Applicant & Grantee Guide

METROWEST
HEALTH
FOUNDATION

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INTRODUCTION & BACKGROUND

This guide is intended to help you navigate the foundation's grant application and reporting process from determining if your project or agency fits into our funding priority areas to what you will need to know if you receive a grant. If you have any questions, please give us a call at 508-879-7625.

The MetroWest Health Foundation is an independent health philanthropy whose mission is *to improve the health status of the community, its individuals, and families through informed and innovative leadership*. The foundation meets the health needs of our region's residents by supporting community-based and community driven programs. We encourage and foster leadership on critical health issues. We are a grantmaker, convener and facilitator, working to provide resources, information, ideas and advocacy for community change.

The foundation serves 25 towns in the region.

BEFORE YOU APPLY FOR A GRANT

What the Foundation Funds and Does Not Fund

Funding guidelines vary each funding cycle. You can find the updated guidelines in the "Apply" section of the foundation's website. In general, the foundation supports projects that directly benefit the health of those who live and work in one of the twenty-five MetroWest communities served by the foundation.

The foundation does not support:
- Direct grants to individuals
- Endowments
- Fundraising drives and events
- Retirement of debt
- Operating deficits
- Projects that directly influence legislation, political activities or candidates for public office
- Programs that are customarily operated by hospitals in Massachusetts
- Projects that provide no direct benefit to the health of those who live and work in one of the 25 communities served by the foundation
- Organizations that are neither tax-exempt under Section 501(c)(3) of the IRS Code or instrumentalities of state or local government.
- Organizations that discriminate in the provision of services on the basis of race, color, religion, gender, age, ethnicity, marital status, disability, citizenship, sexual orientation or veteran status.

Frequently Asked Questions

1. *My agency is outside of the service area, but we serve families from MetroWest communities. Can we apply?*
   Individual eligibility circumstances will vary. Please contact the foundation at 508-879-7625 to speak with a Program Officer to determine if your agency is eligible to apply.

2. *How often do you accept grant proposals?*
   The foundation has two grant cycles per year. As a general rule, the spring Request for Proposals is announced in February and grant awards are made in April. The fall Request for Proposals is announced in August and grant awards are made in November.

3. *How many grants do you award per cycle?*

The number of grant awards varies from cycle to cycle. Since 2005, the foundation has awarded an average of 30 grants per cycle, which includes new and continuation grants.

4. *Can we apply for more than one new grant per cycle?*
Yes, you may submit more than one new grant proposal per cycle as long as the proposed projects are distinct initiatives.

5. *Do you provide multi-year grants?*
Each grant category has different guidelines. You should review the guidelines for each funding initiative and contact a Program Officer with questions. Where multiple year requests are allowed, the amount requested must decline over each successive year.

6. *Who makes the final decision regarding grant funding?*
Grant proposals are reviewed by geographically designated Grants Panels or by the Distribution Committee based on the community(ies) served by the project or program. Funding recommendations are made by the appropriate Grants Panel/Distribution Committee to the foundation's Board of Trustees, who make final decisions.

7. *Can we submit videos or other attachments as part of our application?*
No, unless requested by the foundation.

8. *Do you share copies of successfully granted proposals?*
No, we consider proposals the intellectual property of the applicant.

9. *Can we make a presentation to the Committee?*
No, due to the number of grant applications received we cannot accommodate in-person presentations.

10. *Our proposal was not funded. Do we need to wait a year before applying again?*
No, if your proposal was not funded, you should call the foundation to receive feedback on the Committee's decision. You may be eligible to apply in the next funding round.

APPLICATION INFORMATION & FORMS

Concept Papers

We require a concept paper before the full proposal. Our goal is to give you feedback on your proposal idea and logic model. It is intended to help you frame your proposal as well as to identify projects that are outside the scope of foundation funding before time and resources are devoted to a full application.

Concept Paper Guidelines

1. Concept papers should be no more than one-page and be accompanied by the Concept Paper Cover Sheet and draft Logic Model .

