

# James A. Welch Foundation

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## THE JAMES A. WELCH FOUNDATION

Since its inception in 1960, the James A. Welch Foundation has distributed over two million dollars toward projects which have expanded educational opportunities for talented young students in Genesee County, Michigan.

The matter of pursuing meaningful educational opportunities by talented young people has become more complex. They have many more choices, pressures, societal challenges, and greater economic hurdles. We continue to witness great education challenges and change.

The Foundation looks forward to moving forth with its grant making in this arena with confidence that talented young people given the opportunity and encouragement to excel offer our greatest hope.

## FUNDING GUIDELINES

The James A. Welch Foundation considers proposals to provide funding to qualifying charitable organizations in Genesee County, Michigan for programs or projects which:

1. Identify students who are academically and/or creatively talented, and through guidance and counseling services, encourage them to pursue their special talents, AND
2. Provide additional educational opportunities for academically and/or creatively talented students to cultivate their special talents.

Please answer the following:

1. What academic or creative talent does your organization seek to develop?
2. Explain the process for identifying academically or creatively talented students.
3. Explain the process whereby the academic or creative talent is developed.

*Note to Grantseekers: Please include your definition of “academically talented” and/or “creatively talented” students in your request for funding. Also, describe the selection process used to identify “academically and/or creatively talented students.”*

The following types of requests are of low priority and rarely funded by the James A. Welch Foundation:

Capital Projects	Renovations
Major Equipment	Grants to Individuals
Land Purchases	Sectarian Projects
Endowments	Indirect Cost Recovery

Fixed overhead costs that are not directly related to the project shouldn't be part of the program budget that the Welch Foundation will fund.

Grant proposals are due on the 20<sup>th</sup> of March, May, August or November for consideration by the board at their quarterly meeting the following month. The proposal should be mailed to:

James A. Welch Foundation  
Attn: Tina Smith  
c/o Lewis & Knopf CPAs, PC  
5206 Gateway Centre, Suite 100  
Flint, MI 48507

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## PROPOSAL CHECKLIST

Please Note: Your proposal will not be reviewed unless it is complete and submitted on time. Please refer to this checklist to make sure you have included all pieces of your application. If a document is already on file with the foundation (such as an audit or current board list), please note that in your proposal. Please provide 8 hard copies of the proposal request.

### For project-specific requests:

1. Proposal Cover Sheet with signatures of the executive director and board chair.
2. Your Organization's Mission and Brief Summary of Key Programs (no more than 1 page)
  - a. What academic or creative talent does your organization seek to develop?
  - b. Explain the process for identifying academically or creatively talented students.
  - c. Explain the process whereby the academic or creative talent is developed.
3. Application (no more than 3 single-spaced pages)
  - Project Description
    - Why is this project needed and how does it fit with James A. Welch Foundation (JAWF) Funding Priorities.
    - How are other partners involved?
  - Include your definition of academically or creatively talented students and the selection process used to identify them for your program.
  - Any prior results and outcomes
4. Project Budget (see sample format)
5. Audited Financial Report for the most recent fiscal or calendar year – OR – Page 1 of IRS 990.
6. IRS Determination Letter granting 501c3 status.
7. Your organization's board-approved annual budget and project budget for the proposed grant.
8. Current Board Member list and project staff list

### If you are using a fiscal sponsor:

- Most recent audited financials for the fiscal sponsor.
- A signed copy of the Letter of Understanding outlining the relationship and mutual agreements signed by the sponsor's executive director.

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## JAMES A. WELCH FOUNDATION GRANT APPLICATION FORM – COVER PAGE

Grantees that receive funding from the James A. Welch Foundation are required to submit a Final Report Form within 6 weeks of completion of the funding project or program. Failure to follow these guidelines may jeopardize future funding opportunities. Grantee also agrees to return any JAWF funds not used.

Please complete this application form and submit to:

The James A. Welch Foundation  
Attn: Tina Smith  
c/o Lewis & Knopf CPAs, PC  
5206 Gateway Centre, Suite 100  
Flint, MI 48507

If you have any questions, please contact Tina Smith at 810-238-4617 or [tsmith@lewis-knopf.com](mailto:tsmith@lewis-knopf.com).

