

WYTHE-BLAND FOUNDATION

155 West Monroe Street
Wytheville, Virginia 24382

Grant Guidelines

ABOUT WYTHE-BLAND FOUNDATION GRANTS

The Wythe-Bland Foundation, a non-stock 501(c)(3) health legacy foundation, was created from the lease of Wythe County Community Hospital in 2005. It is managed by a Board of 13 members who are community leaders residing in Wythe and Bland counties. Board members serve without compensation. The foundation owns all of the real estate associated with the hospital and is responsible for ensuring tenant compliance with the terms of the lease agreement. This pre-paid lease created the charitable wealth that generates earnings from investments to provide grant resources to Wythe and Bland County eligible not-for-profit organizations. As a condition of the lease approval, by the Virginia Attorney General, awards are made for health, education, and welfare projects that provide essential services to the citizens in the two-county area with an emphasis on health. The Spending Policies and Community Investment Strategies of the foundation have been created to preserve the asset base as an enduring endowment; therefore, the investment for grants and management of the foundation are limited to approximately 5% of the value of the asset base annually.

Qualified organizations may apply for grants for new programs, current programs or establishing or investigating new programs. No grants will be awarded if the Foundation Grant Application and other requested information described in these guidelines are not provided. Verbal or written letters of request or other inquiries cannot be considered as, or substituted for a formal grant application. Applications must be complete by August 1st with all forms accurate.

MISSION STATEMENT

Providing opportunities for innovation and collaboration to promote a healthier community

VISION STATEMENT

Our vision is to be a part of a thriving community that meets the health, education, and wellness needs of all our citizens

CORE VALUE STATEMENT

We value above all else:

- *Integrity*
- *Fairness*
- *Innovation and Collaboration*
- *Compassion and Commitment*
- *Our Partners' Missions*

AREAS OF INTEREST

The Board of Directors of the Foundation will only approve grants to those identified as 501 IRS designated organizations (or government entities) serving Wythe County and Bland County, Virginia that support, promote, and/or further the Foundation's mission.

The Foundation awards grants to organizations meeting its eligibility criteria in Wythe and Bland Counties. These projects include, but are not limited to, the following:

- Projects that promote or improve the health of citizens in Wythe and Bland Counties
- Projects that promote or improve the education of citizens in Wythe and Bland Counties
- Projects that directly serve citizens unable to afford basic and essential services in Wythe and Bland Counties

GRANT PRIORITIES-GENERAL GUIDELINES

The Board, in making grant decisions, will place the greatest priority on projects that:

- Directly provide health services to low-income, underinsured, or uninsured citizens of Wythe and Bland Counties
- Contain matching funds from other sources
- Are not of a recurring nature unless the project and the need(s) it serves requires otherwise
- Ensures measurable outcomes and objectives data can be accurately measured
- Provides evidence of feasibility and sustainability of the proposed project
- Complies with Wythe-Bland Foundation's grant guidelines
- Does not result in a duplication of services provided by another agency

GRANT PRIORITIES-SPECIFIC GUIDELINES

As the Board evaluates the merits of grant applications, areas of specific interest and high priority will include projects that address, in specific ways:

- Healthcare needs of the underprivileged, underinsured, and uninsured
- Adult and childhood obesity
- Health and nutritional conditions
- Dental care
- Mental health
- Health education
- Education of future generations
- Substance abuse prevention
- Environmental health
- Improving the quality of life in Wythe and Bland Counties

GRANT RESTRICTIONS

To comply with federal guidelines and legal restrictions, the foundation will not fund and will deny the following types of grants:

- Grants to individuals
- Grants to organizations for projects serving the population outside of Wythe or Bland Counties
- Grants to government entities for purposes that are identified as typical government financial responsibilities
- Grants to religious organizations for religious purposes
- Grants to endowments, or other discretionary funding pools
- Grants for fund-raisers, or other ticketed special events
- Grants for political purposes or for lobbying activities
- Grants for debt reduction
- Grants for the purchase of vehicles
- Grants for projects unrelated to the Foundation's mission, vision, or purpose
- Grants supplanting other funds
- Grants to fund applicant's employment or project administration fee

FUNDING LEVEL

At the present time the foundation has not set limits on the size of grants. The foundation does, however, reserve the right to set upper or lower limits on the size of grants in order to promote efficiency in grant administration, provide for financial stability, and to ensure that there are adequate funds to support both current and long-term projects deemed a priority by the Board. Generally, funding levels for grant distribution during a fiscal year is expected to be approximately five percent (5%), including the cost of operations, of the total value of the foundation's endowment.

