of our regularly programmed show “Everyone Has A Story” or as a special program. This creates new broadcasting opportunities for our ongoing collaboration with Open Signal and Metro East, and will
again provide large audience for these emerging filmmakers and their unique visions.

**Family Portrait Projects**
NW Documentary will also launch a new program that partners emerging filmmakers with families who want to capture the memories of parents and grandparents before they are lost. The filmmaker will interview their subject twice in a week to capture stories from the persons life. The filmmaker will also digitize old photos and home movies and will use this material to create a short vignette from the subjects life.

This program will provide emerging filmmakers opportunities to practice setting up, recording, and running interviews. The filmmaker will also be learning how to interact with clients, the families in this case, and will be supported and guided by NW Documentary throughout the process. The families will be given several hours of recorded interviews exploring the life of the subject and a more polished short documentary. The subjects and families will be invited to share the vignettes if they are interested.

These short profiles of the elder members of our city could be broadcast as part of our regular program “Everyone Has A Story” and could be included in NW Documentary’s Homegrown Film Festival at the Clinton Street Theater.

Ultra HD cameras will be a huge benefit to both The Anthology Film Projects and the Family Portrait Projects. The higher resolution of these cameras can change lighting and interview techniques and though working on these projects interested filmmakers will have a chance to learn and experiment with these new strategies. The Ultra HD cameras also mean that the emerging filmmakers will be creating work at a professional standard they can proudly include in film festival and professional work reels.

**360 Video Project Workshops**
The creative challenges of 360 video force filmmakers to learn new rules and reconsider old editing rules in a new context. This practice not only opens up new markets and new skills but also reenforces lessons in basic storytelling and traditional filmmaking. However, 360 video is only just becoming available to the public and access to these tools is limited. In Portland these tools are only available to those who have the personal resources to individually purchase equipment, which means emerging filmmakers are playing catch up with this technology and the skills that go with it.

In 2017 NW Documentary ran a 360 video workshop using borrowed equipment and the workshop brought old students who were excited to learn new skills back to NW Documentary. At least one of these students was so inspired after the 360 Workshop that he resurrected an old documentary project. That project will screen at the mission theater in 2018 and will be broadcast on our partner stations later in the year. This story perfectly captures how these new tools not only push filmmakers into new areas but also reengage them with our community and inspire them to continue to work on the craft of storytelling.

NW Documentary already has community members with experience in 360 video who are ready to begin teaching workshops as soon as the equipment is regularly available. We plan to run at least 4 360 video workshops during the life of this project. All of the work created using 360 videos can be reformatted into broadcast standard video content so every 360 project will be able to produce content for our existing “Everyone Has A Story” show.

NW Documentary will also work to find community partners who are interested in collaborating on 360 Video Projects. Organizations like Outside the Frame, who work with homeless youth, and the Confluence Project, who are documenting tribal memories of the Columbia River, have already expressed interested in developing 360 projects with NW Documentary’s community of filmmakers.

NW Documentary will measure the success of the project over the next two years by tacking the following measurable outcomes:

1. NW Documentary expects to provide structure, equipment, and support for 35 - 45 emerging filmmakers over the course of two years. These filmmakers will make short documentary films that they would otherwise be unable to produce and will continue to develop their skill and personal networks.
2. NW Documentary expects to see a 50% increase in the number of films produced by our community members that are accepted to film festivals world wide.
3. NW Documentary expects to see 10 - 15 more short documentaries produced by our community members than in previous years, growing the total number of films from 25 to at least 35 each year. In particular, we expect to see an increase in the number and quality of films that are available for broadcast on our “Everyone Has A Story” show.
Evaluation Plan

How will you evaluate progress toward and achievement of the projects anticipated outcomes?
The evaluation plan should include evaluation questions, strategies or methodologies to collect data in order to answer the questions and steps to document findings and lessons learned.

