

McGREGOR FUND

Private Liberal Arts Colleges and Universities Program Grantmaking Guidelines and Application Requirements for 2009

The McGregor Fund is a private foundation organized "to relieve the misfortunes and promote the well-being of mankind." It was established in 1925 by Tracy W. McGregor and his wife, Katherine Whitney McGregor. Over the years, the Fund has continued to be faithful to the stated intent of the donors. Grants to relieve misfortune and promote well-being are made in categories ranging from health care, education, and human services to the arts and public benefit. The area of principal interest to the McGregors was southeast Michigan and this remains the primary geographic focus of the Fund.

In education, the Fund provides a special program of competitive grants for private liberal arts colleges and liberal arts colleges within private universities in Michigan and Ohio. The Program annually awards up to three grants of *up to \$250,000* each to the selected institutions. This is a highly competitive program and represents the Fund's only program that provides grants outside metropolitan Detroit.

Priorities for Support of Private Liberal Arts Colleges in Michigan and Ohio

There are two primary objectives of the Program: first, to support projects or activities that will have a significant positive impact on the quality of the liberal arts education provided by the institution, and second to recognize and encourage excellence in private liberal arts education. The Fund considers the proposed projects on the basis of which appear to have the greatest potential to promote the highest quality in liberal arts education. For purposes of comparison, the Fund also reviews such measures as average ACT score of entering students, percentage of freshmen who graduate, student/faculty ratio, need-based financial aid as a percentage of budget, amount of endowment per student and amount and percentage of trustees' contributions to the college. Beginning this year, the Fund is also surveying colleges about how they assess their own performance in educating students.

The Colleges Committee of the McGregor Fund Board of Trustees has adopted the following statement of principles and priorities for the Colleges Program:

1. The purpose of the McGregor Fund's Private Liberal Arts Colleges and Universities Program is to reward and encourage excellence among private liberal arts institutions. Priority will be given to efforts that build upon the aspects of private liberal arts institutions that distinguish them from other colleges and universities.
2. In selecting projects to receive support under the Program, the Committee seeks to leverage the greatest beneficial results with the funds awarded. Applicants should request only the amount of funding, up to \$250,000, which can be documented in the budget as necessary to carry out their projects. The Committee will consider the applying institution's own investment in a proposed project and applicants are encouraged to document that investment, where appropriate, within project budgets. In general, the Fund does not provide grants to capital campaigns, endowments or to support substantial amounts of purchased goods or services that will be required on a recurring basis.

3. The highest priority is to support new, original and innovative efforts that will improve learning by students within liberal arts institutions. While this would most often be learning generally understood as “academic,” it may also include aspects of learning that occur outside the classroom that support the development of individuals who are mature, well-rounded and contributing members of society. For instance, it could include the development of new co-curricular programs that integrate student coursework and other learning experiences. In general, **on-going programs will not be selected.**
4. Requests for capital projects, such as buildings and equipment, are given very low priority for funding and will generally only be considered when closely connected to program efforts, as described above, that contribute to student learning or integrate new information technology in support of educational goals.
5. The Fund will collect data from applicant colleges to evaluate the institutions on a number of criteria that are used to measure characteristics of institutional excellence.

Timing

Grants under this Program are made as one-time distributions restricted to the purpose outlined by the institution in its application, and may be budgeted for expenditure over a period of up to three years. Each grantee is required to provide annual reports documenting the use of the funds until the grant is fully expended. Colleges or universities that receive a grant under the Program are eligible to reapply as early as three years following the previous submission, but only after all grant funds have been expended and a final report on the previous grant has been submitted to, and acknowledged by the Fund office. **Please note that new applications will not be accepted from colleges that still have an open grant at the time of the application deadline.**

Applicants should submit one unbound hard copy of the application. The deadline for receipt of applications at the McGregor Fund offices will be 4:30 p.m. on Monday, February 2, 2009. Grant decisions will be made by the McGregor Fund Board of Trustees in June and applicants will be notified of the decision on their request prior to the end of June.

Prior to the application deadline, McGregor Fund staff is available by telephone to discuss proposal ideas and budgets, and to answer any questions about the Program.

We invite applicants to discuss proposals with our staff well in advance of submission.

McGregor Fund
333 W. Fort Street, Suite 2090
Detroit, MI 48226
(313) 963-3495
www.mcgregorfund.org

McGREGOR FUND

Private Liberal Arts Colleges and Universities Program

APPLICATION PROCEDURES

GRANT PROPOSAL

We ask that grant proposals under this program be prepared using the format which follows:

COVER LETTER

The proposal should be submitted with a brief cover letter, signed by the president, clearly stating the specific purpose and amount of the request.

ATTACHMENTS

The proposal should be submitted with the following attachments:

- the most recent letter from the Internal Revenue Service verifying the institution's tax exempt status under IRS Tax Code Section 501(c)(3);
- a copy of the institution's most recent audited financial statements. (In addition to submitting the most recent audit at the time of application, if a more recent audit is completed prior to May 1, 2009, please forward a copy as soon as it becomes available);
- a listing of the institution's board of trustees or directors, including affiliations;
- a copy of the institutional budget for the current year, including expected revenues by source and expenditures by category;
- a complete copy of the evaluation report prepared by the North Central Accreditation team during their most recent visit to your institution. (Note that this evaluation differs from the Self-Study prepared by your institution); and
- a viewbook or other publication that is used to inform prospective students about the institution.

