



# Petree Grant

## INFORMATION

**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. Since inception in 1996, the Petree Committee has awarded hundreds of grants totaling more than \$1.86 million.

**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 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 that 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 usually start-up grants, or grants that will lift your ministry to a new level, not sustaining grants. Most are limited to onetime awards with a maximum of \$10,000. The Committee favorably views grant requests that document the ability to garner matching funds.

A few examples of some of the successful projects, programs, and ministries the Committee has been privileged to assist are Circle of Care's Child SHARE program, Project Transformation, the Community Dementia Resource Center at Epworth Villa, new Hispanic ministry programs, Quayle United Methodist's Character Cultivating Camp, the Rotation Sunday School Concept at the local church level, CJAMM's New Day Camps, Cookson Hills Mission's Cottage Industry, Skyline Urban Ministries, and El Sistema!, to name just a few.



**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 probably not be funded:*

- Rapidly depleting assets such as vehicles.
- Bricks and mortar. A stand-alone request for construction or renovation will not be funded. The Committee is better able to focus 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. Please choose one project or ministry.
- A project, program or ministry that does not have oversight by the local church or The Oklahoma United Methodist Conference.
- 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 especially of your District Superintendent. **The application must have original signatures.** Faxes will not be accepted, but e-mail approval from District Superintendents can be sent to [jfogarty@okumf.org](mailto:jfogarty@okumf.org).

**ALL APPLICATIONS MUST BE COMPLETED, FULLY SIGNED, AND POSTMARKED OR HAND-DELIVERED TO THE OKLAHOMA UNITED METHODIST FOUNDATION OFFICES BETWEEN THE CLOSE OF ANNUAL CONFERENCE AND SEPTEMBER 15.**

**SEND OR DELIVER YOUR APPLICATION TO:  
THE OKLAHOMA UNITED METHODIST FOUNDATION  
ATTN: PETREE FUND  
4201 N CLASSEN BOULEVARD  
OKLAHOMA CITY, OK 73118-2400**



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## APPLICATION - SUMMER 2016

Program/Project Name: \_\_\_\_\_

Church/Agency Name: \_\_\_\_\_

All grants must be made to projects related to and accountable by the United Methodist Church.

Full Address: \_\_\_\_\_

**Amount Requested: \$** \_\_\_\_\_ **Total Program/Project Cost: \$** \_\_\_\_\_

Grant Preparer: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Email: \_\_\_\_\_ Preferred Communication:  Phone  Email

### ORIGINAL SIGNATURES

\_\_\_\_\_  
Grant Preparer Date: \_\_\_\_\_

\_\_\_\_\_  
Pastor Approval Date: \_\_\_\_\_

\_\_\_\_\_  
District Superintendent Approval Date: \_\_\_\_\_

### THIS IS YOUR COVER PAGE

Attach your numbered answers to the following questions:

1. Describe the need or opportunity you wish to address.
2. How do you plan to meet this need? Include an estimate of how many children, youth, the aging, the needy or disadvantaged could be involved.
3. If this is to be an ongoing ministry or program, how will it be sustained in the future?
4. How will you measure the effectiveness of your program or ministry?
5. Could this innovative project or ministry be developed and used by other churches or agencies? If so, how will you provide leadership and collaboration?
6. Who will be responsible for the expenditure of grant funds?
7. Attach a budget. A sample format follows. Balance your income to expenses.

Please keep your answers succinct. **The deadline is September 15.** The committee will meet in early October to award grants.



## **PROJECT BUDGET FORMAT**

\_\_\_\_\_  
Project Name

\_\_\_\_\_  
Period of Time

INCOME	AMOUNT	EXPENSES (BE SPECIFIC)	AMOUNT
Cash in Hand	\$		\$
Pledged Cash	\$		\$
Fundraising Events (itemize below)			\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
Other Resources (including this grant)			\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
	\$		\$
<b>TOTAL INCOME</b>	<b>\$</b>	<b>TOTAL EXPENSES</b>	<b>\$</b>

***BALANCE YOUR BUDGET. INCOME MUST EQUAL EXPENSES.***