2. The deadline for submitting concept papers varies by grant round and can be found on the foundation's website.

4. Concept papers should include a very brief narrative about your project that consists of the following:
- Need for the project, including relevant, local data
- Elements of the project for which funding is requested
- Organizations you intend to collaborate with
- Population served by the project
- Sustainability of the project beyond the duration of the grant

Email concept papers to the attention of Rebecca Donham at rdonham@mwhealth.org. Staff will make every effort to provide feedback on concept papers within three business days.

Elements of a Grant Proposal

1. *Online Application Questions*

   Using the online application system, you will be asked to enter basic information about the applicant agency, the project title and project director, the dates of the proposed project, collaborating agencies, the total amount of dollars requested and the MetroWest communities to be served.

2. ***Budget & Budget Narrative***

    The Budget contains a detailed breakout of the line items for which funds are being requested. The budget includes five sections: Personnel, Direct Expenses, Overhead, Equipment and Other Expenses. The budget also asks you to identify other sources of support for each line item, if any, and any in-kind or other support that will be used to offset the expense.

    The Budget Narrative is where the applicant provides a description of each line item, including justification for the expense.

    If the grant request is for more than one year, there should be a separate budget and budget narrative for each year of the proposed project.

3. ***Proposal Narrative***

    There is a standard set of questions for each type of proposal asking you to explain the need for the proposed project, why you are the best organization to carry out this work, and what the proposal seeks to accomplish. The narrative is usually a Word document or a PDF that can then be uploaded to the online application.

4. ***Logic Model***

    The Logic Model is a simple way to think about the proposed project in chart form and is completed as part of the online application. A Logic Model has *Inputs, Activities, Outputs and Outcomes*. If the foundation provides funds (Input), those funds are used to do certain things (Activities); these activities impact those to be served (Outputs); and those outputs lead to certain kinds of change (Outcomes).

5. ***Letters of Collaboration***

    Letters of Collaboration specifically describe what a collaborating organization brings to the project and what they are committed to doing to help the project succeed. These letters can also be uploaded through the online application process.

GRANT SUBMISSION CHECKLIST

Use this checklist to make sure your application is complete:

Note: Templates for Forms B, C & D can be downloaded from our website (www.mwhealth.org).

☐   Online Proposal Application

☐   Project Budget and Budget Narrative (Form B)

☐   Narrative: (Form C) All questions answered

☐   Logic Model (Form D)

☐   Listing of your organization's current Board of Directors, if applicable.

☐   Financial statements for your organization's most recent completed fiscal year, including balance sheet and income and expense statement. If your organization is audited, please provide a complete set of your last audited financial statements. Note: government agencies do not have to submit financial statements

Application Tips

- You should use a 12-point font. If you decrease the font size to fit your narrative into the 10-page limit, it is too difficult for the reviewers to read.
- It is easier to read your proposal when you include the questions in the section headings.
- Reviewers come from diverse backgrounds and knowledge of health issues. Don't assume they know as much as you do about the issue area you are addressing. Try not to use acronyms or terms that are not universally known.

Project Abstract

This is a short (150 words or less) description of your project. An example is below.

Farm Healthy seeks funding to expand our community meal and home delivery programs. The goal of our programming is to alleviate hunger with food that is healthy, tasty and provided in a dignified manner. Our community meal program currently serves approximately 50 people a homecooked, healthy meal using fresh ingredients twice a week. Funding would expand the meal program to three times per week. Our home delivery program currently delivers boxes of fresh produce, lean meats and staples, such as spices, to 150 households each month. Funding would expand the number of households receiving a monthly delivery to 200.

Proposal Narrative Tips

1. **Need**: The focus should be on local data as much as possible. If there is not sufficient local data available, we recommend including anecdotal and other

qualitative data to demonstrate your knowledge of the need. If there are other organizations providing similar services, note how your organization is different.

2. **Program Design**: This section is the heart of your proposal. It should be detailed and give the reviewers a clear picture of who you are serving, how many, for how long, specific activities and how you will overcome anticipated barriers.

