POTLATCH FUND

INSPIRING THE NATIVE TRADITION OF GIVING

Capacity Building Program
Cohort Handbook

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Potlatch Fund Capacity Building Program Staff

Tachini Pete (Salish/Dine), MBA, Program Director

Amadeo Guiao (Filipino), MBA, MA, Program Manager

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INTRODUCTION

Potlatch Fund's 2018 Capacity Building Cohort Program is a 10-month endeavor for grant award representatives to access professional development in nonprofit management, language preservation, native art, or native education. This is a very rigorous program and each participant will get out of it as much as he or she puts into it. The decision to participate should not be made lightly and all participants are asked to make their decision in conjunction with work load expectations and professional obligations, so please read this handbook carefully and feel free to contact us with any questions or concerns you may have.

We have provided this handbook to explain the obligations of Potlatch Fund, the Grantee, and the Participant expected in the 2018 Nonprofit Management, 2018 Language Preservation, or 2018 Native Art cohorts along with explanations in regard to evaluation and travel.

Please note that not all cohorts are offered every year mostly due to funding levels. For 2018, Potlatch Fund is offering cohort training and technical assistance in Nonprofit Management, Language Preservation, and Native Arts.

COHORT ELIGIBILITY

To be eligible to participate in a Potlatch Fund Cohort, the organization (or individual for Native Art) must meet the following criteria.

1. Awarded a Healthy Pathways for Native Youth, Community Building, Native Student Success, Language Preservation and Education, or Native Art grant in 2018, 2018, or 2016 from Potlatch Fund.
2. Must provide ONE motivated person who can complete the 10-month scheduled program as directed in the specified cohort.
3. Has not participated in a previous cohort. However, an exception can be made only if room is available, and if willing to pay the expenses for cohort participation.
4. Grantee exception: if the organization is not a Potlatch Fund grantee, they may still participate, but pay an almost-full value of the cohort training.

DEFINITIONS

A **Grantee** is defined as either an organization that has received a Potlatch Fund grant award (e.g., Healthy Pathways for Native Youth, Community Building, Native Student Success, Language Preservation, and Education or Native Arts) or an individual who has received a Potlatch Fund grant award (e.g., Native Arts).

A **Participant** is defined as someone who was chosen by the Grantee (or could be the individual grantee as well) to join and take part in the cohort training and technical assistance program.

COHORT PREPARATION

Please completely read and ensure that you thoroughly understand the Cohort Handbook before making the commitment to the cohort program. We want to ensure success for everyone involved and this can only occur when everyone participates wholeheartedly.

COHORT REGISTRATION FEES

The full value of each cohort program is approximately $4,500 per person. The value was reached by looking at, preparing for and conducting the 75 hours of training and 10 hours of technical assistance. Potlatch Fund is able to cover most of the expenses for the first participant an organization sends, but not all.

The registration fee is based on national conference registration averages (i.e., 2 to 3 day conference that averages 16 to 24 hours of training). We ask the participant to pay for half of the fee to ensure commitment to the cohort training. Grantees can use their Potlatch Fund grant money to pay for the

participation fee by classifying it under professional development. *Furthermore, as long as the modification to the grantee's proposed budget doesn't exceed 10% from line-to-line, a budget modification is not necessary.* The participant's share can be paid by the organization, family member, or sponsorship by another organization. It is up to the participant to find the funds to pay for their portion of the registration fee.

Grantee (Organization and Individual), First participant: $500 fee

- $250 paid by organization
- $250 paid by participant

Grantee (Organization and Individual), Second participant: $1,250

Each additional participant from same organization: $1, 250 plus all travel expenses to two convenings per individual (e.g., transportation, meals and incidentals, and lodging).

- $625 paid by organization
- $625 paid by participant

Non-grantee (Organization or Individual), First participant: $1,750

Non-grantee 1st participant: $1,750 plus all travel expenses to two convenings per individual (e.g., transportation, meals and incidentals, and lodging).

- $875 paid by organization
- $875 paid by participant

Non-grantee (Organization or Individual), Second participant: $1,250

Non-grantee 2nd participant: $1, 250 plus all travel expenses to two convenings per individual (e.g., transportation, meals and incidentals, and lodging).

- $625 paid by organization
- $625 paid by participant

Invoicing, monthly installments, check, credit card, and PayPal payments are available.

POTLATCH FUND OBLIGATIONS

Potlatch Fund will sign a contract (Memorandum of Agreement or MOA) ensuring that the obligations below will be honored.

EXPENSES COVERED BY POTLATCH FUND

1. Potlatch Fund will cover partial travel expenses for one person per organization invited to participate in a cohort program (registration for two convenings, three breakfasts and three lunches), travel to and from each convening location (airfare/mileage and transportation between airport and convening venue), and four nights lodging.
2. Potlatch Fund will provide toll free phone numbers and webinar access for web-based trainings.
3. Potlatch Fund will provide supplies (composition notebook and pen or pencil for convening, printed materials will be distributed in soft copy (PDF on a flash drive at end of cohort) for all trainings, and a limited amount of hard copy handouts will be distributed for the convening).

TRAINING

Potlatch Fund's Capacity Building Program staff and select consultants will provide up to 75 hours of direct training in the areas of native-led nonprofit management, language transfer systems, and native art small business management. The training hours consist of the following opportunities.

- Orientation Webinar (1 hour)
- Convening #1 (24 hours = 3 days, 8 hours each)
- Monthly 1 hour Webinars (8 hours)
- Convening #2 (24 hours = 3 days, 8 hours each)
- Conclusion Webinar (1 hour)
- Required assignments (17 – 20 hours)

- Make-up time includes attending the other cohort's webinars, viewing a recorded webinar and answering questions about the topic, or attending a conference not sponsored by Potlatch Fund and then, providing a report about the conference.

Each cohort has specific topics that provide skills in either nonprofit management, language transfer, or native art small business management. The skills are acquired through completion of activities and participation in the monthly webinars, technical assistance calls, or convenings. An outline of the schedule is provided later in this document and Potlatch Fund will provide a training and technical assistance study guide that provides the specific schedule, the topic goal(s), learning objectives, activity description(s), and time to complete each activity before or after the webinar.

Potlatch Fund expects each Participant to successfully complete the cohort training activities. A successful completion is defined as a 75% or at least 57 hours of training. To attend Convening #2, the Participant's progress must be in good standing (have at least a 75% completion of the training activities offered as of 6 weeks prior to the convening).

TECHNICAL ASSISTANCE

Potlatch Fund's Capacity Building Program staff will provide up to 10 hours of technical assistance to help the Participant complete the assigned activities or bring the progress level up to 75%; fill out a grant application, or to answer any questions in regard to the grantee organization or projects.

Technical assistance calls are scheduled for a recurring day and time (For example, the third Thursday at 3:00 p.m. until 4:00 p.m.) and Potlatch Fund provides a toll-free conference number for the technical assistance call. The technical assistance hours consist of the following opportunities.

- Monthly 1 hour technical assistance calls (8 hours)
- Technical assistance meeting face-to-face during cohort convenings or meeting at an outside conference not sponsored by Potlatch Fund (2 hours)
- Make-up time can include additional phone calls, face-to-face meetings at summer regional conferences, or meeting Potlatch Fund staff at conferences not sponsored by Potlatch Fund.

Potlatch Fund expects each Participant to successfully complete the cohort technical assistance activities. A successful completion is defined as a 75% or at least 7.5 hours of technical assistance. Make-up time can include additional phone calls, face-to-face meetings at Potlatch Fund events or site visits, or meeting Potlatch Fund staff at conferences not sponsored by Potlatch Fund.

To attend Convening #2, the Participant's progress must be in good standing (have at least a 75% completion of the technical assistance activities offered as of 6 weeks prior to the convening).

PROGRAM EVALUATION

To ensure that Potlatch Fund provides excellent quality for training and technical assistance, we implement continuous quality improvement strategies through program evaluation. Specifically, we evaluate the effectiveness of our Capacity Building Program by collecting data to analyze and to direct the cohort training and technical assistance delivery model using the following elements.

