

Evaluation Rubric - General			
Criteria	Yes	Maybe	No
Innovation	Applicant is using unique methods to solve a clear and compelling unmet need in the Jewish community.	Applicant has identified a compelling need in the Jewish community but is using traditional methods to solve this need, or applicant is using innovative methods for a need that is already met in the Jewish community.	Applicant is proposing an idea that already exists in the Jewish community and is not meeting a need.
Budget Criteria	Applicant is an emerging organization or individual with an operating budget of \$1.5 million or less and has not yet gained traction with significant funders	Applicant is part of a large institution and/or is already substantially funded, but is proposing an innovative project with great potential.	Applicant's budget is beyond \$1.5 million and/or organization is a larger institution or affiliated with a longstanding institution.
Contribution to Jewish Life	Project is using creative methods to create new access points to Jewish life and learning, to inspire people to be a part of Jewish life, to connect people to the state of Israel, and/or to build and strengthen Jewish identity.	Project has the potential to make some contribution to Jewish life but does not appear significant.	Project does not indicate how it will add to Jewish life or whether it will help bring new people into Jewish life.
Impact and Reach	Project has potential for both short-term and long-term impact beyond the grant cycle. Project has clear and measurable goals. Applicant has clear metrics to measure its impact and reach.	Project may have the potential to have impact, but its impact is unclear and/or metrics are vague or not thought out.	Project will not have any impact beyond the grant cycle.
Replicability, Scalability/Sustainability	Project has the potential for large-scale expansion. Project has the potential to be replicated in other communities and other formats. Applicant exhibits financial model that will enable it to go beyond the initial year of funding.	Expansion and sustainability plans seem possible, but are not well articulated.	Project has no potential for expansion and replicability, no clear financial model to move forward beyond this grant.
Implementation	Applicant has the capacity to implement plan. Project has clear implementation plan that includes staff leadership, qualified advisors, and sound financial management.	Applicant has the potential to implement project but is in need of certain qualifications.	Applicant does not exhibit appropriate qualifications to implement project and/or has no support structure in place beyond him/herself.

February 15, 2013



Full Name
Organization
Address 1
Address 2
City, State Zip

Sample Grant Agreement

Dear Name,

I am pleased to confirm the details of Natan's grant of [GRANT AMOUNT] to [NAME OF ORGANIZATION] for [TYPE OF SUPPORT], as described in your 2012 proposal.

Natan will issue payments based on the following schedule:

- 1st installment of [AMOUNT 1] upon signature of agreement;
- 2nd installment of [AMOUNT 2] upon satisfactory review of a final report, which includes financial and narrative breakdown.

Jackie Fishman, Program Officer, will supervise this grant on behalf of Natan. Please stay in regular touch with Jackie.

In particular, we require an interim report for your activities by **June 30, 2013**, and a final narrative and financial report no later than **December 2, 2013**. We will evaluate the progress of your organization based on your 2012 proposal as well as the mutually agreed-upon benchmarks in attached in Appendix A. The interim and final reports will also ask you to comment on your success of meeting these benchmarks.

Please include a brief acknowledgement of Natan's support for your project or organization in any public announcement (written or oral) that you may make. Where appropriate, a copy of the Natan logo should be featured as well.

Natan sees its grantmaking as a strategic partnership with grantees. To raise grantee visibility among Natan's members and colleagues, and to discuss issues of shared concern and opportunities to collaborate, Natan will occasionally call upon grantees to participate in Natan events in New York or Israel. (When appropriate, Natan will pay for travel expenses.) Natan will promote grantee events to its members and colleagues whenever possible, and grantees will be expected to reciprocate when appropriate.

It is understood that in funding this project, Natan is not responsible for any indebtedness or other liabilities that your organization may incur.

Sample Grant Agreement

Appendix A - Benchmarks





Sample Report Form

Natan understands that many of the new and innovative organizations that we support will have made changes to their original plans in the period between requesting funding and actually beginning to implement their programs. We hope that this report form will help us to understand these changes and the thinking process behind them.

Please keep reports fewer than 6 pages.

Include the following items in your report:

For all organizations:

- We are aware that organizations are constantly evolving. Please tell us about any major changes or developments in your organization since you submitted your original application and explain the reasons for these changes (e.g. changes to your staff, programs, financials).
- Describe the progress you have made in meeting the benchmarks in your grant agreement. Be sure to include the benchmarks in this report, and to comment on the level of your progress thus far and whether you expect to meet your stated goals by the end of the grant period.
- Describe any major challenges (new, expected, unexpected) that your organization has encountered.
- Did this grant assist your organization in leveraging funds from other sources? If yes, please explain.

For organizations receiving project support from Natan:

- We are aware that new programs often change during the implementation stage. Please tell us about any changes in your goals and plans, and explain the reasons for these changes.
- Please describe the progress that you have made in the implementation of your program to date. Be as precise and as quantitative as possible, discussing in particular the numbers of people who have been affected by your program and any other metrics that you are using to measure your impact.
- Describe the progress you have made in meeting the benchmarks related to your project in your grant agreement. Be sure to include the benchmarks in this report, and to comment on the level of your progress thus far and whether you expect to meet your benchmarks by the end of the grant period.
- Describe any major challenges (new, expected, unexpected) that you have encountered in implementing your project.



Finances – all organizations:

- Attach a financial report including an **updated organizational budget alongside expenditures to date** and an **updated project budget and project expenditures to date** (if applicable).

Other – all organizations:

- Are there any ways in which Natan can be helpful to you at this time?
- Do you have any feedback for Natan that may help us to improve our grantmaking process or our relationship with our grantees?

Interim reports are due to Natan by December 30, 2014 and final reports are due by June 15, 2015. As a reminder, final grant installments will be disbursed upon review and receipt of a final report. Please email a copy to Rebecca Bachman, Grants and Operations Assistant, at rebecca@natan.org.