
METROWEST HEALTH FOUNDATION

Guidelines for Capital Grants for Health-Related Facilities

The MetroWest Health Foundation offers a **limited number** of capital grants on a highly competitive basis to community-based health organizations within its twenty-five communities. To be competitive for such a grant, the applicant organization must demonstrate a record of outstanding service to the community, strong program and financial management, significant private support, and a demonstrated need for capital funds that will directly impact on the organization's ability to deliver health services.

Capital grants are awarded only for projects that will directly benefit the MetroWest community. Applicants are expected to have completed appropriate organizational, financial and facilities planning prior to applying for a capital grant from the Foundation.

Qualified Projects

Any of the following would qualify for consideration under the Foundation's Capital Grants Program:

- New construction;
- Additions to an existing structure;
- Extensive renovation of an existing structure.

In addition, furnishings, equipment and site work associated with any of the above

qualified projects are eligible for consideration.

The Foundation is not positioned to be the sole or major funder of any individual capital project. Therefore, applicants must demonstrate that other funding for the project has been raised or is available through traditional capital financing mechanisms.

Organizations seeking capital support from the foundation must demonstrate each of the following to the satisfaction of the Foundation:

1. The proposed capital project must significantly add to or improve the provision of health services or programming to those living in the MetroWest area, and respond to well-documented community needs.
2. The proposed capital project must be consistent with the mission and purpose of the Foundation, and result in improved health care to vulnerable populations, such as low-income, elders and children.
3. The proposed capital project must be financially viable, and include sufficient resources for ongoing maintenance.

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4. The proposed capital project must be cost effective, in terms of acquisition, construction, maintenance and program administration.
 5. The proposed capital project must be appropriately sized relative to the applicant organization and the program(s) to be housed in the proposed facility.
 6. The proposed capital project must have a significant commitment of financial resources from sources other than the Foundation.

Process

Organizations seeking Capital Grants should send a brief 2-3-page letter to the Foundation outlining the proposed capital project. The Foundation will review these letters, and request full applications only from those projects it wishes to consider for funding. Since funding is quite limited, not all applicants will be asked to submit full proposals.

Applicants chosen to submit a full capital grant application will be sent a Capital Grant Application Package for completion. Applicants are expected to have completed appropriate organizational, financial and facilities planning prior to applying for a capital grant.

The appropriate committee and/or grant panel of the Foundation will review completed Capital Grant Applications. Site visits and other information may be requested as part of Foundation's review. All Capital Grants are subject to approval of the Board of Trustees, consistent with applicable bylaws. Capital Grants shall be subject to regular monitoring and reporting requirements.

Limitations

The Foundation may limit the amount of funds it commits to individual and aggregate capital grants.

Each capital grant is limited to three years in duration.

All capital grants shall be made consistent with Spending and Grant Policies of the Foundation, including applicable spending limits, equitable distribution of funds, and recordkeeping.

No single organization shall receive more than one capital grant from the Foundation at a time.

Capital grants may be rescinded by the Foundation if, in the determination of the Foundation, the original purpose of the grant is no longer being met or the grantee agency has failed to meet the terms and conditions of the grant.

Eligibility

To be eligible for consideration for a capital grant under these guidelines, applicants **must**:

- Propose a project to be physically located within one of the twenty-five towns served by the Foundation.
- Be a nonprofit tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code, or be an instrumentality of government considered an exempt organization.
- Have a successful record of programmatic, financial and administrative achievement.
- Have three years of independently audited financial statements.
- Serve a documented need in the community and

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- Be prepared to document: 1) ownership of, 2) an acquisition plan, or 3) a long-term lease of the land on which the proposed project is to be located.

Ineligible Requests

- Grants will not be made to projects that supplant or substitute for government funding from local, state, or federal sources.
- Grants will not be made for endowments or debt retirement.
- The Foundation will not make grants to individuals.
- Program support or fundraising appeals will not be considered under the capital grants program.
- Projects that have been unsuccessfully submitted to the Foundation before may not resubmit.
- Any organization that has received a capital grant from the Foundation may not reapply for another capital grant for the same facility within three years of award.

Selection Criteria

Capital Grants by the Foundation are extremely competitive. The perceived need for new facilities is not, in and of itself, sufficient justification for a grant. Grants are intended to have a major impact on the delivery of health care services by the applicant and for our region. While these grants support capital projects, the Foundation's review process will include a thorough evaluation of the programmatic, administrative, financial and organizational accomplishments of the applicant. Successful applicants must demonstrate that the proposed project:

- Supports existing measurable program accomplishments of the organization.

- Is responsive to well-documented community needs.
- Increases the capacity, effectiveness, efficiency quality and or success of the applicant to provide health services.
- Has significant and identifiable benefits to the applicant and those served by its programs.
- Is thoroughly planned, both programmatically and architecturally, with a high degree of certainty that the proposed program will meet current and projected needs, and that the design and costs are well researched and reflective of current market conditions.
- Is accompanied by reliable and verifiable cost estimates.
- Has obtained appropriate land use and building permits.
- Is cost effective in terms of construction, maintenance and program administration.
- Is supported by a well-developed financial plan for operations and debt service once completed.

Application Process

The application process includes the following specific stages:

Guideline Review

The applicant should thoroughly review the Foundation's Capital Grant Guidelines to determine eligibility prior to sending a letter of interest to the Foundation.

Letter of Interest

If the applicant believes that their project meets the Foundation's Guidelines for Capital Grants, they should send a 2-3 page letter of interest to the Foundation

requesting an application package. The Letter of Interest should describe the applicant organization, the proposed project, the full costs of the project, and the amount requested from the Foundation.

Upon receipt of the Letter of Interest, the Foundation will either

1. Select projects that it considers worthy of a full Capital Grant Application.
2. Decline the request based on the merits of the Letter of Interest.
3. Defer requests until a later time.

Application

Those projects selected to receive a Capital Grant Application will be mailed an application package. The application must be completed and returned to the Foundation, along with all supporting material, within thirty days.

The Foundation's staff, Grants Panels, and Trustees will review completed applications. During this review process, the Foundation's staff may contact the applicant for additional information or clarification. Site visits and formal presentations by the applicant's representatives will also be scheduled to review potential design and site considerations.

Award Notification

The Foundation will make every effort to respond to Capital Grants Applications within sixty days after receiving the completed application.

Policies

All submitted materials become property of the Foundation and will not be returned to the applicant.

The Foundation reserves the right to change or terminate its Capital Grant Program at will.

Contact with the Foundation

Questions concerning the Capital Grant Program or Letters of Interest should be directed to:

**Capital Grants Program
MetroWest Health Foundation
161 Worcester Road, Suite 202
Framingham, MA 01701
Tel: 508-879-7625
Fax: 508-879-7628
Email: info@mwhealth.org**

Additional information on Capital Grants and other programs can be found on the Foundation's website:

www.mwhealth.org