Joe and Mary Wilson Community Benefit Fund of Mary Washington Hospital and Stafford Hospital Community Benefit Fund

Concept Paper and Formal Proposal Application Guidelines

Introduction

Mary Washington Hospital (MWH) and Stafford Hospital (SH) Foundation, through the Joe and Mary Wilson Community Benefit Fund of MWH and SH Community Benefit Fund, continue our commitment to the community through Responsive Grant Making[i] *(Community-driven)* and Initiated Grant Making[ii] *(Foundation-driven).*

Our grants program has evolved over the years, with many improvements made along the way. Starting with the January 2017 funding cycle, we have prioritized new funding categories under Responsive Grant Making. We have also streamlined portions of the application procedure.

Responsive Grant Requests – Submission Process

To be ready, a proposal should be well beyond the conceptual stage, and have a clear plan, timeline, and budget. There should be defined benefits or outcomes and a description of whom in your community is behind the proposal. Community participation is a primary factor in a proposal being ready. We like to see that fundraising is significantly underway with your traditional supporters, local businesses, key donors, and other foundations.

The need for the program should be clearly documented using research that is applicable to the target population and geographic area being served. You should be able to communicate the need for the program based on thorough research as opposed to anecdotal evidence. To help you accomplish this, Mary Washington Healthcare has made available a web-based tool entitled ***"Community Health Information Resource"***. This tool is meant to help community organizations collect relevant information on health issues and develop concrete actions to improve targeted areas of interest.

Your ability to link program objectives and outcome measures to indicators listed on the ***"Community Health Information Resource"*** website may help you develop a stronger case for funding and will be considered during review of your proposal. An emphasis will be placed on funding organizations that offer relevant evidence-based practice strategies.

The ***"Community Health Information Resource"*** website is
http://www.marywashingtonhealthcare.com/chir

When possible, applicants are encouraged to form partnerships with other community organizations and entities of Mary Washington Healthcare, engaging others in the planning and implementation of proposed programs. In this way, existing resources are better utilized, information sharing is encouraged, and duplication of services is minimized.

Initial Application – The Concept Paper

All applicants are required to submit a Concept Paper highlighting the purpose and objectives of the program. Concept Papers must be submitted by the due date (*See Grants Timetable*). Papers received after the due date will not be considered.

Submit a Concept Paper that includes each of the following:

Cover page:

1. Organization name and address.
2. Title of program.
3. Which of the MWH Community Benefit Fund's nine objectives will the program specifically address?
4. Contact person's name, title, phone number, fax number, and email address.
5. Organization's founding date and mission statement.
6. Organization's fiscal year (beginning date and end date).
7. Total program cost and the dollar amount requested from the MWH Community Benefit Fund.
8. Signature of the **Senior-Ranking Executive**.

Two- page narrative:

1. What is the problem this program will address?
2. Describe the target population to be served including the approximate number of people to be served.
3. Name the geographical area(s) to be served.
4. Describe the results you are committed to achieving.
5. How do you intend to accomplish these results?
6. How will the requested funds be spent?
7. Describe the partnering organizations and community support for the program.

Additional instructions:

- Submit the signed original plus two (2) full copies.
- Concept Papers will be reviewed, and applicants will be notified by email.
- Concept Papers must be <u>received</u> (not postmarked) no later than 5:00 PM on the due date *(See Grants Timetable).* The applicant is responsible for ensuring the Concept Paper has arrived by the deadline.
- Electronic submissions will not be accepted.

Step Two – Submitting a Formal Proposal

If your Concept Paper is approved and appears to meet Community Benefit Fund criteria, you will be invited to submit a Formal Proposal. Formal Proposals must be submitted no later than the specified due date *(See Grants Timetable).*

If the Formal Proposal fails to demonstrate fully the ability of the program to meet the Fund's established guidelines or if sufficient funds are not available, the application may be declined.

A Formal Proposal must contain:

1. **A completed Cover Page and Executive Summary Page**, which are provided by the Foundation. *(Available in electronic form)*

2. **A program narrative** addressing each of the items listed below. Please answer each in the order shown and type the statement in **bold print** followed by your text response. The narrative section has a maximum of six (6) pages.

