



Manage Your California Documentary Project Grant April 2019

On behalf of California Humanities (CH), congratulations on receiving a California Documentary Project (CDP) grant. This document is a guide to managing your CDP award. Project Directors should reference the grant agreement for full details and terms of the grant.

If you have questions, please contact Senior Program Officer John Lightfoot (jlightfoot@calhum.org) or Grants Manager Debra White (dwhite@calhum.org).

At Start of Grant Period

- ☐ Grant Agreement Return agreement signed by both Project Director and Authorizing Official at the Grantee Organization/Fiscal Sponsor in order to process first payment using grantee portal: <https://ch-grants.smapply.io>
 - ☐ Images Provide California Humanities with project images for communications purposes.
 - ☐ Social Media/Press After California Humanities makes it public, announce that you've been awarded a California Documentary Project Grant from California Humanities using the template press release and on social media using social media badges (Folder #2).
 - ☐ [Facebook](#) www.facebook.com/pg/calhumanities
 - ☐ [Twitter](#) @cal_humanities #CalHum, #CADocProject
 - ☐ [Instagram](#) @california_humanities
- Connect with California Humanities on social media.
- ☐ Logos Add California Humanities' logo to your website and marketing materials (See Folder #4 in toolkit).
 - ☐ Thank you letter to elected officials Send thank you letter to your [Congressional Representative](#) using template in Folder #2). Please send a copy of letter to Senior Program Officer John Lightfoot (jlightfoot@calhum.org).
 - ☐ Orientation Webinar Participate in grantee orientation webinar (a recording will be made available). Ensure that you understand all of the requirements of the grant.

During Grant Period

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| <input type="checkbox"/> Communication with Staff | Keep CH staff informed of major project updates, events, and opportunities. In addition to wanting to stay informed about the project, staff is also happy to attend project convenings, preview screenings, presentations, and provide informal advising when requested and as appropriate. Senior Program Officer John Lightfoot (jlightfoot@calhum.org) is your primary staff contact throughout the grant period. |
| <input type="checkbox"/> Grantee Convening | Attend the annual CDP grantee meeting, date TBD. |
| <input type="checkbox"/> Reporting | Track expenses and project activities in anticipation of second grant payment. Submit Interim Report (production grants only) when first 50% of funds have been expended. |
| <input type="checkbox"/> Project Changes | Request approval of proposed project change(s) (if any) in personnel, timeline or scope of activities in advance through grantee portal: https://ch-grants.smapply.io |
| <input type="checkbox"/> Logo and Acknowledgment | Prior to public presentation, e.g. broadcast, festivals, online distribution, etc., provide staff sample acknowledgment language and logo placement for review. |
| <input type="checkbox"/> Project Preview | Prior to any public presentation, provide staff with the final version of the produced project for preview in advance. |

At Project Completion And Beyond

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| <input type="checkbox"/> Premieres, Broadcasts, Exhibitions, Public Programs, Launches, etc. | Let CH know in advance when project premieres, launches, is broadcast, etc. We will help promote and attend events, when possible. As always, <u>CH is interested in co-sponsoring or co-presenting your screenings and events whenever possible. Please contact staff to discuss.</u> |
| <input type="checkbox"/> Invitations to Elected Officials | Send project-related public event invitations to your Congressional Representatives' district offices (look up); cc Senior Program Officer John Lightfoot (jlightfoot@calhum.org). |
| <input type="checkbox"/> Final Report | Submit all components of final report at project completion, including 5 copies of the final production. Receive the remaining 10% of grant funds once approved. Use public programming log to track event statistics and information for CH and NEH data reporting (See Folder #6). |
| <input type="checkbox"/> Project Activities | Continue to send CH advance notice of screenings, events, awards, and other activities throughout lifespan of project. |
| <input type="checkbox"/> NEH Compliance Plan | Participate in yearly statistics collection for NEH Compliance using public programming log (Folder #6)
Thank you! |