1. **Baseline Cohort Assessment (Organization and Individual)**. We'll be collecting data around demographics and skill level in business, language, art, and cultural arts.
2. **Pre- and Post-training evaluations**. The data we collect from the pre- and post- trainings (convenings and webinars) will provide us with information about your knowledge and skill level in regard to the topic before you attend and after to identify the increase of knowledge and skill about the topic. In addition, the post-training will also ask about your satisfaction with the quality and presentation of the material, the effectiveness of the trainers, and whether the material presented will be useful to you as you go forward in your profession.
3. **Closing Cohort Assessment**. The questions asked are similar to the baseline assessment. We want to see if any increase in knowledge and skills occurred because of the cohort program and

whether the cohort program helped you to meet your goal and objectives for participating as outlined in your personal development plan.

4. **Post-Cohort Assessment (Organization and Individual)**. We will contact you at 6 months and 12 months post cohort to find out whether the concepts you learned during the cohort were incorporated into your profession. We'll also ask if you have any suggestions for topics that would benefit future cohorts.

All data collected is confidential and will be used only by Potlatch Fund. The individual forms will be kept on electronic media separate from outside sources (e.g., CD or external hard drive). Once the data has been compiled, analyzed, and reported, then all individual forms will be destroyed.

GRANTEE OBLIGATIONS

A **Grantee** is defined as either an organization that has received a Potlatch Fund grant award (e.g., Healthy Pathways for Native Youth, Community Building, Native Student Success, Language Preservation and Education or Native Arts) or an individual who has received a Potlatch Fund grant award (e.g., Native Arts).

A Grantee is expected to choose a representative of their organization who will participate and successfully complete the cohort training and technical assistance program. In regard to organizations, generally the Executive Director or Tribal Department Head chooses the participant. Potlatch Fund encourages the Executive Director (or tribal department head) to take an active role in the cohort by meeting with the participant often and joining the webinars or technical assistance calls when able.

The Executive Director (or Tribal Department Head) will sign the Memoranda of Agreement ensuring that the obligations below will be honored.

EXPENSES

As stated under Cohort Registration Fees, **a $500 total cohort fee** is charged for the 1st participant and $1,250 for each additional participant plus convening travel expenses. Grantees can use their Potlatch Fund grant money to pay for the participation fee by classifying it under professional development. Furthermore, as long as the modification to the grantee's proposed budget doesn't exceed 10% from line-to-line, a budget modification is not necessary.

The payment schedule will be as follows for Grantee representatives (organization and individuals).

1. 1st Participant: Grantee pays $250 (five installments of $50). The Grantee may request an invoice for the lump sum or for monthly payments.
2. Additional Participants: Grantee pays $625 (five installments of $125. The Grantee may request an invoice for the lump sum or for monthly payments. See Cohort Registration Fees section under Grantees: Second participant: $1,250.
3. Travel expenses not covered by Potlatch Fund, must be covered by either the Grantee or the participant selected for the cohort.

The payment schedule will be as follows for Non-grantee representatives.

1. 1st Participant: Non-grantee (organization or individual) pays $875 (five installments of $175). The Non-grantee may request an invoice for the lump sum or for monthly payments. See Cohort Registration Fees section under Non-grantee Organization or Individual: First participant: $875.
2. Additional Participants: Non-grantee pays $625 (five installments of $125). The Non-grantee may request an invoice for the lump sum or for monthly payments. See Cohort Registration Fees section under Non-grantee Organization or Individual: Second participant.
3. Travel expenses not covered by Potlatch Fund, must be covered by either the Grantee or the participant selected for the cohort.

TRAINING

The Grantee is expected by Potlatch Fund to ensure successful completion of the cohort, and is asked to release the participant from conflicting obligations and to encourage and support the participant as he or she completes the training activities.

- Orientation Webinar (1 hour)
- Convening #1 (24 hours = 3 days, 8 hours each)
- Monthly 1 hour Webinars (8 hours)
- Convening #2 (24 hours = 3 days, 8 hours each)
- Conclusion Webinar (1 hour)
- Required assignments (17 – 20 hours)
- Make-up time includes attending the other cohort's webinars, viewing a recorded webinar and answering questions about the topic, or attending a conference not sponsored by Potlatch Fund and then, providing a report about the conference.

Each cohort has specific topics that provide skills in either nonprofit management, language transfer, or native art small business management. The skills are acquired through completion of activities and participation in the monthly webinars, technical assistance calls, or convenings. An outline of the schedule is provided later in this document and Potlatch Fund will provide a training and technical assistance study guide that provides the specific schedule, the topic goal(s), learning objectives, activity description(s), and time to complete each activity before or after the webinar.

Potlatch Fund expects each participant to successfully complete the cohort training activities. A successful completion is defined as a 75% or at least 57 hours of training. To attend Convening #2, the participant's progress must be in good standing (have at least a 75% completion of the training activities offered as of 6 weeks prior to the convening).

The Executive Director or Tribal Department Head is encouraged to participate in the webinars with the participant, if time allows.

TECHNICAL ASSISTANCE

The participant is expected to work with the Potlatch Fund's Capacity Building team to find a recurring day and time (for example, the third Thursday at 3:00 p.m. until 4:00 p.m.) for monthly technical assistance calls by the first core topic webinar scheduled after the Orientation Webinar. The purpose of the calls is to assist in completing assigned training activities or bring progress levels up to 75%, fill out grant applications, or to answer any questions in regard to workplace issues or projects.

- Monthly 1 hour technical assistance calls (8 hours)
- Technical assistance meeting face-to-face during cohort convenings or meeting at an outside conference not sponsored by Potlatch Fund (2 hours)
- Make-up time can include additional phone calls, face-to-face meetings at summer regional conferences, or meeting Potlatch Fund staff at conferences not sponsored by Potlatch Fund.

Potlatch Fund expects each Participant to successfully complete the cohort technical assistance activities. A successful completion is defined as a 75% or at least 7.5 hours of technical assistance. Make-up time can include additional phone calls, face-to-face meetings at Potlatch Fund events or site visits, or meeting Potlatch Fund staff at conferences not sponsored by Potlatch Fund.

To attend Convening #2, the Participant's progress must be in good standing (have at least a 75% completion of the technical assistance activities offered as of 6 weeks prior to the convening).

The Executive Director or Tribal Department Head is encouraged to participate in the technical assistance calls with the participant, if time allows.

PROGRAM EVALUATION

The Grantee provides information in regard to program evaluation in the following elements.

1. **Baseline Cohort Assessment (Organization)**. We'll be collecting data around organizational demographics and skill level in business, language, art, and cultural arts, as well as asking you to determine a goal with the participant and provide at least one objective to be monitored during the cohort.

2. **Closing Cohort Assessment (Organization)**. The questions asked are similar to the baseline assessment. We want to see if any changes in organizational demographics occurred during the 10 months as a result of the cohort, increase in knowledge and skills occurred because of the cohort program and whether the cohort program helped the participant meet his or her goal and objectives.

3. **Post-Cohort Assessment**. We will contact you at 6 months and 12 months post cohort to find out whether the concepts the participant learned during the cohort were incorporated into the organization. We'll also ask if you have any suggestions for topics that would benefit future cohorts.

PARTICIPANT OBLIGATIONS

A **Participant** is defined as someone who was chosen by the Grantee (or could be the individual grantee as well) to join and take part in the cohort training and technical assistance program. Potlatch Fund encourages the Participant to include the Grantee in training and technical assistance activities as he or she may be able to provide insight into the topics covered.

The Participant will sign the Memoranda of Agreement ensuring that the following obligations will be honored. However, if the Grantee does not sign or wish to participate, then the Participant is not eligible to become part of the cohort.

EXPENSES

To encourage full involvement in the cohort, Potlatch Fund asks that the Participant pay for half of the cohort registration fee. The Participant's share can be paid by the organization, family member, or sponsorship by another organization. It is up to the Participant to find the funds to pay for their portion of the registration fee.