- **Statement of problem or assessment of the need for the program**
    1. Include the method(s) you used to determine the existence of the problem.
    2. When using statistical evidence to support your argument, be certain you include local statistics.
    3. State the problem in terms of the client's needs and with input from clients and beneficiaries.

- **Target population to be served.**
    1. Demonstrate that target clients are presently underserved and/or underinsured.
    2. Provide a description of the targeted population to be served *(examples: age, gender, race, language, socioeconomic status)*
    3. Include the client's area of residence.

- **Provide a detailed description of the program** for which funds are being requested. Please ensure the program description ties in with the goal/objectives section of this proposal.
    1. What is your proposed solution to the stated problem or need?
    2. Is this a new program? If yes, how was the program approach developed? If not, what have you accomplished so far?
    3. How will clients access services and what steps will be taken to ensure clients know about the program?
    4. What is the incentive for a client to enter the program? How will they be impacted?
    5. How will clients be qualified for services?
    6. How will you address barriers to services such as language, transportation, hours of operation, location of services and cultural differences?
    7. Include detailed information on the role and responsibilities of various partners including supporting agencies.

- **Program management.** Clearly describe the position responsible for the daily operation of the program. Include the responsibilities of the immediate supervisor and who is responsible for policy development.

- **Financial Sustainability**.
    1. Present a specific plan to obtain future funding if the program is to be continued.
    2. Include financial development goals and activities covering the next 12 to 18-month period. State goals and activities in quarterly increments.
    3. Describe how other funds will be obtained, if necessary to implement the proposed program.

4. Show evidence of board involvement. Does 100% of your board donate?

- **Foundation criteria.** Provide a statement of how this program addresses each objective checked on the cover sheet of your application.

This marks the end of the narrative section

Step Three – submitting your program goal(s) and objective(s)

When addressing the next three bulleted areas, goals, objectives, methods, and evaluation, use the form provided by the Foundation. There is no page limit on this section.

- **Goal.** The purpose toward which your endeavor (program) is directed. This is a statement of what you want to achieve but may not be strictly measurable or tangible. Tends to be longer term.

- **12-month objectives**. State objectives in specific, measurable outcomes to be achieved by the end of the 12-month period.   Write S.M.A.R.T. objectives that are (S) specific and supports the attainment of the associated goal, (M) measurable so you can determine if you are proceeding toward the objective, (A) attainable and realistic, (R) relevant and important to the end result you wish to reach, and (T) time-limited, meaning an end point exists in the future when the objective should be realized. *Please note that objectives are not methods or actual activities.*

- **Methods.** Describe the method(s) or activities that will be implemented to achieve each objective. Include staffing, the activities that will be conducted, and the timing of these activities. These are "activities" such as hiring staff, scheduling events or trainings, purchasing equipment, screening clients, transporting people, translation or interpretation services, training or education sessions completed, patient visits completed, etc.

- **Evaluation.** Explain your plan to evaluate the extent to which the program achieves the 12-month objectives. The plan should be specific and evaluate the program objectives – ***not the program methods***. Tell who will implement the evaluation procedures and what tools will be used.

Step Four – submitting your program budget and rationale

There is no page limit on this section.

1. **Budget (Income and Expense)** Use the Excel Spreadsheet provided by the Foundation. The proposed budget should include only the income and expenses associated with the program for which you are requesting funds.

2. **Rationale –** Within the expenses spreadsheet, there is a column for you to provide an itemized rationale for each line item listed and for which you are requesting Community Benefit Fund dollars.

3. **Attach a listing of in kind support –** Using your own format, provide a list of in-kind support you receive for the proposed program.

Step Five – attaching additional information

The following attachments should be placed in the order given.

- The formal job description(s) for the position(s) responsible for implementing the proposed program.

- Letters of **commitment** that demonstrate **confirmed** partnerships and collaborations. *(Optional, maximum of three)*

- Copies of any contracts and memorandums of understanding. *(if applicable)*

- A list of the organization's current governing board with terms, occupations, and places of employment

Step Six – include one each of the following items.

Provide one each of the following items. For those items that can be accessed on-line, please provide the Foundation with a current link.

- A copy of the organization's current annual budget as approved by its board.

