

## 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**

Grants are made only to IRS-determined non-profit organizations, Rotary-sponsored projects, and occasionally to public agencies.

Current grant recipients must submit a final report no later than March 31 of the year in which the new grant is being requested to be eligible for future grants.

### **Program Priorities**

Highest priority is generally given to projects in the Greater Waukesha area, especially ones that become self-sustaining. New projects generally get higher priority than continuations of existing ones. Lesser priority is given to coverage of operating costs, and even less to organizations who repackage the money into further grants.

The Charitable Fund places highest priority in the following areas with no particular priority:

- Arts and Culture
- Basic needs, such as food, shelter, and safety
- Children, youth and families
- Elders- Reducing isolation, maintaining independence
- Employment and Training
- Education-Enrichment beyond core
- Environment -Conservation, restoration, or education
- Health- assist individuals without healthcare
- Disabilities: Assist those with physical/mental/addiction issues
- International Projects which promote international understanding and cooperation

**Deadline for Applications:** Applications must be received by April 1 of the year for which the grant is being requested.

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. Note that there are two parts – the narrative and the application.

**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 grant purpose, its significance (why it is necessary), who will benefit from it, ***how the city of Waukesha and surrounding areas or international communities are impacted***, and its total cost. If a project, is it a new project or an expansion of an existing project?
- Outcomes: Describe the key outcome(s) of the program 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.)

### **Program Budget:**

- Provide a budget indicating the sources of income and the expense items. Clearly indicate where the Waukesha Rotary Club Charitable Funds will be applied to the 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 \_\_\_\_\_ Operations \_\_\_\_\_ 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>

<b>EXPENSES</b>	
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>