



*Grant Application Directions and Guidelines*

[www.arello.org/foundation](http://www.arello.org/foundation)  
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## **ARELLO<sup>®</sup> Foundation Grant Application Guidelines**

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## **ARELLO® Foundation's Purpose and Mission**

### **Purpose**

The ARELLO® Foundation operates to reduce the burdens of government, defend human and civil rights secured by law, and enhance the enforcement of real estate laws through research and education.

### **Mission**

The ARELLO® Foundation is dedicated to:

- Providing resources for educational projects and innovative programs that will enhance public protection in the real estate marketplace;
- Educating regulators for effective administration of real estate laws;
- Increasing the public's knowledge of and confidence in real estate regulation; and
- Forming alliances to research emerging trends and potential regulatory concerns.

## **Board of Trustees**

The governing body of the ARELLO® Foundation is the Board of Trustees. The Board has the authority to supervise, control, and direct the affairs of the Foundation; shall actively promote ARELLO® Foundation's objectives; and, shall actively supervise the disbursement of Foundation funds.

For a list of the current Foundation Trustees please visit [www.arello.org/foundation](http://www.arello.org/foundation)

**For more information on the ARELLO® Foundation and any updates on this application, please visit**

**[www.arello.org/foundation](http://www.arello.org/foundation).**

## Submission and Review Process

<u>Date</u>	<u>Event</u>
January 15	Announcement of Solicitations of Proposals for Funding and Posting on ARELLO® website
May 15	Deadline for Request Submissions
June 15	Submissions Review by Board of Trustees
June 30	Grants Announcement and Notification

## Guidelines for Grant Request Application

### 4.1 PURPOSE

Grants by the ARELLO® Foundation shall:

- Support research, development and implementation of educational projects;
- Sponsor educational programs;
- Promote the development of public protection service announcements; and,
- Enhance the development, administration and enforcement of programs and projects directly related to real estate regulation.

### 4.2 ELIGIBILITY

Groups eligible to participate in grant competition are:

- ARELLO® Standing Committees;
- ARELLO® Districts;
- Individual ARELLO® Member Jurisdictions;
- Public and private nonprofit education institutions; and
- Nonprofit real estate associations, societies and organizations.

A grant may also be awarded to provide direct funding or sponsorship for education programs and activities at any regular ARELLO® meeting and/or conference open to all members.

### 4.3 SCOPE AND REQUIREMENTS

All grants awarded must begin in the calendar year in which they are approved.

Grants must be in compliance with ARELLO® Foundation's Policies and Procedures and ByLaws. Ownership of any material produced shall be retained by the Foundation unless addressed in the grant proposal and approved by the Foundation.

Based upon need, grants may be awarded in whole or in part, subject to available funds. (The Foundation is limited to distributions not to exceed 10% of the fair market value of all Foundation assets as valued on December 31 of the prior calendar year.)

A budget of projected income (if applicable) and expenditures must accompany the Grant application and support the project as described. Any change in the project must be approved by the ARELLO® Foundation Board of Trustees. Any unused funds at the end of the project will be returned to the Foundation.

When a grant is awarded, funds allocated at grant approval shall be 50% of the total request. The remaining balance will be disbursed upon successful completion of the project, unless otherwise stated in the original proposal and approved by the Foundation.

If the project is to be completed by the end of the calendar year in which the Grant is awarded, evaluations and accounting for funds should be completed within 30 days of project completion. (Grant Recipient's evaluation form included as a part of this application.)

If the project is a multi-year project, progress reports by the Grant recipient should be made to the Board of Trustees at the Mid-Year and Annual ARELLO® conferences until project completion, at which time a project evaluation and accounting for funds should be completed within 30 days. (Grant Recipient's evaluation form included as a part of this application.)

Failure to complete a project evaluation, to account for funds or to provide proper reports to the Board of Trustees will cause the recipient to be ineligible for future Grants.

If Grant applicant is other than an ARELLO® Standing Committee, District or Member Jurisdiction, a copy of the organization's most recent financial statement should be attached.

#### **4.4 CRITERIA FOR PROJECT/PROPOSAL EVALUATION**

Grant applications will be reviewed based on the following criteria: (See Appendix A and Appendix B for scoring and evaluation criteria, Scoring Matrix and Supplement to Scoring Matrix.)

- Originality of the project
- Demonstrated educational innovation
- Clear evidence of the benefits
- Goals that are well articulated, attainable and measurable
- Timeline and/or activities to achieve the goals
- Accountability of funds detailed in budget request
- Evaluation plan, including measurable indicators of success
- Strongly supports ARELLO® jurisdictions in the administration and enforcement of real estate license laws to protect public interest

#### 4.5 APPLICATION PROCESS

- Grant Application Request Forms are available at [www.arello.org/foundation](http://www.arello.org/foundation).
- Grant Application Request Forms are due by Noon (CDT) May 15.
- Complete Grant Request Applications should be sent to Secretary-Treasurer, ARELLO® Foundation, 150 N. Wacker Drive, Chicago, IL, 60606 or electronically at [susan@arello.org](mailto:susan@arello.org).
- All grants awarded must begin in the calendar year in which they are approved.

#### 4.6 APPLICATION REVIEW AND SELECTION PROCESS

- The Board of Trustees serves as the Grant Committee.
- At the close of the application deadline, ARELLO® Foundation Secretary-Treasurer will provide applications electronically to the Board of Trustees for evaluation together with a Scoring Matrix.
- Applications that meet the stated criteria and are received on time will be reviewed subject to the same review criteria.
- The Chair of the Board of Trustees will establish a deadline for the application review to be completed.
- Upon completion, each member of the Board of Trustees will forward his/her Scoring Matrix to the Board Chair.
- The Board Chair will assign each Trustee a “Review Number” and record his/her evaluation onto a combined evaluation form.
- After the Board Chair has recorded the results, he/she will call a meeting of the Trustees to announce the results.
- The Board Chair will notify the grant recipients and announce via the ARELLO® website and *Boundaries* the successful recipients with a summary of the project.