Grants will normally be awarded on an annual basis, October 1 to September 30; however, the Board may consider multiyear grants. Grant applications seeking matching funds must provide written documentation from the other contributor(s) or the Board may make the foundation's grant contingent on receipt of such matching contribution(s). The documentation may include a letter or resolution from the other contributor(s). The Board reserves the right to request additional documentation of expenditures, including, but not limited to cancelled checks or expenditure certifications and to require project status reports and periodic update.

GRANT FUNDING CYCLE

Grant Applications are reviewed one (1) time per year to consider recommendations for funding. All grant applications must be submitted via e-mail or postmarked on or before the Grant Application due date. The grant application and all requested information must be complete prior to the Application due date to be considered in the Grant Review Cycle. Applications which are not timely submitted will not be considered in the current Grant Cycle unless a new application is submitted by the Grant Application Due Date for such subsequent Grant Review Cycle.

| Grant Application Due Date | Grant Review Cycle | Grant Award Dates |
|----------------------------|--------------------|-------------------|
| August 1 | August/September | October |

The grant review process includes a thorough review of the merits of each application. Therefore, applications submitted after the close of business on August 1st will not be eligible for consideration.

GRANT REVIEW PROCESS

When grant applications are received, the information will be reviewed by the foundation staff to determine compliance with the Grant Application Guidelines.

If the application is deemed to be incomplete, the foundation staff may request additional information. If the information is received in the time specified by the foundation staff, the application will be considered in the current grant review cycle. If the information is not received, or the application is still considered incomplete, the application will not be considered in any subsequent cycle. A new application will need to be submitted for the the next grant cycle.

The board of the foundation will review the applications and reserve the right to ask for additional information or to make a site visit during the review process. Upon completion of the application review, the Board of Directors will make the final decision for funding regarding each grant.

Applicants are encouraged to use the most current guidelines in preparing the grant application. The Foundation will evaluate grant applications based, in part, on the following:

- Is the proposed project consistent with the foundation's mission?
- Has your organization received previous funding from the foundation and successfully met the requirements contained in the grant agreement?
- Has the applicant submitted all of the information required by the foundation?
- Has the applicant clearly stated the need to be addressed and the impact that the project will make on meeting that need?
- Does the project application clearly define the Outcome and Objectives using the SMART (**Specific, Measurable, Attainable, Realistic, Timely**) approach?
- Has the proposing organization clearly documented its capacity and experience to develop and implement the proposed project?
- Is the proposed project consistent with the applicant's historical mission?
- Has the organization and project leadership demonstrated the skills and experience required for success?
- Is the project timetable realistic?
- Does the budget clearly reflect the resources necessary for the proposed project, the operation, and maintenance cost of the organization?
- Does the organization have a Sustainability Plan and/or a Business Plan?
- Has the applicant developed a broad base of support for the project including partnering with other agencies or funders?

After the grant application review process is completed, applicants will be notified in writing by the foundation staff regarding the final outcome of their request. If the grant is approved, the foundation staff will issue a letter advising the applicant of the award and of any conditions, restrictions, payment terms, and reporting requirements (which may include on-site visits) connected with the grant award. The applicant will be required to execute a Grant Agreement and agree to hold harmless and indemnify the foundation from any claim, loss, expense related to the applicant's activities or use of the grant. The Grantee has thirty (30 days) from the dated grant offer to return the fully executed and witnessed Grant Agreement, or the offer of award will be rescinded. The grant award fiscal year is October 1 to September 30 regardless of the date that the Grant Agreement is executed.

The number and amount of requests, community needs, board priorities, federal and state laws and regulations, and available funds may require the foundation to not fully fund a request.

PROJECT ACCOUNTABILITY AND CONTINUITY

The foundation's award letter specifies the terms of the grant, including the use of grant funds, reporting schedule, and the need to adhere to Foundation grantmaking policies.

