

Legend:

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- Entered by Applicant

Application for Funding
The Beveridge Family Foundation, Inc.

Application# **ID** for October 2019 Meeting Application Status: **Status**

Board Decision: **Board Status**

Date Requested: **Submitted** Date Accepted: **Accepted**

Payment Scheduled: **Scheduled Payment** Date Paid: **Date Paid**

- Applicant Organization Name** **Organization** (EIN: **EIN**)
- Address** **Address**
City, State Zip
- Contact Person and Title** **Name** **Title**
Contact Name **Contact Title**
- Contact Information** E-mail Address: **email address**
Phone Number: **phone number**
Website URL: **web URL**
- Name of the program or activity to be funded** **Program Name**
- Please give a brief description of the program or activity to be funded** **Program Description**
[280 characters]
- Amount Requested** From the Beveridge Family Foundation: **Grant Amount**
Requested
Total Project Cost: **Program Budget**
- Summarize how the grant funding from the Beveridge Family Foundation will be used** **Program Fund Expenditure Description**
[280 characters]
- List the objectives and/or results to be achieved by the program or activity** **Program Objectives**
- Summarize the need for this program or activity** **Need Summary [280 characters]**
- Summarize the action plan to address the need** **Action Plan Summary [280 characters]**
- Summarize the current status of the project/activity** **Project Status [280 characters]**

Commented [WC1]: This is the email address you will use for your username to return to this application for editing and to submit a grant review one year after funding. This is also the application where we will send notification of acceptance or rejection. Please check your email account regularly after applying and be sure to check your SPAM/Junk folders.

Commented [WC2]: This is the most important field. Think of it as the opening paragraph in a novel. You want it to be instantly appealing. One trick is to think about how you would explain the project to a five year old, or someone you have never met.

Commented [WC3]: Discuss how the money will be spent. It's important to be as accurate as possible since you will later be held to what you say.

Commented [WC4]: This is where you can talk about measurable change. What will be better when the project is in place or completed? Who benefits?

Commented [WC5]: Why is this program or project important? What happens if you don't engage in this activity?

Commented [WC6]: This can speak to the strategies behind the activity. You described the problem in the last question. Follow that up now with how you plan to solve it. What levels are involved in the solution?

Commented [WC7]: Give us a sense of time here. If the project is already underway, how far along are you? Take a look at the next question before starting this one as they should tie together.

13. List the major steps and timetable for the project / activity

Major steps	Start date (month / year)	Stop date (month / year)
List Steps	Step Starts	Step Finish

Commented [WC8]: Continue from the previous question. Break it down into four or five different stages and do your best at estimating the start and end dates for each.

14. List other major funding sources sought for this project, and results to date

Major funding sources	Results to date (funded, pending, denied)
Funding Source	Status of funding source

Commented [WC9]: Since we fund no more than 20% of a project budget, we want to see that you have plans to raise what you need for the entire project budget. It's a good idea to try to find more money than is needed as not every potential source will come through.

15. List other agencies with similar project / programs in your region

Agencies	City where located	Comments
List similar projects in region	Location	Comments

Commented [WC10]: Help us with some context. Who else is working in this same concept, where are they working with the concept, and how are they the same or different from your proposed activity? Note that if you say there are no similar projects in the area, we are often able to name some from our experiences in prior applications. Update your research before answering this one.

16. How is this program / activity essential to your organization(s)?

Importance to organization [280 characters]

Commented [WC11]: Put another way, we might ask why you are trying to move this project and not another? Is this really the most important work for you to be doing now? Why? What will change in your ability to serve, prosper, grow, survive, etc., because of this project? Look at question 18 before completing this one.

17. What is the impact on youth and/or people in distressed circumstances?

Impact on youth or people in distress. [280 characters]

Commented [WC12]: This may not be relevant to your project so don't try to make it sound like something it's not. For example, a new statue in front of a museum really won't have much to say on this one. For others though, this is a good place to talk more about the need and how this project positively impacts children, or people in need.

18. How does this activity build capacity of organizations meeting that need?

Capacity building discussion. [280 characters]

Commented [WC13]: Think of this when answering question 16. In the case of a straight capacity building program, you may be tempted to repeat the same answer here. Don't. Instead use this space to describe specifically how this project helps you, and others, in expanding your ability to address a need. This is key when you consider that we do not fund general operating support. If you are struggling with this answer, you may not be choosing the right project. If you are seeking funding to continue work you are already doing, it's likely not a good fit. Instead, consider a project that is truly a new area, or a significant change that will lead to likely growth.

