



# 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?




**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. 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).

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 \_\_\_\_\_

*Approved by the president of the Oklahoma City Community Foundation:*

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

For information or assistance on the Charitable Organization Endowment Program and its services, please contact Jennifer Meckling at 405.235.5603 or [j.meckling@occf.org](mailto:j.meckling@occf.org).

