**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.

A final report is required. A downloadable form is available.

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 should not be part of the Project budget that the Welch Foundation will fund.

**Proposal 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 or submit via e-mail.

**Proposal Checklist**

1. Proposal Cover Sheet with signatures of the executive director and board chair***.***
2. Proposal Application/Narrative **(No more than 3 single-spaced pages. Please number pages.)**
3. Project Timeline and Syllabus.
4. Project Budget – (use the attached 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

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.

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**

810-238-4617

tsmith@lewis-knopf.com.

**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.

|  |  |
| --- | --- |
| Date: |  |
| Name of Organization: |  |
| Executive Director: |  |
| Address: |  |
| Contact Person (if different from the Exec. Director) |  |
| Title of Project/Program: |  |
| Phone number(s) |  |
| E-mail AddressProgram/Project Completion Date:  | \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Total Project Budget:  |  | Total Amount Requested:  |  |

**Proposal Application/Narrative (Please respond to each section)**

**ORGANIZATION MISSION**

Your Organization’s Mission and Brief Summary of Key Projects (no more than 1 page)

* 1. What academic or creative talent does your organization seek to develop? Please include your definition of “academically talented” and/or “creatively talented” students in your request for funding.
	2. Explain the selection process for identifying academically or creatively talented students.
	3. Explain the process whereby the academic or creative talent is developed. We also seek to understand how students will continue to develop or move to the next level in their development following participation in your Project. Will participants advance to another level of programming or are they referred to other more advanced Projects?

**PROJECT DESCRIPTION (No more than 3 single-spaced pages.)**

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

Welch Foundation (JAWF) mission. What makes your Project unique?

* Describe the specifics of your Project include timelines, intended audience and geographic area served, number of anticipated participants and Project 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 Project (including growth and development) and opportunities for participant advancement after completing the Project.
* 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. **If you are using a fiscal sponsor please include:** 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.

**PROJECT SUSTAINABILITY**

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

 **ADDITIONAL REFLECTIONS**

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

**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 project 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** |   |  |   |   |