

Hyams Foundation, Inc.

How to Apply Procedures for Applicants

The Hyams Foundation, Inc. welcomes applications and is pleased to provide information about the Foundation and its work. If you have any questions about the following eligibility requirements or application procedures, please contact Administrative Manager Susan Perry (617-426-5600 ext. 307) (sperry@hyamsfoundation.org). We ask that you read these guidelines carefully before submitting an application. Please also visit the “What We Fund” section of the Foundation’s web site (www.hyamsfoundation.org) for any recent announcements or changes.

Eligibility Requirements

1. An applicant must be a charitable corporation with an office and programs located in Boston or Chelsea and serving residents of those communities. The Foundation will consider an organization based outside of Boston or Chelsea only if it has a satellite office in one of these cities that offers programs that match the Foundation’s funding interests. Such organizations should request a grant for their satellite office.
2. Applicants must be tax-exempt under section 501(c)(3) of the Internal Revenue Service Code and “not a private Foundation” under section 509(a) of the Code. An applicant may use a fiscal sponsor if the fiscal sponsor meets these requirements and submits a letter to the Foundation accepting expenditure responsibility.
3. An application from an organization previously funded by the Foundation will not be reviewed until a full report of the expenditure of the previous grant has been received. This report must be submitted using the Foundation’s Grant Report Form and include the Program Outcome Chart. Please visit the “What We Fund” section of the Foundation’s web site to download the form. A financial statement (audited if required) for the previous grant period should be included. (Please see Section V. F under Suggested Application Format that follows for further instructions.) An application may include a request for more than one program or purpose.
4. The Foundation can only consider one proposal from an organization during a 12-month period. This means that if the trustees voted on an application in October, the organization cannot be considered again for support until October of the following year. In this example, the agency should submit its application by the July 1st deadline for the October grantmaking meeting.
5. In general, the Foundation does not make grants to:
 - individuals
 - an educational institution for its standard educational or capital programs
 - any municipal, state or federal agency
 - hospital and health center capital campaigns
 - religious organizations for sectarian religious purposes (The Foundation will consider proposals for social ministry and/or community organizing programs of faith-based organizations.)
 - curriculum development, conferences, film production, scholarships or to national organizations
6. In order to assist applicants submitting a proposal to the Foundation, the staff has prepared a checklist of required items, which can be downloaded from the “What We Fund” section of the Foundation’s web site. Please see that all the required items are included in your application to the Foundation. Applicants should be aware that if their proposal is missing any required information, it will not be reviewed or added to a board meeting agenda.

Application Submission Procedures

1. Please submit one copy of the application to Elizabeth B. Smith, Executive Director, The Hyams Foundation, Inc., 175 Federal Street, 14th Floor, Boston, Massachusetts 02110.
2. The Foundation will send written confirmation of the receipt of each application.
3. An organization that is unsure about whether it meets the Foundation's funding priorities and criteria is encouraged to submit a one to two page letter of interest to the Foundation. This letter should describe the reason for seeking support and the geographic area(s) and population(s) to be served. An organization submitting a letter of interest to the Foundation will be notified as to whether it should submit a full application and when this application will be reviewed.

Full Application Review Procedures

1. The Foundation has set application deadlines. Please see separate sheet for dates or visit the Foundation's web page. Grantmaking meetings are held three times per year, and the review process usually takes three to four months.
2. All applications will be reviewed for completeness, and organizations will be notified in writing if additional information is required. Full staff review will not occur until the application is complete.
3. An applicant whose proposal fits the Foundation's guidelines will have one of the following: a paper review, a telephone interview, or the appropriate staff and a board member from the applicant organization will be invited to meet with the staff at either the Foundation's office or the organization's office.
4. Applicants are encouraged to seek other sources of funding while awaiting a decision by the trustees.

Funding Criteria

Unfortunately, the Foundation will never have sufficient resources to support the many excellent proposals it receives. The Foundation will select applicants for funding based on the extent to which they address the Foundation's mission and grantmaking priorities. Impact, the level of need for support, quality of agency management and board and staff diversity also will be reviewed. Before submitting a proposal, please review carefully the Foundation's funding priorities and criteria and call the Foundation if you have any questions.

