

WYTHE-BLAND FOUNDATION

155 West Monroe Street
Wytheville, Virginia 24382

Grant Guidelines

ABOUT WYTHE-BLAND FOUNDATION GRANTS

The Wythe-Bland Foundation, a non-stock 501(c)(3) health legacy foundation, was created from the lease of Wythe County Community Hospital in 2005. It is managed by a Board of 13 members who are community leaders residing in Wythe and Bland counties. Board members serve without compensation. The foundation owns all of the real estate associated with the hospital and is responsible for ensuring tenant compliance with the terms of the lease agreement. This pre-paid lease created the charitable wealth that generates earnings from investments to provide grant resources to Wythe and Bland County eligible not-for-profit organizations. As a condition of the lease approval, by the Virginia Attorney General, awards are made for health, education, and welfare projects that provide essential services to the citizens in the two-county area with an emphasis on health. The Spending Policies and Community Investment Strategies of the foundation have been created to preserve the asset base as an enduring endowment; therefore, the investment for grants and management of the foundation are limited to approximately 5% of the value of the asset base annually.

Qualified organizations may apply for grants for new programs, current programs or establishing or investigating new programs. No grants will be awarded if the Foundation Grant Application and other requested information described in these guidelines are not provided. Verbal or written letters of request or other inquiries cannot be considered as, or substituted for a formal grant application. Applications must be complete by August 1st with all forms accurate.

MISSION STATEMENT

Providing opportunities for innovation and collaboration to promote a healthier community

VISION STATEMENT

Our vision is to be a part of a thriving community that meets the health, education, and wellness needs of all our citizens

CORE VALUE STATEMENT

We value above all else:

- *Integrity*
- *Fairness*
- *Innovation and Collaboration*
- *Compassion and Commitment*
- *Our Partners' Missions*

AREAS OF INTEREST

The Board of Directors of the Foundation will only make grants to those identified as 501 IRS designated organizations (or government entities) serving Wythe County and Bland County, Virginia that support, promote and/or further the Foundation's mission.

The Foundation awards grants to organizations meeting its eligibility criteria in Wythe and Bland Counties. These projects include, but are not limited to, the following:

- Projects that promote or improve the health of citizens in Wythe and Bland Counties
- Projects that promote or improve the education of citizens in Wythe and Bland Counties
- Projects that directly serve citizens unable to afford basic and essential services in Wythe and Bland Counties

GRANT PRIORITIES-GENERAL GUIDELINES

The Board, in making grant decisions, will place the greatest priority on projects that:

- Directly provide health services to low-income, underinsured, or uninsured citizens of Wythe and Bland Counties
- Contain matching funds from other sources
- Are not of a recurring nature unless the project and the need(s) it serves requires otherwise
- Ensures measurable outcomes and objectives data can be accurately measured
- Provides evidence of feasibility and sustainability of the proposed project
- Complies with Wythe-Bland Foundation's grant guidelines
- Does not result in a duplication of services provided by another agency

GRANT PRIORITIES-SPECIFIC GUIDELINES

As the Board evaluates the merits of grant applications, areas of specific interest and high priority will include projects that address, in specific ways:

- Healthcare needs of the underprivileged, underinsured, and uninsured
- Adult and childhood obesity
- Health and nutritional issues
- Dental care
- Mental health
- Health education
- Education of future generations
- Substance abuse prevention
- Environmental health
- Improving the quality of life in Wythe and Bland Counties

GRANT RESTRICTIONS

To comply with federal guidelines and the Foundation's legal requirements, the Foundation will not fund and will deny the following types of grants:

- Grants to individuals
- Grants to organizations for projects serving the population outside of Wythe or Bland Counties
- Grants to government entities for purposes that are identified as typical government financial responsibilities
- Grants to religious organizations for religious purposes
- Grants to endowments or other discretionary funding pools
- Grants for fund-raisers, or other ticketed special events
- Grants for political purposes or for lobbying activities
- Grants for debt reduction
- Grants for the purchase of vehicles
- Grants for projects unrelated to the Foundation's mission, vision, or purpose
- Grants supplanting other funds
- Grants to fund applicant's employment

FUNDING LEVEL

At the present time the Foundation has not set limits on the size of grants. The Foundation does, however, reserve the right to set upper or lower limits on the size of grants in order to promote efficiency in grant administration, provide for financial stability, and to ensure that there are adequate funds to support both current and long-term projects deemed a priority by the Board. Generally, funding levels for grant distribution during a fiscal year is expected to be approximately five percent (5%), including the cost of operations, of the total value of the Foundation's endowment.

