**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 for talented young people has become more complex. They may have many more choices, pressures, societal challenges, and greater economic hurdles. The James A. Welch Foundation believes providing creative opportunities for the growth and development of young people will result in a community of learners who will live, work, and contribute to an ever-changing global society.

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

**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 in your program description and in your subsequent final report:

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 Grant seekers: 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.” We also seek to understand how students will continue to develop or move to the next level in their development following participation in your program.*

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 20th 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

**Proposal Checklist & Application**

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 printed copies of the proposal request.

1. Proposal Cover Sheet with signatures of the executive director and board chair. (Format follows)
2. Your Organization’s Mission and Brief Summary of Key Programs (no more than 1 page)
   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. Will participants advance to another level of programming or are they referred to other more advanced programs?
3. Application (No more than 3 single-spaced pages. Please number pages.)

**PROJECT DESCRIPTION**

* Briefly describe the purpose of the grant, including goals and objectives that align with James A.

Welch Foundation (JAWF) mission.

* Describe the specifics of your program include timelines, intended audience and program syllabus.
* What impact will this grant have on the JAWF overall mission?
* How are other partners involved in your funding and programming?

**OUTCOMES and RESULTS**

* Will the grant enable you to meet your goals and objectives as outlined in your request?
* Please describe and quantify your anticipated results. Include number of desired participants, outcomes for the program (including growth and development) and opportunities for participant advancement after completing the program.
* List any prior results and outcomes.

**COLLABORATIVE EFFORTS**

* 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.

**FISCAL PARTNERSHIP**

* Will the grant be used to attract new funding from other sources such as corporations, foundations, or other individuals? If so, please describe.

**PROGRAM SUSTAINABILITY**

* What are your plans for sustaining this program/project in the future?

**ADDITIONAL REFLECTIONS**

* Please include any additional comments regarding your program/project.

1. Project Budget – (use the attached sample format)
2. Audited Financial Report for the most recent fiscal or calendar year – OR – Page 1 of IRS 990.
3. IRS Determination Letter granting 501c3 status.
4. Your organization’s board-approved annual budget and project budget for the proposed grant.
5. 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.

**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 8 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: | |  | | |
| Phone number(s) | |  | | |
| E-mail Address  Program/Project Completion Date: | | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | |
| Total Project Budget: |  | | Total Amount Requested: |  |

**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. **Please provide the full budget for the program proposed for funding**. 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) |  |  |
|  |  |  |
| **Total Expense** |  |  |

**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 A. Welch Fdn |  |  |  |
| Corporation |  |  |  |  |
| Individuals |  |  |  |  |
| Other (specify) |  |  |  |  |
| Earned Income |  |  |  |  |
| Events |  |  |  |  |
| Publications & Products |  |  |  |  |
| Other Income (membership, dues, etc.) |  |  |  |  |
| In-Kind Support |  |  |  |  |
| **Total Revenue** |  |  |  |  |

**Final Report Form**

**Due Date:**

**Organization:**

**Address:**

**Project/Program Name:**

**Approved Grant Amount:**

1. **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) |  |  |  |
|  |  |  |  |
| **Total Expense** |  |  |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **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 |  |  |  |  |
|  |  |  |  |  |
| **Total Revenue** |  |  |  |  |

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

**Final Report Form (continued)**

1. **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.

1. What lessons did you learn from this program/project? (if applicable)
2. Is there anything else you would like to tell us about this program/project and/or your relationship with the James A. Welch Foundation?
3. Grantees that receive funding from the James A. Welch Foundation are required to submit a Final Report Form within 8 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.