

## 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. The Charitable Fund Board of Directors reviews applications and recommends grants each year to be made in June.

### **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. Previous grantees must submit a final report no later than February 1, 2019 to be eligible for future grants.

Consideration is given both to requests for new projects and expansion of existing projects.

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, 2019.

Mail applications with all required attachments to:

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

**Waukesha Rotary Club Charitable Fund  
Application Instructions**

---

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

**Narrative: (not to exceed 3 pages)**

**Organization Purpose**

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

**Project Description**

- Provide a brief description of the project purpose, the project's significance (why it is necessary), who will benefit from the program, ***how the city of Waukesha and surrounding areas or international communities are impacted***, and the total cost of the project. Is this a new project or an expansion of an existing 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.)

**Project 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. Clearly indicate how the Waukesha Rotary Club Charitable Funds will be utilized in the project budget.

**Required Attachments:**

- Organization and Grant Information page
- Narrative
- Project Budget
- 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)
- Most recent report of previous Waukesha Rotary Club Charitable Fund grant

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

---

**Organization Information**

Name of Organization: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ Zip Code: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Fax Number: \_\_\_\_\_

Email: \_\_\_\_\_ Date of Incorporation: \_\_\_\_\_

Chief Staff Officer (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 \_\_\_\_\_ International

Describe what the Waukesha Rotary Club's funding would specifically be used for

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	Projected
1. United Way Allocation	_____
2. Other Federated Campaign Allocation	_____
3. Contracts <i>(List sources on bottom of page)</i>	_____
4. Grants <i>(List sources on bottom of page)</i>	_____
5. In-Kind Support <i>(List sources on bottom of page)</i>	_____
6. Client and Program Service Fees	_____
7. Contributions	_____
8. Other Revenue <i>(List sources)</i>	_____
<b>TOTAL PROGRAM REVENUE</b>	<b>\$ _____</b>
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	_____
<b>TOTAL PROGRAM EXPENSES</b>	<b>\$ _____</b>