Edwards Community Endowment Project
Guidelines and Application

Application and Proposal Format
Include a cover letter signed by the Executive Director/CEO and Board President that briefly describes the endowment fund goal, purpose, and the level of commitment anticipated from the organization and its Board of Directors toward the project.

Complete the Endowment Project Fact Sheet, and include it with the required packet of information. (5 copies)

Complete the Narrative, including a brief agency history with your organization’s mission statement. Describe current programs, activities, and clients served. (5 copies)

Endowment Project information

- Describe the strategy and timetable for raising endowment funds. Identify constituencies likely to respond to your Endowment Project appeal.
- How will the endowment be used? For example, will endowment income be used for operations or will it be restricted to specific program areas, etc.? Explain how the endowment will meet your organization’s long-term goals and its significance to the organization.
- Does your organization currently have an endowment? If so, what is its current market value and how are the funds currently managed and used?
- If your nonprofit currently has an endowment, describe the investment philosophy/policy (i.e. risk profile, types of investments, internal or external management, etc.).

Fundraising Information

- Briefly describe previous fund-raising efforts, including annual appeals, capital campaigns, and other organized efforts.
- Identify the staff member who will be directly responsible for overseeing your organization’s participation in the Edwards Community Endowment Project.
Attachments

- Most recent Audited Financial Statement, or appropriate equivalent
- List of Board of Directors, and their occupations and/or community affiliations
- One copy of the organization's 501(c)(3) IRS designation letter
Edwards Community Endowment Project Fact Sheet

Name of Organization: _____________________________________________________________

Address: ______________________________________________________________________

City / State / Zip: __________________________________________________________________

Phone / Fax: _____________________________________________________________________

E-mail: _________________________________________________________________________

Web Address: ___________________________________________________________________

Name of CEO/Executive Director: ____________________________________________________

Do you have an existing endowment?   Y  /  N   (circle one)

If yes, where are the funds located? ____________________________________________________________________________________

Existing endowment is valued at $______________ as of _____________(mm/dd/yyyy).

New endowment fund-raising goal $_____________________________

Fund-raising Results for Previous Fiscal Year:

Individual Solicitations $______________ United Way $______________
Board Members $______________ Corporations $______________
Membership $______________ Bequests/Planned Gifts $______________
Direct Mail $______________ Other (explain) $______________
Special Events $______________ Other (explain) $______________
Foundations $______________