The payment schedule will be as follows for Grantee representatives.

1. 1st Participant pays $250 (five installments of $50), if paying in monthly installments.
2. Additional Participants pay $625 (five installments of $125), if paying in monthly installment.
3. Travel expenses not covered by Potlatch Fund, must be covered by either the Grantee or the Participant for cohort participation.

The payment schedule will be as follows for non-Grantee representatives.

1. 1st Participant pays $875 (five installments of $175), if paying in monthly installments.
2. Additional Participants pay $625 (five installments of $125), if paying in monthly installment.
3. Travel expenses not covered by Potlatch Fund, must be covered by either the Grantee or the participant for cohort participation.

TRAINING

The Participant is expected to successfully complete the cohort training activities. A successful completion is defined as a 75% or at least 57 hours of training. To attend Convening #2, the participant's progress must be in good standing (have at least a 75% completion of the training activities offered as of 6 weeks prior to the convening).

The training activities include the following opportunities.

- Orientation Webinar (1 hour)

- Convening #1 (24 hours = 3 days, 8 hours each)
- Monthly 1 hour Webinars (8 hours)
- Convening #2 (24 hours = 3 days, 8 hours each)
- Conclusion Webinar (1 hour)
- Required assignments (17 – 20 hours)
- Make-up time includes attending the other cohort's webinars, viewing a recorded webinar and answering questions about the topic, or attending a conference not sponsored by Potlatch Fund and then, providing a report about the conference.

Each cohort has specific topics that provide skills in either nonprofit management, language transfer, or native art small business management. The skills are acquired through completion of activities and participation in the monthly webinars, technical assistance calls, or convenings. An outline of the schedule is provided later in this document and Potlatch Fund will provide a training and technical assistance study guide that provides the specific schedule, the topic goal(s), learning objectives, activity description(s), and time to complete each activity before or after the webinar.

TECHNICAL ASSISTANCE

The Participant is expected to work with the Potlatch Fund's Capacity Building team to find a recurring day and time (for example, the third Thursday at 3:00 p.m. until 4:00 p.m.) for monthly technical assistance calls by the first core topic webinar scheduled after the Orientation Webinar. The purpose of the calls is to assist in completing assigned training activities or bring progress levels up to 75%, fill out grant applications, or to answer any questions in regard to workplace issues or projects.

- Monthly 1 hour technical assistance calls (8 hours)
- Technical assistance meeting face-to-face during cohort convenings or meeting at an outside conference not sponsored by Potlatch Fund (2 hours)
- Make-up time can include additional phone calls, face-to-face meetings at summer regional conferences, or meeting Potlatch Fund staff at conferences not sponsored by Potlatch Fund.

Potlatch Fund expects each Participant to successfully complete the cohort technical assistance activities. A successful completion is defined as a 75% or at least 7.5 hours of technical assistance. Make-up time can include additional phone calls, face-to-face meetings at Potlatch Fund events or site visits, or meeting Potlatch Fund staff at conferences not sponsored by Potlatch Fund.

To attend Convening #2, the Participant's progress must be in good standing (have at least a 75% completion of the technical assistance activities offered as of 6 weeks prior to the convening).

PROGRAM EVALUATION

The Participant provides information in regard to program evaluation in the following elements.

1. **Baseline Cohort Assessment (Individual)**. We'll be collecting data around individual demographics and skill level in business, language, art, and cultural arts, as well as asking you to determine a goal with at least one objective to be monitored during your participation in the cohort.

2. **Pre- and Post-training evaluations**. The data we will be collecting from the pre- and post-trainings (convenings and webinars) will provide us with information about your knowledge and skill level in regard to the topic before you attend and after to identify the increase of knowledge and skill about the topic. In addition, the post-training will also ask about your satisfaction with the quality and presentation of the material, the effectiveness of the trainers, and whether the material presented will be useful to you as you go forward in your profession.

3. **Closing Cohort Assessment (Individual)**. The questions asked are similar to the baseline assessment. We want to see if any increase in knowledge and skills occurred because of the cohort program and whether the cohort program helped you to meet your goal and objectives for participating.

4. **Post-Cohort Assessment**. We will contact you at 6 months and 12 months post cohort to find out whether the concepts you learned during the cohort were incorporated into your profession and organization. We'll also ask if you have any suggestions for topics that would benefit future cohorts.

COHORT COMMITMENT

Commitment to the cohort program is demonstrated in two ways:

1. Filling in and signing the Memoranda of Agreement (MOA). The specific MOA for each cohort is located in the Appendix or at the cohort website (www.potlatchfundcohorts.org).
2. Paying the cohort fee in full or begin the monthly payment process (e.g., request an invoice, submitting first installment by credit card by due date).

The signed MOA that pertains to your cohort and first installment of the cohort fee received at the Potlatch Fund office by the designated dates and time below.

- **Nonprofit Management Cohort: August 24, 2018, 5:00 p.m.**
- Language Preservation Cohort: September 29, 2018, 5:00 p.m.
- Native Arts Cohort: November 10, 2018, 5:00 p.m.

NONPROFIT MANAGEMENT COHORT

For the nonprofit management cohort, we will focus on three indicators of a healthy native-led nonprofit: Finance Management and Funding Models, Sustainability, and Native Nonprofit Context. The 75 hours of training and technical assistance will consist of 10 monthly webinars and will require the participant to use outside time to complete assigned activities and to prepare for convening presentations. The specific schedule is outlined below. Potlatch Fund will provide a training and technical assistance study guide that provides the specific schedule, the topic goal(s), learning objectives, activity description(s), and time to complete each activity before or after the webinar. Only those participants who have submitted payments and MOAs will receive the information and ask to continue on to the Convening Preparation Webinar. Emails about the webinars will be sent as save-the-dates and reminders, complete with webinar access information, topic, and learning objectives.

The objectives of the Nonprofit Management (NPM) Cohort is directed towards developing skills in financial and nonprofit management, organizational and board development, fundraising and grant writing, and communications. An important aspect of the cohort model and an intention of this program is peer-knowledge sharing and developing or strengthening relationships with other nonprofits.

NPM COHORT TRAINING SCHEDULE

The NPM Cohort program consists of the following schedule. Topics may change or move as needed.

- **July 17, 2018**: Cohort Information Webinar 1, 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **August 14, 2018**: Cohort Information Webinar (repeat), 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **August 28, 2018**: Orientation Webinar, 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **Sept 6, 2018:** Organizational Development Topic, 12:00 p.m. to 1:00 p.m. PST(1 hour)
- **September 27, 2018:** Organizational Development Topic, 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **October 18, 2018:** Mission Management Topic, 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **November 18, 2018:** Mission Management Topic, 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **November 29, 2018:** Convening #1 Prep webinar (All Cohorts), 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **December 3 - 5, 2018 (travel days Dec. 2 & 6):** Convening #1, Finance Management Topics; All Cohort Day Funder's panel (tentative), Coeur d'Alene Resort Casino, Worley, ID. (24 hours)
- **January 10, 2019:** Fundraising Topic, 12:00 p.m. to 1:00 p.m. (1 hour)
- **February 21, 2019:** Fundraising Topic, 12:00 p.m. to 1:00 p.m. (1 hour)

- **March 21, 2019:** Fundraising Topic, 12:00 p.m. to 1:00 p.m. (1 hour)
- **April 18, 2019:** Cohort Conclusion webinar, 12:00 p.m. to 1:00 p.m. (1 hour)
- **May 6-8, 2019 (travel days May 5 & 9):** Convening #2, Communication Topics, Chinook Winds Resort Casino, Lincoln City, OR. (24 hours)

LANGUAGE PRESERVATION COHORT

The Language Preservation Cohort will focus on major components of healthy language transfer system: instruction, assessment, teacher training, and language study. The 75 hours of training will consist of 10 monthly webinars and will require the participant to use outside time to complete assigned activities and to prepare for convening presentations. The specific schedule is outlined below. Potlatch Fund will provide a training and technical assistance study guide that provides the specific schedule, the topic goal(s), learning objectives, activity description(s), and time to complete each activity before or after the webinar. Only those participants who have submitted payments and MOAs will receive the information and ask to continue on to the Convening Preparation Webinar. Emails about the webinars will be sent as save-the-dates and reminders, complete with webinar access information, topic, and learning objectives.