3. **Organizational Capacity**: Try to be succinct about your organization's history and services. The reviewers are more interested in your current ability to provide this service than your longevity or size.

4. **Outcomes**: Reviewers are looking for an explanation of how your project will improve health. This section is where you can further explain your logic model.

5. **Tracking Success**: Reviewers want to know that you can measure your results. Do you have an existing database that tracks client progress? Do you have baseline data? Is the measurement instrument your organization uses appropriate to the project, clients, intervention, etc.?

6. **Health Equity**: Stating that your organization does not discriminate and is open to everyone is not sufficient. You should cite any disparities that relate to your outcomes (i.e. Black and Hispanic adults have significantly higher rates of diabetes compared to White adults). Then discuss your plan for partnering with the communities most affected by your issue. Be honest about your past successes and challenges doing this in the past and how you plan to be more effective in the future. You can refer to the foundation's *Building Inclusive Communities Guidebook* for detailed information on heath equity in the region and tips for further building equity within your organization.

7. **Collaboration**: Letters of collaboration are not the same as letters of support. Letters of collaboration should detail how each partner will contribute to your project, not just that they believe it is a worthy idea. Reviewers take notice when applications lack letters of collaboration from organizations specifically mentioned in the proposal. They also do not look favorably upon duplicated form letters from collaborators.

8. **Sustainability**: Think about elements of the project that can be absorbed by your agency or one of your collaborators at the end of the grant period. Detail your successful efforts to sustain other projects started with private grant funds. If there is a potential funding stream, be sure to mention that. Be as specific as possible.

Budget Tips

Project Personnel: Include all salaries for individuals who will be working directly on your project. This includes part- and full-time permanent and temporary employees. Do not include fee-for-service consultants in this category.

For each employee, include the following in the appropriate column: 1) "Position Title" – their title within their agency 2) "Base Salary" – their annual salary 3) "% Time" – the percentage of the time working on the project 4) "Total" – the amount of their salary apportioned to the grant. This is calculated by multiplying the "Base Salary" x "% Time".

Of the "Total" for each employee, indicate how much will be covered by the sponsoring/collaborating agency/ies ("In-Kind"), how much will be covered by other sources ("Other Support") and how much are you requesting from the foundation ("Foundation"). For example:

Position Title	Base Salary	% Time	Total	In-Kind	Other Support	Foundation
Project Director	$45,000	.25	$11,250	$1,250	$5,000	$5,000

Fringe: Include the agency's Fringe Rate (%) where indicated on the budget form and then apply this rate to the project personnel subtotal. Your agency's Fringe Rate is a calculation of the benefits offered to employees as a percentage of total salaries. It generally includes benefits such as unemployment taxes, life insurance, health insurance, and FICA.

In-Kind: Include all goods (facilities, staff, etc.) and services (photocopying, transportation, etc.) that the sponsoring agency, its collaborating partners or outside vendors are providing to the project free-of charge. These are items that the project would normally have to pay cash for had they not been provided for free. If the sponsoring agency or its partners are providing these goods and/or services, they are generally paid for through general operating funds. Volunteer time, while a valuable contribution to a project, should not be included in the budget.

Other Support: Include all cash contributions earmarked for a line item. This can be a grant from another funding source, cash contributed by a collaborating partner, or third-party billing revenue.

Other Direct Costs: Include items that are required specifically to support the development and implementation of your initiative, such as the design and printing of brochures, copying program materials, mileage, meeting costs and postage. Please note that in most cases the foundation will not pay for out of state travel. Occupancy costs and general administrative expenses are considered part of the 'overhead' line item.

Equipment: Include durable goods purchased for the purpose of supporting the activities of the grant. These could include fitness equipment, computers, health monitoring systems or dental chairs. Consumable supplies should be listed under Other Direct Costs in the Supplies line.

