

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: Annual Campaign

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

Address of Organization: 225 West Vine St, Milwaukee WI 53212

Name of Contact/Individual: John Andrekopoulos, Manager, Corporate Engagement

Address of Contact/Individual: 225 West Vine St, Milwaukee WI 53212

Phone No. of Contact/Individual: (414) 263-8117

Email Address of Contact/Individual: jandreopoulos@unitedwaygmwc.org

Dates of proposed charity drive: - Fall 2025 campaign

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:

United Way of Greater Milwaukee & Waukesha County changes lives and improves our community by mobilizing people and resources to drive strategic impact in health, education, and financial stability. United Way of Greater Milwaukee & Waukesha County aspires to accomplish the following:

- Produce significant and measurable results in the areas of Health, Education, and Financial Stability.
- Convene diverse teams of community members to take collaborative action on priority issues.
- Recruit and retain talent to drive cross-sector initiatives and integrated, community-focused work.
- Sustain its financial stability and efficient operations.
- Be recognized as a leader in effecting long-term societal change.
- Attain robust revenue growth as donors' charity of choice.

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 has always been a leader in the community. Our organization began in 1909 as Milwaukee's Central Council of Philanthropies to prevent duplication and standardize delivery of human services among charitable organizations. In 1916, a committee from the Central Council proposed and implemented a plan to organize 22 philanthropic organizations in the city into a financial confederation called the Centralized Budget of Philanthropies. This fund-raising organization conducted Milwaukee's first community-wide campaign. Today, United Way of Greater Milwaukee & Waukesha County continues to tackle big problems with big solutions.

- We championed efforts to reduce teen births in our community by 65%.
- We are the first community in the nation to have met the criteria set by the United States Interagency Council on Homelessness and have ended family homelessness in two of our four counties.
- We are one of the leaders in the United Way network that is creating solutions to bridge the digital divide.
- We are a trusted and effective network.

As one of the world's largest privately funded charities, United Way Worldwide serves 37 countries and territories, making life better for 47 million people every year.

We are an independently-governed 501(c)3 nonprofit organization connected to a network of more than 1,400 local United Ways through United Way Worldwide. We have our own board of directors and focus our work on local solutions for local problems.

United Way of Greater Milwaukee & Waukesha County has been recognized nationally and locally for a high rate of efficiency and fiscal accountability. View our recent financial forms and reports.

Over the past several years, United Way of Greater Milwaukee & Waukesha County has received awards from the Milwaukee Business Journal, Milwaukee BizTimes, the Waukesha County Business Alliance, and the Association of Fundraising Professionals.

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 partner agencies, please reference **Appendix A 24-25 Agency Partner Listing**,

and **Appendix B 24-25 Agency Partner Agreement**. For information regarding disbursements

and the agencies that receive program funding, please reference

Appendix I Proof of Disbursements – 990

Yes No
☒ ☐

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.**

Refer to Appendix G Non-Discrimination Policy

Yes No
☒ ☐

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.**

Refer to Appendix F Fundraising Administrative Expenses

Yes No
☒ ☐

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.**

Refer to Appendix B 24-25 Agency Partner Agreement

Yes No
☒ ☐

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.**

Refer to Appendix E Financial Audit Report 06-30-24

Yes No
☒ ☐

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
☒ ☐

Refer to Appendix C Board of Directors No Compensation

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
☒ ☐

Refer to Appendix D Corporate Bylaws 11 13 24


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 H UWGMWC IRS Determination Letter

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

2/13/25
Date

John Andreopoulos
Printed Name of Authorized Signatory

Manager Corporate Engagement
Title

United Way of Greater Milwaukee + Waukesha County
Name of Umbrella Organization submitting application

STATE OF WISCONSIN)
)
COUNTY OF WAUKESHA)

**Cathy J Euclide
Notary Public
State of Wisconsin**

Personally appeared before me, this 13 day of February, 2025
_____, to me known to be the person who executed the foregoing instrument
and acknowledged the same.


Notary Public