At the end of 2017 NW Documentary began a new process of interviewing students and alumni and will continue capturing qualitative feedback in this way from our community. This feedback provides information about the ways that NW Documentary can continue to support the artistic growth of our community members, and is used in the development of our strategic plan and support services. This work is conducted three times a year and the stories gathered in these interviews immediately becomes factored into plans for upcoming workshops and new services. NW Documentary prides itself on being responsive to the individual needs of our community members and these interviews provide quick and direct feedback. In addition to in-person interviews we will send out anonymous surveys to the members to provide them an opportunity for impersonal feedback about workshops and programs that we offer, which will include the new programs implemented as part of this project.

At a more quantitative level, the organization will measure success in the following ways:
1. NW Documentary expects to provide structure, equipment, and support for 35 - 45 emerging filmmakers over the course of two years. These filmmakers will make short documentary films that they would otherwise be unable to produce and will continue to develop their skill and personal networks.
2. NW Documentary expects to see a 50% increase in the number of films produced by our community members that are accepted to film festivals world wide.
3. NW Documentary expects to see 10 - 15 more short documentaries produced by our community members than in previous years, growing the total number of films from 25 to at least 35 each year. In particular, we expect to see an increase in the number and quality of films that are available for broadcast on our "Everyone Has A Story" show.

Beyond the scope of the period covered by this grant we expect to see "emerging filmmakers” continue develop their craft. These long term outcomes will be measured by the number of sustainable careers in filmmaking, and the artistic successes that our organization helps to foster.

Project Partners

A “Project Partner” is defined as an organization that supplies cash or in kind resources and/or plays an active role in the planning and implementation of the project. You should present who your Project Partners are, their respective roles in the project, and specific contribution each partner will make to the project in the form of financial support, equipment, personnel, or other resources.

NW Documentary has the resources to launch these programs independently. Each of the Anthology Film projects will have a unique audience and an existing community and NW Documentary will reach out to organizations with in these communities for support. The support may come in many forms and before the specific themes have been identified it is difficult to account for the specific resources that these partners will provide. As an example if the project were to be about Historical Trees in Portland we might get in-kind services from arborists, and historians who help to research and develop the stories in collaboration with the filmmakers. We would also reach out to community organizations like Friends of Trees to get financial support that would go into a production fund that would help to cover or offset the production costs incurred by filmmakers. It is likely that in the course of these projects graphic designers, musicians, and other collaborators will provide discounted and in-kind material and services.

Oregon Film Office has committed to providing funds in the range of $2,000 - $3,000 to support the Anthology Film Series. Kerri Lynne Thorp will bring her expertise, experience, and network in 360 video to support the 360 Video workshops and projects. She will also personally provide instruction, training and any additional staff needed to run the workshops. NW Documentary will provide, equipment, logistic and event co-ordination, and physical space for the workshops.

PROJECT FEASIBILITY SECTION includes: Technical Design, Implementation Plan, Organizational Capacity and Project Budget (see Final Application Budget form)
Technical Design

The Technical Design should specify in detail the proposed technology and equipment to be employed; the rationale in selecting the particular technology; how the technical design supports the project’s use of the community access channels and/or the I-Net; and the plans for maintaining and upgrading the system or equipment in the future.

Ultra HD Video Cameras

Panasonic GH5, Panasonic EVA 1, Metabones Lens Adapters, Camera Batteries, Camera Bags, UV Filters, HD Cards

These cameras were selected after extensive online research and community recommendations. The Panasonic GH5s are considered to be some of the best in their class. They have a form factor similar to cameras that our community is currently used to and will be compatible with our existing cameras lens with the Metabones Speedbosters. These cameras also have excellent image stabilization which is open up new creative opportunities for our students.

The EVA 1 is also considered to be a best in class camera and offers incredible low light performance with a dual ISO

360 Cameras

Z Cam 360 Camera, Oculus Go VR Headsets, Monopod

This equipment was recommended by Kerri Lynne Throp who is a 360 video producer here in Portland and a member of NW Documentary’s board of directors. She is familiar with this equipment and will be the lead instructor in our 360 Video workshops.

Computers

Apple Laptops, Adobe Creative Suite, LaCie Rugged Hard Drives

NW Documentary works with Apple computers. The Apple workstations in NW Documentary’s edit lab will be able to handle the Ultra HD and 360 footage but the organization will require new laptops in order to review and edit footage in the field. The laptops that NW Documentary currently have are nearing the end of their useful life and need to be upgraded regardless.

