



**P O L K • B U R N E T T**

1001 State Road 35 • Centuria, WI 54824-9020  
(715) 646.2191 • (800) 421.0283 • FAX (715) 646.2404 • www.polkburnett.com

Branch Office: 7298 State Road 70 • P.O. Box 201 • Siren, WI 54872-0201

**OPERATION ROUND-UP®**

**Polk-Burnett Charities, Inc.**

**1001 State Road 35**

**Centuria, WI 54824**

**715-646-2191 or 800-421-0283**

Polk-Burnett is pleased to provide financial support to community programs through Operation Round-Up®. Funding for Operation Round-Up is donated by the member-owners of Polk-Burnett Electric Cooperative, who volunteer to round their monthly electric bill up to the next even dollar amount. The monies are combined and grants are awarded on a quarterly basis.

Recipients are selected by a committee of Polk-Burnett members, and contributions are *generally awarded* to non-profit programs, projects and organizations that improve the quality of life in our local communities *and* emphasize: public safety, health care, self-sufficiency, basic human needs, our cultural environment, community leadership and social issues for youth. Only one grant per year will be awarded to an organization.

Unless your project benefits the overall community, contributions are *generally not awarded* to: lobbying, political, religious, veteran or fraternal organizations; fundraising dinners, raffles or events; individuals; capital fund campaigns; scholarship programs; national fund drives or advertising.

ALL APPLICANTS MUST PROVIDE a complete application package for consideration, including: an official application form, your most recent financial statement (*a budget summary or balance sheet showing income and expenses specific to the project or program for which you are seeking grant funds*) and documentation of tax-exempt status under the IRS Code Section 501(c)(3) or a letter of explanation regarding your tax-exempt status. If your organization has previously received an Operation Round-Up grant, the application requires that you give a detailed account of how the previous grant was used.

We invite you to apply for a grant if you meet our criteria. Application deadlines are March 1, June 1, September 1 and December 1. Please send the application to the address listed on the application form.

Thank you for your interest in Operation Round-Up and your efforts to improve our community. If you have questions, please contact Joan O'Fallon, Polk-Burnett communications director, 800-421-0283.

# OPERATION ROUND-UP®

Polk-Burnett Charities, Inc.  
1001 State Road 35, Centuria, WI 54824  
715-646-2191 or 800-421-0283

## APPLICATION FOR DONATION FOR ORGANIZATION/AGENCY

1. Name of Organization: \_\_\_\_\_
2. Address: \_\_\_\_\_  
Street or Post Office Box  
\_\_\_\_\_  
City or Town State Zip Code
3. Phone Number: \_\_\_\_\_  
Work Home
4. Contact Person: \_\_\_\_\_  
Name Title
5. Has your organization ever applied for an Operation Round-Up grant? Yes \_\_\_ No \_\_\_
6. Has your organization ever applied for an Operation Round-Up grant under a different name?  
Yes \_\_\_ No \_\_\_  
If yes, please provide the organization's different name: \_\_\_\_\_
7. Is organization requesting funding exempt from payment of income tax: Yes \_\_\_ No \_\_\_  
*Documentation from the Internal Revenue Service indicating non-profit status **MUST** be attached (see attached sample) OR a letter of explanation regarding tax-exempt status.*
8. A copy of financial statement(s) from most recent year **MUST** be attached.  
*A budget summary or balance sheet showing income and expenses specific to the project or program for which you are seeking grant funds.*
9. Number of individuals, families or groups served in Polk or Burnett counties last year:  
\_\_\_\_\_
10. Does organization serve outside Polk or Burnett counties: Yes \_\_\_\_\_ No \_\_\_\_\_  
If yes, please provide information or number served and location.  
\_\_\_\_\_

11. State amount of grant request:

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12. State purpose of grant request:

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13. List other sources of funding for use of grant request as described in the above:

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14. How are your organization's programs measured for effectiveness?

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15. If your organization has *previously* received an Operation Round-Up grant, provide the following information about the most recent grant received:

a. Amount received: \_\_\_\_\_

b. How were grant funds spent, including amounts and dates of expenditures:

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16. Please list three references.

Name		Phone	
Address	City	State	Zip Code
Name		Phone	
Address	City	State	Zip Code
Name		Phone	
Address	City	State	Zip Code

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

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

\_\_\_\_\_  
Signature of Representative

\_\_\_\_\_  
Date

*Please complete form and submit with required information (IRS documentation and financial summary must be attached, per questions 7 and 8). Attach separate sheet of paper if you need additional space for any question, especially number 12, explaining grant purpose. Do NOT attach brochures, newsletters or organizational literature. Your complete application is copied for all members of the Operation Round-up board, and the board considers information requested in the official application, only.*

INTERNAL REVENUE SERVICE  
P. O. BOX 2508  
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

**AUG 15 2006**

Date:

**SAMPLE**  
**501(C)(3) EXEMPTION**  
**FROM FEDERAL INCOME TAX**

Employer Identification Number:

DLN:

Contact Person:

ID#

Contact Telephone Number:

Accounting Period Ending:  
December 31

Public Charity Status:  
170 (b) (1) (A) (vi)

Form 990 Required:  
Yes

Effective Date of Exemption:  
March 7, 2006

Contribution Deductibility:  
Yes

Advance Ruling Ending Date:  
December 31, 2010

Dear Applicant:

We are pleased to inform you that upon review of your application for tax exempt status we have determined that you are exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code. Contributions to you are deductible under section 170 of the Code. You are also qualified to receive tax deductible bequests, devises, transfers or gifts under section 2055, 2106 or 2522 of the Code. Because this letter could help resolve any questions regarding your exempt status, you should keep it in your permanent records.

Organizations exempt under section 501(c)(3) of the Code are further classified as either public charities or private foundations. During your advance ruling period, you will be treated as a public charity. Your advance ruling period begins with the effective date of your exemption and ends with advance ruling ending date shown in the heading of the letter.

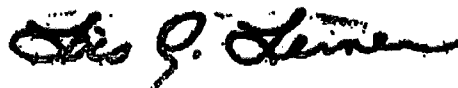
Shortly before the end of your advance ruling period, we will send you Form 8734, Support Schedule for Advance Ruling Period. You will have 90 days after the end of your advance ruling period to return the completed form. We will then notify you, in writing, about your public charity status.

Please see enclosed Information for Exempt Organizations Under Section 501(c)(3) for some helpful information about your responsibilities as an exempt organization.

If you distribute funds to other organizations, your records must show whether they are exempt under section 501(c)(3). In cases where the recipient organization is not exempt under section 501(c)(3), you must have evidence the funds will be used for section 501(c)(3) purposes.

If you distribute funds to individuals, you should keep case histories showing the recipient's name and address; the purpose of the award; the manner of selection; and the relationship of the recipient to any of your officers, directors, trustees, members, or major contributors.

Sincerely,



Lois G. Lerner  
Director, Exempt Organizations  
Rulings and Agreements

Enclosures: Information for Organizations Exempt Under Section 501(c)(3)  
Statute Extension  
Statute Extension