



Applicant & Grantee Guide

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Introduction & Foundation 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 priorities are guided by the foundation's strategic plan as well as ongoing conversations with stakeholders regarding community needs. The specific 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. Generally, the spring Request for Proposals is announced in February, and grant awards are made in May. The fall Request for Proposals is announced in August, and grant awards are made in December.

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.

6. *Who makes the final decision regarding grant funding?*

The foundation's Distribution Committees, which are composed of community members, review grant proposals based on the community(ies) served by the project or program. The Distribution Committees then make funding recommendations to the foundation's Board of Trustees, which makes final decisions.

7. *Can we submit a video 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 and Forms

Concept Papers

We require a written concept paper and draft logic model before the full proposal. Foundation staff will review your submission with the goal of providing feedback on your proposal idea and to determine whether it is a good fit for the foundation before you devote time and resources to a full application.

Concept papers should be no more than one-page and be accompanied by the concept paper cover sheet and a draft logic model. The deadline for submitting concept papers varies by grant round and can be found on the foundation's website.

Concept papers should include a very brief narrative about your project that consists of the following:

- Elements of the project for which funding is requested;
- Population served by the project;
- Short-term outcomes; and
- How the project addresses equity.

Send your concept paper and draft logic model to Rebecca Donham at rdonham@mwhealth.org. Staff will make every effort to provide feedback via a phone call within four business days. If you do not hear back from foundation staff, please call to follow up. Foundation staff will provide guidance on whether you may proceed to the full proposal stage.

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 dollar amount being requested and the MetroWest communities to be served.

2. Budget & Budget Narrative

The Budget forms are available on the website in an Excel template that must be completed and uploaded as part of the online application. 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 list 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 request is for more than one year, a separate budget and budget narrative for each year of the proposed project must be submitted.

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 right organization to carry out this work, how you will bring an equity focus to the work, and what the proposal seeks to accomplish. The narrative is usually completed as a Word document or a PDF that can then be uploaded to the online application.

4. *Logic Model*

The Logic Model is a useful tool where you summarize the proposed project in chart form. It is completed as a Word document that is uploaded to the online application. A Logic Model details the project's *Inputs, Activities, Outputs, Outcomes and Measurement*. 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); and those outcomes are measurable (Measurement).

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, if applicable. They must not be generic letters of support and they should be tailored to each individual collaborator organization.

Grant Application Tips

General Guidance

- You should use a 12-point font.
- It is easier to read your narrative proposal when you include the headings and questions.
- 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

1. Project Goals and Objectives: This section should outline why you are undertaking this project, including the community need you are seeking to address. You should also describe specific activities you will conduct and the broad goals you hope to achieve.
2. Impact: This section should include specifics about the population you are serving and how they will benefit from the project. Include the number of people you expect to serve and discuss specific outcomes. Outcomes can be short-term (3-12 months) and/or longer-term. Your outcomes should tell the story of what will change because of your project. Talk about any evidence you have to support your model and outcomes. This can be from literature or past experience in your agency or the community. Make sure you can measure any outcomes you are proposing. Also, double check that the narrative in this section aligns with the inputs and outcomes in your logic model.
3. Community Engagement: This section is your opportunity to discuss your relationship with those who will benefit from your project. Talk about how you have partnered with community members in the past and your plans for doing so within your proposed project. There is an expectation that your project will meaningfully engage, and partner with, those who will benefit from the work of the project.
4. Organizational Capacity: This section should address why your organization is the right one to take on this project. Discuss the skills and relationships your staff and volunteers bring to the project. You can also share about past programs that have provided lessons learned and skills to lead the project you are proposing. You should also describe your collaborating partners and how they add to the capacity needed to successfully implement your project.
5. Equity: Stating that your organization does not discriminate is not sufficient. You should talk about how you will shape your project with a focus on equity. A few examples of how to do this are: looking at data on health disparities and intentionally engaging populations most affected by the issue you are addressing; ensuring accessibility to programming for all who could benefit; thinking through the power dynamics of program delivery and how to make them more equal; or bringing programs to spaces that are comfortable for those who

will most benefit. Also discuss any work your organization has done around diversity, equity and inclusion. This refers to internal work with staff and volunteers.