19. How does this activity or the Beveridge Family Foundation funding promote collaboration among organizations addressing that need?

Collaboration description [280 characters]

Commented [WC14]: Don't go it alone. Who are you working with to tackle this problem? It may be that your issue is one that is very specific and has no real collaborators, so think of how your issue fits into a wider context and describe who is working with those tangential or neighboring issues, and then describe how you coordinate with those other organizations. Think about your answer to question 15 too. Should you be working with any others?

20. How will this activity be sustainable after the Beverage Family Foundation grant ends?

Sustainability Description [280 characters]

Commented [WC15]: We do not provide multi-year grants. How are you going to fund this program when our grant runs out? If you are simply planning to continue to fundraise for the program into the foreseeable future, say so, but also briefly describe your track record for fundraising and why you think it will continue or grow.

21. How will the Beverage Family Foundation funding leverage more and/or future funding?

Leverage Description [280 characters]

Commented [WC16]: Are there any matching opportunities that this grant will help you meet? Do you think it will be helpful to show progress on a campaign? Do you sense there are other donors waiting to see if this project is going to gain traction who would be more willing to donate after you receive this grant? Is there program revenue available that leaves a gap that you must fill along a certain percentage, allowing you to earn more program revenue for every dollar raised in donations?

22. How is your organization especially valuable to the community it serves?

Organization Value [280 characters]

Commented [WC17]: Why should we fund you instead of the other amazing nonprofits in Pioneer Valley?. If your organization did not exist, what would be the impact on the community? Be realistic here. Other organizations may be able to lean into your area, but are they already stretched to capacity? Why are you the best at what you do?

SAMPLE

Fiscal Year	<i>Fiscal year for latest submitted 990 (Tax Year)</i>
Proposal Amount	<i>Grant Request Amount</i>
Project Budget	<i>Program Budget</i>
Government Contributions (Grants)	<i>Government Contributions or grants as on 990 (Part 8 Line 1e)</i>
Total Contributions	<i>Total Contributions from 990 (Part 1 Line 8)</i>
Program Service Revenue including Government Fees and Contracts	<i>Program Service Revenue from 990 (Part 1 Line 9)</i>
Proposal Amount / Contributions (Should be < 25 %)	<i>Calculated</i>
Proposal Amount / Project Budget (Should be < 20 %)	<i>Calculated</i>
25% of Contributions	<i>Calculated</i>
20% of Project Budget	<i>Calculated</i>
Maximum Grant to be considered by the Board of Directors	<i>Calculated*</i> <i>* Lesser of \$50,000; 25% of Contributions; 20% of Project Budget or Proposal Amount</i>
Total Revenue	<i>Revenue from 990 (Part 1 Line 12)</i>
Total Expenses	<i>Expenses from 990 (Part 1 Line 18)</i>
Excess or (Deficit) for the Year	<i>Calculated</i>
Total Assets	<i>Assets from 990 (Part 1 Line 20)</i>
Total Liabilities	<i>Liabilities from 990 (Part 1 Line 21)</i>
Total Net Assets or Fund Balances	<i>Net Assets or Fund Balances (Part 1 Line 22)</i>
Total Liabilities and Net Assets/Fund Balances	<i>Calculated (Part 10 Line 34)</i>

Commented [WC18]: This is the year at the top of your most recently filed 990. If you did not file a 990 because you are too new or fall below the revenue thresholds, then enter the last year for which you have full financial records. All other numbers after this should be from that same year.

Commented [WC19]: This will be one of the first fields you enter. Please remember our policies limiting funding to the lesser of \$50,000, 25% of Contributions or 20% of Project Budget

Commented [WC20]: This is the total budget for the program, project or activity. It should not be your entire organizational budget unless you are a new organization seeking startup funding. You may include administrative and other overhead costs, but if you do, be prepared to show your work in the project budget document detailing the method of determining the share of costs attributed to the project.

Commented [WC21]: What is the amount of government funding received in the fiscal year entered above? This should match the numbers on your 990 exactly.

Commented [WC22]: Again this, and all subsequent amounts in this section must match your 990 for the tax fiscal year entered above.

