



# SWRE Association, Inc. Charitable Foundation

## GRANT GUIDELINES

### **Policy and Purpose**

The SWRE Charitable Foundation will be funded by contributions from members of the Southwest Rural Electric Cooperative Association, Inc. and from other sources available to the fund. Operation Round Up contributions will be used throughout SWRE's service territory.

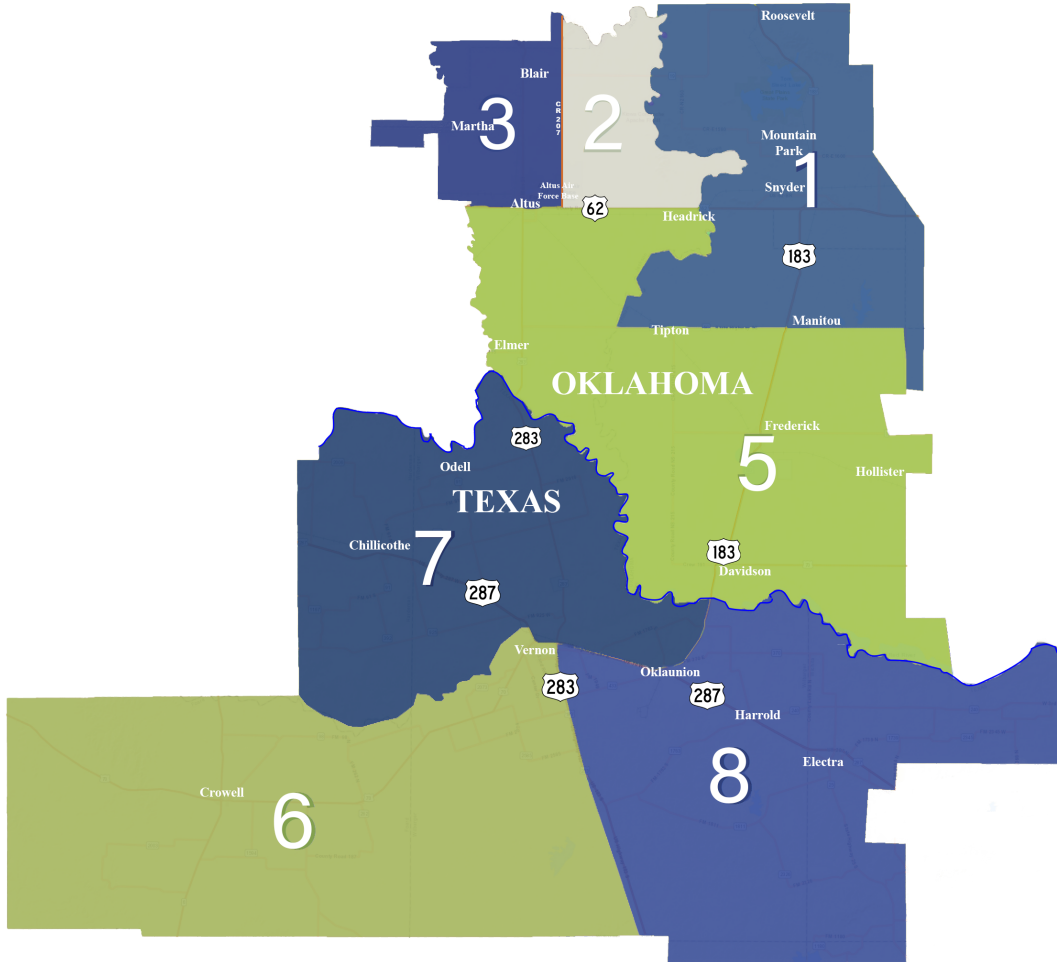
### **Application Instructions**

1. Please complete all sections of the application. If an item is not applicable to your organization, please make note in the space provided.
2. If you are exempt from income tax, please attach verification such as a copy of letter 501(c)3 from the Internal Revenue Service or an explanation of why your organization is considered to be exempt.
3. Please include a financial statement for the most recent fiscal year and a year-to-date profit and loss statement. If the financials are for a subsidiary or special fund or chapter of the organization, please include details about expenses and funding for this entity. *Please do not send a complete audit. A cash flow or profit and loss statement is sufficient.*
4. Please be specific when describing how the funds will be used if approved and attach price estimates if available.
5. Please apply online and attach the aforementioned supporting documents before submitting. *If you can't meet this requirement, please contact the co-op ([marketing@swre.com](mailto:marketing@swre.com)) or the nearest ORU Board Member) and we can assist you!*

## Grant Application Guidelines

### **Geographic Focus**

The Southwest Rural Electric Association, Inc. Charitable Foundation (the “Foundation”) provides funds for Charitable purposes within the service area of Southwest Rural Electric Association, Inc. (SWRE)



### **Grant Cycles**

Grant applications are reviewed annually. Applications are to be received in the SWRE offices by the close of business 14 days before the bi-annual meeting of the Foundation board of directors.

