

Evaluation and Renewal Application 2016

Instructions

This page explains how to submit an Evaluation and Renewal Application.

Please refer to the email accompanying these instructions for pertinent deadlines. A late or incomplete form will not be accepted for consideration.

A complete evaluation and renewal application includes the:

- **Evaluation and Renewal Application section starting on the next page of this file.**
- **Required Documents that are listed in the Required Documents Checklist file that was also emailed to you along with this file.**

Application Steps

- Starting on the next page complete this evaluation and renewal application by answering all the questions in the provided boxes, which will expand to accommodate the information.
- When typing your answers use Times New Roman, font size 12.
- If a field does not apply to you, enter NA.
- Review the Required Documents Checklist file.
- Gather all the required documents (preferably in electronic format).
- Edit the Required Documents Checklist file to indicate whether you will send each file by email, postal mail or messenger service, or in the Comments column enter the specific website address (URL) where it is available.
- Email this completed evaluation and renewal application and the required documents (including the completed Required Documents Checklist file) to both:
mail@brinsonfoundation.org and your program officer
- If any of the required documents are in paper only format, mail or messenger them to:
The Brinson Foundation
737 North Michigan Avenue, Suite 1850
Chicago, IL 60611
- We will inform you via a confirmation email when we receive your evaluation and renewal application and required documents.
 - **If you do not receive our confirmation email within 3 business days, please call us at 312-799-4500.**

Thank you.

Evaluation and Renewal Application

Application Date – *Enter today's date*

Organization and Contact Information

U.S. Tax ID

Enter your organization's U.S. Tax ID that was issued by the Internal Revenue Service.

Organization Name

Enter the exact legal name to which a grant would be paid.

Organization Address

Enter your organization's mailing address. Also indicate if there is an alternative address for a parent organization, etc. and indicate which address is preferred for grant agreements/checks.

Organization Telephone Number

Enter your organization's main telephone number.

Website Address

If your organization has a website, enter the URL address. Otherwise enter NA.

Contact Name(s) – *Enter your and any alternate's names.*

Contact Title(s) – *Enter your and any alternate's titles.*

Contact Address(s)

Enter your and any alternate's mailing addresses, if different from the organization address.

Contact Telephone Number(s) – *Enter your and any alternate's telephone numbers.*

Contact Email(s) – *Enter your and any alternate's email addresses.*

Charity Status

Date of Most Recent IRS Determination Letter

Please provide the date of your most recent IRS determination letter.

Changes in Tax and Public Charity Status

Have you requested or received a new IRS letter of determination in the past 24 months or has there been any change in, or challenge to, your tax exempt or public charity status or any finding that you are a Type III supporting organization since the date of your most recent IRS letter of determination? Please answer Yes or No. If the answer is Yes, please provide a brief explanation.

Evaluation Information (For Last Year's Grant)

This section pertains to the grant you received last year, which may be ongoing.

Progress towards Goals and Objectives

Please list the funded program's stated goals and note the progress made towards meeting them. What goals did you meet or exceed? What goals were not met or are still in progress? (If you received general operating support, your answer should relate to your organization's objectives.)

Evaluation Processes/Tools

What evaluation processes/tools are you using to measure your progress in meeting your goals and objectives? What have these processes/tools told you about the effectiveness of your work? Has your work changed or will it evolve as a result of what you have learned?

Significant Changes or Challenges

If your organization experienced any significant changes or challenges in the following areas in the past year or you anticipate any in the coming year, please briefly describe them:

- a. Organization's goals*
- b. Management*
- c. Operations*
- d. Financial condition*
- e. Programs or activities*
- f. Legal proceedings*

If applicable, describe any steps taken or to be taken to address these changes.

Project Budget versus Actuals

Please provide a project budget versus actual comparison which is in the Required Documents Checklist. If there is substantial variation between the project’s original budget revenue/expense and actual revenue/expense (or if the project is still in process, projected revenue/expenses), please explain the variation here (otherwise enter NA). (If you received general operating support, your answer should relate to your organization’s budget for the fiscal year.)

Deficit Explanation

If your organization operated at a deficit during the most recently completed fiscal year or anticipates operating at a deficit in its current or next fiscal year, please provide an explanation including the organization’s plan to address this situation.

Renewal Application Information (For a Potential Renewal Grant This Year)

This section pertains to this year’s request for renewed support.

Project Title

Enter your project’s title using no more than a few words. If your application is for general operating support, enter GEN OP.

Start Date

Enter the start date of the period in which the requested amount would be used.

Month	Day	Year
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End Date

Enter the end date of the period in which the requested amount would be used.

Month	Day	Year
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Requested Amount

Enter the amount of your grant request in U.S. dollars.

Project Description

Describe how the grant will be used in 10 lines or less. If your application is for general operating support, enter GEN OP.

Project Goals and Objectives

Please describe the goals and objectives for this grant in 10 lines or less. If your application is for general operating support, please describe your organization’s overall goals and objectives for the coming year.

Project Budget

Please provide a project budget, including indirect costs that must be covered to ensure a successful program, as described in the Required Documents Checklist. If a narrative description of the project budget would be helpful, please provide it here (otherwise enter NA). If your application is for general operating support, enter GEN OP.

Project Specific Funding

For this particular project, list other significant private and public funding sources, if there are any, and amounts that have been received, committed or are pending. If there are none enter NONE. If your application is for general operating support, enter GEN OP.

Endowment Value and Date

Enter the most current value of your organization's endowment and the date of such valuation. If you have no endowment, enter NONE.

Other Pertinent Information/Process Feedback

Provide any other brief comments you believe are pertinent to helping us consider your application. If you would like, please also provide any feedback you may have on our grant application process and/or this document. Your candid feedback, whether positive or negative, is greatly appreciated.

-- End of Evaluation and Renewal Application --

-- End of File --