McGREGOR FUND

PRIVATE LIBERAL ARTS COLLEGES AND UNIVERSITIES PROGRAM

GRANT PROPOSAL FORMAT

*This format is available on the McGregor Fund's website, www.mcgregorfund.org
Please feel free to copy it into your word processing program to facilitate the preparation of your application.*

A. GENERAL INFORMATION

1. Date of Application
2. Legal name of college or university (should be same as IRS determination letter)
3. Address
4. Name of president and date appointed
5. Name, title and phone number of contact person (someone familiar with proposal, attachments and information furnished)

B. DESCRIPTION OF THE INSTITUTION

1. Brief history of the college or university
2. Brief description of the college or university today, including goals and current programs (include data on persons served annually by each program).

C. DETAILS OF THE REQUEST

1. Name and description of the proposed program or project. Please indicate whether this is a new program or project, or part of an ongoing activity.
2. Concise statement of the purpose of the program or project and the need it addresses. (Note that a stated purpose of this grants program is to stimulate excellence in private liberal arts education. Please comment briefly in this section on the link between the proposed purpose and your institutional "quest for excellence.")
3. Are there other colleges or universities that offer the same or a similar program? If yes, please indicate the names of those other institutions.
4. Amount of the request.
5. Which academic areas and how many faculty and students will be involved in the program?
6. Description of the work plan and timeline to carry out the activity.

7. What measurable results will be achieved? How will the proposed program or project be evaluated? (Please indicate whether this will involve a third party evaluation.)
8. If other funds, in addition to a McGregor Fund grant, are needed to implement the activity, please describe the fund raising plan, including both committed and prospective sources and amounts, and the status of other requests. Please include any institutional resources that will be used.
9. Indicate whether any other funding sources have declined a request for support of this activity and identify those sources.
10. If only part of the funding sought from all sources is received, how will the institution proceed?
11. Outline the plan to secure continued support for this program after the conclusion of McGregor Fund support.
12. Please list the names and qualifications of the individuals who will implement the program or project. (Please include curriculum vitae as an attachment.)

D. FINANCIAL AND STATISTICAL INFORMATION

1. Please provide as an attachment the budget, including expected revenues by source and planned expenditures, for the proposed program or project.
2. Please provide as an attachment the amounts and sources of corporate and foundation grants of \$25,000 and over received in the last three years.
3. Please provide the survey and statistical summary information requested on the attached sheets.

E. SURVEY AND STATISTICAL SUMMARY (Show %'s to first decimal)

STUDENT PROFILE

Full time undergraduate enrollment _____
Part time equivalent undergraduate enrollment _____
If full-time undergraduate enrollment is less than 90%, please
provide full-time equivalent (FTE) undergraduate enrollment _____
Percent change in full-time or FTE enrollment over 5 years (+ or -) _____ %
Percentage from Michigan _____ %
Percentage - women _____ %
Percentage - minorities _____ %
Freshman average ACT (nearest tenth) _____ %
Freshman average GPA (nearest tenth) _____

STUDENT EXPERIENCE

Student to Faculty ratio _____ to 1
(based on _____ students and _____ faculty)
Total full-time instructional faculty _____
Total part-time instructional faculty _____
Full-time equivalent (FTE) instructional faculty _____

Foreign language requirement for graduation:

Percentage of students who study abroad at least one full term in 4 years _____ %

2007-2008 Internship placement information:

Total number of students placed in internships _____
Number of students placed in paid internships _____
Total number of students placed in internships with non-profit organizations _____
Number of students placed in paid internships with non-profit organizations _____

Percentage of freshmen graduating within 5 years _____ %

INSTITUTIONAL ASSESSMENT

Does the college utilize the Collegiate Learning Assessment (CLA)?

Does the college utilize the National Survey of Student Engagement (NSSE)?

List other standardized surveys and assessments utilized to measure student learning, experience, engagement and outcomes:

List national and international merit designations the institution has received:

FINANCIAL BUDGET

Annual operating budget for the current year, showing sources of revenue
and major expense categories \$ _____
Percentage of annual operating budget covered by tuition _____%

STUDENT EXPENSES

Annual tuition (full-time basis) per student \$ _____
Annual room and board per student \$ _____

INSTITUTIONAL FINANCIAL AID (do not include government aid programs
administered by the institution)

Need-based aid budgeted in current year \$ _____
Non-need based aid budgeted in current year \$ _____

CONTRIBUTIONS RECEIVED (most recent fiscal year)

	<u>Amount</u>	Per Cent Contributing
Alumni	\$ _____	_____%
Trustees	\$ _____	_____%
Corporations	\$ _____	
Foundations	\$ _____	
Religious Affiliations	\$ _____	
Other	\$ _____	
TOTAL	\$ _____	

ENDOWMENT

Total Market Value \$ _____ as of _____

PLANT

Book Value \$ _____ as of _____

CAPITAL DEBT OUTSTANDING \$ _____

Signature of Official Responsible for Preparing the Above Information

I have prepared the information provided above using current institutional data and, to the best of my knowledge, it is accurate and complete.

Signature _____

Name (typed) _____

Title _____

Date _____