Security Cameras

NW Documentary will install a security system to ensure the equipment is secure.

Proposed Project Start and End Date:

Projects may include timelines of up to 36 months.

Proposed Start Date (month/year) June 2018
Proposed End Date (month/year) June 2020

Implementation Plan

The Implementation Plan should include major tasks and milestones in addition to detailed tasks needed to successfully implement the project.
Anthology Film Projects x 3

2018 Anthology Film Project. Completed and screening by the fall of 2018. Broadcast in the winter of 2018.
• Confirmed Topic of films: Tress of Portland.
• Status: Filmmaker recruitment is underway. PSU signed on as a community partner.
• Implementation Plan:
  • Filmmaker recruitment from 1/1/2018 - 5/1/2018
  • Production from 4/1/2018 - 7/1/2018
  • Post Production from 6/1/2018 - 8/1/2018
  • Curriculum Development from 7/1/2018 - 9/1/2018
  • Public Film Screenings from 7/1/2018 - 11/1/2018
  • Use in Classrooms from 9/1/2018 - 6/1/2019
  • Broadcast in November 2018
• Final Report completed in December 2018 tracking:
  • Number of filmmakers and films made
  • Awards, festival appearances, and media coverage of project and filmmakers
  • Project expense and revenue
  • Estimate audience from screenings, broadcast, and online streaming
  • Estimated benefit to community partners

• Potential topic of films: Board Games of Portland.
• Implementation Plan:
  • Filmmaker recruitment from 10/1/2018 - 12/1/2018
  • Production from 1/1/2019 - 5/1/2019
  • Community Partner Development 4/1/2019 - 7/1/2018
  • Post Production from 5/1/2018 - 7/1/2018
  • Public Film Screenings from 7/1/2018 - 12/1/2018
  • Broadcast in November 2019
• Final Report completed in December 2019
• Number of filmmakers and films made
• Awards, festival appearances, and media coverage of project and filmmakers
• Project expense and revenue
• Estimate audience from screenings, broadcast, and online streaming
• Estimated benefit to community partners

• Potential topic of films: Horse Stories of Oregon
• Implementation Plan:
  • Filmmaker recruitment from 2/1/2019 - 4/1/2019
  • Production from 5/1/2019 - 9/1/2019
  • Community Partner Development 7/1/2019 - 11/1/2018
  • Post Production from 9/1/2019 - 12/1/2019
  • Public Film Screenings from 1/1/2020 - 4/1/2020
  • Broadcast in April 2020
• Final Report April in 2020
• Number of filmmakers and films made
• Awards, festival appearances, and media coverage of project and filmmakers
• Project expense and revenue
• Estimate audience from screenings, broadcast, and online streaming
• Estimated benefit to community partners
Family Portrait Project x 6
- NW Documentary will complete at least three Family Portraits in 2018 and three in 2019.
  - Implementation Plan for each of the Portraits:
    - Identify community partners and find families interested in commissioning a Portrait
    - Match filmmakers with families and help with scheduling and planning
    - Week of production for filmmaker (NW Documentary assisting with equipment and logistic support)
    - Post production work by filmmaker (NW Documentary supporting by providing workspace and software as needed)
    - Delivery of final project to family with in three weeks of production week. (1 month turn around time per project)
    - Screening and broadcast of portrait to be determined based on subjects interest and upcoming opportunities
      - Films expected to screen at Homegrown Film Festival
      - Films expected to be broadcast on “Everyone Has A Story”

360 Video Workshops x 4
- 360 Video workshops will be run twice in 2018 and twice in 2019, once in the early summer, and once in the late fall each year.