Date: \_\_\_\_\_

Name of Organization: \_\_\_\_\_

Executive Director: \_\_\_\_\_

Address: \_\_\_\_\_

Contact Person  
(if different from the Exec. Director) \_\_\_\_\_

Title of Project/Program: \_\_\_\_\_

Program/Project Completion Date: \_\_\_\_\_

Total Project Budget: \_\_\_\_\_ Total Amount Requested: \_\_\_\_\_

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## GRANT APPLICATION FORM

1. Briefly describe the purpose of the grant, including goals and objectives that align with JAWF mission.
2. What impact will this grant have on the JAWF overall mission?
3. Will the grant enable you to meet your goals and objectives as outlined in your request? Please describe and quantify your anticipated results.
4. Are there any collaborative efforts with other organizations for this project? If yes, please list these organizations and their anticipated contribution(s) to your project or program.
5. Will the grant be used to attract new funding from other sources such as corporations, foundations or other individuals? If so, please describe.
6. What are your plans for sustaining this program/project in the future?
7. Please add any additional comments regarding your program/project.

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## SAMPLE PROJECT BUDGET FORMAT

This page provides a sample project budget form. You may submit your budget in any appropriate format. Please put the name of your organization, the date and the beginning and ending dates for the budget time period at the top of the page. Use only categories appropriate for your organization.

### Expense:

Include a description and the total amount for each of the following budget categories that apply to your project. Define each category, such as the number of full-time staff equivalents (FTEs) for the salaries and benefits line item or the types of consultants used. List the dollar amount for each applicable category.

Expense	Description (relates general category to project)	Project Total
Salaries & Benefits (FTEs)		
Consultant and Professional Fees		
Travel		
Supplies		
Printing & Copying		
Telephone & Fax		
Postage & Delivery		
Evaluation		
Other (specify)		
<b>Total Expense</b>		

### Revenue:

Include the amount & sources of funding for the budgeted categories listed, for example grants/contracts/contributions, earned income and membership income. Also, please indicate which sources are committed or pending. Insert additional lines if necessary.

Revenue	Source (Name)	Amount	Committed or Pending	Project Total
Grants/Contracts/Contributions				
Government				
Foundation				
Foundation 1	James Welch Fdn			
Corporation				
Individuals				
Other (specify)				
Earned Income				
Events				
Publications & Products				
Other Income (membership, dues, etc.)				
In-Kind Support				
<b>Total Revenue</b>				

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**FINAL REPORT FORM**

**Due Date:**  
**Organization:**  
**Address:**  
**Project/Program Name:**  
**Approved Grant Amount:**

**A. Financial Report**

Expense - Final Report	Description (align with proposal request)	Budgeted Amount	Amount Spent
Salaries & Benefits (FTEs)			
Consultant and Professional Fees			
Travel			
Supplies			
Printing & Copying			
Telephone & Fax			
Postage & Delivery			
Evaluation			
Other (specify)			
<b>Total Expense</b>			

Revenue - Final Report	Source	Budget Amount	Amount Received	Project Total
Grants/Contracts/Contributions				
Government				
Foundation				
Corporation				
Individuals				
Other (specify)				
Earned Income				
Events				
Publications & Products				
Other Income (membership, dues, etc.)				
In-Kind Support				
<b>Total Revenue</b>				

*Please explain differences between budgeted amount and actual amount spent that exceeds 25% of any line item.*

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## FINAL REPORT FORM (CONTINUED)

### B. Narrative Report (3 pages or less)

Please provide a narrative summary of the accomplishments of your program/project. Please include the following information:

- List the program goals & objectives. To what extent were goals & objectives met and what measures were used. How did the actual measures/outcomes compare to the intended/expected outcome.
- Describe the program/project and include specific activities and number of participants.
- What factors contributed to the success of the program/project? Please be specific.
- Were there barriers to success of the program/project? Please be specific.

C. What lessons did you learn from this program/project? (if applicable)

D. Is there anything else you would like to tell us about this program/project and/or your relationship with the James A. Welch Foundation?

E. Grantees that receive funding from the James A. Welch Foundation are required to submit a Final Report Form within 6 weeks of completion of the funding project or program. Failure to follow these guidelines may jeopardize future funding opportunities. Grantee also agrees to return any JAWF funds not used.