

## INGHAM COUNTY BAR FOUNDATION GRANT GUIDELINES

The Ingham County Bar Foundation ("Foundation") is a 501(c)(3) nonprofit organization established in Michigan in 2002 as a vehicle for lawyers and other interested citizens to make charitable contributions for the tangible, meaningful benefit of persons and organizations located within Ingham, Eaton and Clinton counties.

One of the purposes of the Foundation is to fund a broad spectrum of programs in the above referenced counties, consistent with the Foundation's mission and its purposes, as expressed in the Foundation's Articles of Incorporation.

The Foundation's mission is . . .

- To promote access to justice;
- To expand the availability of legal services to the public at large;
- To support local charitable organizations;
- To promote continuing legal education; and
- To foster the honor and integrity of the profession of law.

The Foundation's purposes, as set forth in its Articles of Incorporation, are:

- To receive and administer funds exclusively for charitable, scientific, literary or educational purposes, and to give funds and property from time to time to public or private organizations that are organized and operated exclusively for any one or more of the aforesaid purposes;
- To improve and facilitate the administration of justice in Ingham County and throughout the State of Michigan;
- To insure to the fullest extent possible that legal services are made available to all members of the public regardless of their race, sex, religious, or economic status;
- To make charitable contributions to, and to work in conjunction with, charitable organizations whose purpose is to provide meaningful benefit to the community, including the disadvantaged and disabled, and other groups whose needs could be supported by the Foundation;
- To promote the study and research of law, and to promote the continuing legal education of lawyers;

- To acquire, preserve and exhibit rare books and documents, objects of art and items of historical interest having legal significance or bearing on the administration of justice;
- To educate the public in general as to their legal rights and obligations and other subjects related to the law;
- To foster and maintain the honor and integrity of the profession of the law;
- To promote, foster, solicit and receive funds and property of every kind and nature whatsoever, whether by gift, bequest, devise or otherwise, in any form, from any person, party or entity, to hold and administer such funds and property, and to expend such funds for charitable purposes which are approved, sponsored, and supported or undertaken by the Foundation, provided, however, that the expenditure of funds for charitable purposes shall be limited to those purposes that are permitted to be carried on by organizations exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code; and
- To engage in all lawful activities that may be incidental or reasonably necessary to any of the foregoing purposes.

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**CRITERIA**

***Priorities:***

Within the Foundation's grant purposes, the Board of Directors places a priority on programs and applicants meeting one or more of the following criteria:

Programs which:

- Demonstrate innovative approaches or new ideas
- Benefit Ingham, Eaton and/or Clinton County residents
- Have potential for independent continuity
- Demonstrate community support
- Avoid duplication of services
- Address underserved needs or populations
- Use challenge grants or other fund-matching arrangements to augment Foundation funds

Applicants who:

- Have a history of service reflecting clear ability to deliver quality service
- Demonstrate cooperative efforts between service providers in their area
- Request funds for services rather than capital expenses
- Have sources of income in addition to the Foundation funds requested

***Exclusions:***

The Foundation **will not** make grants:

- To political campaigns or entities designed primarily for lobbying
- To support religious activities
- If the Foundation's tax-exempt status would be jeopardized
- If the applicant fails to show fiscal responsibility and integrity

The Foundation **generally will not** make grants:

- To individuals
- To endowment campaigns
- To repay loans
- As a substitute for other funds
- If Foundation funds will be the organization's primary source of continuing financial support

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**APPLICATION**

The Foundation will make funding determinations on the basis of written applications in a format prescribed by the Foundation. Application forms and instructions can be requested by email [jfanderton@loomislaw.com](mailto:jfanderton@loomislaw.com). The Foundation may, in its discretion, request supplements to the applications and make on-site visits or require an applicant to appear at a Board or Committee meeting.

One electronic version sent as a portable document file (pdf) format of the application and supplemental materials in (ONE) pdf format should be sent to [jfanderton@loomislaw.com](mailto:jfanderton@loomislaw.com) at the office of the Ingham County Bar Foundation. The Foundation is not accepting hard copies of grant applications; all submissions must be made via e-mail. To be considered for an award, an application must be received no later than **5 p.m. on December 31**. Any application received after December 31 will not be considered. All applications will be screened initially by the staff of the Foundation to establish:

- eligibility of the applicant to receive Foundation funds, and
- the completeness of the application.

***Grant applicants must agree:***

- To submit grant requests in the prescribed format; and
- To sign and follow the Foundation's Grant Assurances; and
- To make their financial records open to review, upon request of the Foundation, during the application process and thereafter if a grant is awarded; and
- That their applications, once received, become the property of the Foundation.

*The Foundation reserves the right to use any or all ideas presented whether or not an application is accepted for funding.*

***Entities of the Ingham County Bar Association must solicit the approval or authorization of the ICBA Board of Directors for the program or projects seeking funds, and the application of any such entity must indicate whether the program or project has been endorsed by the ICBA Board of Directors.***

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**AWARDS AND MONITORING**

*Grant Awards and Payments*

Applicants will be notified in early 2023 of the disposition of any grant application that has been submitted timely on or in advance of the **December 31 deadline**. All grants will be made pursuant to a written announcement by the Foundation to the recipient, setting forth any terms and conditions of the grant award. The method of payment (prepayment, installments, or reimbursements) will be specified on a case-by-case basis at the time of making the award.

*Monitoring of Grant Recipients*

Recipients of Foundation grants will provide the following information to the Foundation:

- A final written report as to how the grant money has been spent and the results achieved; and
- A written interim report, if requested, as to how the grant money has been spent and the status of the program; and
- A copy of the applicant's annual financial statement (an audited statement, if requested) for the fiscal year in which the grant was made, as soon as it becomes available; and
- Responses to any reasonable requests for further information by the Foundation.

