



SECTION 3: HISTORICAL INFORMATION AND CONSENT TO GUIDELINES

Have you previously received funding from the HBA Charitable Foundation or the HBA of Greater Tulsa?

Yes No

If you answered yes, please indicate the amount provided and date.

Amount Provided: _____ Month/Year: _____ Amount Provided: _____ Month/Year: _____
Amount Provided: _____ Month/Year: _____ Amount Provided: _____ Month/Year: _____

7. Does Requestor agree to and understand that the HBA Charitable Foundation may seek media publicity if support is provided? Further does Requestor agree to the use of Requestor’s image, name and/or likeness in conjunction with any such media coverage and waive the right to any compensation associated with the coverage?

Yes No

8. Does Requestor agree to provide a written update to the HBA Charitable Foundation on the anniversary date of the contribution detailing how the contribution was used?

Yes No

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SECTION 4: SUPPORT OF HBA CHARITABLE FOUNDATION MISSION

HBA Charitable Foundation Mission Statement

Our mission is to engage in charitable endeavors, on behalf of the residential construction industry, to advance education and housing related needs in the Tulsa metropolitan area. All funds will be used to support a variety of causes in Tulsa and the surrounding communities.

Describe how request is consistent with the HBA Mission Statement (150 word limit):

.....
SECTION 5: COMPLETED BY HBA STAFF

Date Received: ____/____/____ Received by (staff name): _____

Reviewed by Committee: ____/____/____ Reviewed by Board: ____/____/____

Approved: Yes No

If approved, contribution date: ____/____/____ Approved contribution value: _____

Made Via (check, services, etc.): _____

Details/Notes _____



Charitable Request Guidelines

Request Approval Guidelines and Policies

The HBA Charitable Foundation maintains a limited budget and is willing to coordinate the support of both skilled and non-skilled volunteers to provide philanthropic support to both individuals/private entities and 501(c)(3) organizations/public entities.

Eligibility

The Foundation will consider requests on a case-by-case basis upon submission of a completed request form and supporting documentation, evaluating each on the following criteria:

Individual Criteria

1. Completed request form
2. Must be a housing/shelter need or education related
3. Income stipulation – proof of need
4. Insurance Review
5. Property inspected by HBA representatives
6. Labor requests involve work by HBA member in good standing
7. Geographic criteria

Organizational Criteria

1. Completed request form
2. Must be housing/shelter or education related
3. 501 (c) (3) organization
4. Review/Support of Board of Directors
5. Annual Report (previous year)
6. Projected Income (current year)
7. Labor requests involve work by HBA member in good standing
8. Geographic criteria

Definition of criteria:

Housing and Shelter need will be defined as a deficient or substandard residence for a homeowner or business. The criteria is flexible, based on the nature of the request, and consideration for the type of request and how the request contributes to the overall mission of the HBA, helping to promote and better the state of housing and the industry in the area.

Income stipulation will require that Requestor produce a verification of income that shows a lack of ability to fund adequate housing/shelter need.

Insurance review will require that Requestor provide proof of homeowner's insurance, with coverage to extent deemed appropriate and necessary by members of the Review Committee.

Property Inspection: Before approving any donation, the Committee will make a site visit to inspect the property in order to assess the accuracy of the requested services/money and the scope of work needed.



Geographic criteria: All requests must be made by, and benefit an entity within the jurisdiction of the Home Builders Association of Greater Tulsa, which includes but is not limited to the metro Tulsa area, such as Owasso and communities as far to the southwest as Glenpool and Kiefer, and includes the outlying areas of Grand Lake.

Work by HBA member in good standing: Any request for funds to supplement a project will be given additional consideration should the project be done by a member of the HBA in good standing. If the request is for labor/services, any work provided on behalf of the HBA would be done only by a member in good standing.

501 (c) (3) organizations: Additional consideration will be given to public organizations that have 501 (c) (3) status.

Other organizational requirements: Documentation of review and support by an organization's Board of Directors must accompany request form, along with a copy of the previous year's annual report and a projection of current year income.

Types of requests

The Foundation will consider two primary types of requests:

1. Monetary
2. Labor/Services (to the extent that they are something that is provided by at least one, willing member in good standing of the organization.)

No requests for products in kind will be accepted, as the HBA Charitable Foundation does not have access to "products". Requests of this type should be made directly with a company that provides the product. However, in kind donations may be included in the scope of a labor/service project.

Approval process

Timing of approval

All requests will be evaluated within 30 days of receipt. Notification will be sent to the Requestor within a minimum of 30 days and a maximum of 60 days of the date the request was received. Any requests that do not fit within the timing of the HBAs approval process will not be considered. Requestor should not consider any request as approved by the HBA until Requestor receives a formal written letter of approval from the HBA. Any action or expense undertaken by Requestor prior to such written approval shall be done at Requestor's sole risk and expense.

Approval Requirements

Requests will be filtered based on the adherence to the guidelines outlined, and all completed applications that meet the minimum criteria will be considered by the HBA members for initial approval. Any request that falls outside of those guidelines will be denied unless it is given special approval by the HBA Board of Directors.

HBA Sponsor

An HBA member in good standing may sponsor any charitable request as a show of support toward the request. This will be taken into consideration when the request is presented at all levels, should it meet the minimum criteria.



Policy on Publicity

It shall be the policy of the HBA Charitable Foundation to obtain approval from any Requestor, prior to a final decision being made, the right for the Foundation to publicize in whatever manner that the Foundation so desires, the decision and the contribution made by the HBA Charitable Foundation. The Foundation will work directly, and may request the involvement of the Requestor, to disseminate the information to media partners in order to establish positive public relations results.

Policy on Follow-Up Reports

It shall be the policy of the HBA Charitable Foundation that recipients of any resources through the Charitable Request Process must be willing to provide an update to the Foundation at the one-year anniversary, if not before, detailing how the contribution was used by the Requestor. If the report is not provided, any future requests from the organization will not be considered.