



## 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**

## Fact Sheet

### 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 \$\_\_\_\_\_