

The Hyams Foundation, Inc.
Completing Online Application & Grant Report

NOTE: Online applications and grant reports will be accepted in the Civic Engagement Grassroots Leadership Development and the Affordable Housing, Civic Engagement and Teen Development Public Policy areas. All other organizations should be in touch with their program officer or Susan Perry prior to submitting either a grant report or application. Unless a Hyams staff member advises otherwise, groups applying for funding after July 21st, 2011 are required to use the online system. If you have any questions about the eligibility requirements or application procedures, please contact the Administrative Manager, Susan Perry (617) 426-5600, ext. 307 or sperry@hyamsfoundation.org.

1. BEGINNING – Setting Up Your Organization on the Online System

Go to the Hyams website – www.hyamsfoundation.org - Click on the link that will take you to the online grant application. When applying for the first time online, applicant's Executive Director will need to:

- Register and create login and password by clicking on 'signup'
- Confirm that the organization meets Foundation's eligibility requirements by clicking 'checkbox' on bottom
- Enter agency contact information, EIN number (Note – Hyams Foundation only considers grant applications from organizations located in Boston or Chelsea)
- In order for other members of the agency to work on applications or reports, they must be invited as a collaborator of the agency by the Executive Director. In order to do this, the Executive Director goes to the section 'Share with a Colleague' and invites others. Additional members will receive an email notification inviting them into this system and will have the opportunity to create their own user name and password. In the future, the Executive Director may remove individuals affiliated with the agency if necessary by removing them from the Collaborator table.

Upon completion of the agency information, please click on the 'Save' button. Each time you save, you will be brought to the top of the screen. You are now ready to add a grant application (#2A below), a technical assistance application (#2B below) or a grant report (#3 below). Please note that this system does not automatically save, so please save often.

2A. COMPLETING A PROGRAM OR OPERATING REQUEST GRANT APPLICATION

To begin a grant application, click on the button "Add Program or Operating Support Application". The grant application is divided into eight sections and all sections are required (i.e., if you do not have an answer for particular optional questions, please put N/A in that field). The sections are as follows:

Section I – General Information

- This will include prepopulated organization contact information. Executive Director or authorized individual needs to choose type of grant application. Choices are:
 - Grant Application (for operating or program expenses)
 - Grant Application & Technical Assistance (for operating or program expense AND technical assistance)
 - Technical Assistance Application (for technical assistance only)
 - If you are a fiscally sponsored organization, do not select 501(c)(3) or Public School. After adding your organization, you will then be able to enter information for your fiscal sponsor. Click on None of the Above option. Enter fiscal sponsor information after entering agency information. Enter fiscal sponsor's EIN number and contact information and upload letter signed by fiscal sponsor's Executive Director stating that it will accept expenditure responsibility
- Choose one Outcome Area. Choices are:
 - Affordable Housing
 - Civic Engagement
 - Teen Development
- Choose Strategy Area (appropriate to outcome area already chosen). Once you've chosen a Strategy Area, an explanation of the various strategy areas will appear.
- Choose Type of Request (operating or program)
- Enter requested grant amount

Section II - Organization Information

Enter a brief description of organization's mission as well as information on current programs.

Note - Once you've completed a section, the background color turns to pink

Section III – Operating or Program Request

- For title, enter either 'Operating Expenses' or the actual title of the program for which funds are being sought
- Briefly explain how this request meets the Hyams Foundation's grantmaking strategies
- Continue completing additional application questions, including Program Outcome and Population sections

Section IV – Organizational Capacity

- Explain agency's strengths and capacities
- Answer questions on staff qualifications, with option of adding additional staff names and qualifications

Section V – Organizational Diversity

- Answer questions on how your organization promotes diversity on its board and staff; how diversity has affected the organization's operations and effectiveness; and whether the organization incorporates a focus on racial and ethnic disparities

Section VI – Diversity Data

- Enter diversity information for agency board and staff; application will automatically calculate totals and percentages at bottom of screen

Section VII – Financial Information

- Enter agency's year-end fiscal year, corresponding budget amounts and other requested financial information. Note – for organizations using a fiscal sponsor, an unaudited agency end-of year financial statement will be needed. See Section VIII below
- If you need to add any additional information or explanations (e.g., request for multi-year funding), there is an optional comment section here

Section VIII – Documentation (uploaded documents)

