

Beveridge Family Foundation Eligibility Form

Please provide your EIN
Charity Check:

Which Counties in Western Mass do you serve?

Does your organization have a grant from the
Beveridge Family Foundation being paid currently?

Has your organization received any grant payment,
other than discretionary distributions, from the
Beveridge Family Foundation within the last two (2)
years?

Support Type Requested

Institutional/Program Activity Area

Select any of the following that apply:

Units of government including federal, state, county
and municipal agencies, schools, colleges, universities
and hospitals and their foundations

Foreign organizations or for foreign expenditure

Organizations that are located outside the
geographically approved area of giving

Other private foundations excluding exempt operating
foundations

Private educational institutions not attended by
members of the Beveridge Family

Federated drives and their foundations including
Catholic Charities, United Jewish Appeal and the
United Way.

This is the first form you will complete. You must get past this to be able to apply. BE sure to have completely read the eligibility pages on Beveridge.org first.

Your EIN must match your IRS 501©3 Determination letter and 990.
We use Submittable as our application submission engine. Submittable uses CANDID to check EIN's against the IRS Publication 78 which lists all current public charities. If you are not on the list, you may not apply.

If you don't serve Hampton and/or Hampshire Counties, we cannot provide funding.

We have a two year waiting period between active paid general grants. Discretionary grants do not count against this. If you received a discretionary grant, but do not have a board approved general grant in the last two years, you can say no to this. Read your grant award letter for clarity on what type of grant(s) you received.

Be sure to have studied the program areas supported and not supported on the eligibility pages. If you are applying for a scholarship for an individual, please do not continue. If you are seeking a grant to fund a scholarship program, contact our office for further instructions on how to complete these fields.

We do not fund government agencies. We fund certain schools, hospitals and universities. If we have funded yours in the past, you may enter "no" here.

Sorry, we are limited to the US.

If you are outside Western Mass, but the application for funding is for programming specifically taking place in Hampden and/or Hampshire counties, you may enter "no".

We are not able to fund other foundations without exercising fiscal oversight.

We fund certain schools, hospitals and universities. If we have funded yours in the past, you may enter "no" here.

Except with permission from our office, we cannot fund these organizations.

Grant Application Form

Organization Name
Employer ID Number (EIN)
Address Question
Website

Contact Information
Name of Primary Contact
Title
Email Address

Phone

Project Information

Application for Funding
The Beveridge Family Foundation, Inc. imposes the following limitations on the maximum grant amount you may request. The lesser of:

- o 25% of Contributions and grants
- o 20% of the PROJECT Budget
- o \$50,000

You must fill out the entire application before it will be submitted for review. Your application is saved and placed on Hold after each step, and you may return at a later date to finish your application.

Grant Amount To Be Requested

Project Budget

Tax Year (YYYY)

Name of the Program of Activity to be Funded

Who are you? This should match the IRS information for your EIN

The EIN of the registered 501(3). This is where we get the

This is the address where we will send the check if the application is funded.

We like to check out your website, so let us know what it is

This is the person who will be the main point of contact. If it is not the person completing the application, then know that the emails sent from Submittable, may not get to the person intended. Please have the main contact be the person who registers with Submittable, creates the account, and completes the application.

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.

If we need to follow up or get lost on the way to the site visit, this is the number we will call.

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.

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.

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.

What will we call it? This should be brief, and clear.

Step 2 of 6 - From IRS FORM 990

Contribution and Grants

Government Grants (contributions)

Program Service Revenue

Total Revenue

Total Expenses

Total Assets

Total Liabilities

Net Assets or Fund Balances

Total Liabilities and Net Assets/Fund Balances

These numbers should match those on your 990. If you are a church without a 990, enter the relevant amounts as best you can.

Step 3 of 6 - About the Program and Funding Needs

Please give a brief description of the program or activity to be funded

Summarize how the grant funding from the Beveridge Family Foundation will be used

List the objectives and how results will be measured by the program or activity

Objective 1.

Objective 2.

Objective 3.

Objective 4.

Summarize the need for this program or activity

Summarize the action plan to address the need

Summarize the current status of the project/activity

(500 characters) 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.

(280 characters) 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.

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

(280 characters) Why is this program or project important? What happens if you don't engage in this activity?

(280 characters) 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?

(280 characters) 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.

Step 4 of 6 - Project Timeline, Other Funding Sources, and Similar Projects

List the major steps and timetable for the project/activity

Major Step 1

Step 1 Start

Step 1 End

Major Step 2

Step 2 Start

Step 2 End

Major Step 3

Step 3 Start

Step 3 End

Major Step 4

Step 4 Start

Step 4 End

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

Funding Source 1

Funding Source 1 Results to Date

Funding Source 2

Funding Source 2 Results to Date

Funding Source 3

Funding Source 3 Results to Date

Funding Source 4

Funding Source 4 Results to Date

List other agencies with similar project/programs in your region

Similar Agency 1

Similar Agency 1 - City Where Located

Similar Agency 1 - Comments

Similar Agency 2

Similar Agency 2 - City Where Located

Similar Agency 2- Comments

Similar Agency 3

Similar Agency 3- City Where Located

Similar Agency 3 - Comments

Similar Agency 4

Similar Agency 4 - City Where Located

Similar Agency 4 – Comments

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.

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.

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.

Step 5 of 6 - Impact and Capacity

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

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

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

Step 6 of 6 - Collaboration and the Future

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

How will this activity be sustainable after the Beveridge Foundation grant ends?

How will the Beveridge Family Foundation funding leverage more and/or future funding?

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

(280 characters) 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.

(280 characters) 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.

(280 characters) 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.

(280 characters) 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?

(280 characters) 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.

(280 characters) 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?

(280 characters) 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?

Submit for Review

Your application is ready to submit for review. Once you click the "Apply" button your application will be reviewed by the Foundation directors. A determination will be made as to whether or not your application has been accepted. If your application is rejected, you are free to submit applications in future funding cycles. If your application is accepted, you will be asked to submit supporting documentation on this website and be contacted if necessary to schedule a site visit.

Accepted applications will be discussed at the next Board Meeting in April or October. Final determination will be announced following the meetings. All announcements will be made via email to the address entered in your application.

Important Information

- o Your application will NOT be reviewed until you click the "Apply" button.

- o If you are not ready to submit your completed application, you may return at a later date to complete the application process. To access your saved application visit the "My Submissions" in the drop down at the upper right corner of the page. Select the "Saved Drafts" to see your applications not yet submitted.

- o Once you click the "Apply" button, you will NOT be able to return and edit your application.

- o If this is your first time creating an application, your password will be sent via email.

Thank you for applying to the Grant Application Form. You should expect to hear from us within 10 days after the application deadline at the email address used in this application.

Documents

If you pass the first round of reviews, you will be asked to upload supporting documents. Here's what they are:

- **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

- **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

- **Construction Bids**

Three (3) bids, if construction project

- **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

- **DON or CON**

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

- **Financial Statements**

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

- **Grant Administrator**

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

- **Project Budget**

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

- **Source of Funding**

List of other sources of funding for this project

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

- **Table of Organization** Organization Chart

- **Unit of Government**

If applicant is a unit of government, evidence of relationship

- **Supporting Documentation – Other**

Optional: Other documentation vital to the understanding of the project or organization, such as an annual report.

- **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.

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.

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.

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.

This is only relevant if the proposal is for a construction project. You may skip it otherwise.

Please list all current board members. It is a required document.

This is only relevant for health-related facilities. Others may skip it.

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.

Tell us a little about the person in charge of this project. Required.

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.

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.

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.

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

This should not be necessary we do not fund government agencies.

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.

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