The objectives of the Language Preservation (LP) Cohort is directed towards developing an effective and efficient language transfer systems. A language transfer system is set of sub-systems and cycles that aim to build the capacity to effectively and efficiently transfer the language from the hearts and minds of speakers to non-speakers in a structured holistic goal-oriented approach. In the analogy of the journey, an effective and efficient language transfer system guides non-speakers on an increasingly shorter route to join the speaking community. An important aspect of the cohort model and an intention of this program is peer knowledge sharing and developing or strengthening relationships with other language programs.

LP COHORT TRAINING SCHEDULE

The LP Cohort program consists of the following schedule. Topics may change or move as needed.

- **August 23, 2018**: Cohort Information Webinar 1, 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **September 6, 2018**: Cohort Information Webinar (repeat), 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **September 13, 2018**: Orientation Webinar, 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **September 20, 2018:** Language Transfer Design, 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **October, 9, 2018:** Language Transfer Strategy, 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **November, 13, 2018:** Language Transfer Goals, 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **November 29, 2018:** Convening #1 Prep webinar (All Cohorts), 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **December 5 - 7, 2018 (travel days Dec. 4 & 8):** Convening #1, Language Transfer System Strategic Plan; All Cohort Day Funder's panel (tentative), Venue is to be determined. (24 hours)
- **January 16, 2019:** Language Transfer Community Building, 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **February, 19, 2019:** Language Transfer Teachers, 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **March 19, 2019:** Language Transfer Curriculum, 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **April 16, 2019:** Language Transfer Assessment, 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **May 2, 2019:** Convening #2 Prep webinar (All Cohorts), 12:00 p.m. to 1:00 p.m. PST (1 hour)
- **May 8-10, 2019 (travel days May 7 & 11):** Convening #2, Language Transfer System Strategic Plan, Chinook Winds Resort Casino, Lincoln City, OR. (24 hours)
- **May 23, 2019:** Cohort Conclusion webinar, 12:00 p.m. to 1:00 p.m. PST (1 hour)

NATIVE ART COHORT

Native Art trainings focus on key performance indicators of financially successful artists: business plan, marketing plan, and artist portfolio. All of these topics will be taught in a Native-owner context. Our Native Art training program includes Business Startup, Business Management, Finance Management,

and Marketing. The Native Art (NA) cohort program is directed towards financial literacy specific to an artist's needs in competing or entering the art market. It also helps the individual develop an understanding of marketing principles and setting a fair market price for wholesale and retail markets. An important aspect of the cohort model and an intention of this program is peer knowledge sharing and developing or strengthening relationships with other artists and nonprofit organizations.

NA COHORT TRAINING SCHEDULE

The NA Cohort program consists of the following schedule. Topics may change or move as needed.

- **November 15, 2018**: Orientation Webinar, 12:00 p.m. to 1:00 p.m. (1 hour)
- **November 29, 2018:** Convening #1 Prep webinar (All Cohorts), 12:00 p.m. to 1:00 p.m. (1 hour)
- **December 5 - 7, 2018 (travel days Dec. 4 & 8):** Convening #1, Native Art Topics; All Cohort Day Funder's panel (tentative), Coeur d'Alene Resort Casino, Worley, ID. (24 hours)
- **January 24, 2019:** Native Art Topic, 12:00 p.m. to 1:00 p.m. (1 hour)
- **February, 28, 2019:** Native Art Topic, 12:00 p.m. to 1:00 p.m. (1 hour)
- **March 28, 2019:** Native Art Topic, 12:00 p.m. to 1:00 p.m. (1 hour)
- **April 25, 2019:** Convening #2 Prep webinar (All Cohorts), 12:00 p.m. to 1:00 p.m. (1 hour)
- **May 7-11, 2019:** Convening #2, Lincoln City, OR, Communication Topics (24 hours)
- **May 23, 2019:** Native Art Topic, 12:00 p.m. to 1:00 p.m. (1 hour)
- **June 27, 2019:** Native Art Topic, 12:00 p.m. to 1:00 p.m. (1 hour)
- **July 25, 2019:** Native Art Topic, 12:00 p.m. to 1:00 p.m. (1 hour)
- **August 22, 2019:** Cohort Conclusion webinar, 12:00 p.m. to 1:00 p.m. (1 hour)

PARTICIPANT TRAVEL POLICY

We are committed to minimizing the need for participants to incur out-of-pocket expenses when traveling on Potlatch Fund business. Potlatch Fund pays expenses through a reimbursement process and does **NOT** provide travel expense advances for cohort members. Participants are responsible for reading and understanding this policy before incurring expenses. Please be prepared to pay for out-of-pocket expenses while on travel to each convening. Expenses not expressly covered in this policy are not eligible for reimbursement.

Typically, meals and transportation are prearranged and billed directly to Potlatch Fund, as are lodging and airfare when arranged through the Capacity Building program staff.

SUMMARY OF PARTICIPANT ACTIONS

1. Fill out the traveler profile form (see Appendix or cohort website) and submit as soon as possible or by the date indicated by program staff. If a traveler profile form has been submitted and changes need to be made, contact the Capacity Building program staff for a new form, check the Appendix, or download from the cohort website.
2. Contact program staff to make any cohort-related travel arrangements.
3. **Immediately notify the Capacity Building staff if any of our arrangements on your behalf require changes.**
4. Submit expense-reimbursement claims using the Potlatch Fund expense claim form. Fill it out electronically and submit it **within 30 days** of attending the event.
5. Submit receipts showing proof of payment for all expense claims.

TRAVELER PROFILE FORM

The traveler profile form is posted on the cohort website or you can use one of the forms found in the Appendix. This form will be used for the entire cohort year. Fill out the form completely, and submit it **as soon as possible.** If you need to change any information on your form, contact the Capacity Building program staff or submit a new form.

TRANSPORTATION

Potlatch Fund will cover airfare between the participant's local airport and the convening location. Because all participants are expected to stay for **all three days**, the airfare will be arranged as follows.

AIRFARE

The Capacity Building staff will select and pay for flights based on the following criteria, in the following order of priority:

1. Departure date and time the day before start of convening and the day after the convening,
2. lowest fare available at time of booking,
3. nonstop routes, and
4. Potlatch Fund's preferred carriers.

These priorities override personal preferences or frequent-flyer program considerations. Coach class is standard policy for all flights.

Fees from airlines that charge for the first checked bag are eligible for reimbursement. The receipt must include baggage fee and charge dates.

Arrive at the airport at least **2 hours BEFORE your flight** is scheduled to leave to allow time for inclement weather, traffic issues, parking, check-in, and long security lines. Don't forget your identification for both check-in and security.

Immediately notify the Capacity Building staff if any of our arrangements on your behalf require changes.

EXPENSES NOT ELIGIBLE FOR REIMBURSEMENT

Fees and expenses incurred due to changes in seat assignments, flight dates and times, cancellations, delays, or missed flights are **not** eligible for reimbursement.

Fees from airlines to check bags beyond the first one or for other items, such as overweight baggage, are **not** eligible for reimbursement.

GROUND TRANSPORTATION

Potlatch Fund provides transportation throughout the duration of the meeting and includes roundtrip ground transportation between the convening city airport and the venue.

Immediately notify the Capacity Building staff if any of our arrangements on your behalf require changes.

EXPENSES NOT ELIGIBLE FOR REIMBURSEMENT

Expenses incurred because the participant chooses to decline Potlatch Fund-provided transportation are not eligible for reimbursement.

