



OCEC Operation Round Up Program
PO Box 1135
Alto, NM 88312-1135

OCEC-Operation Round Up® Program Funding Guidelines

I. Policy & Purpose

The OCEC-Operation Round Up® Program will be funded by contributions from members of the Otero County Electric Cooperative and from other sources available to the fund. Operation Round Up contributions will be used in Otero, Lincoln, Chaves and Socorro County for charitable, educational, environmental and emergency assistance.

II. Major Funding Categories

Although there are many worthy charitable, education projects and community needs in our local area, the limited availability of funds requires us to establish funding categories as follows:

A. Community Service

1. Programs, projects and organizations that are important components of a community's overall quality of life, with emphasis on public safety, health care and self-sufficiency.
2. Individual or family unit with emphasis on health care and self-sufficiency. Individuals or family unit funding is only available to Otero County Electric members with an active electric account. All individual or family applications must be accompanied by a referral letter from a social service agency, such as the Department of Health and Welfare, Lincoln County Medical Center, Gerald Champion Memorial Hospital, etc.
3. Programs and projects that enhance the cultural environment of communities in our local area.

B. Education & Youth

1. School programs and projects with an emphasis on leadership, math, science and the arts.
2. Programs that are designed to combat critical social problems affecting our children and youth, with an emphasis on children and teens at risk.
3. Programs and projects that promote wellness and encourage youth participation in athletics and physical fitness activities.

C. Environment

1. Programs and projects that promote community recycling and natural resource preservation.
2. Community-based environmental quality education programs.

D. Emergency Assistance

1. Community action programs, Red Cross and other local entities that collect and distribute money for low-income emergency assistance.

III. Geographic Focus

Contributions will be in the geographic region of Otero County, Lincoln County, Chaves County and Socorro County.

IV. Funding Restrictions

- A. Contributions to organizations will generally be made only to non-profits that have been granted tax-exempt status under Internal Revenue Code Section 501(c)(3).
- B. Contributions will not be made for
 1. Lobbying and political organizations
 2. Veteran, fraternal and labor organizations
 3. National fund drives
 4. Advertising

- 5. Individuals mortgage and rent payments
- 6. Electric bills
- C. Fund recipients cannot apply within one year of receipt of funds.

V. Evaluation Factors

- A. The following factors will be considered in the evaluation of all funding requests:
 - 1. The documented critical needs of an individual or family unit
 - 2. Potential benefit to area residents and the entire community
 - 3. Level of community support for the program or project or the organization requesting the funds
 - 4. Fiscal and administrative capability of the organization to deliver a quality service or program; and
 - 5. Results that are predictable and can be evaluated.
- B. It shall be the responsibility of the Board of Trustees to evaluate funding requests and to allocate contributions to accomplish the purposes and intent of these guidelines.

ATTESTED _____
Secretary

DATE _____

Adopted: 01/13/2012



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APPLICATION FOR DONATION FOR ORGANIZATION

1. Name of Organization: Shady Pines Chamber Players
2. Mailing Address: P.O. Box 1115, Cloudcroft, NM 88317
 Street Address: Shady Pines, 200 Fox (facing Wren)
 City: Cloudcroft State: NM Zip: 88317
3. Contact Person and Title: Suzannah Cox, volunteer coordinator
4. Phone Number
 Home: _____ Cell: 361-557-1960 Work: _____
5. Federal Tax ID#: 488068173151
6. Is organization requesting funding exempt from payment of income tax? If "YES", a copy of Form 501(c)3 from Internal Revenue Service must be attached.
 YES _____ NO _____
We are a very small operation. We would consider the possibility of working through a parent group or CLOC or some other operation which has a 501(c)3 if that would make a difference for ellgibility. Your guidance would be helpful in this regard.
7. A copy of financial statement for most previous year should be attached. Statement attached?
 YES see attached synopsis NO _____
8. Number of individuals, families or groups served in Otero, Lincoln, Chaves and Socorro Counties in the last year: 250 individuals attend concets and events; many students & families benefit from donation to Cloudcroft Schools music programs; 2019 "The Cello Speaks to Otero County music students" program expected to reach many county-wide students & families.
9. Does agency serve communities outside Otero, Lincoln, Chaves and Socorro Counties?
 YES Most patrons are Otero county residents but many come from all over New Mexico, west Texas & beyond. NO _____
10. State purpose of organization's/agency's request. Include amount requested and specifics of how funds will be used.
We do pay fees for top notch musicians (see attached musician resumes) to lead our performances. In 2019 we expect those fees to total \$3,000.
We would like the OCEC Round Up Program to help with \$2,000 of those fees as our Musician sponsor. As you can see from our budget (see attached Synopsis), our total cash budget exceeds \$11,000.
That does not take into account the many donated services and accommodations provided by volunteers.
Since we are expanding activities this year to reach more music students county wide directly, we believe this participation fits perfectly with the OCEC Round Up program (section A.3).

11. List other sources of funding for use of request as described above.

As can be seen from the attached budget, our programs have been substantially supported financially by the Cox family (around \$6,000 in 2018). Unforeseen family changes has made that level of commitment challenging. Though the Cox family continues its commitment to produce and support these programs financially, So we need extra help from the community. In addition to Cox family contributions, we receive cash donations from many individuals (\$2,000 in 2018). This year we are also seeking funds from community organizations County-wide.

Again note that in-kind support (in the form of housing, accommodations for musicians, performing venues, and many other services) from the Cox family and the community continues to be crucial in our ability to continue this work.

12. How are agency's programs measured for effectiveness?

CONCERT AUDIENCE - We are careful to measure the size of our main concert audience(s). It has grown from around 35 or so in 2013 to 160 2018. With the addition of the "Cello Speaks" program this year, we expect that exposure to significantly rise.

GARDEN VISITORS - We also collect information about garden visitors and encourage comments and suggestions through sign-in sheets provided at all events.

GEOGRAPHIC & DEMOGRAPHICS

We have noticed further expansion of our patronage, attracting more people from a wider geographic area and broader age range (incrementally more children and young students each year).

Our annual donation to the Cloudcroft schools music programs (\$1,200 in 2018) has greatly helped with needs which cannot be covered by the school budgets.

13. Please list three (3) references. Do not use OCEC personnel or Board of Trustee members.

(a) Name: Mike Shinabery Phone: c: 575-687-2001; 491-5683; space museum: 437-2840

Address: P.O. Box 167

City: Cloudcroft State: NM Zip: 88317

(b) Name: Pat Gaskill Phone: 575-430-9182

Address:

City: Cloudcroft State: NM Zip: 88318

(c) Name: Bonnie Brooks Phone: 915-542-1093

Address: P.O. Box 524

City: Cloudcroft State: NM Zip: 88317

The information contained in this statement is for the purpose of obtaining funding from the OCEC Operation Round Up Program on behalf of the undersigned. Each signing applicant understands that the information provided herein is used in deciding to grant funding, and each undersigned represents and warrants that the information provided is true and complete and the OCEC Operation Round Up Program may consider this statement as continuing to be true and correct until a written notice of a change is provided. The OCEC Operation Round Up Program is authorized to make all inquiries they deem necessary to verify the accuracy of the statements made herein.

Shady Pines Chamber Players

Name of Organization

Suzannah Cox

Signature of Representative

4/11/2019

Date