360 Video Projects x 2
- The first 360 video project will be completed and shared with the public by the spring of 2019.
  - Implementation Plan:
    - Community Partner Development from 6/1/2018 - 8/1/2018
    - Filmmaker recruitment from 7/1/2018 - 9/1/2018
    - Production from 9/1/2018 - 11/1/2018
    - Post Production from 11/1/2018 - 1/1/2019
    - Public Film Screenings from 1/1/2019 - 4/1/2018
    - Broadcast in May of 2019
    - Final Report in June of 2019
  - Awards, festival appearances, and media coverage of project and filmmakers
  - Project expense and revenue
  - Estimate audience from screenings, broadcast, and online steaming
  - Estimated benefit to community partners

- The second 360 video project will completed and shared with the public by the spring of 2020.
  - Implementation Plan:
    - Community Partner Development from 6/1/2019 - 8/1/2019
    - Filmmaker recruitment from 7/1/2019 - 9/1/2019
    - Production from 9/1/2019 - 11/1/2019
    - Post Production from 11/1/2019 - 1/1/2020
    - Public Film Screenings from 1/1/2020 - 4/1/2020
    - Broadcast in May of 2020
    - Final Report in June of 2020
  - Awards, festival appearances, and media coverage of project and filmmakers
  - Project expense and revenue
  - Estimate audience from screenings, broadcast, and online steaming
  - Estimated benefit to community partners

Homegrown Film Festival x 6
- Homegrown Film Festival
  - Implementation Plan:
    - Festivals scheduled for the end of May, Sept, and Nov 2018
Festivals scheduled for the end of May, Sept, and Nov 2019
• Festivals scheduled for the end of May, Sept, and Nov 2020

“Everyone Has A Story”
• NW Documentary will continue to broadcast and support our “Everyone Has A Story” program.
• 12 episodes in 2018
• 12 episodes in 2019
• 12 episodes in 2020

Organization Capacity
The applicant should demonstrate the Organization’s capacity to successfully integrate the project into the organization.

NW Documentary has thirteen years of experience teaching filmmaking and building an enthusiastic community of non-fiction storytellers. Over the years this community has grown into one of the organizations strongest resources, and these filmmakers are actively asking for new opportunities. The desire for these tools and these programs already exists within our organization. These programs will require NW Documentary to identify and recruit emerging filmmakers, and the existing mailing list and community network will easily provide enough interested and invested filmmakers to complete the projects. NW Documentary anticipate that these projects will be over enrolled based on the level of existing expressed interest.

In addition NW Documentary has well established collaborative relationships with other organizations like: POWFest, Portland Film Festival, Girls Inc, Women in Film, Media Institute for Social Change, Outside the Frame, Young Gift and Black, and others. These connections offer avenues for NW Documentary to reach out and market these program to a diverse collection of emerging filmmakers.

The history of the organization will provided the institutional framework and knowledge to successfully launch and implement these kinds of programs. Many of our community members know how to use the technology and tools we will acquire through this grant and they will volunteer their knowledge to help train our staff and community members. The systems, policies, and processes for renting, lending, and maintaining this kind equipment are established and currently being implemented on an on-going basis.

Measurable Project Outcomes
What project outcomes do you hope to achieve for the identified community or targeted beneficiaries through the use of the proposed technology?
NW Documentary will measure the success of the project over the next two years by tackling the following measurable outcomes:
1. NW Documentary expects to provide structure, equipment, and support for 35 - 45 emerging filmmakers over the course of two years. These filmmakers will make short documentary films that they would otherwise be unable to produce and will continue to develop their skill and personal networks.
2. NW Documentary expects to see a 50% increase in the number of films produced by our community members that are accepted to film festivals worldwide.
3. NW Documentary expects to see 10 - 15 more short documentaries produced by our community members than in previous years, growing the total number of films from 25 to at least 35 each year. In particular, we expect to see an increase in the number and quality of films that are available for broadcast on our "Everyone Has A Story" show.

**Anthology Film Projects x 3**
*Expected to produce 30 - 45 short documentary films.*
• The first Anthology Film Project will be completed and screening by the fall of 2018. It will be broadcast by the winter of 2018.
• The second Anthology Film Project will be completed and screening by the summer of 2019. It will be broadcast in the fall of 2019.
• The third Anthology Film Project will be completed and screening by the spring of 2020. It will be broadcast by the summer of 2020.