*Further Information:*

If you have questions or require further information, please contact:

Ingham County Bar Foundation  
email: [jfanderton@loomislaw.com](mailto:jfanderton@loomislaw.com)

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COVER SHEET

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

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

State/Zip: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

Chief Executive Officer: \_\_\_\_\_

Person preparing application: \_\_\_\_\_

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

State/Zip: \_\_\_\_\_ Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail \_\_\_\_\_

Amount Requested: \_\_\_\_\_ For time: \_\_\_\_\_ to \_\_\_\_\_

Payable to: \_\_\_\_\_ Attn of: \_\_\_\_\_

Tax Exempt: \_\_\_\_\_ yes \_\_\_\_\_ no \_\_\_\_\_ pending (Attach copies of IRS Exemption letter.)

Federal ID # \_\_\_\_\_

\_\_\_\_\_ Corporation \_\_\_\_\_ Unincorporated \_\_\_\_\_ Other \_\_\_\_\_

**Summary of Grant Request**

You must complete the space below. Use only this space. Do not attach a separate sheet. Please write this summary suitable for use in press releases related to any grant that may be awarded.

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The information requested below should be typed in the space provided or, *where requested*, on attached 8.5" x 11" paper. List applicant, date, and question number on all attachments. ***One electronic version sent as a portable document file ( ONE pdf) of the completed application and supplemental materials (also in pdf format) should be sent to [jfanderton@loomislaw.com](mailto:jfanderton@loomislaw.com).***

1. Describe the applicant organization below, including the form of organization (i.e., corporation, partnership, unincorporated association), date established, and purpose(s). ***Attach a list of applicant's current officers, directors, and, if requested, a copy of the applicant's charter and governance documents.***
  
2. Title of Project: \_\_\_\_\_  
***Use up to one side of a separate sheet to describe the project and anticipated activities for which funds are requested. Include project objectives and plan of action for accomplishing them, the needs met, geographic area(s) and population(s) to be benefited, the anticipated results/impacts, and a brief history of the requesting organization or program. Briefly describe your project's community support and indicate whether other organizations in the area perform the services your project seeks to perform or works with you on the services. NOTE: ICBA entities must indicate endorsement of their project by the ICBA Board of Directors.***
  
3. Anticipated Beginning Date for Project: \_\_\_\_\_
  
4. Anticipated Termination Date for Project: \_\_\_\_\_
  
5. If ongoing, explain whether or how the project will continue to be funded after the Foundation Funds requested are spent.
  
6. Briefly describe the applicant's evaluation method to determine the project's success.

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7. *Attach applicant organization's most current operating budget and financial statements for its last fiscal year (including audited financial statements for its last fiscal year, if requested).* If an audit was not conducted, attach a financial accounting for the period which has been certified correct by the responsible financial officer.
8. List below the project's estimated budget, detailed by major line items. Indicate which items are to be funded with the requested Foundation funds.
9. Amount of **Foundation funds requested** \$ \_\_\_\_\_
10. Anticipated **other funding** sources  
Please identify: \_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_
11. **Total Funds** needed for this project \$ \_\_\_\_\_
12. Indicate below which of the other potential funding sources are firmly committed to funding this project and whether or how any will match funds.
13. If requested, attach, or describe multiple or competitive bids obtained by the applicant for any project components or for any costs noted in your response to Item 8 above
14. List the dates and purposes of any prior applications for Ingham County Bar Foundation funds submitted by the applicant within the past five (5) years.

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**ASSURANCES BY APPLICANT**

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*(Applicant Program Name)*

The Applicant Program assures that:

1. It will restrict the use of Foundation funds to purposes that are charitable or educational within the meaning of Section 501(c)(3) of the Internal Revenue Code, as amended, and which meet the purposes of the Foundation, and the proposed uses described in the grant application.
2. It will not discriminate on the basis of race, marital status, religion, sex, age, handicap, or national origin in administering the program or project supported in whole or in part by this grant.
3. It will, upon request, cooperate with all data collection and evaluation activities by the Foundation and give any authorized representative of the Foundation access to any copies of all financial records, books, papers, or documents.
4. It will provide a copy of a financial audit prepared within the previous two years if available, or, in the alternative, a financial accounting which has been certified correct by the responsible financial officer of your organization.
5. It understands and agrees that the Foundation may, in its sole discretion, grant funds in greater or lesser amounts and/or for greater or lesser periods of time than requested in this application.
6. It understands and agrees that the application, once received by the Foundation, becomes the property of the Foundation, which may use any or all ideas contained therein and that this application will be available for public inspection.
7. It will provide (i) a final written report of how the grant money was spent and the results achieved within 90 days of completing the funded project and (ii) other interim reports on the project's status as requested by the Foundation.
8. It will acknowledge the Foundation's funding assistance in press releases, media contacts, and printed, video or audio material resulting from the program or projects supported in whole or in part by any grant awarded.
9. If for any reason the project or program is abandoned or discontinued during the term of the grant, it will return to the Foundation any funds remaining which were not used for the intended purpose.

I have read these assurances and understand that if this application is approved for funding, the grant will be subject to these assurances. I certify the applicant will comply with these assurances if the application is approved.

Chief Executive Officer (PRINT): \_\_\_\_\_ Date: \_\_\_\_\_

Chief Executive Officer Signature: \_\_\_\_\_

Responsible Financial Officer  
(if other than Chief Executive Officer) (PRINT): \_\_\_\_\_

Responsible Financial Officer Signature: \_\_\_\_\_