PERSONAL OWNED VEHICLE

To use your personal vehicle in lieu of traveling by air, you will need approval in advance. Your **reimbursement will be limited** to the cost of travel by a direct route or on an uninterrupted basis (i.e., generally the cost of a roundtrip airline ticket from designated home airport). You will be responsible for any additional costs. After you have **received written approval** from program staff (email or letter) to drive to the event, you need to document the mileage and keep gas receipts. Mileage reimbursement is based on the current mileage rate for 2018 ($0.535) set by the U.S. General Services Administration (GSA) located at www.gsa.gov. Fuel costs for roundtrip to and from event location are reimbursable up to the cost of the roundtrip airline ticket from designated home airport. Receipts must be dated and show proof of purchase (keep receipts).

RENTAL CAR

Under certain circumstances, the Capacity Building staff may need to rent a car and ask you to be a driver for you and other travelers. If you accept the request to be a driver, then the staff will reserve a car and put it on the staff member's credit card. You will need your driver's license when you pick up the car. You need to keep all fuel receipts for reimbursement.

LODGING AND MEALS

LODGING

All lodging will be arranged through the Potlatch Fund. We strive to have lodging costs (room and tax) billed directly to us. Please let us know in the traveler profile your accommodation needs.

If Potlatch Fund staff directs you in writing to arrange for your own hotel/lodging accommodations, then reimbursement is available at the GSA rate for the event location. You will be responsible for any additional costs. Please submit documentation of Potlatch Fund request (email or letter) and lodging receipts.

Immediately notify the Capacity Building staff if any of our arrangements on your behalf require changes.

EXPENSES NOT ELIGIBLE FOR REIMBURSEMENT

Please be advised that the hotel may require a personal credit card from the participant to cover any incidental costs you may incur in addition to room and tax that is paid by the Potlatch Fund.

Incidental expenses incurred such as telephone, internet, movies, mini bar, laundry, tips, and other services are not eligible for reimbursement.

MEALS AND INCIDENTAL EXPENSES (M&IE)

We provide six of the meals (three breakfasts and three lunches) throughout the duration of each convening.

EXPENSES NOT ELIGIBLE FOR REIMBURSEMENT

Expenses incurred because the participant chooses to decline a Potlatch Fund-provided meal are not eligible for reimbursement by Potlatch Fund.

Meals outside the designated convening food are not reimbursed by Potlatch Fund. Such per diem should be discussed with the participant's organization for reimbursable costs.

REIMBURSEMENT CLAIM FORMS

For out-of-pocket expenses incurred while participating in a training event, you are solely responsible for promptly submitting your reimbursement claim and providing documentation to verify each expense. Expense claims must be submitted using the reimbursement claim form provided by the Capacity Building staff. Forms must be filled out electronically, printed, and signed. Receipts must be taped to an 8.5" x 11" sheet of paper. Completed forms and accompanying receipts can be mailed, or scanned and emailed, or faxed to Tachini Pete, Program Director. If you do not have an electronic version of the form, ask Tachini Pete or Amadeo Guiao to send you a form.

Instructions for completing the form are available within the form document. Submit your completed expense claim form within 30 days of the meeting to:

Potlatch Fund
Attn: Tachini Pete, Travel Reimbursement
801 Second Ave, Ste. 304
Seattle, WA 98104

Claim forms received after 30 days from the end of your event may not eligible for reimbursement.

We will make every effort to process payments for expense claims within 30 days of receipt. A check in U.S. dollars will be issued and sent to the reimbursement address provided on the claim form or the traveler profile form.

RECEIPTS AND OTHER DOCUMENTATION

We suggest that you keep an envelope with you to collect all of your receipts during the time you are at each convening. The receipts you need to submit to Potlatch Fund for reimbursement include the following:

- Baggage fees, if applicable: baggage fee receipt (roundtrip, one bag only).
- Other lodging approved: email/letter indicating Potlatch Fund approval, lodging receipts.
- Personal vehicle approved for travel: email/letter indicating Potlatch Fund approval, mileage documentation, and fuel receipts.
- Rental car approved: email/letter indicating Potlatch Fund approval, copy of rental car receipt (if available), and fuel receipts.

TRAVEL PROCESS OVERVIEW

Step 1:	A Potlatch Fund capacity building staff member sends you an email on convening and travel to convening.
Step 2:	A capacity building staff member refers you to the Cohort Handbook and section about travel and sends you a Traveler Profile form with a due date to return the form (if you have not submitted one previously).
Step 3:	Instructions on how to arrange travel are emailed 1 week following receipt of Traveler Profile form. Travel logistics (such as airfare, lodging, and ground transportation) vary according to convening and will be communicated with directions. You will receive and return required information either with a form attached to the email or through a website link. **NOTE: you must contact Tachini Pete or Amadeo Guiao before incurring any expenses related to Potlatch Fund-sponsored events.**
Step 4:	Travel arrangements are confirmed. You will receive a detailed itinerary via email. The itinerary will include the following. • Travel dates, times, airline, and flight number. • Transportation to the hotel (such as assigned driver, contact information, and assigned meeting place) • Lodging reservation • **Immediately notify the Capacity Building staff if any of our arrangements on your behalf require changes.**
Step 5:	Attend the convening. If something occurs that prevents you from traveling to the convening as planned, then immediately contact Tachini Pete or Amadeo Guiao. See contact information following the FAQ section.
Step 6:	Participant submits reimbursement claim for out-of-pocket expenses. Complete the claim form on a computer, print, and sign. Mail, scan/email, or fax along with receipts within 30 days of the training.
Step 7:	Reimbursement claim form is reviewed, approved, and processed with payment issued accordingly. Potlatch Fund provides reimbursement within 30 days of claim form receipt, provided that all information is accurate and complete. A check in U.S. dollars will be

issued.

FREQUENTLY ASKED QUESTIONS (FAQ) FOR TRAVEL

GENERAL

Do I or my organization pay for travel to the convenings?

No. Potlatch Fund covers the travel to and from the convening location (airfare or mileage), lodging for four nights, and six meals (three breakfasts and three lunches). The only costs that your organization or you cover is incidentals (GSA rate at $5.00 per day), travel days meals, and three dinners.

Who should I contact if I have questions?

Your main point of contact is the Tachini Pete, Program Director. Throughout the process, Amadeo Guiao, Program Manager might contact you about travel logistics. Refer to the contact information sheet at the end of this document for details.

I understand that Potlatch Fund is directly paying for most of the travel accommodations in advance. I do not have a credit card and am concerned about my ability to cover my out-of-pocket expenses. What should I do?

Contact Tachini Pete to review your particular concerns.

I would like to express-ship my form. Am I reimbursed for the charges?

Charges incurred to express-ship claim forms and/or receipts are not eligible for reimbursement.

Is an itinerary considered a receipt?

No, an itinerary does not provide adequate proof of payment.

AIR TRAVEL

I prefer a red-eye flight. Is this an option?

Yes. Although Potlatch Fund will not require participants to travel on red-eye flights, this option is available if specified when submitting your travel request.

I prefer to drive rather than fly. Is this an option?

Yes, however, you need to send an email to Tachini or Amadeo about your travel preference and before they make flight arrangements. Your mileage will be reimbursed up to the cost of the airfare ticket you would have received, if you had flown.

MEALS

I have special dietary needs and might not be able to eat food provided through the Potlatch Fund. May I skip these meals and get reimbursed for food I arrange myself?

No. Please make note of your dietary needs in the Traveler Profile form and contact Tachini Pete before the event begins of any special requirements and he will ensure, within reason, that your dietary needs are accommodated. If your dietary needs have changed since you submitted your traveler profile, please contact Amadeo Guiao for a new form or download from the cohort website.

GROUND TRANSPORTATION

What about tips? Can I add a tip to the bill? If so, how much?

All tips are considered part of incidental expenses and are not reimbursed separately by Potlatch Fund.

What if the ground transportation is scheduled and then something changes?

Immediately notify Capacity Building program staff if any of our arrangements on your behalf require changes. We aim to treat our vendors with the same respect and consideration we require of them, and ask for your cooperation to meet that objective. Fees incurred because of cancellations, delays, or missed appointments are not eligible for reimbursement.

How do I know if ground transportation will be provided, and therefore, whether I should request it?