- In this area you will need to upload various documents from your computer [IRS determination letter, audit, agency and program budget (if requesting program support), fiscal sponsor audit (if applicable)]. For organizations using a fiscal sponsor, an unaudited agency end-of year financial statement is also required
- There are two links to templates for this section. You may use the optional Associated Grant Makers budget template, and you will need to complete the Foundation's required Board of Directors Form template

Electronic Signature

When application is complete and ready to be submitted to the Foundation, the Executive Director should enter his/her name and mark in box labeled: 'Click here if signature is complete'

Confirm and Submit

Final Step – Click the 'checkbox' and then click on the 'Save and Submit' button

Congratulations! The grant application has been submitted. The Executive Director will receive a confirmation email from the Hyams Foundation that the application has been received (the system can only notify one person at the organization). If additional information is needed, a separate email will be sent to either the Executive Director or Grant Contact.

2B. COMPLETING A TECHNICAL ASSISTANCE GRANT APPLICATION

If you've chosen to ask for a technical assistance grant, you will enter 'technical assistance request' in this section and 'save'. Please proceed to respond to the specific questions related to the technical assistance request and upload the requested documents. You will then be asked to sign and submit the entire application as noted above.

3. ADDING AN OPERATING OR PROGRAM GRANT REPORT

- A. Agency, Contact, EIN, Grant Amount, Hyams Outcome and Strategy Areas, Title of Request and Type will be prepopulated

For the first time you complete a grant application in this on-line system, you will need to select the button "Add Grantee Report". Moving forward, this button will appear in your application table next to the grant application for which a report is due.

Depending on the Hyams Outcome and Strategy areas you have chosen, the system will take you to the appropriate 'Program Outcomes Section' of the grant report, which has both 'planned' and 'actual' components. For your organization's first online grant report, we are not requiring that you enter your last grant's 'planned'

activities in this section of the grant report. (In the future, this information will be pre-populated with information that you enter in your funded grant application). However, you do need to report on your actual activities and outcomes by answering the questions in each section. Please note that while the format for this section of the online grant report is different, the content is the same as the Foundation's previous "Program Outcome Chart".

You also will be asked to answer five or six additional questions related to your prior grant, which also are the same as on the Foundation's grant report form.

For Grantees Requesting Release of a Multi-Year Grant:

- Go to this section and also complete the organization's planned activities and outcomes for the next year's grant.
- Add board and staff diversity information as requested.
- Upload next fiscal year's operating and program budget (if applicable).
- Upload completed Board of Directors form.

B. ADDING A TECHNICAL ASSISTANCE GRANT REPORT (if applicable)

Please answer the specific questions related to your technical assistance grant.

To Confirm and Submit a Grant Report

Final Step – Click the 'checkbox' and click on 'Save and Submit' button. The Executive Director will receive a confirmation email from the Hyams Foundation that the application has been received. If additional information is needed, a separate email will be sent to either the Executive Director or Grant Contact.

GENERAL INFORMATION

- There is NO AUTOMATIC SAVING of data in this system. Please remember to click on the 'Save' button at the top and bottom of the application or grant report. Each time you save, you will be brought to the beginning of the application. To continue to enter information, click the 'Edit' button at the top of screen and then scroll down to the appropriate area.
- You can access and work on your application until the Submission date; after this date, you will not be able to change your application unless Foundation staff requests additional information and gives you access to edit your application. Moving forward, you will be able to view (but not edit) all applications and reports that have been submitted to the Foundation.
- If you would like to create a copy of your application or report for your own records, select "Print" and choose the option that will create a PDF copy of the document which you can then save to your desktop.
- You cannot email the application.
- You can spellcheck, and how you do this will depend upon the browser you are using (Chrome, Firefox, etc.)
- Each section has a button that allows you to 'hide' a section. If sections are hidden, this allows easier navigation through the application. You can open or hide sections as you like.
- Some formatting does not keep when you cut and paste (e.g., bullets).
- In the past, paper proposals were required to be 8-10 pages. Within the online grant application/report, most fields have unlimited text characters. Please keep your responses as brief and concise as possible.
- You will receive email reminders of reports due.
- At the moment, Hyams grantees under any of the Foundation's Requests for Proposals (RFPs) are not to use the online application or grant report.
- **IF YOU NEED HELP – Please call 617-426-5600 or email**
Susan Perry x307 or sperry@hyamsfoundation.org
Shani Pankam x100 or rpankam@hyamsfoundation.org

**Thank you again for your patience as we implement this new online system!
All feedback and suggestions are appreciated!**

November 2, 2011