**Family Portrait Project x 6**
*Expected to produce 6 short documentary films.*
• NW Documentary will complete three Family Portraits in 2018 and three in 2019.

**360 Video Workshops x 4**
*Expected to produce 12 micro documentary films.*
360 Video workshops will be run twice in 2018 and twice in 2019, once in the early summer, and once in the late fall each year.

**360 Video Projects x 2**
*Expected to produce 6 short documentary films.*
• The first 360 video project will be completed and shared with the public by the spring of 2019.
• The second 360 video project will be completed and shared with the public by the spring of 2020.

**Homegrown Film Festival x 6**
• Homegrown Film Festival will happen at the end of each DIY Workshop term.

"Everyone Has A Story"
• NW Documentary will continue to broadcast and support our "Everyone Has A Story" program.

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**Budget Narrative**

*Budget Narrative*
PERSONNEL

Item: NW Documentary Executive Director
The Executive Director will work with the emerging filmmakers to help support and guide the Anthology Film Series. This work will include meeting with filmmakers to work on story structure, helping filmmakers plan and coordinate their shots, and running bi-monthly meetings. This work will also include supporting filmmakers working on Family Portrait projects and providing quality control and feedback before these projects are delivered to the families. The Executive Director will receive 8 hours of VR camera training. The Executive Director has a working salary of $47,000 per year.

The Executive Director will also be responsible for ordering and organizing the new equipment purchases which is budgeted to take three full work days spread out over the period of the grant. (Grant funded)
The matching amount is calculated as 47000 * 2 * 0.20.
Grant Funds: $600.00
Matching Funds: $18,800.00 (100% matching funds)

Item: NW Documentary Community & Operations Manager
The Community and Operations manager will coordinate and communicate with all filmmakers and partner organizations to make sure that programs are running on budget and on time. They will also be responsible for marketing the programs to recruit filmmakers for projects and to promote projects once complete. The Community and Operations manager will be in charge of managing equipment rental and returns, and will handle a bulk of the email correspondence required by the projects.

This work is estimated to account for 20% of the Community & Operations Manager's time during the 24 month period of the grant. The Community and Operations Manager will receive 8 hours of VR camera training. The Community and Operations Manager has a salary of $30,000.00 per year.

The matching funds are calculated as 30,000 * 2 * 0.20
Grant Funds: $0.00
Matching Funds: $12,000.00

Total Personnel Budget: $30,800.00 (100% matching funds)

EDUCATION & TRAINING

Item: VR Training
This will include training for NW Documentary staff in the proper use of VR cameras, editing, and distribution. The expected time required for this initial training is one 8 hour day. Training will be provided by Kerri Lynne Thorp who charges a $50 hourly rate. The cost of the training is calculated as 50 * 8.

Grant Funds: $400.00
Matching Funds: $0.00

Total Training Budget: $400.00 (100% grant funds)

CONTRACTUAL

Item: Anthology Films Post Production
NW Documentary will provide port production support to the emerging filmmakers who complete short documentaries for the Anthology Film Series. This support will cover the cost of professional color correction, sound mixing, and closed captioning for all the projects. These services will be provided by Piñata Post, Digital One, and Cheryl Green or other Portland based service providers. The rates will vary depending upon the projects but we estimate the cost for these services will be around $15,000 per Anthology Film project.

The matching amount is calculated as $15,000 * 3.
Grant Funds: $0.00
Matching Funds: $45,000.00

Item: 360 Video Instructor
Kerri Lynne Thorp will be contracted as an instructor for the 360 Video workshops, a project lead / mentor for 360 Video projects, and for help converting the 360 video in broadcast ready content. Her standard rate is $50 an hour.

