



FAQ's / OTCF Managed Funds

Does the Oregon Trail Community Foundation (OTCF) compete with my nonprofit organization for donor dollars? No. Our goal is to identify community needs—and nonprofits meeting those needs—and connect them with appropriate and interested donors. “We are not a Cause; we’re a Causeway.”

If you talk to a donor who is interested in the mission of my nonprofit organization, do you try to get them to give their money to you or to us? We first determine whether the donor is interested in helping with your ongoing, current needs or if they like the idea of setting up a fund that would benefit your organization on an ongoing basis. If they want to help you right now, we recommend they give you the money directly. If they want to create a fund for your benefit, we give them information about how we can do that easily and with no set-up costs. The donor makes the final decision.

How can OTCF help my nonprofit organization?

- Grant-making – your organization may wish to participate in our annual grant cycle and be considered for a grant.
- Grants from outside – in some instances, it might help you when you’re applying for a grant from an outside funding agency to include the Oregon Trail Community Foundation as an advocate or partner in the grant application. This may only be done with our permission.

Why should my organization consider establishing a managed fund with the Oregon Trail Community Foundation?

- As mentioned above, it assures you of a source of income for the future. It can be more affordable than setting up a fund or trust on your own since you have legal fees, and by pooling all our fund monies, we can achieve lower fees for professional investment management.
- We can offer you investment diversification options that are not practical or available for a smaller account on your own.
- By taking on the administrative and financial oversight of your funds, we reduce the responsibility and liability of your volunteer members.
- Once you have a fund in your organization’s name, you can promote it to your constituents and other donors who have an interest in your mission, encouraging them not only to donate to it but also to include it in their estate planning.
- Your organization’s fund will be listed in our literature and on our website. We will help you promote your organization by disseminating this literature to the public, to donors and to estate planning professionals.

How do I manage invoices that I need to pay for my fund?

You will need to submit your invoices to OTCF either by dropping them off at our offices at 115 W Railway, Scottsbluff, NE – or via email: info@otcf.org with the required signatures from your advisory council. We will process these payments usually within the next 48 hours. These funds will be written directly from your fund's account.

How will I know my balance on my account?

You will receive a quarterly profit and loss statement, as well as an account activity report via email. If you should need these financials before then, you may send your request to: info@otcf.org.

I need to be reimbursed for an expense associated with my fund. How do I go about doing that?

You will need to submit your receipts to OTCF either by dropping them off at our offices at 115 W Railway, Scottsbluff, NE – or via email: info@otcf.org with the required signatures from your advisory council.

I am writing a grant for my nonprofit. How do I go about getting the information I need to do that from OTCF?

We are happy to send the required information you need to complete most grant applications, which generally includes an EIN number and an IRS determination letter.

I use a third-party to help with online fundraising (i.e. Amazon Smiles, Benevity, etc). How do I notify you that I have a payment coming to you?

We are happy to work with these payments. Please forward us the statements or notifications you receive regarding these payments. Generally, they will be credited to our bank account without any notice or explanation. We will need verification from you that these are your funds.