Grants will normally be awarded on an annual basis, October 1 to September 30; however, the Board will consider multiyear grants. Grant applications seeking matching funds must provide written documentation from the other contributor(s) or the Board may make the Foundation's grant contingent on receipt of such matching contribution(s). The documentation may include a letter or resolution from the other contributor(s). The Board reserves the right to request additional documentation of expenditures, including, but not limited to cancelled checks or expenditure certifications and to require project status reports and periodic update.

GRANT FUNDING CYCLE

The Grant Review Committee will convene one (1) time per year to review grant applications and to consider recommendations for funding. All grant applications must be submitted via e-mail or postmarked on or before the Grant Application due date. The grant application and all requested information must be complete prior to the Application due date to be considered in the Grant Review Cycle. Applications which are not timely submitted for the Grant Review Cycle will not be considered in the next Grant Review Cycle unless a new application is submitted by the Grant Application Due Date for such subsequent Grant Review Cycle.

Grant Application Due Date	Grant Review Cycle	Grant Award Dates
August 1	August/September	October

The grant review process includes a thorough review of the merits of each application. Therefore, applications submitted after midnight by the due date on August 1st will not be eligible for consideration.

GRANT REVIEW PROCESS

When grant applications are received by the Foundation, the information will be reviewed by the Foundation staff to determine whether the Foundation Grant Application Guidelines have been met.

If the application is deemed to be incomplete, the Foundation staff may request additional information. If the information is received in the time specified by the Foundation staff, the application will be considered in the current Grant Review Cycle. If the information is not received or the application is still considered incomplete, the application will be not considered in any subsequent Grant Review Cycle. A new application will need to be submitted for the next grant cycle.

Members of the Grant Review Committee will review the applications and reserve the right to ask for additional information or to make a site visit during the review process. Upon completion of the application review, the Grant Review Committee will make a recommendation to the full Board of Directors regarding each grant.

The Grant Review Committee will evaluate grant applications based, in part, on the following guidelines. Applicants are encouraged to use the most current guidelines in preparing the grant application.

- Is the proposed project consistent with the Foundation's mission?
- Has the applicant included all information required by the Foundation in the grant application?
- Has the applicant clearly stated the need to be addressed?
- Is the constituency to be served clearly identified?
- Does the project application clearly define the Outcome and Objectives using the SMART (**Specific, Measurable, Attainable, Realistic, Timely**) approach?
- Has the proposing organization clearly documented its capacity and experience to develop and implement the proposed project?
- Is the proposed project consistent with the applicant's historical mission?
- Have the organization and project leadership demonstrated the skills and experience required for success?
- Is the project timetable realistic?
- Does the budget clearly reflect the resources necessary for the proposed project, the operation, and maintenance cost of the organization?
- Does the organization have a Sustainability Plan and/or a Business Plan?
- Has the applicant developed a broad base of support for the project, including partnering with other agencies?

After the grant application review process is completed, applicants will be notified in writing by the foundation staff regarding the final outcome of their request. If the grant is approved, the foundation staff will issue a letter advising the applicant of the award and of any conditions, restrictions, payment terms, and reporting requirements (which may include on-site visits) connected with the grant award. The applicant will be required to execute a Grant Agreement and agree to hold harmless and indemnify the foundation from any claim, loss or expense related to the applicant's activities or use of the grant. After the grant offer is mailed, the Grantee has four (4) weeks from the post-date of the offer to return the fully executed Grant Agreement, or the offer of award will be rescinded. The grant fiscal year is October 1 to September 30 regardless of the date that the Grant Agreement is executed.

The number and amount of requests, community needs, board priorities, federal and state laws and regulations, and available funds may require the foundation to not fully fund a request.

PROJECT ACCOUNTABILITY AND CONTINUITY

Each organization receiving funds from the foundation may be required to provide periodic financial reports and project reports. Additionally photographs may be requested for inclusion on the foundation's newsletters, press releases, and/or websites.

Failure to expend grant funds and to provide a complete, accurate, and timely accounting of award within one year, or term agreed to at application approval, may prohibit the organization from receiving future funding from the foundation. It may also result in the Foundation seeking restitution of any misspent funds.

