

OCWLA PHILANTHROPIC GUIDELINES & APPLICATION

For Charitable Giving

Address

P.O. Box 6130
Newport Beach, CA
92658

Contact

Amelia Montgomery
(949) 478-1103
info@ocwla.org

Orange County Women Lawyers Association

www.ocwla.org/community-service-charitable-giving



2

PHILANTHROPIC GIVING

OUR MISSION

It is the goal of the Orange County Women Lawyers Association to make charitable gifts to non-profits in the spirit of assisting the advancement of the status of women and children in law and society in matters including, but not limited to:

1. Legal services, education, awareness, and prevention services regarding domestic violence, and human trafficking.
2. Gender discrimination, harassment, or bias against women.
3. Access to services that support and improve the rights and lives of women.

Become Part of Our Tradition of Charitable Giving

Learn more about our charitable contributions in 2019, with proceeds raised in 2018 [HERE](#).



Spotlight For Your Cause At An OCWLA Event

Most grants include a presentation to OCWLA supporters at an event, offering exposure to your organization.



PHILANTHROPIC GIVING POLICY

Application Policy

Once a year, the OCWLA Philanthropy Committee shall review all submitted applications for OCWLA's philanthropic giving. All submissions must be received by January 31. After the submissions are received, each applicant will be assigned to an OCWLA Philanthropy Committee board member who will learn about the applicant organization. The board member should consider speaking with the applicant and conduct a site visit. Philanthropic gifts may range up to \$5,000 per organization in a one year period. Maximum gift amounts may be modified by the board. Grants will be awarded during the first quarter of the calendar year.

Conflict of Interest

Any OCWLA board member who is affiliated with an organization that submits an application for a philanthropic gift, either as a member, board member, or officer of the submitting organization, shall refrain from voting on OCWLA's gift to that organization.

Considerations

In deciding which organizations should receive philanthropic gifts, OCWLA's board should consider the following:

1. Whether the gift will facilitate volunteerism and community service by OCWLA members.
 2. Whether the gift will bring positive public attention to OCWLA.
 3. Whether the gift will meet OCWLA's philanthropic giving policy.
 4. Whether the goals and objectives of an organization are consistent with OCWLA's philanthropic giving application mission.
 5. Whether the Organization is a 501(c)(3) tax exempt organization.
-

Limitations

OCWLA shall observe the following limitations, and should not make philanthropic gifts to the following organizations:

1. Organizations having a religious, political, or lobbying purpose, unless these activities are incidental to the primary organizational mission.
2. Organizations whose primary function is to allocate funds to other charitable organizations or projects.
3. Projects that will take place outside Orange County.

4

THE OCWLA PHILANTHROPIC GIVING

PHILANTHROPIC GIVING APPLICATION



1. All applicants must complete the philanthropic giving application form below.
2. Applications must be scanned and submitted electronically only to info@ocwla.org.
3. Applicants must provide the following information:
 - a. Organizational information, such as mission statement and location
 - b. How the philanthropic gift will be used
 - c. Amount of the philanthropic gift requested
 - d. Organization's 501(c)(3) status
 - e. Financial statements for last two years
 - f. Current year operating budget
 - g. List of board members
 - h. List of staff of the organization
 - i. Copy of organization's current bylaws

ORGANIZATION

Address _____

Office Phone _____

Mobile _____

Email _____

Contact Person _____

Contact Title _____

NON-PROFIT INFORMATION

501(c)(3) Status

Yes

No

GIFT REQUIREMENTS

Amount Requested _____

Notes _____

CONTACT

2020 Philanthropy Committee Chairs



Jessica Achtsam
Philanthropy Member, Director

✉ Knobbe Martens
2040 Main Street
Irvine, CA 92617

☎ (949) 721-4648

✉ jessica.achtsam@knobbe.com



Jessica Munk
Philanthropy Member, Director

✉ LAW OFFICE OF DAVID W.
WIECHERT
27136 Paseo Espada, Suite B1123
San Juan Capistrano, CA 92675

☎ (949) 361-2822

✉ jessica@davidwiechertlaw.com



Michelle Philo
OCWLA President

✉ Philo Law Firm, P.C.
PO Box 16721
Irvine, CA 92623

☎ (949) 229-0908

Michelle@philolaw.com



Orange County Women Lawyers Association

www.ocwla.org

ADMINISTRATION



Amelia Montgomery
Executive Director

 (949) 478-1103

 info@ocwla.org