

Waukesha Rotary Club Charitable Fund Program Overview

The Waukesha Rotary Charitable Fund annually provides funds to agencies serving the City of Waukesha and its surrounding areas, as well as funds for international projects.

Eligibility

Priority is given to nonprofit organizations with federal tax-exempt status. Rotary sponsored projects and occasionally to public agencies. Highest priority is given to projects in the Greater Waukesha area. Grants are made only to organizations.

Funds for Operating Support or New Projects

Consideration is given both to requests for operating support and to requests to initiate new projects. Operating support is regarded as funds needed to maintain services already in effect at the time of application. A new project is one that is being implemented for the first time.

Instructions for making a grant request are provided on the following page.

Program Priorities

The Charitable Fund places highest priority on projects in the following areas:

- Arts and Culture
- Basic needs, such as food, shelter
- Children, youth and families
- Elders - Reducing isolation, maintaining independent living
- Employment and Training
- Education - Enrichment activities beyond the core curriculum
- Environment - Conservation, restoration, or education
- Health - assist individuals lacking access to health care;
- Disabilities: Assisting persons with physical or mental disabilities, including addictions

International Priorities are as follow:

- Projects which respond to the priorities stated above
- Projects which promote international understanding and cooperation through the exchange of people

Deadline for Applications: Applications must be received by April 1, 2010.

Mail applications to:

Waukesha Rotary Club Charitable Fund
P.O. Box 1876
Waukesha, WI 53187-1876

Waukesha Rotary Club Charitable Fund Application Instructions

Instructions for Requests for Operating Support

Complete the enclosed Organization and Grant Information page (page 3).

Organization Profile (one page or less)

- Provide a brief history of the organization's mission and major program
- Provide three to five key outcomes the agency achieved in the past year

Required Attachments:

- List of organization's officers and directors
- Income and expense budget for current fiscal year
- Most recent audit (or most recent year-end statements, if agency has no audit)
- Statement of federal tax exemption (501c3)

Only complete applications, providing all the requested information, will be considered

Instructions for Requests for New Project Funding

Complete the enclosed Organization and Grant Information page (page 3).

Organization Purpose (Half page)

Provide a brief summary of the organization's mission and programs.

Project Description (Not to exceed two pages)

- Abstract (half page): Provide a brief description of the project purpose, the project's significance (why it is necessary), who will benefit from the program, and the total cost of the project.
- Outcomes: Describe the key outcome(s) of the project and the evaluation process to determine if the outcome was achieved.
- Methods: Provide a brief explanation for how and when the project will be planned and implemented. (This should make clear how the Outcomes will be attained.)

Budget

- Provide a project budget indicating the sources of income and the expense items. A budget form is attached, but you may create your own budget form.

Required Attachments (Required for application to be considered)

- List of organization's officers and directors
- Income and expense budget for current fiscal year
- Most recent audit (or most recent year-end statement, if agency has no audit)
- Statement of federal tax exemption (501c3)

Only complete applications, providing all the requested information, will be considered.

**Waukesha Rotary Club Charitable Fund
Organization and Grant Information**

Organization Information

Name of Organization: _____

Address: _____

City: _____ Zip Code: _____

Phone Number _____ TTY: _____ Fax Number _____

Email: _____ Date of Incorporation: _____

Chief Staff Officer (Name & Title): _____ Phone Number: _____

Contact Person (Name & Title): _____ Phone Number: _____

Board Chairperson (Name & Title): _____ Phone Number: _____

Dates of Organization's fiscal year: _____

Organization's total operating budget: past year: _____ current year: _____

Grant Request Information

Amount Requested: _____

Nature of Request: _____ Project _____ Operating _____ International

Name of Project (If a project): _____

Has this Request Been Authorized by the Board of Directors? _ Yes _____ No _____

When would funds be needed: _____

Signature and Title of Person Requesting Funds:

Signature _____

Title: _____

Date Submitted: _____

If Grant is Awarded, send payment to: Name of Person: _____

Address: _____

City : _____ Zip Code _____

PROGRAM BUDGET

REVENUE

2010 Projected (**Balanced**)

1. United Way Allocation _____
2. Other Federated Campaign Allocation _____
3. Contracts *(List sources on bottom of page)* _____
4. Grants *(List sources on bottom of page)* _____
5. In-Kind Support *(List sources on bottom of page)* _____
6. Client and Program Service Fees _____
7. Contributions _____
8. Other Revenue *(List sources on bottom of page)* _____

TOTAL PROGRAM REVENUE \$ _____

EXPENSES

1. Salaries \$ _____
2. Benefits/Taxes _____
3. Professional Fees _____
4. Supplies, Printing _____
5. Travel _____
6. Telephone _____
7. Occupancy _____
8. Payments to Affiliates _____
9. Major Property & Equipment Acquisition _____
10. In-Kind Expenses _____
11. Other Expenses _____

TOTAL PROGRAM EXPENSES \$ _____

Contracts:

Grants:

In-Kind:

Other: