



Manage Your California Documentary Project Next Gen Grant

On behalf of California Humanities (CH), congratulations on receiving a California Documentary Project (CDP) NextGen grant. This document is a guide to managing the award. Project Directors and Authorizing Officials should reference the grant agreement for full details, requirements, 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 Read the grant agreement thoroughly and take note of all grant requirements. 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>

Digital signatures are accepted. If scanning and sending electronically, please include all pages of the document.
- ☐ Images Provide California Humanities with project images for communications purposes.
- ☐ Social Media/Press After California Humanities has announced the awards publicly, share that you have been awarded a California Documentary Project Grant NextGen from California Humanities using the template press release and social media.
 - ☐ [Facebook](#) www.facebook.com/pg/calhumanities
 - ☐ [Twitter](#) @cal_humanities #CalHum, #CADocProject
 - ☐ [Instagram](#) @california_humanities
- ☐ 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"/> Reporting | Track expenses and project activities in anticipation of second grant payment. Submit Interim Report when first 50% of funds has 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. <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 | To receive the remaining 10% of grant funds, submit all components of final report at project completion, including: <ol style="list-style-type: none">1. A full resolution digital file of the final production/s2. Responses to self-evaluation survey3. Final financial report4. Public programming log5. Audience surveys, as appropriate6. Copies of signed release forms7. Copies of publicity materials |
| <input type="checkbox"/> NEH Compliance Plan | Respond to California Humanities' request for annual event information collection (your completed Public Programming Log) for compliance to the National Endowment for the |

Humanities (NEH).

☐ Second thank you to elected officials

Send second thank you letter to [Congressional Representatives and Elected Officials](#) (template in Folder #6) and send a copy to Senior Program Officer John Lightfoot.

☐ If applicable, share project-related event information

If you continue to hold public programs related to your project, continue to send details of project-related public events at least one to two (1-2) months in advance to Senior Program Officer John Lightfoot.

Thank you!