



## **Sample Grant Application**

Please use this sample application to assist you in gathering all answers and documents needed. Applications are only being accepted online. Please do not submit this document as your entry. If you can't apply online, please contact the co-op (1-800-256-7973) or the nearest ORU Board Member, and we can assist you!

When you have gathered all the answers and documents, type/copy your answers and upload your supporting documents here: [SWRE.com/RoundUp](http://SWRE.com/RoundUp). Be prepared to complete the online application all at once – there is no option to save and return.

**Application Deadline:  
October 1**

# Operation Round Up

## SWRE Charitable Foundation

P.O. Box 310 • Tipton, OK 73570 • 1 (800) 256-7973

### SAMPLE APPLICATION FOR DONATION

**Please make sure all fields are completed and upload all requested supporting materials before submitting your online application. The application will not be processed without these items.**

1. Name of Organization: \_\_\_\_\_

2. Mailing Address: \_\_\_\_\_

Street and/or P.O. Box

\_\_\_\_\_

City

State

Zip Code

3. Contact Person: \_\_\_\_\_

Name

Title

4. Telephone Number: \_\_\_\_\_

Work

Cell

5. Email Address: \_\_\_\_\_

6. Amount of funding you are requesting from Operation Round Up (*not to exceed \$1,500 for individuals or \$5,000 for organizations*): \$ \_\_\_\_\_

7. Describe the project and how the grant funds will be used.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

8. Total estimated cost of the project: \$ \_\_\_\_\_

9. List other sources of funding being used to complete the project.

\_\_\_\_\_  
\_\_\_\_\_

10. Estimated timeline for project completion: \_\_\_\_\_

11. Do you plan to use grant funds to purchase equipment or hire a contractor? Yes \_\_\_\_\_ No \_\_\_\_\_

*If yes, upload two (2) quotes/estimates for contract work or equipment purchases.*

*Applications will not be considered without this information.*

Two quotes/estimates uploaded (if applicable)? Yes \_\_\_\_\_ No \_\_\_\_\_

12. Is the organization requesting funding exempt from paying income tax? Yes \_\_\_\_\_ No \_\_\_\_\_

*If yes, please upload a copy of an IRS letter indicating your organization's tax-exempt status.*

IRS Letter of Determination uploaded? Yes \_\_\_\_\_ No \_\_\_\_\_

13. Do you have a Federal Tax I.D. Number? Yes \_\_\_\_\_ No \_\_\_\_\_

*If yes, what is your Federal Tax I.D. Number? \_\_\_\_\_*

14. Upload at least one of the following financial documents:

- *Preferred: Balance Sheet (list of assets & liabilities) from the most recent year end*
- *Preferred: Income Statement (list of revenue & expenses) from the most recent year end*
- *Current bank statement*
- *A narrative description of the organization's current financial condition*

Financial document(s) uploaded? Yes \_\_\_\_\_ No \_\_\_\_\_

15. **NEW!** What is your total annual operating budget? \$ \_\_\_\_\_

16. **NEW!** What is the end date of your current fiscal year? \_\_\_\_\_

17. **NEW!** What is the total of your current assets today (*date of this application*)? \$ \_\_\_\_\_

18. Have you previously received funding from Operation Round Up? Yes \_\_\_\_\_ No \_\_\_\_\_

*If yes, please list the date(s) and amount(s) you received:*

Year: \_\_\_\_\_ Amount Received: \$ \_\_\_\_\_

Year: \_\_\_\_\_ Amount Received: \$ \_\_\_\_\_

Year: \_\_\_\_\_ Amount Received: \$ \_\_\_\_\_

NOTE: Recipients of an Operation Round Up Grant are required to submit a Follow-Up Report to Southwest Rural Electric c/o Operation Round Up that includes receipts, documentation, and publicity/photos of the project. Grant recipients will have one year to spend the grant funds for the project and two months thereafter to complete and submit a Follow-Up Report. Grant recipients who have not met these requirements will be flagged for consideration in future grant disbursements.

Please send in your Follow-Up Report to [marketing@swre.com](mailto:marketing@swre.com) before completing the online application. If your project is not completed, you can send a Progress Report to [marketing@swre.com](mailto:marketing@swre.com) that will be included with your application.

Follow-Up Report completed (if applicable)? Yes \_\_\_\_\_ No \_\_\_\_\_

19. Please check the counties that this organization serves and estimate the number of individuals that this organization served last year in the following counties, where possible:

- Archer Estimated Number of People Served: \_\_\_\_\_
- Baylor Estimated Number of People Served: \_\_\_\_\_
- Foard Estimated Number of People Served: \_\_\_\_\_
- Hardeman Estimated Number of People Served: \_\_\_\_\_
- Wichita Estimated Number of People Served: \_\_\_\_\_
- Wilbarger Estimated Number of People Served: \_\_\_\_\_
- Comanche Estimated Number of People Served: \_\_\_\_\_
- Greer Estimated Number of People Served: \_\_\_\_\_
- Jackson Estimated Number of People Served: \_\_\_\_\_
- Kiowa Estimated Number of People Served: \_\_\_\_\_
- Tillman Estimated Number of People Served: \_\_\_\_\_

20. Does this organization serve needs outside the counties mentioned previously? If yes, provide information on the estimated number served and locations.

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21. Provide a brief mission statement for your organization.

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

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

Representative's E-Signature: \_\_\_\_\_

Date: \_\_\_\_\_

School Superintendent's E-Signature\*: \_\_\_\_\_

Date: \_\_\_\_\_

\* Please complete the online application with your superintendent present. All applications for grants benefitting schools require the signature of the school superintendent. This includes applications submitted by booster clubs, parent-teacher organizations and other school-related groups, teachers and principals. This requirement was established to ensure coordinated communication on projects that fit a school district's priorities.

## APPLICATION CHECKLIST

**Incomplete applications will automatically be denied.**

- I have answered each question as completely as possible.
- I have provided a copy of the IRS letter verifying my organization's tax-exempt status, if applicable.
- I have provided my organization's TAX ID number, if applicable.
- I have provided at least one of the following financial documents: balance sheet (*preferred*), income statement (*preferred*), current bank balance, or a narrative description of the current financial condition.
- I have provided a clear description of my funding request including a specific dollar amount, a description of how the funds will be used and a timeline of project completion.
- I have provided two quotes or estimates for specific equipment to be purchased or contract work to be provided, if applicable.
- SCHOOLS ONLY: I have completed the application with my superintendent present and received their electronic signature.
- I have provided a Follow-Up Report or Progress Report to SWRE for previous grant funding, if applicable.
- I have submitted my application online and attached the supporting documents. *If you can't complete your application online, please contact the co-op (1-800-256-7973) or nearest ORU Board Member and we can assist you!*

**FOR OPERATION ROUND UP USE ONLY:**

\_\_\_\_\_ APPROVED \_\_\_\_\_  
Date Amount Approved ORU President

\_\_\_\_\_ REJECTED \_\_\_\_\_  
Date ORU President