

V. **Responsible Parties** (Identification of staff and others who will be involved in the project, particularly CREs, and the roles they will play.)

VI. **Mechanism for Evaluation** (How the project will be evaluated and by whom.)

VII. **Sustainability** (Submit if applicable. For example, if the program is ongoing, how will it be funded in the future?)

VIII. Relevance: (Explanation of how the project will complement the objectives, character, and image of The Counselors of Real Estate.)

IX. Acknowledgement (Specific strategy through which The Counselors of Real Estate will be routinely recognized (in writing) for its role in supporting the project.)

X. Alliance Partners (Organizations and/or individuals expected to collaborate with The Counselors on this project.)



Helpful Hints for Those Submitting Funding Proposals

- I. **Executive Summary:** This is the most important section of the proposal in that it summarizes key information about the project. Think of it as a kind of “sales document” designed to convince the reader that this particular project should be funded. An Executive Summary should include a succinct conceptual description of the project, the need it is expected to fill and the \$ amount requested. You might also address the type and number of people expected to benefit from the program.
- II. **Overview:** This section should provide detail on how the project will actually be conducted: the process involved, who will be responsible for what activities, the methodology through which progress will be monitored and evaluated. This section is also a good place for more extensive background information on the entity which will be funded or is making the request as well as elaboration on the validity of the request – why the project should be funded and what will be achieved. An explanation on the status of local funding should be included. Finally, the project’s educational component and relationship to the real property industry should be addressed in this section
- III. **Timetable:** This section should present the order and timing of the tasks involved. Identify what will be achieved and by what date. It also reinforces the basic intent of the project by providing a succinct summary of the steps anticipated to achieve a successful result.
- IV. **Budget:** As you prepare a preliminary budget for the project, note all items relating to its operation. Take into account not only new costs that will be incurred if the project is funded (staffing) but also the ongoing expenses required to make it happen (i.e. travel, printing, consultants, etc.). List any additional sources of funding which might have been acquired. If deemed necessary, include a brief narrative or footnotes to provide elaboration on specific expenditures where explanation is warranted.
- V. **Responsible Parties:** The proposal should include discussion of who will actually be responsible for the project. Professional staff support as well as volunteer involvement and oversight should be carefully detailed here, particularly identification of the CREs who will participate.

- VI. Evaluation:** The proposal should address the frequency and methodology of evaluation. What is the measure for success and who will be responsible for making that determination?
- VII. Sustainability:** How will the program be sustained in the future? Those making grants do not generally wish to take on a permanent funding commitment to a particular project; rather they want to know that the project is finite in scope (with specific start up and conclusion dates) or that the grant is expected to be catalytic to the acquisition of additional funding or revenue raising.
- VIII. Relevance:** How will the program reinforce the character and objectives of The Counselors of Real Estate? The proposal should explain why the project is a good fit for funding by the “Foundation Arm” of the Counselors of Real Estate. How are The Counselor organization and/or the CRE Designation elevated, effectively positioned, or more widely exposed by The Counselors’ potential association with the project?
- IX. Acknowledgement:** The James E. Gibbons Educational Development Trust Fund is an affiliate of The Counselors of Real Estate, a professional organization whose members provide real estate advisory services to clients worldwide. How will The Counselors of Real Estate be recognized for its support of the project proposed? What specific steps will be taken to ensure that The Counselor organization is continuously acknowledged in all written materials referencing the project?
- X. Alliance Partners:** Today’s foundations are interested in collaborative projects, those that combine the resources of both the public and private sectors to achieve a common goal. It is particularly appealing to the Educational Development Trust Fund if a collaborative partner represents an audience which might benefit from the services offered by a Counselor of Real Estate.



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**GRANT APPLICATION GUIDELINES
JAMES E. GIBBONS EDUCATIONAL
DEVELOPMENT TRUST FUND**

1. Grants must complement the objectives and character of The Counselors of Real Estate and should, in some way relate to the real property business.
2. Particular emphasis will be placed on applications which include an educational component, and enhance the awareness and image of the CRE Designation, organization and/or real estate counseling profession.
3. Grants shall provide positive leverage in terms of dollars, pro bono services and/or alliances with other organizations.
4. Grants will generally be approved for a minimum amount of \$2,500 and a maximum amount of \$20,000.
5. Each proposal will include a CRE volunteer to monitor the grant as the Trust Fund liaison, providing regular progress reports to the Trustees.
6. No grants will include direct stipends to CREs except possibly in the case of research.
7. Preference will be given grants which provide the greatest opportunity for CREs to volunteer their time and services.
8. Each grant application will include a thorough plan of proposed activity, a detailed budget, and, where possible, a presentation to the Fund's Board of Trustees at one of its regularly scheduled meetings (held in conjunction with The Counselors' Fall Convention and Spring Business Meetings).
9. Each grant application will include a specific strategy for regular written acknowledgement and promotion of The Counselors of Real Estate in reference to the project for which funding is sought.
10. Except under unusual circumstances, projects which have been rejected by the Budget and Finance Committee of The Counselors of Real Estate will not be reconsidered by the Trust Fund.
11. Except under unusual circumstances, the Trust Fund does not fund local charities which might more appropriately be funded by local CREs.
12. Except under unusual circumstances, grants shall be limited to not-for-profit entities.