Each organization receiving funds from the foundation may be required to provide periodic financial reports and project reports. Additionally, photographs may be requested for inclusion on the foundation's newsletters, press releases, and/or websites.

Failure to expend grant funds and to provide a complete, accurate, and timely accounting of award within one year, or term agreed to at application approval, may prohibit the organization from receiving future funding from the foundation. It may also result in the Foundation seeking restitution of any misspent funds.

Grant recipients must inform the foundation immediately if significant events occur that may impact the project. Examples may include, but are not limited to, a change in the project director, or in the organization's key personnel; the organization's priorities, board members, funding sources, project costs, or operations. Failure to notify the foundation of issues that could adversely impact the project may result in a temporary, permanent cessation of payments, or possible action to reclaim funds.

REPORTING AND DISBURSEMENTS

Grant Award Disbursements

Disbursements for grant awards are usually made in three payments. Any deviation from this schedule must be approved in advance by the foundation. Unless otherwise approved, or change required by the grantor, the schedule of disbursements will be as follows:

Payment 1: One-third of the award is given to the grantee when the original Grant Agreement award letter is signed and returned by the grantee.

Payment 2: The second one-third disbursement is made upon receipt and approval of the mid-term report.

Payment 3: The final one-third disbursement is given when the final report is received which includes documentation of the checks written for the grant.

The final payment will reflect any change to the project budget with any unapproved funds reducing the total award to the Grantee.

Report Requirements and Forms

Report Forms:

The **WBF Project Data Sheet** is used for both the Mid-term and Final reports.

Each grant recipient is required to collect data. The **Data Collection Form should be used if your agency does not have a form**. This form will provide demographic data both for the board for long term evaluation, but will also assist the grantee in collecting information for the evaluation of the goals of the grant. This form is not included in the Mid-term or Final Reports.

The **Outcome Evaluation Form** is required for the grant and sets measurable goals for the project.

Required Reports:

Mid-term Report: Grantees will complete the **WBF Project Data Sheet**, the **Outcome Evaluation Plan Form** and the **Evaluation & Report Summary Form** and **documentation for all money spent as of the date of report**.

Final Report: Grantees will complete the **WBF Project Data Sheet**, the **Outcome Evaluation Plan Form** and the **Evaluation & Report Summary Form**, and **documentation for all money spent**. A copy of a check register or spread sheet would be suitable documentation. Individual receipts are not required unless additional documentation is requested.

One copy of the report, both Mid-term and Final, should be submitted either online via e-mail:

cking@wbfoundation.com

or

Wythe-Bland Foundation
155 West Monroe Street
Wytheville, VA 24382

Overdue Reports:

When a project is not completed in a timely manner, or Mid-term or Final Report is not provided, an Overdue Report letter is sent to the grantee and grant award may be rescinded. All advanced grant funds not adequately accounted for by the Grantee may have to be repaid to the foundation.

PUBLICITY

Each organization receiving grants from the foundation is required to include the Wythe-Bland Foundation logo within their publications and advertising.

GRANT APPLICATION GUIDELINES

All grant applications must be submitted by the Grant Application due date. Applications must be in writing, and should be based on the most current grant guidelines. Grant applications must be **complete**, and mailed, e-mailed, or hand-delivered by the required deadline. Faxes are not acceptable.

Once the grant application is completed by your organization, the application must be signed and dated by an individual authorized to do so by the organization. If any sections of the grant application are not completed, a written statement must be submitted explaining the reason(s), or the application may not be considered.

Wythe-Bland Foundation Grant Application Forms

TABLE OF CONTENTS

| | |
|--|--|
| Grant Application | |
| Applicant's Feasibility Report | |
| Project Calendar..... | |
| Budget Form | |
| Project Outcomes and Objectives..... | |
| Previous WBF Funding..... | |
| Application Checklist | |
| Evaluation & Report Summary Form | |

Wythe-Bland Foundation Grant Application

Before completing this and other grant applications, be sure to:

- Read all instructions thoroughly before beginning and complete all questions.
- Research and communicate with other funders – obtain a copy of funding guidelines, deadlines and/or annual report. Be aware of each funder's preferred method of initial contact, and additional information required.
- Be strategic – make sure your goals, objectives, and amount requested match the criteria of the foundation.