### **Grant Amounts**

Grants to any group, organization, charity or similar organization will not exceed \$5,000 and grants to individuals will not exceed \$1,500 annually.

### **School-Related Applicants**

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.

### **Categories of Assistance**

#### 1. Communities

- Programs, projects and organizations that are important components of a community's overall quality of life, with emphasis on public safety, health care, environmental sustainability, self-sufficiency, and basic human needs.

#### 2. Education and Youth

- Programs and projects designed to combat critical social problems affecting youth, particularly children and teens at risk.
- Programs and projects that promote youth wellness.
- Programs and projects that work to provide supplemental materials and equipment for schools.
- Programs and projects to enhance school facilities.

#### 3. Senior Citizens

- Programs and projects to support organizations and the facilities serving senior citizens.

#### 4. Emergency Assistance

- Community action programs, volunteer fire departments and other local entities that collect and distribute money for low-income emergency assistance.

#### 5. Individuals

- An individual or family in need of assistance may request a grant. Examples of need conditions may include the consequences of a disaster, catastrophic illness, or permanent disability.
- Individual applications must include a letter of referral from a sponsoring group such as a church, civic organization or other group wanting to raise funds for the individual.

The Foundation will not consider requests for general operating funds, capital campaigns or support for salaries. The Foundation prefers requests for program needs.

The Foundation will not consider requests for the benefit of an individual or family unit unless the application includes a letter from a sponsoring group. Grants will be issued to the sponsoring group.

### **Applicant Eligibility**

1. Contributions will generally be made only to not-for-profit organizations that have been granted tax-exempt status by the Internal Revenue Service; and to civic-based entities.
2. The organization must contribute to the community's health and/or welfare.
3. The organization's services must be non-discriminatory in nature.
4. Contributions will not be made for lobbying or political organizations, national fund drives, advertising, individual mortgage and rent payments or electric bills.
5. Activities affiliated with a religious organization with a secular community designation are eligible for the Foundation's consideration of support. *A secular designation is defined as an organization separate from the church or religious organization that provides services to*

*people regardless of their religious beliefs and does not propagate a belief in a specific faith. (Example: A food bank that is a separate 501(c)(3) organization from a church and provides food and meals to anyone who qualifies for services, regardless of religious belief.)*

### **Evaluation Factors**

1. The following factors will be considered in the evaluation of all funding requests:
  - Potential benefit to residents of the SWRE service area and the entire community.
  - Prior contribution level of Foundation or community support for the program or project or the organization requesting the funds.
  - Fiscal and administrative capability of the organization to deliver a quality service or program.
  - Results that are predictable and can be evaluated.
2. The Foundation's Board of Directors shall evaluate all funding requests and determine whether to issue a grant for all or a portion of the funds requested.

### **Project Timing**

Request for funding should state whether the funds are intended for ongoing operations or for a specific project that will terminate at some point in the future. Whenever possible, requests for funding should be for projects that will be completed within 12 months following the Foundation's approval of the grant application.

### **Contingent Grants**

In the case of a grant application's being a part of a large fundraising effort, the Foundation may choose to make a grant contingent upon the requesting organization raising the remaining funds. Grant recipient will be required to submit documentation showing the additional funds are in place before the Foundation releases the funds earmarked for the project. The Foundation will hold the funds for no more than one year.

### **Follow-Up Reports**

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 do not meet this requirement will be flagged for consideration in future grant disbursements.

### **Public Relations**

Basic information about grants issued by the Foundation to an organization will be publicized. Information will include the name of the grant recipient, a description of how the funds will be used and the amount of the grant.

Occasionally, an organization and grant project will be highlighted more in-depth in publicity and public relations efforts by Southwest Rural Electric Association, Inc. Selection of organizations and projects to be featured is at the sole discretion of SWRE.