At Step 4 in the process, you will receive an itinerary that will include information about your trip's logistics. If you do not receive an itinerary 2 weeks before the event or its information is insufficient, contact Tachini Pete or Amadeo Guiao.

CONTACT INFORMATION

COHORT WEBSITE: WWW.POTLATCHFUNDCOHORTS.ORG

POTLATCH FUND WEBSITE: WWW.POTLATCHFUND.ORG

Capacity Building Staff	Tachini Pete, Program Director	Amadeo Guiao, Program Manager
Mailing Address:	Potlatch Fund 801 Second Ave., Suite 304 Seattle, WA 98104	Potlatch Fund 801 Second Ave., Suite 304 Seattle, WA 98104
Physical Address:	Norton Building 801 Second Ave., Suite 304 Seattle, WA 98104	Norton Building 801 Second Ave., Suite 304 Seattle, WA 98104
Office Phone:	206-264-6076, extension 11	206-883-3500
Cell Phone:	406-830-0808	206-883-3500
Email:	tachini@potlatchfund.org	amadeo@potlatchfund.org
Fax:	206-264-7629	206-264-7629

APPENDIX

MEMORANDA OF AGREEMENT

NONPROFIT MANAGEMENT MOA

LANGUAGE PRESERVATION MOA

NATIVE ART MOA – INDIVIDUAL

NATIVE ART MOA – ART ORGANIZATION

TRAVEL PROFILE FORM

2018 NONPROFIT MANAGEMENT COHORT MEMORANDUM OF AGREEMENT

This Memorandum of Agreement (MOA) is entered into by and between Potlatch Fund, _____, a grantee of Potlatch Fund (Grantee), and _____, a representative of the Grantee who will participate in the 2018 Nonprofit Management Cohort.

Purpose.

The purpose of this MOA is to ensure that all parties are committed to building capacity of the Grantee as a cohort member.

The nonprofit management trainings focus on key performance indicators of a healthy nonprofit: Governance, Planning, Finance, and Fundraising. All of these topics will be taught in a Native-led nonprofit context through our workbook series

Potlatch Fund's Nonprofit Management training program includes Organizational Development, Mission Management, Finance Management, Fundraising, and Community Communication. Each of the trainings are given in workshop formats and include a workbook with activities and assignments. An important aspect of the cohort model and an intention of this program is peer knowledge sharing and developing or strengthening relationships with other nonprofits.

Potlatch Fund Obligations, Roles, and Responsibilities.

Potlatch Fund agrees to:

Responsibility/Activity	Responsible Person
Identify eligible Grantees for cohort training program and contact Grantees in regard to interest in participating.	Capacity Building Program staff
Provide travel expenses for each of the two Convenings: registration, six meals (three breakfasts and three lunches), roundtrip travel to convening location (airfare/mileage and transportation between airport and convening venue), and four nights lodging.	Capacity Building Program staff
Provide up to 75 hours of direct training as per schedule given in 2018 Cohort Handbook.	Capacity Building Program staff and/or contracted consultants
Provide toll free phone numbers and webinar access for web-based trainings at no cost to participants.	Capacity Building Program staff
Provide 1 composition notebook, 1 pen/pencil for convening participant; all written materials in PDF on a flash drive at conclusion of cohort.	
Provide 10 hours of individual technical assistance (1 hour/month) by phone as scheduled between Potlatch Fund staff and participant and 1 hour of in person at convening.	Capacity Building Program staff
Provide toll free conference phone number at no cost to participant.	Capacity Building Program staff
Provide access to evaluation forms for the Grantee Organization and the Participant to fill	Capacity Building Program staff

out.	
Provide a report to the grantee organization and participant in regard to the evaluations analysis.	Capacity Building Program staff

Grantee Organization Obligations, Roles, and Responsibilities.

_____ (Grantee Organization Executive Director/
Tribal Department Head) agrees to:

Responsibility/Activity	Responsible Person
Identify one person to represent the Grantee as a member of the cohort training program and provide the name and contact information to Potlatch Fund.	Executive Director or Tribal Department Head
1st Participant pay Cohort Fee of $250 up front or in payments as scheduled: $50: no later than August 25, 2018 $50: no later than September 29, 2018 $50: no later than October 31, 2018 $50: no later than November 30, 2018 $50: no later than December 29, 2018	Executive Director or Tribal Department Head
Provide travel expenses for each of the two convenings not covered by Potlatch Fund.	Executive Director or Tribal Department Head
Provide cohort costs for each additional personnel to participate in cohort either up front or in monthly payments. Cohort fee: $625 $125: no later than August 25, 2018 $125: no later than September 29, 2018 $125: no later than October 31, 2018 $125: no later than November 30, 2018 $125: no later than December 29, 2018 Travel expenses associated with the each of the two convenings (registration, transportation, lodging, and per diem).	Executive Director or Tribal Department Head
Encourage and support participant to complete at least 75% of direct training hours offered as per schedule.	Executive Director or Tribal Department Head
Encourage and support participant to complete at least 75% of individual technical assistance offered as per schedule.	Executive Director or Tribal Department Head
Complete all evaluation forms applicable to Organization and submit to Potlatch Fund by dates requested.	Executive Director or Tribal Department Head

Grantee Representative/Participant Obligations, Roles, and Responsibilities.

_____ (Grantee Representative/Participant) agrees to:

Responsibility/Activity	Responsible Person
1st participant pay Cohort Fee of $250 up front or as scheduled: $50: no later than August 25, 2018 $50: no later than September 29, 2018 $50: no later than October 31, 2018 $50: no later than November 30, 2018 $50: no later than December 29, 2018	Grantee Representative/Participant
2nd participant or more pay Cohort Fee of $625 up front or as scheduled: $125: no later than August 25, 2018 $125: no later than September 29, 2018 $125: no later than October 31, 2018 $125: no later than November 30, 2018 $125: no later than December 29, 2018	Grantee Representative/Participant
Provide travel expenses for each of the two convenings not covered by Potlatch Fund.	Grantee Representative/Participant
Complete at least 75% of direct training hours (e.g., activities and homework) offered as per schedule.	Grantee Representative/Participant
Schedule and participate in a recurring monthly 1 hour long technical assistance call with Potlatch Fund Staff.	Grantee Representative/Participant
Complete at least 75% of individual technical assistance offered as per agreed upon schedule.	Grantee Representative/Participant
Complete all evaluation forms applicable to Participant and submit to Potlatch Fund by dates requested.	Grantee Representative/Participant

Timeframe.

This MOA will commence on August 25, 2018 and will dissolve at the end of day on May 31, 2018.

This MOA is the complete agreement between Potlatch Fund, _____ (Grantee Organization), and _____ (Participant, print clearly), and may be amended only by written agreement signed by each of the parties involved.

Potlatch Fund

_____
Tachini Pete   Date
Capacity Building Program Director

Grantee Organization:

_____
Executive Director signature   Date

_____
Grantee Representative signature   Date

2018 LANGUAGE PRESERVATION COHORT MEMORANDUM OF AGREEMENT

This Memorandum of Agreement (MOA) is entered into by and between Potlatch Fund, _____, a grantee of Potlatch Fund (Grantee), and _____, a representative of the Grantee who will participate in the 2018 Language Preservation Cohort.

Purpose.

The purpose of this MOA is to ensure that all parties are committed to building capacity of the Grantee as a cohort member.

The Language Preservation Cohort will focus on supporting the 2018 Language Preservation and Education grants for the development of language transfer systems. The primary goal of this cohort is to develop community assessments and identify the other areas of a healthy language transfer system: instruction, teacher training, and language study.

Potlatch Fund Obligations, Roles, and Responsibilities.