Documents:

○ **IRS Form 501(c)(3)/509(a)**

A copy of the most recent letter of exemption from federal income taxes under Section 501(c)(3) and applicant classification under Section 509(a) of the Internal Revenue Service **Code**

Commented [WC23]: If your application is accepted for consideration after the submission deadline of Feb or Aug 1, you will be notified by email and requested to upload supporting documents. BE SURE TO CHECK YOUR SPAM FOLDERS in the days following the application deadline. If you haven't heard from us by Feb/August 10th, please call after checking your inbox and spam folders for the email account used in the application.

If you accidentally upload an incorrect document, please email us as we can delete it for you. You may upload multiple documents in each section.

○ **IRS Form 990**

A copy of the Internal Revenue Service Form 990 for the most recent fiscal year, if applicant is required to file. If your organization filed Internal Revenue Service Form 2758, Application for Extension of Time to File the Internal Revenue Service Form 990 for the most recent fiscal year, please provide a copy of Form 2758 and submit the previously filed Internal Revenue Service Forms 990

Commented [WC24]: This is a required document. Please do NOT send your Massachusetts forms such as ST-2. Only your IRS 501(3)3 determination letter will suffice. If you can not find it, you will need to request it from the IRS which may delay your application until the next funding cycle,

Commented [WC25]: You may upload multiple 990s if for example, you filed a more recent 990 since completing the numbers in the initial application. This is required.

○ **Construction Bids**

Three (3) bids, if construction project

Commented [WC26]: This is only relevant if the proposal is for a construction project. You may skip it otherwise.

○ **Directors and Affiliations**

The names and affiliations of the members of the Board of Directors of Trustees responsible for the management of the requesting organization

Commented [WC27]: Please list all current board members. It is a required document.

○ **DON or CON**

If a hospital or other health-related facility, a copy of the Determination of Need (DON) or Certificate of Need (CON)

Commented [WC28]: This is only relevant for health-related facilities. Others may skip it.

○ **Financial Statements**

Latest balance sheet and detailed income statement as audited by the organization's certified public accountant (if such audits are made)

Commented [WC29]: It's best to send the entirety of your latest audit in PDF form. If you do not complete a third party audit, please provide your latest board-approved "balance sheet" and "statement of income and expense." Required.

○ **Grant Administrator**

The name and qualifications of the individual proposed to administer the grant

Commented [WC30]: Tell us a little about the person in charge of this project. Required.

○ **Project Budget**

Detailed budget of the project showing how the requested funds would be spent

Commented [WC31]: Take some time to get this one right. It's required and is one of the one that our reviewers spend the most time on. If it doesn't match the application, explain why. Check your math to ensure totals and subtotals are correct. Required.

○ **Source of Funding**

List of other sources of funding for this project

Commented [WC32]: This should be a more exhaustive list of funders than presented in question 14. Make sure they line up. Explain the status of each funding source. We are looking for major funders. Be sure to include a line that totals the donations by individuals. You need not list individual donors in detail. Required.

- **Statement of Authority**
A statement on your organization's letterhead signed by an officer other than the applicant that the grant request is executed by a person authorized to submit on behalf of the requesting organization

Commented [WC33]: Pay attention to this one. It must be on letterhead and signed by an officer of the board other than the applicant. Plan ahead to have it before the Feb/Aug 15th deadline. Required.

- **Table of Organization**
Organization Chart

Commented [WC34]: Simple org chart will suffice. It's helpful if it includes the names of people involved in the project and people that will be attending the site visit. Required.

- **Unit of Government**
If applicant is a unit of government, evidence of relationship

Commented [WC35]: This should not be necessary we do not fund government agencies.

- **Supporting Documentation – Other**
Optional: Other documentation vital to the understanding of the project or organization, such as an annual report.

Commented [WC36]: If you have read this far in the FAQ, you get the prize. This is where you get to expound upon your story without the 280 character limit. Please be kind however as our Directors have a limited time in which to review each application, so don't go overboard. It is helpful however to make sure each document that we would review on the site visit has been uploaded. This is the spot to upload other collateral supporting the application such as blueprints, annual reports, letters of support (brief), etc. Optional.

- **Management Letter**
If your latest Audit contained a Management Letter, please provide along with a narrative describing steps taken or planned to address the issues raised.

Commented [WC37]: If your audit included a management letter, please include it here and also perhaps attach a document explaining your response to the issues raised.