



# APPLICATION TO ESTABLISH A CHARITABLE ORGANIZATION ENDOWMENT FUND

A Charitable Organization Endowment Fund may be established for the benefit of a nonprofit organization or charitable purpose with approval of the Board of Trustees of the Oklahoma City Community Foundation. The initial contribution may come from a single donor, a group of donors or from the beneficiary organization. The fund is part of the permanent endowment of the Oklahoma City Community Foundation and all assets are legally those of the Oklahoma City Community Foundation and not those of any agency that they may benefit. The fund is governed by the Charitable Organization Endowment Fund Policy of the Oklahoma City Community Foundation.

**A. PROFILE DATA**

Organization Name: \_\_\_\_\_

Executive Director: \_\_\_\_\_

Mailing Address (list physical address, if different): \_\_\_\_\_

Phone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

E-mail address: \_\_\_\_\_ Web Site: \_\_\_\_\_

**B. ORGANIZATIONAL HISTORY**

In space provided below, give a brief history of the organization’s activities, accomplishments and impact on the community.


**C. BOARD OF DIRECTORS & GOVERNANCE**

In space provided below, describe the governance of the organization and how the governing board is selected. Describe what relationship or affiliation, if any, the organization has with any state or national organization?


**D. BOARD OF DIRECTORS, STAFF AND VOLUNTEERS**

1. What percentage of your current board of directors has contributed financially during the organization's last fiscal year? \_\_\_\_\_
2. What is the aggregate amount of contributions made by the board of directors during the last fiscal year? \$ \_\_\_\_\_
3. Number of full-time staff: \_\_\_\_\_ Number of part-time staff: \_\_\_\_\_
4. Do you have fundraising and development staff? \_\_\_\_\_
5. Average number of active volunteers: \_\_\_\_\_

**E. FINANCIAL INFORMATION**

Based upon the most recent year-end financial statement, please provide the following for the current year:

SOURCE	AMOUNT
Total Organizational Budget	\$ _____
<b>Income Sources:</b>	
Contributions/Dues/Memberships	\$ _____
Endowment Fund Distribution/Income	\$ _____
Other Endowment Income	\$ _____
Non-government contracts	\$ _____
Government contracts and grants	\$ _____
United Way/Allied Arts Support	\$ _____
Earned income from program	\$ _____
Earned income from sales, rentals, fundraising events, etc.	\$ _____
Other (explain):	\$ _____

**F. INITIAL AMOUNT TO ESTABLISH FUND \$ \_\_\_\_\_**

Source of funds (check all that apply):

- |                                                        |                                                                  |
|--------------------------------------------------------|------------------------------------------------------------------|
| <input type="checkbox"/> Existing organizational funds | <input type="checkbox"/> Donor gift (cash, stock, bequest, etc.) |
| <input type="checkbox"/> Matching grant                | <input type="checkbox"/> Funds to be raised                      |
| <input type="checkbox"/> Other _____                   |                                                                  |

**G. PURPOSE OF ENDOWMENT FUND:**


**H. ENDOWMENT GROWTH STRATEGY & PLAN**

Describe your organization’s strategy and plan for raising funds to establish the endowment and provide for future growth of the fund. Include your specific goals for the next five years.


**I. CONTINUITY PLAN**

The organization is required to maintain current records of financial position, board, staff and evidence of other legal compliance with OCCF. Please describe your strategy for continuity through board or staff succession.


**J. THE FOLLOWING DOCUMENTS MUST BE SUBMITTED WITH CHARITABLE ORGANIZATION ENDOWMENT FUND APPLICATION:**

- Organizational mission statement (50 words or less).
- A copy of the sponsoring organization’s Letter of Determination from the Internal Revenue Service.
- A copy of the organization’s articles of incorporation and bylaws.
- A copy of the organization’s strategic or long-range plan, if available.
- List of the current officers and directors of the organization.
- A current year financial statement and organizational budget.
- A copy of the most recent year-end financial statement (audited if available).
- A copy of the Charitable Organization Registration in Oklahoma issued by OK Secretary of State.

We have read the Charitable Organization Endowment Fund Policy Statement and understand the policies and operations of the Charitable Organization Endowment Fund.

Submission of this proposal is consistent with the goals and mission of the organization and the proposal has been reviewed by the organization's governing board.

*Signed by the head of the organization's governing board:*

\_\_\_\_\_ Date \_\_\_\_\_

*Signed by the president of the Oklahoma City Community Foundation and contingent upon approval of the OCCF Trustees:*

\_\_\_\_\_ Date: \_\_\_\_\_

For information or assistance on the Charitable Organization Endowment Program and its services, please call 405.235.5603.



**OKLAHOMA CITY COMMUNITY FOUNDATION**

P.O. Box 1146 Oklahoma City, OK 73101-1146 405/235-5603 405/235-5612 [www.occf.org](http://www.occf.org)