



THE OKLAHOMA UNITED METHODIST FOUNDATION

4201 Classen Boulevard
Oklahoma City, Oklahoma 73118-2400

405-525-6863
800-259-6863

PETREE GRANT INFORMATION Summer 2009

Background: Margaret E. Petree of El Reno left a portion of her estate to the Oklahoma United Methodist Foundation when she died in 1994. Her endowment produces earnings that are annually distributed to Oklahoma City University, her home church in El Reno, scholarships for El Reno high school students and students at Redlands Community College, and maintenance of the Petree Plaza in El Reno. Ten percent (10%) of the earnings is reserved for **grants** to be awarded by a committee of lay members from the Oklahoma United Methodist Foundation board of trustees. This annual tithe of her endowment earnings has had great influence on the institutions and agencies of the church in Oklahoma.

Purpose: Miss Petree's will clearly states these grants are to be used for "the use of those institutions, agencies and nonprofit corporations administered, managed or supervised by The Oklahoma Annual Conference of The United Methodist Church and which are operated primarily for any one or more of the care of **children, youth, the aging or needy and disadvantaged.**"

Read this paragraph carefully: The Petree funds are limited. The Petree Grant Committee does not have the resources to purchase vans, build buildings and playgrounds, or purchase electronic equipment for churches of the Conference. Every effort is made to encourage promising, innovative projects, programs, and ministries to grow, make the church and community better, inspire, and serve to bring **children, youths, the aging, or marginalized** into a closer relationship with God, their church and their community. These are primarily start-up grants, or grants that will lift your ministry to a new level, not sustaining grants. They are usually limited to one-time awards with a maximum of \$10,000. The Committee favorably views grants demonstrating the ability to match Petree funds.

In the past 12 years the Petree Committee has awarded over 200 grants totaling more than \$1,028,500.00. Here are examples of some of the successful projects, programs, and ministries the Committee has been privileged to assist:

- Circle of Care's Child S.H.A.R.E. program
- Project Transformation
- Community Dementia Resource Center at Epworth Villa
- Panhandle Hispanic Ministry Program in Guymon
- Quayle United Methodist's Character Cultivating Camp
- Rotation Sunday School Concept at the local church level
- CJAMM's New Day Camps
- Cookson Hills Mission's Cottage Industry
- Skyline's Jets Program
- Chinese Ministry Start-up with the Wesley Foundation at UCO

What will not be funded? This letter attempts to help applicants understand what will and what will not be funded. The Committee must make subjective choices with the information you provide relative to all the applications that are submitted. Partial grants may be awarded, if resources allow. Sometime applicants are encouraged to come back with different considerations. *These activities will not be funded:*

- Rapidly depleting assets such as vehicles, computer hardware and most electronics.
- Bricks and mortar. A stand-alone request for construction or renovation will not be funded. The Committee is more focused on programming and ministry. The Committee wants to make a difference with these grants, and there are not enough resources for construction costs.
- A project, program or ministry that does not demonstrate broad support and/or shows no promise of continuing or expanding beyond the term of the grant.
- Grants for staff salaries, endowments, or administrative/operating expenses. For example, a grant may be awarded to purchase curriculum for a new project, but not for the salary of the teacher or to pay for air conditioning the building.
- Multiple applications from the same church or agency. Choose one project or ministry.
- A project, program or ministry that does not have local church or Conference oversight.
- Applications that are incomplete, unsigned, or received past the deadline will be returned.

The easiest programs for the Petree Committee to assist are those that fill multiple criteria. Call the Foundation at 405-525-6863 or 800-259-6863 if you have any questions. Allow yourself plenty of time to obtain the necessary approval signatures of your pastor and your District Superintendent. **The Committee must receive one original and 4 copies of the application.** Faxes will not be accepted.

ALL APPLICATIONS MUST BE FULLY COMPLETED, FULLY SIGNED, AND POSTMARKED OR HAND-DELIVERED TO THE OKLAHOMA UNITED METHODIST FOUNDATION BETWEEN **JUNE 1** and **SEPTEMBER 15**.

SEND TO:

**The Oklahoma United Methodist Foundation
Attn: Petree Committee
4201 N. Classen Boulevard
Oklahoma City, OK 73118-2400**

[OFFICE USE ONLY]

THE OKLAHOMA UNITED METHODIST FOUNDATION
PETREE GRANT APPLICATION
Summer 2009

PROGRAM/PROJECT NAME: _____

Church/Agency Name: _____
All grants must be made to projects related to and accountable to the United Methodist Church.

Address: _____

Amount Requested: \$ _____ Total Program/Project Cost: \$ _____

Grant Preparer: _____ Telephone Number: _____

Best way to reach you if there are questions: _____

Original Signatures (No Faxes):

Grant Preparer Date: _____

Pastor Approval Date: _____

District Superintendent Approval Date: _____

PLEASE ATTACH YOUR **BUDGET** AND YOUR **NUMBERED ANSWERS** TO THE FOLLOWING **6** QUESTIONS:

1. Briefly describe the **history** and overall purpose of your ministry or agency.
2. Describe the **need** or opportunity you wish to address.
3. **Explain how your project or ministry will meet this need.**
 - Include an estimate of how many children, youth, the aging, the needy or disadvantaged could be involved.
 - If this is a one-time project, how will your ministry be impacted?
 - If this is to be an ongoing ministry or program, how will it be sustained in the future?
 - What other support for this project or ministry has been developed?
4. Who will be responsible for the expenditure of grant funds?
5. How will you measure the effectiveness of your program or ministry?
6. Could this innovative project or ministry be developed and used by other churches or agencies? If so, how will you provide leadership and collaboration?

PLEASE KEEP YOUR BUDGET AND NUMBERED ANSWERS LIMITED TO A TOTAL OF THREE PAGES. THE DEADLINE IS SEPTEMBER 15. THE COMMITTEE WILL MEET IN EARLY OCTOBER TO AWARD GRANTS.

BUDGET

(Project Name)

(Period of Time)

INCOME	Amount	EXPENSES (be specific)	Amount
Cash in Hand	\$		\$
Pledged Cash	\$		\$
Fund Raising Events <i>(itemize below)</i>			\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
Other resources <i>(including this grant)</i>			\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
Total Income	\$	Total Expenses	\$

Balance your budget. Income must equal expenses.
Please highlight which expenses you hope to cover with Petree grant proceeds.

SEND APPLICATION TO:

The Oklahoma United Methodist Foundation
Attn: Petree Committee
4201 N. Classen Boulevard
Oklahoma City, OK 73118-2400

MUST BE POSTMARKED OR HAND DELIVERED BY SEPTEMBER 15.