

ISA Educational Foundation Grant Application

The ISA Education Foundation (“Foundation”) is an Illinois Not-for-Profit Corporation, exempt from federal income tax pursuant to Internal Revenue Code Section 501(c)(3). It is organized and operated to advance the following exempt purposes:

- Advance education related to personal property appraising
- Provide instruction and training of individuals for the purpose of improving or developing their capabilities, skills and knowledge of personal property appraising and subjects related to personal property appraising
- Provide instruction for the public on personal property appraising and related subjects.

In furtherance of its exempt purposes, the Foundation has established the ISA Education Foundation Grant Program. Each year the Foundation makes financial grants available to organizations to develop personal property appraising educational programs, courses, and other educational resources. Each organization (“Applicant”) seeking to apply for an Educational Grant from the Foundation must complete the following application. In accordance with the ISA Education Foundation Grant policies and procedures, the Foundation uses the requested information to learn more about the Applicant, the activity for which the grant is sought, and to assess whether awarding the Applicant a grant advances the Foundation’s purpose of promoting and supporting education related to the personal property appraising. Some of the questions ask for responses that may not fit in the space provided. In those instances, you may attach additional pages. However, you are encouraged to keep your answers as brief as possible.

If you have questions regarding the Application, please call the Foundation at (305) 446-1820 or email TaraFinley@gmail.com (Foundation President)

Applicant General Information

Name of Organization

Address

Address Line 1

Address Line 2

City

State / Province / Region

Postal / Zip Code

Country

Phone

Fax

Email

Website

Briefly describe the purpose and activities of the Applicant's organization and how these activities relate to personal property appraising:

Organization Contact Person

Please provide the following information for the individual who will serve as the contact person for this grant application:

Name

First

Last

Address

Address Line 1

Address Line 2

City

State / Province / Region

Postal / Zip Code

United States

Country

Phone

Fax

Email

Position:

Applicant Legal Form

Is the Applicant a nonprofit, not-for-profit corporation, or similar type of entity:

Yes No

Please specify the legal form of the Applicant (e.g. Corporation, Limited Liability Company):

Date of incorporation of formation:

State of incorporation or formation:

Is the Applicant currently in good standing with its state of incorporation or formation:

Yes No

Applicant's Tax-Exempt Status

Is the Applicant exempt from federal income tax pursuant to Internal Revenue Code Section 501(c)(3):

Yes No

If yes, please attach a copy of the Applicant's determination letter from the IRS.

If no, is the Applicant exempt from federal income tax pursuant to another section of the internal Revenue Code[e.g. IRC 501(c)(6)]:

Yes No

If the Applicant is exempt from federal income tax pursuant to a provision of the Internal Revenue Code other than IRC 501(c)(3), please specify the code section upon which the Applicant's income tax exemption is based and attach a copy of the Applicant's determination or recognition letter from the IRS along with a copy of its organizational documents.

Applicant Experience and/or Relationship to Personal Property Appraising

Please describe the Applicant's or Organization's experience in personal property appraising and/or a related field and how that experience will enable the applicant to successfully carry out the educational activity for which the grant is being sought.

Activity Information

Please provide the following information regarding the activity for which the grant is sought:

Name of the activity or event:

Describe the activity in detail:

Describe how the event or program advances personal property appraising education:

If the activity is a one time event or educational program, please provide the date(s) for the course or program:

If the activity is a course, please identify the time period in which the course will be developed and introduced:

If the activity is an event, describe the location(s) and facilities where the activity is to be held:

If the activity is course development, research, or activity development, describe the projected use of the activity, i.e. frequency, duration, etc:

Describe the intended audience for the activity and who is or will be eligible to participate in the activity, course or event:

Describe the Applicant's reasons for conducting the activity or event, or developing the course:

If the activity is a course or educational program, provide the name, address, telephone number, email address, website and/or curriculum vitae/resume for each course instructor or presenter. If any of this information is not known at the time of the submission of this application, please provide information regarding the qualifications required of the individuals who will serve as instructors. Note: providing links to websites is not acceptable.

If the activity is not a course or educational program, provide the name, address, telephone number, email address, website (if applicable), and curriculum vitae or resume for each person who will be overseeing and/or conducting the activity. If any of this information is not known at the time of the submission of this application, please provide information regarding the qualifications required of the individuals overseeing and/or conducting the activity. (Note: providing links to websites is not acceptable.)

What is the dollar amount of the grant you are requesting:

Details of Grant Use

Describe in detail how the grant will be used. If the grant is for education speakers, list each speaker, their place of employment and their proposed topic. Then list that speaker's fees, the speaker's expected travel expense, the speaker's hotel expense, etc. If the grant is for course development, outline the number of course development hours, the course developer's hourly wage rate, etc. **NOTE: The Organization's overhead and routine expenses are not grant eligible.**
Untitled

Describe why a grant is needed for this activity and list any other grants or monies obtained for the same activity: (Note, this does not include course tuition or attendance fees)

Identify any fees or tuition that will be charged in connection with the activity, and specify if they are per event, per course, etc.

Describe how the activity shall be advertised or promoted to the appraiser community:

Attach a copy of all materials describing or advertising the activity. If materials are yet to be developed, summarize the materials, and outline the anticipated content. Untitled

If the material requested is not available at the time of the submission, the Foundation reserves the right to request this material when it becomes available.

If the activity is a course or educational program, attach a copy of the proposed curriculum.

If the material requested is not available at the time of the submission, the Foundation reserves the right to request this material when it becomes available.

If the activity is a course or educational program, attach a copy of the course material.

If the material requested is not available at the time of the submission, the Foundation reserves the right to request this material when it becomes available.

Please attach any other information you think will be helpful in evaluating the activity.

Applicant's Representations and Warranties

The Applicant hereby represents, warrants, and agrees that:

- The undersigned is duly authorized to execute this document on behalf of the Applicant.
- The information provided is true and correct.
- If the Applicant is awarded a grant, it will be used *exclusively* for educational purposes related to personal property appraising and for the activity identified in this application.
- If the Applicant is awarded a grant, it shall, as a condition of receiving the grant, execute the ISA Education Foundation Grant Agreement.
- If the Applicant is awarded a grant, the Applicant shall keep complete and accurate records regarding the purpose(s) for which all grant funds were actually used and shall on or before the 30th day after the completion of the activity provide the Foundation with a report documenting how the grant was utilized.
- Any grant funds not used for the purposes identified in this application shall be returned to the Foundation no later than 30 days after the end of the activity.
- There is no guarantee the Applicant will be awarded a grant. Grants are awarded at the discretion of the Foundation in furtherance of its exempt purposes.
- If the Applicant is awarded a grant, it shall abide by the terms, conditions, representations, warranties, and agreements outline in this Application and those contained in the ISA Education Foundation Grant Agreement.

I hereby certify the information contained in this application is true and correct and that I am authorized to execute this application on behalf of the Applicant:

Applicant (Name of Organization):

By:

First

Last

Title:

Date:

Signature