Preparing an Application

The Foundation accepts the Associated Grant Makers' (AGM) Common Proposal Form. If the AGM Common Proposal Form is used, please submit appendices and other information required by the Hyams Foundation including the Program Outcome Chart. Organizations are welcome to use a different format as long as the following information is included. The outline below is intended to assist organizations in preparing an application to the Foundation. **Proposals should be no more than ten pages in length (exclusive of attachments).**

Suggested Application Format

I. Cover Sheet:

Date: _____

- A. Legal name of organization, address, and name of executive director:
- B. IRS 501(c)(3) nonprofit and “not a private foundation” under section 509(a)?
- C. (Please circle) YES NO
- D. 2.a. If not, identify your fiscal sponsor and attach the written agreement from the fiscal sponsor.
- E. Contact person and title: _____
- F. Phone: _____ Fax: _____ Email: _____
- G. Amount Requested: \$ _____
- H. Type of request (operating, program, capital, other): _____
- I. State your organization’s mission:
- J. No more than four sentences summarizing the proposal and its strategic link with the Hyams Foundation’s priorities:
- K. List of the proposal’s target population, constituents, and geographic communities:
- L. Total annual organizational budget: \$ _____ Fiscal Year End __/__/__
- M. Program, project or capital budget (if applicable): \$ _____

II. Request

- A. Brief description of the organization’s history, mission, current and planned program(s)
- B. Description of the goals, activities and outcomes for which funds are being requested and how they will be measured. (Please complete the “Planned” section of the Program Outcome Chart that is attached to the Grant Report Form). For general operating requests, briefly describe each of the organization’s programs.
- C. Explanation of how the request addresses the Hyams Foundation’s funding priorities and outcomes.
- D. Description of the population served including: geographic area(s) served; number of persons served (by individual program if available); ages, income level(s), race and ethnicity, and special needs of individuals served. Please comment if serving hard-to-reach individuals. If applicable, please elaborate upon characteristics and how goals and outcomes are established for this group.
- E. Evidence of need for the organization’s program(s) or special project and how this need was determined.
- F. Description of how the organization’s work is different from and/or complements other local agencies’ efforts. Please identify: 1) those agencies with which the organization collaborates; and 2) other available community resources and strengths which relate to the need(s) being addressed in the application.
- G. Description of the level and nature of involvement of local residents or individuals served in the development or operation of the organization’s program(s) or project.
- H. Evidence of the organization’s capacity to operate and manage the program(s) or special project for which funds are being requested. Please describe the qualifications and experience of administrative staff responsible for management of the organization and special project (if applicable). (Please do not include resumes.)

III. Staff and Board of Directors

Please provide a brief description of the organization’s staff and board including the following:

Staff: 1) numbers and types of staff; 2) annual staff turnover rates; and 3) use of volunteers

Board: 1) board structure (e.g. leadership, committees, etc.); and 2) major functions (e.g. approve budget, hire executive director, etc.)

IV. Organizational Diversity

All applicants must respond to the following two questions:

- A. What has your agency done in recent years to promote a more diverse board and staff?
- B. How has increased organizational diversity impacted the effectiveness of your agency's operations and programs?

V. Financial Status

- A. Please submit the financial information requested in the Appendices.
- B. Briefly describe the organization's short and longer range fund-raising strategies and assessment of financial opportunities and challenges.

VI. List of Appendices (Please review checklist sheet.)

Note: Applications will not be reviewed until all appendices have been submitted.

- A. Current Internal Revenue Service determination letter which states that the organization is tax-exempt under section 501(c)(3) and is "not a private foundation" under section 509(a) of the Internal Revenue Code
- B. If the organization has never applied to the Foundation, proof of incorporation as a charity
- C. Board approved operating budget for year for which funding is requested
- D. Organization's year-to-date financial statement showing expenditures and sources of revenue
- E. List of proposals pending with other funding sources for general operating expenses and program/project expenses, if applicable.
- F. Financial audit for previous fiscal year for applicant and for fiscal sponsor, if applicable (Massachusetts nonprofits with revenues equal to or more than \$500,000 must conduct an annual independent audit. Those with revenues between \$100,000 and \$249,999 must conduct a financial review in lieu of an independent audit. Any nonprofit with revenues of \$99,999 or less is not required to conduct an independent audit or an accounts review and should submit a board-approved, unaudited year-end financial statement for the previous fiscal year including revenues, expenses and balance sheet.) An audit is due within six months of the close of the applicant's fiscal year.
- G. Hyams Foundation Diversity Form (download Excel form on website).
- H. Hyams Foundation Board of Directors Form. (download form on website).
- I. If applicable, report of the expenditure of previous grant submitted on the Foundation's Grant Report Form and a financial statement or audit for the previous grant period.

If an organization is requesting a capital, technical assistance or program/project grant, the following appendices also must be submitted:

- J. Board approved capital, technical assistance or program/project budget, including projected income and expenses
- K. Total amount and sources of funds received or committed to date for the project
- L. List of proposals pending with other funding sources for the project