The matching amount is calculated as 50 * 180.
Grant Funds: $0.00
Matching Funds: $9,000.00  
**Total Contractual Budget:** $54,000 (100% matching funds)

### EQUIPMENT

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<tr>
<td>Adobe Creative Suite</td>
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<td>VR Headsets</td>
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<td>Monopod</td>
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<td><strong>Total:</strong></td>
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Grant Funds: $46,200.00  
Matching Funds: $0.00  
**Total Equipment Budget:** $46,200.00 (100% grant funds)

### INFRASTRUCTURE / FACILITIES CONSTRUCTION

NA

### MISCELLANEOUS

**Item:** Filmmaker Reimbursement  
$300 has been budgeted to cover travel expenses for filmmakers working on NW Documentary projects. These costs are expected to be fairly minimal and could include reimbursement for the cost of gas, contracting a drone pilot to record footage of the city, music licensing fees, etc. The average cost per filmmaker is estimated to be $150. 45 filmmakers are expected to participate in grant funded projects over the 24 month period.  
The matching amount is calculated as $150 * 45.  
Grant Funds: $0.00  
Matching Funds: $6,759.00  
**Total Miscellaneous Budget:** $6,759.00 (100% matching funds)

**Item:** Marketing  
This will cover the cost of marketing our programs and new equipment and will help to grow our community and make the work produced visible and accessible to the general public. This will include printed and digital marketing campaigns.  
Grant Funds: $0.00  
Matching Funds: $10,000.00  
**Item:** Venue Rental  
This covers the cost for renting venues that NW Documentary will use to premiere and celebrate the works produced by our
for the anthology film projects ($4000 * 3).
Grant Funds: $0.00
Matching Funds: $14,160.00

**Total Miscellaneous Budget:** $24,160.00 (100% matching funds)

**OVERHEAD**

**Item: NW Documentary Executive Director**

The Executive Director will oversee and provide guidance for the projects supported by this grant. This work will include tracking the timelines and expenses of the projects, recruiting filmmakers and instructors for the projects, evaluating the success of the programs, and reporting to the board of NW Documentary, partner organizations, and MHCRC. The Executive Director has a working salary of $47,000 per year. The matching amount is calculated as 47000 * 2 * 0.10.

Grant Funds: $0.00
Matching Funds: $9,400.00 (100% matching funds)

**Item: Workspace Rental**

This covers the cost of space for equipment storage and rental, as well as editing and meeting space for community members who are working on documentary projects. The monthly rental rate is $3,307.00. We estimated that 20% of the rental rate will support the projects covered in the scope of this grant.

The matching amount is calculated as $3,307.00 * 24 * 0.20.

Grant Funds: $0.00
Matching Funds: $15,873.60

**Item: Utilities**

This covers the cost of heat, electricity, water, and trash for the space used by our community for editing and meeting while working on documentary projects covered by this grant. The monthly rate is estimated at $300.00. We estimated that 25% of the monthly activity in this space will be work dedicated to the projects covered in the scope of this grant. The matching amount is calculated as $300.00 * 24 * 0.20.

Grant Funds: $0.00
Matching Funds: $1,440.00

**Total Overhead Budget:** $26,713.60 (100% matching funds)

**Statement of Matching Resources**

A project will not be considered eligible for funding unless the applicant documents the capacity to supply matching resources of at least 50 percent (50%) of the total project cost.

The Statement of Matching Resources is essential to understanding which project costs identified in the Budget Narrative and the line Item Budget will be supported by the applicant organization and which project cost will be supported by Project Partners.

Matching funds will come from the following sources:

NW Documentary General Operating Fund will cover the cost of the Executive Director, Community & Operations Manager, Gas Reimbursement, Security Camera Installation, Marketing, Workspace Rental, and Utilities.

Kerri Lynne Throp, a member of NW Documentary's Board of Directors, will provide the VR Training to NW Documentary staff. The training is valued at $400 and the cost of this will be contributed by Kerri as an in-kind service. NW Documentary will also contract with Kerri Lynne Throp to be an instructor for the 360 Video workshops, a project lead / mentor for 360 Video projects, and for help converting the 360 video in broadcast ready content.

Venue rentals for screenings and film premieres will be covered by matching funds from each project's internal budget, discounted and donated space from our community partners (Clinton Street Theater, Hollywood Theater, Mission Theater, Revolution Hall), and historical project sponsors like Pro Photo Supply, Oregon Film Office, Koerner Camera, etc.