#### 4.7 RESPONSIBILITIES OF GRANT RECIPIENT

- Grant funds must be used for the purpose described in the Grant Application.
- Fully implement the project and complete evaluation and accounting within 30 days of project completion.
- For multi-year grants, recipients should report project status to the Board of Trustees at Mid-Year and Annual Conferences. As with all grants, upon project completion, Grant recipient shall file a project evaluation and final accounting within 30 days.
- All grants awarded must begin in the calendar year in which they are approved.

#### **4.8 FUNDING PROCESS**

- When a grant is awarded, funds allocated at grant approval shall be 50% of the total approved. The remaining balance will be disbursed upon successful completion of the project, unless otherwise stated in the original proposal and approved by the Foundation.
- Based upon need, grants may be awarded in whole or in part, subject to available funds. (The Foundation is limited to distributions not to exceed 10% of the fair market value of all Foundation assets as valued on December 31 of the prior calendar year.)



## ARELLO® Foundation Grant Request Application Form

(Deadline for Application Submission: May 15)

<b>Grant Request #</b>	<b>Amount Requested: \$</b>
<b>Program/Project Title:</b>	
<b>Group(s) Making the Grant Request (include all partners):</b>	
<b>Contact Name:</b>	
<b>Contact Address:</b>	
<b>Contact Email Address:</b>	
<b>Contact Telephone Number:</b>	<b>Contact Fax Number:</b>
<b>If you are an Organization Other Than an ARELLO® Committee, District or Member Jurisdiction, are you a Tax Exempt Organization?    <input type="checkbox"/> 501(c)3?    <input type="checkbox"/> 509(a)    <input type="checkbox"/> Other</b>	
If "Other", Explain:	
<b>Please summarize your Mission/Goal:</b>	
<b>Need:</b> Describe the need for the project and provide data that would support your request.	

<b>Objective:</b> State measureable objectives and benefits for the project	
<b>Primary target population to be served:</b>	
<b>Timeline: (Activities to Achieve Goals)</b> Describe benchmarks for project completion	
<b>Is This a Multi-Year Project?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
If "Yes", what period of time does your funding request cover?	
<b>Program/Project Budget</b> (attach detailed budget if applicable):	
<b>Income</b> (if applicable):	\$
<b>Expenditures:</b>	\$
<b>Are there other funding sources for this project?</b> <input type="checkbox"/> Yes <input type="checkbox"/> No	
If "Yes", please list those sources:	
<b>Signature of Contact for the Project:</b>	
<b>Name:</b>	<b>Title:</b>

Completed Grant Applications must be submitted on or before the deadline date of May 15 to:

[susan@arello.org](mailto:susan@arello.org) or mail to ARELLO® Foundation, Attn: Secretary/Treasurer  
150 North Wacker Drive, Suite 920, Chicago, IL 60606-1682

## ARELLO® Foundation—Grant Recipient’s Evaluation Form

**(To be submitted within 30 days of project completion)**

The Board of Trustees of the ARELLO® Foundation congratulates you as a recipient of a Foundation Grant. Please provide us with information on your project’s success along with any digital photographs you may have available, with the understanding that any such photographs may be used in promoting the mission and purpose of the ARELLO® Foundation.

Please complete this form, attach any other documentation and digital photographs you feel will be beneficial and forward to [susan@arello.org](mailto:susan@arello.org).

<b>Date:</b>	
<b>Grant Recipient Contact Name:</b>	
<b>Grant/Project Title:</b>	
<b>Grant Amount Received:</b>	\$
<b>Provide a brief description of your project:</b>	
<b>Briefly describe how you measured the effectiveness of your project and your results:</b>	

**Tell us at least one specific story/incidence of how your project benefited your target population.**

**Did you find it necessary to make any changes from your original request?**  Yes  No  
If "Yes", please explain.

**Were there any unanticipated benefits?**

**Please provide/share any additional information regarding your grant that you think would be of interest to the Board of Trustees and others.**

**Grant Recipient Signature**

**Date**

## 4.4 CRITERIA FOR PROJECT/PROPOSAL EVALUATION

### ARELLO® Foundation—Grant Reviewer Scoring Matrix

(Sample of form used by Trustees in evaluating projects)

<b>Grant Request Number:</b>				<b>Evaluator Number:</b>		
<b>Project Title:</b>						
<b>Amount of Grant Request:</b>				\$		
Please rank the effectiveness of each item with 3 being high and 0 being low. Circle the number that best describes each statement						
CRITERIA	Effectiveness				Weighted Amount	Weighted Total
	3	2	1	0		
Application clearly details project and meets stated completion requirements					X1	
Project originality					X3	
Educational innovation clear and apparent (if applicable)					X3	
Objectives/benefits specifically stated and measurable					X2	
Goals are well articulated, attainable and measurable					X2	
Timelines for grant period are clearly stated					X2	
Budget complete, realistic and appropriate					X2	
Evaluation plan, includes measurable indicators of success					X1	
Strongly supports ARELLO® jurisdictions in the administration and enforcement of real estate license laws to promote and protect public interest					X3	
<b>Total</b>						

Please indicate below the statement that best describes how you would rank this application:

- I would definitely recommend funding this project.
- I would recommend partially funding this project. Suggested Amount: \$ \_\_\_\_\_  
(See comments below.)
- I would not recommend funding this project.

**Comments:**