Applicant

Name of Organization:

Tax I.D. Number:

Legal Name (as the identified by IRS):
(if different than above)

Address:

Phone:

Fax:

E-mail:

Website:

Executive Director:

Primary Contact:
(foundation contact; grants will be addressed to this individual)

Title:

Phone:

Fax:

Current Board President: N/A

Current Board Members: N/A

| | | |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

IRS nonprofit designation?

Yes No (If no, name of fiscal agent)

Form 1023-EZ used to obtain a 501(c)(3) Designation?

Yes (If yes, please provide copy of Form 1023-EZ)
 No

Government Entity?

Yes No

Applicant financial reporting:

Fiscal Year:

Yes Start Date: End Date:
 No

Calendar Year: (January 1 – December 31)

Yes No

Total Organizational Operating Budget for 1 year:

Other than the Wythe-Bland Foundation, list of three largest funders for your operating budget in the last fiscal year and amount of funding.

| | | | |
|-----------|--------------------------|----------------|--------------------------|
| 1. Funder | <input type="checkbox"/> | Amount funded: | <input type="checkbox"/> |
| 2. Funder | <input type="checkbox"/> | Amount funded: | <input type="checkbox"/> |
| 3. Funder | <input type="checkbox"/> | Amount funded: | <input type="checkbox"/> |

State your organization's Mission Statement, (if none, state your mission):

Is this request being submitted exclusively to the foundation?

Yes

No (If no, attach additional funding source(s) information)

Project

Name of Project:

Summarize your proposal and how it fits with the foundation's mission and grantmaking priorities:

Has the project been approved by the governing body of your organization?

Yes

No

Date of approval:

Total Project Budget:

Amount requested from foundation: *(Round to the nearest hundreds)*

Amount of other project funding sources:

Percent of total project requested from foundation: %

**Note: Project funds will be decreased if project is reduced that reflect this percentage change.*

Duration of grant requested project: Months
(Provide justification if project exceeds 12 months)

Project Starting Date:

Project Ending Date:

How would you request grant funding be advanced? (Normal funding advances are made 1/3 grant amount at execution of the grant agreement, 1/3 upon submission of the mid-term report, and final payment at completion of project and submission and approval of the final report.)

If other method of funding advances is requested, other than that described above, please provide a justification:

AGREEMENT

I certify, to the best of my knowledge, that all information included in this proposal is correct. The tax-exempt status of this organization is still in effect. If a grant is awarded to this organization, the proceeds of that grant will not be distributed or used to benefit any organization or individual supporting or engaged in unlawful activities. The Wythe-Bland Foundation requires that you certify your application by submitting an electronic signature. To certify your application, read the text below and provide an electronic signature (type your name) and check box to confirm your signature

Enter Electronic Signature:
(Type your full name here)

*Signature Box:

Date:

Feasibility Report

1. **Existing Service.** Briefly describe what service you currently provide or how service is currently provided.

2. **Proposed Project.** Describe the proposed project and provide a description how foundation grant funds will be used.

3. **Need for the Project.** Indicate why the proposed project is needed and what will be different from the date prior to grant award and once your project is complete.

4. **Need for the Grant.** Identify why Wythe-Bland Foundation grant is needed. (Provide evidence addressing items such as your organization's balance sheet, or other resources)

5. **Sustainability.** Identify how this project is going to be sustained in the future.

6. **Service Area.** Indicate what area the proposed project will serve and, if known, the population or number of families to be served.