**Line Item Budget**

<table>
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<th>Cost Category</th>
<th>Grant Funds</th>
<th>Match Amount</th>
<th>Project Total</th>
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<td>Personnel</td>
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Education and Training $400.00 $0.00 $400.00
Travel $0.00 $6,759.00 $6,759.00
Contractual $0.00 $54,000.00 $54,000.00
Equipment $46,200.00 $0.00 $46,200.00
Infrastructure/Facilities $0.00 $0.00 $0.00
Construction $0.00 $24,160.00 $24,160.00
Overhead $0.00 $26,713.60 $26,713.60
Totals $47,200.00 $142,432.60 $189,632.60

Final Application Signature
Signature of Duly Authorized Representative
Samuel Kellogg Gaty
Date
03/16/2018
Title
Executive Director
Phone
503-881-5535
E-mail
sam@nwdocumentary.org

Supplemental Material Attachments

Partner Commitment Letter(s)
EXAMPLE OF INTERIM REPORT INFORMATION

ACTIVITIES AND PROGRESS
Describe project activities that focus on the intended outcomes and/or progress made toward the outcomes. Provide both quantitative and qualitative details as they relate to an activity.

VIDEO OUTPUT
If the grant intends to produce video programming for the community media channels, describe the programming produced.

EVALUATION AND LEARNINGS
Summarize the key evaluation steps completed or underway. What are the primary lessons learned thus far about the project? Have you had any course corrections or adjustments to your project based on learnings thus far? How might these learnings impact project implementation in the next Reporting Period?

IMPLEMENTATION SUCCESSES AND CHALLENGES
By using the project’s original implementation plan/timeline (included in Attachment 2 to the Grant Agreement, The Implementation Plan), provide a mark-up of the plan indicating the status of your project in relation to the original plan/timeline by adding a “status” column to your activities list.

Describe any anticipated and unanticipated successes and challenges.

EXPENSE DETAIL
Provide a line item accounting, in context of the original grant budget, of the expenditures incurred during the Reporting Period; including both Grant fund and Matching fund expenditures.

Provide a clear narrative of the expenditures incurred for each line item identified above.

Provide a clear explanation of any expenditure that substantially differs from the original Grant budget.

WORK SAMPLES
Periodically, the MHCRC will use photos and videos (with permission) on our website to highlight the work of the organizations we support. Please send us photos or videos that illustrate the impact of the grant project in the community. (By sharing photos or videos, you acknowledge that any and all material you are providing has been obtained with appropriate signed media releases and may be shared with the MHCRC’s stakeholders and broader audiences.)
EXAMPLE OF FINAL REPORT INFORMATION

RESULTS
Describe the significant project activities that took place throughout the life of your project and how these activities contributed to the realization of the original project purpose and outcomes. (As applicable, please quantify your results as they related to your original project outcomes, i.e. numbers of people served, the demographics of those served, the number and type of content created, the number/type of classes/programs offered, etc.)

Outline your evaluation process, including evaluation tools and methods. Detail the results of your evaluation.

Do you have a testimonial story to tell that captures the essence of the project’s impact? (Where anonymity is required, please use pseudonyms.)

REFLECTIONS
What did you learn about the problem or issue you were trying to address?
What did you learn about the population served?
What factors contributed to your success?
What, if any, were the significant challenges encountered? How did you address both anticipated and unanticipated challenges in the course of the project?

SUSTAINABILITY
Will the project/program continue beyond the term of this Grant? If so, what are your next steps and plans for continuing or changing the project/program?

EXPENDITURE DETAIL
Provide a line item accounting, in context of the original grant budget, of the expenditures incurred during the Project term; including both Grant fund and Matching fund expenditures.

Provide a clear narrative of the expenditures incurred for each line item identified in Step 1.

Provide a clear explanation of any expenditure that substantially differs from the original Grant budget.

WORK SAMPLES
Periodically, the MHCRC will use photos and videos (with permission) on our website to highlight the work of the organizations we support. Please send us photos or videos that illustrate the impact of the grant project in the community. (By sharing photos or videos, you acknowledge that any and all material you are providing has been obtained with appropriate signed media releases and may be shared with the MHCRC’s stakeholders and broader audiences.)