Potlatch Fund agrees to:

Responsibility/Activity	Responsible Staff
Identify eligible Grantees for cohort training program and contact Grantees in regard to interest in participating.	Capacity Building Program staff
Provide travel expenses for each of the two Convenings: registration, six meals (three breakfasts and three lunches), roundtrip travel to convening location (airfare/mileage and transportation between airport and convening venue), and four nights lodging.	Capacity Building Program staff
Provide up to 75 hours of direct training as per schedule given in 2018 Cohort Handbook.	Capacity Building Program staff
Provide toll free phone numbers and webinar access for web-based trainings at no cost to participants.	Capacity Building Program staff and/or contracted consultants
Provide 1 composition notebook, 1 pen/pencil for convening participant; all written materials in PDF on a flash drive at conclusion of cohort.	Capacity Building Program staff
Provide 10 hours of individual technical assistance (1 hour/month) by phone as scheduled between Potlatch Fund staff and participant and 1 hour of in person at convening.	Capacity Building Program staff
Provide toll free conference phone number at no cost to participant.	Capacity Building Program staff
Provide access to evaluation forms for the Grantee Organization and the Participant to fill out.	Capacity Building Program staff
Provide a report to the grantee organization and participant in regard to the evaluations analysis.	Capacity Building Program staff

Grantee Organization Obligations, Roles, and Responsibilities.

_____ (Grantee Organization Executive Director/ Tribal Department Head) agrees to:

Responsibility/Activity	Responsible Staff
Identify one person to represent the Grantee as a member of the cohort training program and provide the name and contact information to Potlatch Fund.	Executive Director or Tribal Department Head
1st Participant pay Cohort Fee of $250 up front or in payments as scheduled: $50: no later than September 22, 2018 $50: no later than October 31, 2018 $50: no later than November 30, 2018 $50: no later than December 29, 2018 $50: no later than January 31, 2019	Executive Director or Tribal Department Head
Provide travel expenses for each of the two convenings not covered by Potlatch Fund.	Executive Director or Tribal Department Head
Provide cohort costs for each additional personnel to participate in cohort either up front or in monthly payments. Cohort fee: $625 $125: no later than September 22, 2018 $125: no later than October 31, 2018 $125: no later than November 30, 2018 $125: no later than December 29, 2018 $125: no later than January 31, 2019 Travel expenses associated with the each of the two convenings (registration, transportation, lodging, and per diem).	Executive Director or Tribal Department Head
Encourage and support participant to complete at least 75% of direct training hours offered as per schedule.	Executive Director or Tribal Department Head
Encourage and support participant to complete at least 75% of individual technical assistance offered as per schedule.	Executive Director or Tribal Department Head
Complete all evaluation forms applicable to Organization and submit to Potlatch Fund by dates requested.	Executive Director or Tribal Department Head
Identify one person to represent the Grantee as a member of the cohort training program and provide the name and contact information to Potlatch Fund.	

Grantee Representative/Participant Obligations, Roles, and Responsibilities.

_____ (Grantee Representative/Participant) agrees to:

Responsibility/Activity	Responsible Staff
1st Participant pay Cohort Fee of $250 up front or in payments as scheduled: $50: no later than September 22, 2018 $50: no later than October 31, 2018 $50: no later than November 30, 2018 $50: no later than December 29, 2018 $50: no later than January 31, 2018	Grantee Representative/Participant
2nd participant or more pay Cohort Fee of $625 up front or as scheduled: $$125: no later than September 22, 2018 $125: no later than October 31, 2018 $125: no later than November 30, 2018 $125: no later than December 29, 2018 $125: no later than January 31, 2019	Grantee Representative/Participant
Provide travel expenses for each of the two convenings not covered by Potlatch Fund.	Grantee Representative/Participant
Complete at least 75% of direct training hours (e.g., activities and homework) offered as per schedule.	Grantee Representative/Participant
Schedule and participate in a recurring monthly 1 hour long technical assistance call with Potlatch Fund Staff.	Grantee Representative/Participant
Complete at least 75% of individual technical assistance offered as per agreed upon schedule.	Grantee Representative/Participant
Complete all evaluation forms applicable to Participant and submit to Potlatch Fund by dates requested.	Grantee Representative/Participant

Timeframe.

This MOA will commence on September 22, 2018 and will dissolve at the end of day on June 29, 2018.

This MOA is the complete agreement between Potlatch Fund, _____ (Grantee Organization), and _____ (Participant, print clearly), and may be amended only by written agreement signed by each of the parties involved.

Potlatch Fund   **Grantee Organization:**

_____   _____
Tachini Pete   Date   Executive Director signature   Date

Capacity Building Program Director

                                                _____
                                                Grantee Representative signature   Date

2018 NATIVE ART COHORT MEMORANDUM OF AGREEMENT – INDIVIDUAL ARTIST

This Memorandum of Agreement (MOA) is entered into by and between Potlatch Fund, _____, a grantee of Potlatch Fund (Grantee), who will participate in the 2018 Native Art Cohort.

Purpose.

The purpose of this MOA is to ensure that all parties are committed to building capacity of the Grantee as a cohort member.

Native Arts trainings focus on key performance indicators of financially successful artists: business plan, marketing plan, and artist portfolio. All of these topics will be taught in a Native-owner context. Our Native Arts training program includes Business Startup, Business Management, Finance Management, and Marketing.

Potlatch Fund Obligations, Roles, and Responsibilities.

Potlatch Fund agrees to:

Responsibility/Activity	Responsible Staff
Identify eligible Grantees for cohort training program and contact Grantees in regard to interest in participating.	Capacity Building Program staff
Provide travel expenses for each of the two Convenings: registration, six meals (three breakfasts and three lunches), roundtrip travel to convening location (airfare/mileage and transportation between airport and convening venue), and four nights lodging.	Capacity Building Program staff
Provide up to 75 hours of direct training as per schedule given in 2018 Cohort Handbook.	Capacity Building Program staff
Provide toll free phone numbers and webinar access for web-based trainings at no cost to participants.	Capacity Building Program staff and/or contracted consultants
Provide 1 composition notebook, 1 pen/pencil for convening participant; all written materials in PDF on a flash drive at conclusion of cohort.	Capacity Building Program staff
Provide 10 hours of individual technical assistance (1 hour/month) by phone as scheduled between Potlatch Fund staff and participant and 1 hour of in person at convening.	Capacity Building Program staff
Provide toll free conference phone number at no cost to participant.	Capacity Building Program staff
Provide access to evaluation forms for the Grantee Organization and the Participant to fill out.	Capacity Building Program staff
Provide a report to the grantee organization and participant in regard to the evaluations analysis.	Capacity Building Program staff

Grantee Participant Obligations, Roles, and Responsibilities.

_____ (Grantee Representative/Participant) agrees to:

Responsibility/Activity	Responsible Staff
Grantee participant pay Cohort Fee of $250 up front or as scheduled: $50: no later than November 29, 2018 $50: no later than December 29, 2018 $50: no later than January 31, 2019 $50: no later than February 28, 2019 $50: no later than March 30, 2019	Grantee Representative/Participant
Provide travel expenses for each of the two convenings not covered by Potlatch Fund.	Grantee Representative/Participant
Complete at least 75% of direct training hours (e.g., activities and homework) offered as per schedule.	Grantee Representative/Participant
Schedule and participate in a recurring monthly 1 hour long technical assistance call with Potlatch Fund Staff.	Grantee Representative/Participant
Complete at least 75% of individual technical assistance offered as per agreed upon schedule.	Grantee Representative/Participant
Complete all evaluation forms applicable to Participant and submit to Potlatch Fund by dates requested.	Grantee Representative/Participant

Timeframe.

This MOA will commence on November 17, 2018 and will dissolve at the end of day on August 31, 2019.

This MOA is the complete agreement between:

	Grantee Organization	**Cohort Participant**
Potlatch Fund	Name: _____	N:_____
801 2nd Ave	Address: _____	A: _____
Seattle, WA 98115	City, State:_____	C, S:_____

Be amended only by written agreement signed by each of the parties involved.

Potlatch Fund   **Grantee Participant:**

_____   _____

Tachini Pete   Date   Grantee participant signature   Date

Capacity Building Program Director

2018 NATIVE ART COHORT MEMORANDUM OF AGREEMENT – ART ORGANIZATION

This Memorandum of Agreement (MOA) is entered into by and between Potlatch Fund, _____, a grantee of Potlatch Fund (Grantee), and _____, a representative of the Grantee who will participate in the 2018 Native Art Cohort.