Grant recipients must inform the foundation immediately if significant events occur that may impact the project. Examples may include, but are not limited to, a change in the project director or in the organization's key personnel; the organization's priorities, board members, funding sources, project costs or operations. Failure to notify the foundation of issues that could adversely impact the project may result in a temporary or permanent cessation of payments or possible action to reclaim funds.

REPORTING AND DISBURSEMENTS

Grant Award Disbursements

Disbursements for grant awards are usually made in three payments:

Payment 1: One third of the award is given to the grantee when the award letter is signed and returned by the grantee and the Outcome Evaluation Plan and Budget are approved and revised if necessary.

In some circumstances, the disbursement is delayed if there are outstanding grant reports, or if the agency wishes to delay payment such as in the case of a government agency wishing to delay payment until the new fiscal year.

Payment 2: The second one-third disbursement is made upon receipt and approval of the mid-term report.

Payment 3: The final one-third disbursement is given when the final report is received which includes documentation of the checks written for the grant.

The final payment will reflect any change to the project budget with any unapproved funds reducing the total award to the Grantee.

Report Requirements and Forms

Report Forms:

The **WBF Project Data Sheet** is used for both the Mid-term and Final reports.

Each grant recipient is required to collect data. The **Data Collection Form should be used if your agency does not have a form**. This form will provide demographic data both for the board for long term evaluation, but will also assist the grantee in collecting information for the evaluation of the goals of the grant. This form is not included in the Mid-term or Final Reports.

The **Outcome Evaluation Form** is required for the grant and sets measurable goals for the project.

Required Reports:

Mid-term Report: Grantees will complete the **WBF Project Data Sheet**, the **Outcome Evaluation Plan Form** and the **Evaluation & Report Summary Form** and **documentation for all money spent as of the date of report**.

Final Report: Grantees will complete the **WBF Project Data Sheet**, the **Outcome Evaluation Plan Form** and the **Evaluation & Report Summary Form**, and **documentation for all money spent**. A copy of a check register or spread sheet would be suitable documentation. Individual receipts are not required unless additional documentation is requested.

One copy of the report, both Mid-term and Final, should be submitted either online via e-mail, or to:

Wythe-Bland Foundation
155 West Monroe Street
Wytheville, VA 24382

Overdue Reports:

When a project is not completed in a timely manner, or Mid-term or Final Report is not provided, an Overdue Report letter is sent to the grantee and grant award may be rescinded. All advanced grant funds not adequately accounted for by the Grantee may have to be repaid to the foundation.

PUBLICITY

Each organization receiving grants from the foundation is required to include the Wythe-Bland Foundation logo within their publications and advertising.

GRANT APPLICATION GUIDELINES

All grant applications must be submitted by the Grant Application Due Date. Applications must be in writing and should be based on the most current grant guidelines. Grant applications must be **complete**, and mailed, e-mailed, or hand-delivered by submittal deadline. Faxes are not acceptable.

Once the grant application is completed by your organization, the application must be signed and dated by an individual authorized to do so by the organization. If any sections of the grant application are not completed, a written statement must be submitted explaining the reason(s).

Wythe-Bland Foundation Grant Application Forms

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Wythe-Bland Foundation Grant Application

Before completing this and other grant applications, be sure to:

- Read all instructions thoroughly before beginning.
- Research and communicate with other funders – obtain a copy of funding guidelines, deadlines and/or annual report. Be aware of each funder's preferred method of initial contact, and additional information required.
- Be strategic – make sure your goals, objectives, and amount requested match the criteria of the foundation.

Applicant

Name of Organization:

Tax I.D. Number:

Legal Name (as the identified by IRS):
(if different than above)

Address:

Phone:

Fax:

E-mail:

Website:

Executive Director:

Primary Contact:
(foundation contact; grants will be addressed to this individual)

Title:

Phone:

Fax:

Current Board President:

Current Board Members:

IRS nonprofit designation?

- Yes
- No (If no, name of fiscal agent) [redacted]

Form 1023-EZ used to obtain a 501(c)(3) Designation?

- Yes (If yes, please provide copy of Form 1023-EZ)
- No

Government Entity?

- Yes
- No

Applicant financial reporting:

Fiscal Year:

- Yes Start Date: [redacted] End Date: [redacted]
- No

Calendar Year: (January 1 – December 31)

- Yes
- No

Total Organizational Operating Budget for 1 year: [redacted]

Other than the Wythe-Bland Foundation, list of three largest funders for your operating budget in the last fiscal year and amount of funding.