Consultants/Contracts: Include all individuals who are not considered employees of the sponsoring organization(s). This includes all individuals and organizations hired solely for the duration of the grant period on a contract or fee for service basis. All consultant contracts will require approval by the foundation once the grant is awarded.

Overhead: The foundation allows up to 15% of the total requested from the foundation for personnel and direct costs to cover items your agency needs to support its business operations, such as rent, utilities, office equipment rental, and accounting fees. Municipal agencies cannot take overhead costs.

Multi-Year Requests: Include a project budget for each year. The requested amount must decline over each successive year. Note that not all grants are eligible for multi-year funding.

Budget Narrative: Include a description for each budget item and the role it will play in the project. For employees, describe their roles and responsibilities for the project. Include a calculation for all direct costs and equipment, i.e. how you arrived at the line item amounts included on the budget.

Preparing the Online Grant Application

All proposals must be submitted through the foundation's online system. If you need assistance or have any questions about the technology, contact Cathy Glover at cglover@mwhealth.org.

To begin an application, go to the foundation's website www.mwhealth.org. From the homepage, click on Apply > Grants in the top right corner. On the Apply page, scroll to the Steps to Apply section and follow Steps 1 – 4 to prepare documents and information that will be uploaded or entered into the online application.

Once you get to Step 4, there will be a link (Submit an Online Application) to complete and submit your application.

Applicant Login

You need to create an account to access the online application, save your work, and submit your grant reports, if your project is funded. You will receive a confirmation email with a link to your application once your account is active.

If you are a New Applicant, click on the Submit an Online Application link. On the Login Page, enter your email address and click on "New Applicant." Follow the prompts to set a password. Once completed you will have access to the online application. If you wish to Save and Finish your application at another time, click on the My Account Page link to continue work on your application.

Online Grant Application

Once you click on the Submit an Online Application you will be directed to the online application. Complete the information requested on all tabs and upload the appropriate documents requested. Once complete, click on Review and Submit to review your application and then Submit your application. You will receive a confirmation email that your application was successfully submitted. Please be sure to save your application as you go along to make sure you don't lose information.

Tips for Navigating the Online Application

- Before you upload your documents, make sure you run a spell check. Check you r math on your budget form, as it may affect the grant amount.
- Save the documents you intend to upload with your application under a title we will understand. For example: Letter of Collaboration Jane Doe Organization.
- When uploading documents, use the drop-down menu to properly identify the document you are attaching. Only documents requested may be uploaded.

- Entering non-numeric characters in a numeric field will cause your application to be rejected from the online system. For example, to answer "Total number served" enter 500 not 500+.
- Do not use the back arrow button on the web browser to move to a new page; use the page links provided at the top of the page.
- If you use the scroll button on your mouse, be sure that you are not changing data entered in a field on the application form.
- It is recommended you submit your proposal prior to the day of the deadline, if possible.

ADDITIONAL RESOURCES

Health Equity:

Building Inclusive Communities: A Guidebook for Advancing Health Equity in the MetroWest Region

Logic Models:

This is simply a visual representation of your program. It outlines what you plan to do, how many people, sessions, etc. will be involved, what will change and how you will measure that change. Below are links to resources and examples of logic models.

- MetroWest Health Foundation Logic Model Webinar
- MetroWest Health Foundation Logic Model Example
- W.K. Kellogg Foundation Logic Model Development Guide
- Innovation Network-Logic Model Workbook

Sustainability:

Bringing the Future into Focus: A Step-by-Step Sustainability Planning Workbook

Sustainability Webinar

Measuring Outcomes:

Validated Measurement Tools

ONCE YOUR GRANT IS APPROVED

If you receive a grant from the foundation, there are a few policies and resources to consider. Foundation staff should be viewed as partners in the work of creating a healthy region. With that in mind, feel free to reach out to us with questions or if there are ways we can help.

Foundation and Grantee Expectations

Foundation staff work with you to ensure that project outcomes are measurable and achievable, that grant activities are connected to larger community efforts to address health needs, and that you have access to technical assistance and training to help achieve success. We seek to learn from each grant, using site visits and grantee reports to record lessons learned that can inform our work and that of future grantees.