Purpose.

The purpose of this MOA is to ensure that all parties are committed to building capacity of the Grantee as a cohort member.

Native Arts trainings focus on key performance indicators of financially successful artists: business plan, marketing plan, and artist portfolio. All of these topics will be taught in a Native-owner context. Our Native Arts training program includes Business Startup, Business Management, Finance Management, and Marketing.

Potlatch Fund Obligations, Roles, and Responsibilities.

Potlatch Fund agrees to:

Responsibility/Activity	Responsible Staff
Identify eligible Grantees for cohort training program and contact Grantees in regard to interest in participating.	Capacity Building Program staff
Provide travel expenses for each of the two Convenings: registration, six meals (three breakfasts and three lunches), roundtrip travel to convening location (airfare/mileage and transportation between airport and convening venue), and four nights lodging.	Capacity Building Program staff
Provide up to 75 hours of direct training as per schedule given in 2018 Cohort Handbook.	Capacity Building Program staff
Provide toll free phone numbers and webinar access for web-based trainings at no cost to participants.	Capacity Building Program staff and/or contracted consultants
Provide 1 composition notebook, 1 pen/pencil for convening participant; all written materials in PDF on a flash drive at conclusion of cohort.	Capacity Building Program staff
Provide 10 hours of individual technical assistance (1 hour/month) by phone as scheduled between Potlatch Fund staff and participant and 1 hour of in person at convening.	Capacity Building Program staff
Provide toll free conference phone number at no cost to participant.	Capacity Building Program staff
Provide access to evaluation forms for the Grantee Organization and the Participant to fill out.	Capacity Building Program staff
Provide a report to the grantee organization and participant in regard to the evaluations analysis.	Capacity Building Program staff

Grantee Organization Obligations, Roles, and Responsibilities.

_____ (Grantee Organization Executive Director/
Tribal Department Head) agrees to:

Responsibility/Activity	Responsible Staff
Identify one person to represent the Grantee as a member of the cohort training program and provide the name and contact information to Potlatch Fund.	Executive Director or Tribal Department Head
1st Participant pay Cohort Fee of $250 up front or in payments as scheduled: $50: no later than November 29, 2018 $50: no later than December 29, 2018 $50: no later than January 31, 2019 $50: no later than February 28, 2019 $50: no later than March 30, 2019	Executive Director or Tribal Department Head
Provide travel expenses for each of the two convenings not covered by Potlatch Fund.	Executive Director or Tribal Department Head
Provide cohort costs for each additional personnel to participate in cohort either up front or in monthly payments. Cohort fee: $625 $125: no later than November 10, 2018 $125: no later than December 29, 2018 $125: no later than January 31, 2019 $125: no later than February 28, 2019 $125: no later than March 30, 2019 Travel expenses associated with the each of the two convenings (registration, transportation, lodging, and per diem).	Executive Director or Tribal Department Head
Encourage and support participant to complete at least 75% of direct training hours offered as per schedule.	Executive Director or Tribal Department Head
Encourage and support participant to complete at least 75% of individual technical assistance offered as per schedule.	Executive Director or Tribal Department Head
Complete all evaluation forms applicable to Organization and submit to Potlatch Fund by dates requested.	Executive Director or Tribal Department Head
Identify one person to represent the Grantee as a member of the cohort training program and provide the name and contact information to Potlatch Fund.	

Grantee Representative/Participant Obligations, Roles, and Responsibilities.

_____ (Grantee Representative/Participant) agrees to:

Responsibility/Activity	Responsible Staff
1st participant pay Cohort Fee of $250 up front or as scheduled: $50: no later than November 10, 2018 $50: no later than December 29, 2018 $50: no later than January 31, 2019 $50: no later than February 28, 2019 $50: no later than March 30, 2019	Grantee Representative/Participant
2nd participant or more pay Cohort Fee of $625 up front or as scheduled: $125: no later than November 10, 2018 $125: no later than December 29, 2018 $125: no later than January 31, 2019 $125: no later than February 28, 2019 $125: no later than March 30, 2019	Grantee Representative/Participant
Provide travel expenses for each of the two convenings not covered by Potlatch Fund.	Grantee Representative/Participant
Complete at least 75% of direct training hours (e.g., activities and homework) offered as per schedule.	Grantee Representative/Participant
Schedule and participate in a recurring monthly 1 hour long technical assistance call with Potlatch Fund Staff.	Grantee Representative/Participant
Complete at least 75% of individual technical assistance offered as per agreed upon schedule.	Grantee Representative/Participant
Complete all evaluation forms applicable to Participant and submit to Potlatch Fund by dates requested.	Grantee Representative/Participant

Timeframe.

This MOA will commence on November 17, 2018 and will dissolve at the end of day on August 31, 2018.

This MOA is the complete agreement between:

	Grantee Organization	**Cohort Participant**
Potlatch Fund	Name: _____	N:_____
801 2nd Ave	Address: _____	A: _____
Seattle, WA 98115	City, State:_____	C, S:_____

Be amended only by written agreement signed by each of the parties involved.

Potlatch Fund   **Grantee Organization:**

_____   _____
Tachini Pete   Date   Executive Director signature   Date
Capacity Building Program Director

                                                    _____
                                                    Grantee Representative signature   Date

TRAVELER PROFILE FOR POTLATCH FUND 2018 COHORTS

PERSONAL INFORMATION	
Name (as printed on driver's license or official identification)	
Birthdate (as printed on driver's license or official identification)	
E-mail address	
Business phone	
Work Cell phone	
Home phone	
Cell phone (contact while you are traveling)	
Location address (for mileage reimbursement)	
Mailing address (if different from location address)	
Home Airport	
TSA PRE√ (IF AVAILABLE)	
Known traveler number	
Expiration date	
FREQUENT FLYER PROGRAMS (IF APPLICABLE)	
Program name	
Account number	
Program name	
Account number	
AIRPLANE TRAVEL PREFERENCES	
Position (e.g., aisle, window, center)	
Location (e.g., forward, rear, wing, exit row, bulkhead, right, left)	
Meal (if available) (e.g., no preference, vegetarian, kosher)	
HOTEL PROGRAMS (IF APPLICABLE)	
Hotel name	
Guest number	
Hotel name	
Guest number	
HOTEL ROOM PREFERENCES	
Floor preference (e.g., ground floor)	
Special requests (e.g., refrigerator)	
DIETARY RESTRICTIONS	
Food allergies or avoidances (e.g., peanuts, dairy, gluten)	
Food preferences (e.g. vegetarian, vegan, kosher)	

TRAVELER PROFILE FOR POTLATCH FUND 2018 COHORTS

PERSONAL INFORMATION	
Name (as printed on driver's license or official identification)	
Birthdate (as printed on driver's license or official identification)	
E-mail address	
Business phone	
Work Cell phone	
Home phone	
Cell phone (contact while you are traveling)	
Location address (for mileage reimbursement)	
Mailing address (if different from location address)	
Home Airport	
TSA PRE√ (IF AVAILABLE)	
Known traveler number	
Expiration date	
FREQUENT FLYER PROGRAMS (IF APPLICABLE)	
Program name	
Account number	
Program name	
Account number	
AIRPLANE TRAVEL PREFERENCES	
Position (e.g., aisle, window, center)	
Location (e.g., forward, rear, wing, exit row, bulkhead, right, left)	
Meal (if available) (e.g., no preference, vegetarian, kosher)	
HOTEL PROGRAMS (IF APPLICABLE)	
Hotel name	
Guest number	
Hotel name	
Guest number	
HOTEL ROOM PREFERENCES	
Floor preference (e.g., ground floor)	
Special requests (e.g., refrigerator)	
DIETARY RESTRICTIONS	
Food allergies or avoidances (e.g., peanuts, dairy, gluten)	
Food preferences (e.g. vegetarian, vegan, kosher)	