- A copy of the organization's IRS Tax Ruling Letter. e.g. {501(c)(3), 501 (c)(4), etc.}

- A copy of the organization's most recent annual financial statement (prefer audited statement).

- A copy of the organization's statement of Financial Income and Expense covering the most recent 6-month period.

- The first page of the organization's most recent form 990.

Step Seven – formatting and submitting your proposal:

- The narrative portion has a maximum of **six (6), double spaced, typewritten pages**.

- When possible, print front and back per page, but each side will count as one page.

- Use standard 12-point font.

- Number each page of your entire proposal sequentially in the lower right-hand corner. **Note -- If you submit a proposal without page numbers, your proposal will not be considered until you arrange to correct the error.**

- Submit the original plus ten copies of items from **Step Two through Step Five**.

- Submit one original (or copy) of items listed under **Step Six.**

- All attachments should be submitted with the Formal Proposal. The Foundation will not accept any materials, including letters of support, received under separate cover.

- Unless specifically requested, do not submit attachments that are not listed in the guidelines (videos, newsletters, flyers, etc.).

- Do not place proposals in a binder. Place one staple or binder clip at the top left-hand corner of each copy.

- Applicants are responsible for ensuring proper delivery of the proposal to the Foundation's office by the specified due date. All funding requests (including Concept Papers and Formal Proposals) received after the due date will be returned to the applicant. *The Foundation strongly suggests delivery by hand or certified mail.*

Additional instructions and tips

Examine the proposal to ensure you have provided all the information requested, and that your proposal meets all the specifications outlined in the guidelines. **Incomplete applications will not be considered for funding.**

After receipt of the Formal Proposal, the Grantor and Community Benefit Funds Manager will contact the organization to schedule a site visit and discuss the grant proposal in detail.

A Community Benefit Fund Selection Committee will review each proposal and make recommendations for funding to the Hospital Board of Trustees. Grant awards will be announced by the specified date (*see Grants Timetable*). Decisions of the Hospital Board of Trustees are final.

Grants Timetable

All Concept Papers and Formal Proposals must be received in the Foundation office by 5:00 PM on the specified due date.

Deadline for submission of Concept Papers	Monday, September 21, 2020
Notice regarding development of Formal Proposals	Wednesday, September 23, 2020
Conference Call Grant Application Process	Wednesday, September 30, 2020
Deadline for submission of Formal Proposals	Thursday, October 15, 2020
Grant Awards Announced	Monday, December 21, 2020
Grant checks awarded	Friday, January 15, 2021

Contract and Reporting Requirements

Each organization awarded funding will be required to sign a Letter of Agreement that states:

- Grant funds distributed will be used only for the purposes designated in the letter of agreement.
- No funds will be used for political campaigns or to support attempts to influence legislation of any governmental body.
- If the organization loses its exempt status, any unexpended funds will be returned.
- Adequate accounting records of the expenditure of funds will be maintained by the grantee organization.
- MWH and SH Foundations reserve the right to make public any recipient's name, the program name, and the amount of the grant. All confidential information provided by the recipient on the grant application will not be released.

In addition, each funded agency is required to submit an interim report and final report. A site visit by the Grantor and Community Benefit Funds Manager may be scheduled at any time during the funding period.

For more information, please contact:

Tamara N. Robinson, Grantor and Community Benefit Funds Manager
2600 Mary Washington Blvd.
Fredericksburg, Virginia 22401
Phone: 540-741-1433, Fax: 540-741-2685
Tamara.robinson@mwhc.com

[ii] **Responsive Grant-Making:** This process is two-tiered and requires a Concept Paper to be submitted as the initial step in requesting funding. Concept Papers are reviewed and, if appropriate, an invitation to submit a Formal Proposal as the second step in requesting funds is extended to the requesting agency.

[ii] **Initiated Grant Making**: The MWH and SH Foundations collaborate, partner or strategically align resources with others sharing Mary Washington Healthcare's commitment to improving health and healthcare in the community. Periodically, the Foundations may initiate partner collaboration to engage the broader community and develop opportunities for investing in community initiatives. By researching and designing programs shaped around specific interventions, the Foundations hope to "move the needle" in collaboration with appropriate partners. Initiated Grant Making would be announced by either Foundation, at any time, through special communication and proposals will be by invitation only.