The following is an overview of what the foundation expects from grantees and what grantees can expect from the foundation. Depending on a grant's fit with the foundation's strategic plan and the level of investment, there may be additional expectations. Foundation staff are always willing to discuss these expectations and other ways foundation resources can be helpful.

What Grantees Can Expect from the Foundation
- Program Officer availability to discuss, troubleshoot or advise on any aspect of the project
- At least one site visit during the grant, except in cases where the grant scope is limited
- Acknowledgement of the project in the foundation's newsletter and/or social media
- Progress about the grant shared with the foundation's grant committees and trustees
- Grant checks sent out in a timely manner, pending all required reports and documents

What the Foundation Expects from Grantees
- Written reports every six months submitted through the foundation's online system
- Timely communication with the foundation regarding any issues, challenges, delays or major milestones
- Participation in relevant technical assistance provided by the foundation

- Adherence to the foundation's Grant Terms and Conditions and Budget Guidelines
- Written request for permission to change the start and/or ending date of a grant

Grant Reporting

Grant reports are typically due every 6 months and include a narrative, logic model update, demographics and a financial report. The timing and number of reports may vary depending on the grant. The reporting schedule will be included in the *Grant Terms and Conditions* document you will receive when the grant is awarded. If you have questions about the content or timing of your reports, contact your Program Officer.

Instructions for Submitting Grant Reports

1. All reports must be submitted through the Grantee Portal on the Foundation's website: www.mwhealth.org.

To access the portal from our homepage:

- Scroll to the bottom right hand corner of the homepage and click on the link that says *Grantees.*
- Log in to the portal with the username and password provided to you by foundation staff in your blue instruction folder.

   Note*:* The project director will be issued a username and password to the portal to submit reports. If this authorization needs to be changed due to a change in staff or other reason, please contact Cathy Glover.

2. Once you are logged into the portal, you will have the ability to view information and documents associated with your grant, download your financial report template, and complete and submit your reporting requirements online.

3. On the portal page, you will see a section titled "*Your Active Grants*" where you can view various documents relating to your grant by clicking on the links. Click on the grant project title to view a *Project Overview Report* that will provide you general information about the grant including scheduled reporting requirements and payment status. You can also access your financial report, grant award letter and grant terms and conditions under the Grant Docs column.

4. On the top section of the portal under the *Forms and Resources* tab, you can download a *Budget Modification form*, if needed. Please discuss your request for a budget modification with your Program Officer before proceeding with this form.

5. When you are ready to submit your mid-year or year-end reports, download a copy of your financial report. Complete the form and save it to your computer.

6. Click on the "*Submit a Report*" button. This will bring you to a separate login where you will enter the username and password you used to submit the grant application.

7. After you login you will be directed to your "*My Account Page*."   At the top of the page, you will see an *Applications* tab and a *Requirements* tab. Click on the *Requirement* tab. You will see a list of required report links. For a typical one-year grant, you will see four links to reports: 1) Mid-Year Financial Report; 2) Mid-Year Grantee Report; 3) Year-End Financial Report; and 4) Year-End Grantee Report.

8. Click on the link for the requirement you are submitting. The link to the Mid-Year and Year-End Financial Reports will allow you to upload the financial form that you completed and saved to your computer. The Mid-Year and Year-End Grantee Reports will have the following pages for you to complete online:

- Logic Model
- Data Tracking
- Narrative

9. Complete each of the pages. If you are unable to complete the report in one session, you may click the *Save & Finish Later* button at any time.

Click the *Review & Submit* button. Review your submission. Scroll to the bottom of the page and click the Submit button. You will receive a message that the reports have been submitted to the foundation and the report links will move to the submitted requirements area of your portal.

CONCLUSION

We look forward to working with you to improve the health of the MetroWest region. If you have any questions, ideas, or concerns, please give us a call at 508-879-7625 or email us at info@mwhealth.org.