6. Sustainability: The foundation defines sustainability as the ability to sustain the impact of the project after grant funding ends. This could mean outlining other funding you plan to pursue or reimbursements that may be available (i.e. insurance payments for clinical services). You can also describe ways the impact will be sustained after the grant period. This may mean elements of the project are embedded throughout your agency or community or concepts and learnings become part of the culture of how your work is conducted going forward.

Budget

Project Personnel: Include all salaries for individuals who will work 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 their time spent 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 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 request funding for overhead costs.

Multi-Year Requests: Include a project budget for each year. Ideally, the requested amount should 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 Rebecca Donham at rdonham@mwhealth.org.

To begin an application, go to the foundation's website www.mwhealth.org. From the homepage, click on Menu>Apply for a Grant. 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 will need to create a Blackbaud 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 once your account is active.

Online Grant Application

Once you click on the link to submit an online application, you will be directed to the foundation's online application. Complete the information requested on all tabs and upload the appropriate documents requested. You will have the opportunity to invite other people to collaborate on the application. The system automatically saves your work as you go. Once complete, click on Submit to submit your application. You will receive a confirmation email that your application was successfully submitted.

Tips for Navigating the Online Application

- Before uploading your documents, make sure you run a spell check. Check your math on your budget form, as it may affect the grant amount.
- Save the documents you intend to upload with your application using a title that makes it easy to find and remember so you do not upload the wrong document.
- 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 by 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: https://stdidmwhealthprod.blob.core.windows.net/mwhealth/images/Health-Equity-Resource-Book_Updated-Jan-2023.pdf

Logic Models

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

- MetroWest Health Foundation Logic Model Basics: <https://stdidmwhealthprod.blob.core.windows.net/mwhealth/documents/grants/Logic-Model-Overview-2026.pdf>
- W.K. Kellogg Foundation Guiding Program Direction with Logic Models: [Guiding Program Direction with Logic Models \(issuelab.org\)](https://www.issuelab.org/publications/guiding-program-direction-with-logic-models)
- The Community Tool Box: <https://ctb.ku.edu/en/table-of-contents/overview/models-for-community-health-and-development/logic-model-development/main>
- Administration for Community Living: Logic Model Guidance: <https://acl.gov/sites/default/files/programs/2020-10/ACL%20Logic%20Model%20Guidance.pdf>

Community Engagement

- Collective Impact Forum Community Engagement Toolkit: <https://collectiveimpactforum.org/resource/community-engagement-toolkit/>
- Creating Resilient Communities Workbook: This is based on program in Arizona, but features universal concepts and concrete action steps. <http://vitalysthealth.org/wp-content/uploads/2015/10/CreatingResilientCommunitiesWrkBk-Oct-2015.pdf>

Sustainability

Bringing the Future into Focus: A Step-by-Step Sustainability Planning Workbook: <https://localwellnessfunds.org/wp-content/uploads/2021/11/A-Step-by-Step-Sustainability-Planning-Workbook.pdf>

Measuring Outcomes

Validated Measurement Tools: <https://consult.ucsf.edu/guidance/special-populations-measures>

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. 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 how a grant fits 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. Reports will be submitted through the same login used for the application. 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 Blackbaud, the same system you used to apply for a grant. There is a link for instructions for submitting reports on grants page of our website. There are also links for the logic model report form. The financial report was emailed to the account holder at the beginning of the grant.
2. If you need to submit a request to modify your budget, you can download a copy of the *Budget Modification form* on the website. This should be used for all modifications that are outside the budget modification policy included in the grant terms and conditions.
3. When you are ready to submit your mid-year or year-end reports, download a copy of your financial report and the logic model report templates. Complete the forms and save them to your computer.
4. Click on the link for the requirement you are submitting. Complete the information requested on the Data Tracking and Narrative tabs. On the Attachments tab, you can upload the complete logic model report form and financial report. Select the appropriate form name from the drop-down menu and upload the corresponding report. The system auto saves while you work, so if you are unable to complete the report in one session, just exit out. Once you are ready, 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.

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.

Angela Castrillo Vilches, Program Officer: acastrillo-vilches@mwhealth.org

Rebecca Donham, Senior Program Officer: rdonham@mwhealth.org

Phillip González, President and CEO: pgonzalez@mwhealth.org