

# OREGON HERITAGE – GRANT REPORTING & REIMBURSEMENT CHECKLIST

Grants awarded by Oregon Heritage, Oregon Parks and Recreation Department are reimbursement grants. In order to receive payment, grantees must submit a progress report demonstrating work completed and a reimbursement request documenting all project expenses including those supported by a match source.

## Basics

Progress reports and reimbursement requests may be submitted as work is completed and are required at specific times. The required reporting dates are found in your grant agreement, in attachment B.

**A progress report is always required with a reimbursement request to receive funds.** A progress report can be submitted without a reimbursement request.

## When to submit

When to submit a progress report:

- When required per the grant agreement, this may be an updated timeline if no work has been completed.
- When submitting for reimbursement.
- When requesting a scope of work change.
- When submitting workplan specifications for approval.
- When submitting extension requests. NOTE: These are rare and, in some cases, not allowed.
- When the entire project is complete, and be sure to click the 'final report' check box on the progress report.

When to submit a reimbursement request:

- When required per the grant agreement.
- When a large portion of work is complete.
- When all project work is complete, be sure to check the 'final request' check box in the reimbursement request.

## How to submit

Submit both the progress report and reimbursement request using the [OPRD Grants Online system](#). This is the same program used to submit the application. If you are not the person in your organization you can use the reporting instructions below to create an account.

Tools to help you with the online system.

- [OPRD Grants Online Reporting and Reimbursement Request Instructions](#)
- Video tutorials
  - [How to submit a progress report](#)
  - [How to submit a reimbursement request](#)

Tips & common challenges when submitting.

- Submit through the project, which is found in the project tab, not the application tab.



- Always click 'edit' at the top of the page when you want to start a report or request, or to enter information.
- The report and request are saved when you click 'save' and submitted when you click 'submit'. OPRD is only notified and can respond when submitted.
- Both the report and request must have at least one attachment uploaded in order to submit.

## What to submit

### Progress Report

The progress report is evidence of the value, quality and type of work completed. Its purpose is to support that the terms of the agreement have been met. A description of the completed work is required in addition to uploaded supporting documents. Also, we frequently use these materials to share about good work in the state, develop resources, consider for awards, create conference sessions, and promote the value of the grant program. Please see the list below for suggested information and attachments to include based on the project type.

### Reimbursement request

The reimbursement request must include all of the costs associated with the grant funded project. Matching costs must be included.

What to attach:

- Staff time tracking – the document should include the staff person, task, hours and rate related to work on the project.
- Volunteer time tracking – the document should include the volunteer, task, hours and rate related to work on the project. It is best if this is signed by the volunteer. The rate is Oregon minimum wage for your region. If it is a professional doing their profession as an in-kind donation, you must submit a document from them indicating their rate.
- Invoices/receipts
  - **Items over \$500** – Proof of cost of project associated work is required. The invoice/receipt must list the work completed and the cost.
  - **Items under \$500** – You may compile a list or spreadsheet of small costs, it should include each item and its cost. The total from this document can be used as a project expense item in the online system.
- **DO NOT** submit copies of checks unless the account information is redacted.

Once your final report and reimbursement request are submitted, be sure to complete the impact and evaluation survey. You can find the link in your grant guidelines and on the website.



## Suggested attachments for progress reports based on project

### Building and historic cemetery rehabilitation, repair or restoration projects

- Before, during and after photos
  - Detail of work area
  - Full structure photo
- Inspection documents, occupancy approval, etc.
- Public engagement, response

### Archaeology projects

- Photos of people doing the work
- Screen shots of web content
- Methodology
- Number and type of collaborating people and organizations
- Evaluation from participants and attendees
- Reports, permit requirements, etc.
- Value of this work
- Public engagement, response

### Collections Housing and Storage

- Photos of people doing the work
- Before and after storage photos
- Inventory of items rehoused
- Approximate number (items, boxes, files, linear feet, etc.) and type of items rehoused
- Value of this work
- Public engagement, response

### Collections Digitization

- Photos of people doing the work
- Sample digitized items
- Inventory of items digitized
- Approximate number (items, boxes, files, linear feet, etc.) and type of items digitized
- Value of this work
- Public engagement, response

### Education Projects – working with schools and school programs

- Photos of people doing the work, permissions if students included
- Copies of curriculum and materials
- Number and type of programs and participants
- Evaluation from participants
- Marketing/promotion materials
- Value of this work



### Interpretation – Exhibits

- Photos of people doing the work
- Photos of the interpretation installed
- Photos of people accessing the interpretation
- PDFs of text, design, etc.
- Number and type of collaborating people and organizations
- Evaluation from participants and attendees
- Marketing/promotion materials
- Access tracking
- Value of this work
- Public engagement, response

### Interpretation – Panels and Online Information

- Photos of people doing the work
- Photos of the interpretation installed or screen shots of web content
- Photos of people accessing the interpretation
- PDFs of text, design, etc.
- Number and type of collaborating people and organizations
- Evaluation from participants and attendees
- Marketing/promotion materials
- Access tracking
- Value of this work
- Public engagement, response

### Tourism

- Photos of people doing the work
- Screen shots of web content
- PDFs of text, design, etc.
- Number and type of collaborating people and organizations
- Evaluation from participants and attendees
- Marketing/promotion materials
- Value of this work
- Public engagement, response

### Oral History

- Description of topic and main themes of the project, how and why the themes were selected
- Photos of people doing the work
- Inventory of oral histories completed (links if available online)
- Number and type of collaborating people and organizations
- Evaluation from participants
- Value of this work
- Public engagement, response



## Public Education – events

- Photos of people doing the work
- Screen shots of web content
- PDFs of text, design, etc.
- Number and type of collaborating people and organizations
- Evaluation from participants and attendees
- Marketing/promotion materials
- Value of this work
- Public engagement, response

If you have questions or require assistance after reviewing the guidelines, instructions and tutorials, please contact:

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Oregon Heritage, OPRD

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