



Office of the Mayor
201 Delafield Street
Waukesha, Wisconsin 53188-3633

Shawn N. Reilly, Mayor
sreilly@waukesha-wi.gov
1-262-524-3700

Office Use Only
Date Received _____
Date Approved _____
Good for campaigns through _____

**APPLICATION FOR PERMISSION TO ENGAGE
IN FUNDRAISING ACTIVITIES**

All Umbrella Organizations must have an approved "Application for Permission to Engage in Fundraising" on file with the City's Charitable Contributions Committee.

Umbrella organizations shall submit applications to participate in the Annual Charity Drives on forms provided by the Committee, which shall be available at the Office of the Mayor or the Mayor's designee. Each application shall be filed with the Office of the Mayor or Mayor's designee prior to February 15 of each year in order for the applicant to be eligible to participate in the Annual Charity Drives.

If the umbrella organization has been deemed eligible for a five-year period, application need not be made for participating in the Annual Charity Drives for the second through fifth years of eligibility. Each umbrella organization shall, however, provide the Committee with a written notice of intent that it wishes to continue its participation in the Annual Charity Drive between January 1 and February 15 of each year. The notice of intent shall be accompanied by a statement that the questions and supporting documentation contained in the original application remain correct and accurate. Any changes from the original application should be detailed and supporting documentation provided.

The Committee reserves the right to request a new application be completed.

Upon completion of the following eligibility requirements, please sign, date, and return to City of Waukesha Mayor's Office, 201 Delafield Street, Waukesha, WI 53188.

Name of Annual Charity Drive: Fundraiser for the Parade Memorial Fund

Name of Umbrella Organization: Waukesha County Community Foundation/Parade Memorial Fund

Address of Organization: Waukesha County Community Foundation, 2727 N Grandview Boulevard, Suite 301, Waukesha, WI 53188

Name of Contact/Individual: Melissa Baxter, President

Address of Contact/Individual: 2727 N Grandview Blvd., Suite 301, Waukesha, WI 53188

Phone No. of Contact/Individual: 262-513-1861

Email Address of Contact/Individual: Melissa Baxter <Mbaxter@waukeshafoundation.org>

Dates of proposed charity drive: The campaign to solicit pledges for contributions would take place the month of
November, 2023

The contributions would be for payroll in 2024.

Please describe here or attach documents that explain the character and extent of the charitable work being done by the organization named above, as well as the location:

The Parade Memorial Fund was established at the Waukesha County Community Foundation as a way to raise funds for the planned Parade Memorials on Main Street and at Grede Park. The City in coordination with the Parade Memorial Commission has been working to raise funds for past year. Additional donations are needed and it was suggested that it would be impactful to ask employees to show their support for the community through donations to the Parade Memorial Fund. Offering simple payroll deductions is the easiest way for employees to make contributions

More information about the parade memorial fund is available on the City's website at Waukesha-wi.gov/paradememorial

Charitable organizations must conduct their fundraising activities for the direct good or benefit of the public, located in the State of Wisconsin, the national community or the international community in the fields of health and human services, education, the environment, or the arts. Provide a statement explaining the umbrella organizations' compliance with this requirement.

The Waukesha County Community Foundation is a collection of charitable funds established by individuals, families, businesses and organizations to help meet local challenges and improve the quality of live in Waukesha County. You can learn more about the Waukesha County Community Foundation on their website:
<https://waukeshafoundation.org/about/>

The Parade Memorial Fund is a fund that was established by the Parade Memorial Commission to receive donations for the Parade Memorial.

ATTACH THE FOLLOWING ITEMS TO THIS APPLICATION

Yes No
x

Umbrella organizations must disburse or grant funds or products to at least five (5) charitable organizations (list below) and attach demonstrated proof of such disbursements in the calendar year prior to its application. Each charitable organization receiving funds or products from an umbrella organization must meet all of the requirements of this policy.

Documentation is attached.

Yes No
x

Charitable organizations and umbrella organizations have a policy and procedure of non-discrimination in regard to race, religion, color, national origin, handicap, age, marital status, sex or sexual orientation applicable to persons served by the charitable organization, applicable to charitable organization staff employment, and applicable to membership on the charitable organization's governing board. **Attach a copy of this policy to the application.**

Yes No
x

Funds contributed to charitable organizations by City employees will be used for the announced purposes. An umbrella organization's fundraising and administrative expenses do not exceed 25 percent of its unrestricted income as demonstrated by its annual financial reports. Designated contributions by employees will not constitute restricted income. **Attach verification to this effect to the application.**

Yes No
x

An umbrella organization has the express written permission of each charitable organization it represents to use said charitable organization's name in the Annual Charity Drives. **Attach verification to this effect to the application.**

Yes No
x

Umbrella organization has provided documented proof of at least one year of operation. Both charitable and umbrella organizations satisfy all other criteria contained in this policy. **Attach verification to this effect to the application.**

Yes No
x

Both charitable and umbrella organizations are governed by a Board of Directors which serves without compensation. **Attach verification to this effect to the application.**

Yes No
x

The organization operates in compliance with all applicable federal, state, and local laws. The organization operates under current, valid articles of incorporation and by-laws or other governing instruments which comply with federal and state laws. **Attach verification to this effect to the application.**

Yes No
x □

The organization holds and maintains a current, valid designation by the IRS as a 501(c)(3) organization and be eligible to receive tax-deductible contributions under Chapter 170 of the Internal Revenue Code. This requirement also applies to each constituent agency of the umbrella organization. The umbrella organization has verified its constituent organizations that will receive funds raised from the City's annual charity drive and certify that they also hold and maintain a current, valid designation by the IRS as a 501(c)(3) organization and be eligible to receive tax-deductible contributions under Chapter 170 of the Internal Revenue Code. **Attach verification to this effect to the application for both the umbrella organization.**

Organizations making solicitations of City employees or receiving contributions through payroll deductions are not instrumentalities of the City of Waukesha and are separate from the City. The City is not responsible for decisions made by any such organization or its constituent agencies.

Please note that if this application is approved, approval will not be used or represented to be an endorsement by the City of the applicant.

By signing this document the applicant verifies that the umbrella organization has met all the requirements outlined above, that this application has been accurately completed and the required documentation is attached hereto.

Authorized Signatory/Signature

Date

Printed Name of Authorized Signatory

Title

Name of Umbrella Organization submitting application

STATE OF WISCONSIN)
)
COUNTY OF WAUKESHA)

Personally appeared before me, this _____ day of _____, 20 ,
_____, to me known to be the person who executed the foregoing instrument
and acknowledged the same.

Notary Public, Waukesha County, WI
My Commission expire