7. **Organizational Income.** List the sources and estimate the amount of expected revenue for a typical year. *(This table or other format that contains similar information may be used and attached).*

| Entity/Source | Amount of Funds |
|---------------|-----------------|
| | \$ |
| | \$ |
| | \$ |
| | \$ |
| | \$ |
| | \$ |
| | \$ |
| | \$ |

8. **Organizational Operating History.** If you have operated a similar program, attach audits, financial statement, or lists of income and expenses for the past year. *(This table or other format that contains similar information may be used and attached).*

| Source | Income | Source | Expense |
|--------|--------|--------|---------|
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |
| | \$ | | \$ |

9. **Part A: Project Cost Estimate.**

| | |
|----------------------------|----|
| Construction | \$ |
| Real estate | \$ |
| Administrative costs | \$ |
| Professional fees | \$ |
| Equipment Purchase | \$ |
| Other (describe) | \$ |
| Total: | \$ |

PROJECT CALENDAR

MONTH/YEAR

Explanation if Necessary
(one sentence, or less)

October

November

December

January

Feburary

March

April

May

June

July

August

September

October

November

December

Budget Form

OVERVIEW: An important component of your grant application is the preparation of a detailed project budget and budget narrative.

(This form or other format that contains similar information may be used).

LINE-ITEM BUDGET GUIDELINES

- The line-item budget should *include all income and expenses associated with the proposed project*. Please note that not every line-item applies to every project.
- Projected Operating Budget to be completed for three years beginning with the first year of grant award.

Three Year Projected Total Organizational Project Income and Expense Statement

| Income | Year 1 | Year 2 | Year 3 |
|---------------------------|-------------------------|-------------------------|-------------------------|
| Foundations | \$ <input type="text"/> | \$ <input type="text"/> | \$ <input type="text"/> |
| Other Grants | \$ <input type="text"/> | \$ <input type="text"/> | \$ <input type="text"/> |
| Earned Income | \$ <input type="text"/> | \$ <input type="text"/> | \$ <input type="text"/> |
| Interest Income | \$ <input type="text"/> | \$ <input type="text"/> | \$ <input type="text"/> |
| Total Revenue: | \$ <input type="text"/> | \$ <input type="text"/> | \$ <input type="text"/> |
| | | | |
| Expenses | | | |
| Salary Wages and Benefits | \$ <input type="text"/> | \$ <input type="text"/> | \$ <input type="text"/> |
| Insurance | \$ <input type="text"/> | \$ <input type="text"/> | \$ <input type="text"/> |
| Professional Fees | \$ <input type="text"/> | \$ <input type="text"/> | \$ <input type="text"/> |
| Equipment | \$ <input type="text"/> | \$ <input type="text"/> | \$ <input type="text"/> |
| Supplies | \$ <input type="text"/> | \$ <input type="text"/> | \$ <input type="text"/> |
| Debt Service | \$ <input type="text"/> | \$ <input type="text"/> | \$ <input type="text"/> |
| Other Expenses | \$ <input type="text"/> | \$ <input type="text"/> | \$ <input type="text"/> |
| Total Expenses: | \$ <input type="text"/> | \$ <input type="text"/> | \$ <input type="text"/> |
| | | | |
| Net Income | \$ <input type="text"/> | \$ <input type="text"/> | \$ <input type="text"/> |

Application Checklist

(Forms necessary for an application to be considered complete)

- Grant Application form
- IRS Nonprofit Designation Letter* *(N/A for government entities)*
- Certificate of Good Standing State Corporation Commission *(N/A for government entities)*
- Feasibility Report
- Letter of support from other partnering agencies in the project, or to which services will be provided.
- Itemization of Items to be Purchased with Grant Funds
- Budget Form
- Project Outcomes and Objectives
- Articles of Incorporation* *(N/A for government entities)*
- Bylaws* *(N/A for government entities)*
- Audits or Financial Statements from the Previous Year

**If your organization has previously submitted a copy to the Foundation, and they remain unchanged, no submission is necessary.*

Wythe-Bland Foundation

Evaluation & Report Summary

PLEASE USE THIS FORM FOR THE **MIDTERM** AND **FINAL** REPORT

(This form may be transmitted electronically, faxed, or mailed)

Please indicate which report: Midterm Report: Final Report: Combined Report:

Organization:

Project:

Award Date:

PART I: (Midterm Report Only) MEETING YOUR OBJECTIVES *(Insert answers to this sheet)*

Attach the **Project Evaluation Summary Report**.

Has there been any change of focus in services provided since the inception of the project?

Yes No

Please explain any delays in the implementation of the project and what you have done to remedy the delays/problems.

PART II: (Midterm Report Only) EVALUATING YOUR PROGRESS

Describe any changes to your Project Evaluation Plan and explain the need for change.