1. Funder [redacted]	Amount funded: [redacted]
2. Funder [redacted]	Amount funded: [redacted]
3. Funder [redacted]	Amount funded: [redacted]

State your organization's Mission Statement, (if none, state your mission): [redacted]

Is this request being submitted exclusively to the Foundation?

Yes

No (If no, attach additional funding source(s) information)

Project

Name of Project:

Summarize your proposal and how it fits with the Foundation's mission and grantmaking priorities:

Has the project been approved by the governing body of your organization?

Yes

No

Date of approval:

Total Project Budget:

Amount requested from foundation: *(Round to the nearest hundreds)*

Amount of other project funding sources:

Percent of total project requested from foundation: %

Duration of grant requested project: Months
(Provide justification if project exceeds 12 months)

Project Starting Date:

Project Ending Date:

How would you request grant funding be advanced? (Normal funding advances are made 1/3 grant amount at execution of the grant agreement, 1/3 upon submission of the mid-term report, and final payment at completion of project and submission and approval of the final report.)

If other method of funding is requested, other than normal advances, please provide justification:

AGREEMENT

I certify, to the best of my knowledge, that all information included in this proposal is correct. The tax-exempt status of this organization is still in effect. If a grant is awarded to this organization, the proceeds of that grant will not be distributed or used to benefit any organization or individual supporting or engaged in unlawful activities. The Wythe-Bland Foundation requires that you certify your application by submitting an electronic signature. To certify your application, read the text below and provide an electronic signature (type your name) and check box to confirm your signature

Enter Electronic Signature:
(Type your full name here)

*Signature Box:

Date:

9. **Other funds.** List the sources and amount of funds that may be available other than from the Wythe-Bland Foundation, to fund part of the project. *(This table or other format that contains similar information may be used and attached).*

Entity/Source	Amount of Funds
[REDACTED]	\$ [REDACTED]
[REDACTED]	\$ [REDACTED]
[REDACTED]	\$ [REDACTED]
[REDACTED]	\$ [REDACTED]
[REDACTED]	\$ [REDACTED]
[REDACTED]	\$ [REDACTED]
[REDACTED]	\$ [REDACTED]
[REDACTED]	\$ [REDACTED]
[REDACTED]	\$ [REDACTED]
[REDACTED]	\$ [REDACTED]
[REDACTED]	\$ [REDACTED]
[REDACTED]	\$ [REDACTED]
[REDACTED]	\$ [REDACTED]
[REDACTED]	\$ [REDACTED]
[REDACTED]	\$ [REDACTED]

PROJECT CALENDAR

MONTH/YEAR

Explanation if Necessary
(one sentence, or less)

October

November

December

January

Feburary

March

April

May

June

July

August

September

October

November

December

Budget Form

OVERVIEW: An important component of your grant application is the preparation of a detailed project budget and budget narrative.

(This form or other format that contains similar information may be used).

LINE-ITEM BUDGET GUIDELINES

- The line-item budget should *include all income and expenses associated with the proposed project*. Please note that not every line-item applies to every project.
- Projected Operating Budget to be completed for three years beginning with the first year of grant award.

Three Year Projected Total Organizational Project Income and Expense Statement

Income	Year 1	Year 2	Year 3
Foundations	\$	\$	\$
Other Grants	\$	\$	\$
Earned Income	\$	\$	\$
Interest Income	\$	\$	\$
Total Revenue:	\$	\$	\$
Expenses			
Salary Wages and Benefits	\$	\$	\$
Insurance	\$	\$	\$
Professional Fees	\$	\$	\$
Equipment	\$	\$	\$
Supplies	\$	\$	\$
Debt Service	\$	\$	\$
Other Expenses	\$	\$	\$
Total Expenses:	\$	\$	\$
Net Income			
	\$	\$	\$

Application Checklist

(Forms necessary for an application to be considered complete)

- Grant Application form
- IRS Nonprofit Designation Letter* *(N/A for government entities)*
- Certificate of Good Standing State Corporation Commission *(N/A for government entities)*
- Feasibility Report
- Letter of support from other partnering agencies in the project, or to which services will be provided.
- Itemization of Items to be Purchased with Grant Funds
- Budget Form
- Project Outcomes and Objectives
- Articles of Incorporation* *(N/A for government entities)*
- Bylaws* *(N/A for government entities)*
- Audits or Financial Statements from the Previous Year

**If your organization has previously submitted a copy to the Foundation, and they remain unchanged, no submission is necessary.*