METROWEST HEALTH FOUNDATION

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 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 May. 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.

6. *Who makes the final decision regarding grant funding?*
   Grant proposals are reviewed by Distribution Committees, comprised of community members, based on the community(ies) served by the project or program. Funding recommendations are made by the Distribution Committees to the foundation's Board of Trustees, who 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 before the full proposal. Our goal is to give you feedback on your proposal idea. 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 papers should be no more than one-page and be accompanied by the concept paper cover sheet. 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;
- How the project addressed equity.

Send concept papers to Rebecca Donham at rdonham@mwhealth.org. Staff will make every effort to provide feedback on concept papers and schedule calls 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 forms are available on the website in an Excel document that can be uploaded to 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 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 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, how you will bring an equity focus to the 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 a Word document that is uploaded to the online application. A Logic Model has *Inputs, Activities, Outputs, Short and Long-term 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 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. <u>Project Goals and Objectives</u>: This section should outline why you are taking on this project, including the community need. You should also describe specific activities you will undertake and the broad goals you hope to achieve.

2. <u>Impact</u>: 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. <u>Community Engagement:</u> 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 start of the project.

4. <u>Organizational Capacity:</u> This section should talk about 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 talk about past programs that have provided lessons learned and skills to lead the project you are proposing. Also talk about your collaborating partners and how they fill in gaps in capacity that your organization lacks.

5. <u>Equity:</u> 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. <u>Sustainability:</u> 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 talk about 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 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 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 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 your 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: https://d2yy08d49bfqoo.cloudfront.net/documents/publications/Health-Equity-Guidebook.pdf

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 and what will change. Below are links to resources and examples of logic models.

- MetroWest Health Foundation Logic Model Basics: Bidder's Conference (d2yy08d49bfqoo.cloudfront.net)
- W.K. Kellogg Foundation Guiding Program Direction with Logic Models: Guiding Program Direction with Logic Models (issuelab.org)
- Centers for Disease Control Logic Model Guidance: Logic Models - Program Evaluation - CDC
- Administration for Community Living: Logic Model Guidance: https://acl.gov/sites/default/files/programs/2020-10/ACL%20Logic%20Model%20Guidance.pdf

Community Engagement

- Centers for Disease Control: Meaningful Community Engagement for Health Equity: https://www.cdc.gov/nccdphp/dnpao/state-local-programs/health-equity-guide/pdf/health-equity-guide/Health-Equity-Guide-sect-1-2.pdf
- Collective Impact Forum- Community Engagement Toolkit: https://www.collectiveimpactforum.org/sites/default/files/Community%20Engagement%20Toolkit.pdf
- 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://www.ruralhealthinfo.org/sustainability/pdf/bringing-the-future-into-focus-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 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 (final report only), 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 of the homepage and click on the link that says *Grantee Login*.
- 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 logic model report and financial report templates, and complete and submit your reporting requirements online.

3. On the portal page, you will see a section on the left 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. Under the Grant Docs column, you can access your grant award letter and grant terms and conditions, under the Reporting Forms column, you can access the logic model report and financial report templates.

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 and the logic model report templates. Complete the forms and save them 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 the "*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 two links to reports: 1) Mid-Year Report Requirements; and 2) Year-End Report Requirements.

8. 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. All forms must be submitted at one time. 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.

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