PART III: (Midterm and Final Report) PROJECT DATA

Organization: Date Submitted:

Project Name: Award Period:

A. Individuals Served by Project

| | Mid-Term Objective Total | Mid-Term Actual Total | Final Objective Total | Final Actual Total |
|--|---------------------------------|------------------------------|------------------------------|---------------------------|
| 1. Unduplicated individuals served by project | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 2. Client encounters/visits provided by the funded project | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

B. Other Encounters

| Type of Encounter | Target | Number of Encounters | Total |
|--------------------------|----------------------|-----------------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Rate the level of success of your project on a scale of 1 to 10 with 1 being least successful and 10 being highly successful:

1 2 3 4 5 6 7 8 9 10

Explain Your Rating:

Project Evaluation Summary Report

GRANT DATE:

AGENCY:

| Outcome Objectives | Indicators/ Measures | Target/ Benchmark | Baseline | Conditions/ Limitations | Data Source/ Collection | Results & Comments |
|--|-------------------------------|----------------------------------|-----------------------------------|---|---|--|
| <i>Measurable result established for project</i> | <i>What is being measured</i> | <i>Degree of change expected</i> | <i>Starting point or standard</i> | <i>Criteria for inclusion; describe & define group or project</i> | <i>Where data will come from & how/when collected</i> | <i>Your results; brief comments on challenges/problems</i> |
| 1. <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 2. <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 3. <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 4. <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| 5. <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

NARRATIVE REPORT

(Final Report Only)

The final narrative report should specifically describe the progress made toward reaching the goals of the project. General activity reports or summaries contained in an annual report do not fulfill this requirement. The narrative report should include, but not be limited to: a description of the project, how staff and volunteers were involved in carrying out the project activities, and the impact it had on project participants. To what extent were the project goals achieved. Any changes in the project's implementation and described in the original application should be documented, offering insight for the reason and how the project was impacted. How does the end result compare with the original project plan, in terms of quality, schedule and budget?

CERTIFYING THE INFORMATION

We certify that the information contained in this progress report and all forms, narrative, and any attachments submitted with it are true and correct to the best of our knowledge. We understand that any willful manipulation of information or data will result in immediate discontinuation of funding from the Wythe-Bland Foundation.

The Wythe-Bland Foundation requires that you certify your Midterm and Final Report by submitting an electronic signature. This signature consists of typing your name at the "Enter Electronic Signature" line and checking the "Signature Box"; thus, certifying the information contained in the report is accurate.

Enter Electronic Signature: *Signature Box

Date:

Budget Form

(Midterm and Final Report)

OVERVIEW: The IRS requires a private foundation receive a report on the use of funds and compliance with the terms of any grant that they award. The IRS expects the grantee to make an annual accounting of the funds with a final report on all expenditures made from the funds, and documenting the progress made toward the goals of the grant.

LINE-ITEM BUDGET GUIDELINES (BELOW FORMAT MUST BE USED FOR FINAL REPORT)

- The line-item budget should *include all income and expenses associated with the proposed project*. Please note that not every line-item applies to every project.
- Attach supporting documents to the **final budget report** as necessary.

| | WBF Foundation | Owner Contribution | Other |
|--------------------------------|----------------|--------------------|--------|
| Total Project Funds: | \$ [] | \$ [] | \$ [] |
| | | | |
| | | | |
| | | | |
| Expenses | | | |
| Salary Wages and Benefits | \$ [] | \$ [] | \$ [] |
| Insurance | \$ [] | \$ [] | \$ [] |
| Professional Fees | \$ [] | \$ [] | \$ [] |
| Equipment | \$ [] | \$ [] | \$ [] |
| Supplies | \$ [] | \$ [] | \$ [] |
| Other Expenses | \$ [] | \$ [] | \$ [] |
| | \$ [] | \$ [] | \$ [] |
| | \$ [] | \$ [] | \$ [] |
| | \$ [] | \$ [] | \$ [] |
| | \$ [] | \$ [] | \$ [] |
| Total Project Expenses: | \$ [] | \$ [] | \$ [] |
| | | | |
| Unexpended Funds | \$ [] | \$ [] | \$ [] |