

**OFFICE OF THE MAYOR**

201 DELAFIELD STREET  
WAUKESHA, WISCONSIN 53188-3633  
TELEPHONE 262/524-3700 FAX 262/524-3899

Shawn N. Reilly, Mayor  
mayor@ci.waukesha.wi.us

for Office Use Only

Date Received           FEB 12 2020            
Date Approved \_\_\_\_\_  
Good for campaigns through \_\_\_\_\_

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

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

***In order to be eligible to participate in an annual charity drives, this form is due February 15 of each year.***

***If your charity is granted permission to engage in fundraising, we will return a copy of your approved application. Please note the dates indicated above for the period of time that permission has been granted.***

***In year two, an approved organization shall provide the Committee with a written notice of intent to continue its participation in the annual charity drive. This written notice must be filed with the Committee between January 1 and February 15 of each year. The notice of intent shall be accompanied by a notarized 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 that 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 Annual Campaign

Name of Umbrella Organization United Way of Greater Milwaukee & Waukesha County

Address of Organization 225 W Vine Street

Milwaukee, WI 53212

Name of Contact/Individual Bruce H Schmidt



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.

United Way of Greater Milwaukee & Waukesha County serves the counties of  
Waukesha, Milwaukee, Washington and Ozaukee and annually raises money and other  
resources that are then invested back into this four-county community to financially  
support programs offered by those agencies in the area of health and human  
services. United Way's funding is directly primarily to the specific areas of health,  
education and financial stability.

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**ATTACH THE FOLLOWING ITEMS TO THIS APPLICATION**

Yes    No  
   

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.

For a listing of United Way of Greater Milwaukee & Waukesha County's partner  
agencies, please reference **Appendix B: Agency Descriptions** and **Appendix C:**  
**Agency Partners**. For information regarding disbursements and the agencies  
that receive program funding, please reference **Appendix D: Proof of Disbursements**.

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Yes    No  
✓      □

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.**  
**Refer to Appendix K: Non-Profit Status**

**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

2/11/2020  
\_\_\_\_\_  
Date


Bruce H Schmidt  
\_\_\_\_\_  
Printed Name of Authorized Signatory

Senior Account Manager  
\_\_\_\_\_  
Title

United Way of Greater Milwaukee & Waukesha County  
\_\_\_\_\_  
Name of Umbrella Organization submitting application

STATE OF WISCONSIN    )  
  )  
COUNTY OF WAUKESHA )

Personally appeared before me, this 11<sup>th</sup> day of February, 2020,  
Bruce Schmidt, to me known to be the person who executed the foregoing instrument  
and acknowledged the same.

  
\_\_\_\_\_  
Notary Public, Waukesha County, WI  
My Commission expires: 8/21/2021

## **Charitable Campaign Committee Rules and Regulations**

The following restrictions apply to solicitation campaigns of City employees on city premises:

1. A grandfathered organization or an umbrella charitable fundraising organization may conduct only one campaign during a calendar year. Any such campaign may take place only during the time period as allowed by City Policy H-8. Constituent agencies may not conduct an independent campaign. All campaign activities must be conducted by the umbrella organization.
2. The deduction or pledge cards and any campaign materials must be approved in advance by the Charitable Campaign Committee. The organization must supply its own forms at its own expense, subject to City approval. Posters may also be placed in locations designated by the City. The City reserves the right to reject any and all campaign materials.
3. Each City employee will be allowed to attend one employee meeting, as approved by the Department Director, conducted by each approved grandfathered or umbrella organization. Such attendance is purely voluntary. City employees will be compensated for attendance at no more than one campaign meeting per agency or umbrella organization per year, provided such meetings fall within a normal employees regular scheduled hours of work. Campaign meetings should be scheduled to enable employees to attend without disrupting service to the public. No overtime payments or compensatory time accumulation will be granted.
4. No office space will be provided by the City, except that the City may allow reasonable space for employee meetings conducted by eligible grandfathered or umbrella organizations.
5. Each campaign will have one lead City employee appointed by the Mayor. Up to one City employee in each building of the city may be named as the department or agency coordinator for the campaign, subject to Director approval. The City may direct and limit the tasks associated with the coordinators. Reasonable amount of work time may be used as approved by the Department Director.