

## POLK-BURNETT ELECTRIC COOPERATIVE

1001 State Road 35, Centuria, WI 54824-9020  
715-646-2191 • 800-421-0283 • FAX 715-646-2404  
polkburnett.com



Branch Office: 7298 State Road 70 • Webster, WI 54893

### Polk-Burnett Charities, Inc. OPERATION ROUND-UP® Grant Guidelines

Polk-Burnett Electric Cooperative is pleased to provide financial support to community, educational and charitable programs in our local area through Operation Round-Up®. Funding for Operation Round-Up is made possible by co-op members who round their monthly electric bill up to the next even dollar amount. Member donations are combined, and Operation Round Up grants are awarded quarterly to improve our local quality of life.

#### Eligibility

- Grants will be awarded to **nonprofit organizations** that **demonstrate a commitment to improving the quality of life in our co-op service territory**, with an emphasis on:
  - Public safety, health care, basic human needs, self-sufficiency, the arts and culture of our local area, youth and education.
  - Programs that empower self-reliance, problem solving and leadership, and those that address social issues and help at-risk children and teens.
- Grants will be made to organizations that have **tax-exempt status under IRS Code Section 501(c)(3)**.
- Grants will be awarded to programs and projects that **benefit local communities in our co-op service area**.
- **Only one grant per year** will be awarded to a nonprofit organization.
- Annual grants typically do not exceed \$1,000 for any organization.

#### Restrictions

Grants will generally NOT be awarded to:

- Lobbying and political organizations.
- Fraternal and labor organizations.
- Religious organizations and churches.
- Fundraisers (dinners, raffles, benefits).
- Individuals.
- Scholarship programs.
- National fund drives.
- Advertising.
- Ongoing operational expenses and wages.
- Cemetery and lake associations.

#### Requirement checklist

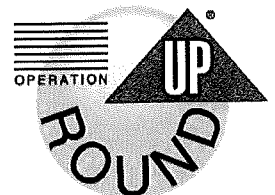
ALL APPLICANTS MUST PROVIDE a complete application package for consideration, including:

1. **Complete application form.**
2. Attach most recent **financial statement for your organization** (budget summary or balance sheet showing income and expenses for your organization). *Do not attach full budget or audit report.*
3. Attach proposed **program or project budget** for which you are seeking grant funds. List expenses needed to fulfill your project or program. Expenses may be estimated, rounded to the nearest whole dollar.
4. **Documentation of tax-exempt status** under the IRS Code Section 501(c)(3) **or letter of explanation** regarding your tax-exempt status.
5. If your organization has previously received an Operation Round-Up grant, the application requires that you give a detailed account of **how the previous grant was used**.

*Applications not meeting these requirements will not be considered.*

Application deadlines: March 1, June 1, September 1 and December 1.

Questions? Contact Joan O'Fallon, 800-421-0283, ext. 333, or jofallon@polkburnett.com.



## OPERATION ROUND-UP®

Polk-Burnett Charities, Inc.  
1001 State Road 35, Centuria, WI 54824  
715-646-2191 or 800-421-0283

### APPLICATION FOR DONATION FOR ORGANIZATION/AGENCY

1. Name of Organization: \_\_\_\_\_
2. Address: \_\_\_\_\_  
Street or Post Office Box  
\_\_\_\_\_  
City or Town State Zip Code
3. Phone Number: \_\_\_\_\_  
Work Home
4. Contact Person: \_\_\_\_\_  
Name Title
5. Has your organization ever applied for an Operation Round-Up grant? Yes \_\_\_\_\_ No \_\_\_\_\_
6. Has your organization ever applied for an Operation Round-Up grant under a different name?  
Yes \_\_\_\_\_ No \_\_\_\_\_  
If yes, please provide the organization's different name: \_\_\_\_\_
7. Is organization requesting funding exempt from payment of income tax: Yes \_\_\_\_\_ No \_\_\_\_\_  
*Documentation from the Internal Revenue Service indicating non-profit status **MUST** be attached (see attached sample) OR a letter of explanation regarding tax-exempt status.*
8. A copy of financial statement(s) from most recent year **MUST** be attached.  
*A budget summary or balance sheet showing income and expenses specific to the project or program for which you are seeking grant funds.*
9. Number of individuals, families or groups served in Polk or Burnett counties last year:  
\_\_\_\_\_
10. Does organization serve outside Polk or Burnett counties: Yes \_\_\_\_\_ No \_\_\_\_\_  
If yes, please provide information or number served and location.  
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11. State amount of grant request:

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12. State purpose of grant request:

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13. List other sources of funding for use of grant request as described in the above:

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14. How are your organization's programs measured for effectiveness?

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15. If your organization has *previously* received an Operation Round-Up grant, provide the following information about the most recent grant received:

a. Amount received: \_\_\_\_\_

b. How were grant funds spent, including amounts and dates of expenditures:

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16. Please list three references.

Name	Phone		
Address	City	State	Zip Code

Name	Phone		
Address	City	State	Zip Code

Name	Phone		
Address	City	State	Zip Code

The information contained in this statement is for the purpose of obtaining funding from the Polk-Burnett Charities, Inc. on behalf of the undersigned. Each undersigned understands that the information provided herein is used in deciding to grant funding, and each undersigned represents and warrants that the information provided is true and complete and that the Polk-Burnett Charities, Inc. may consider this statement as continuing to be true and correct until a written notice of a change is provided. The Polk-Burnett Charities, Inc. is authorized to make all inquiries they deem necessary to verify the accuracy of the statements made herein.

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

\_\_\_\_\_  
Signature of Representative

\_\_\_\_\_  
Date

*Please complete form and submit with required information (IRS documentation and financial summary must be attached, per questions 7 and 8). Attach separate sheet of paper if you need additional space for any question, especially number 12, explaining grant purpose. Do NOT attach brochures, newsletters or organizational literature. Your complete application is copied for all members of the Operation Round-up board, and the board considers information requested in the official application, only.*