



Jerome J. and Dorothy H. Holz Family Foundation

2024 GRANT APPLICATION

THIS GRANT APPLICATION FORM IS REQUIRED FOR ANY CONSIDERATION OF A GRANT REQUEST.

1. **Name of applicant organization** (Please use full legal name)

2. **Street Address:** _____

City/State/Zip: _____

Phone Number: _____ **Email Address:** _____

3. **Affiliate Organizations:** Is the applicant organization affiliated with other organizations? If yes, please list names

4. **Purpose for Request:** Provide a program or project title here. Attach a detailed Purpose for Request document with this Grant Application Form (500 words recommended).

5. **Amount Requested \$** _____

6. **2023 Holz Family Foundation Funding:**

a. Did the applicant organization receive funding from this foundation in 2023? _____

b. If yes, please include a Grant Report with this Grant Application Form.

Amount Funded \$ _____ **Program** _____

7. **Other Support:** What other sources have you approached for support of this program?

8. Tax-Exempt Status:

- a. Is the applicant organization tax-exempt under the Internal Revenue Code section 501(c)(3)? _____
- b. If no, will a charitable donation to this organization qualify as tax-exempt under IRC section 170(c)? _____
- c. Is the applicant organization an operating tax-exempt organization? _____

9. Geographic Focus:

- a. Will at least 90% of the requested funding be used for programs located in Milwaukee and Waukesha County? _____
- b. If no, approximately what proportion of the requested funding will directly benefit residents of Milwaukee and Waukesha County? _____

10. Grant Giving Focus: Does the proposed program or project fit within the following priority themes (yes or no)? Please clarify how the program or project fits the grant giving focus of the Holz Family Foundation in your Purpose for Request document.

- a. Education for youth and young adults. _____
- b. Food and housing security for children and families. _____
- c. Funding for cultural and scientific institutions. _____
- d. Civic support for Hales Corners, Wisconsin. _____

11. Employment and Inclusion:

- a. Does the applicant organization have full time employees? _____
- b. If yes, is the applicant organization an Equal Opportunity Employer that complies with all laws and regulations prohibiting employment or other discrimination? _____
- c. Is the applicant organization committed to not discriminate against any employee, applicant for employment, customer, volunteer or any person eligible for services by their organization because of age, race, religion, color, handicap, sex, physical condition, developmental disability, gender identity and expression, sexual orientation or national origin? _____

12. Fundraising Costs:

- a. Will any part of this grant be used for fundraising appeals? _____
- b. What percentage of grants received during 2023 was used for fundraising? _____%

- 13. Applicant Organization Budget:** This section is only required for 501(c)(3) tax-exempt organizations that are required to file an IRS Form 990 or 990-EZ. Include the organization's most recently filed IRS Form with this Grant Application Form.
- b.** What was the organization's most recently reported Total Revenue? _____
 - c.** What was the organization's most recently reported Total Expenses? _____
 - d.** What was the organization's most recently reported Total Assets? _____
 - e.** What was the organization's most recently reported Total Liabilities? _____

The undersigned, a representative of the applicant organization, submits this grant application for consideration and states that the above information is true and correct and that its tax-exempt status has not been revoked or modified.

By: _____
(Print Name & Title) (Signature) (Date)

2024 GRANT APPLICATIONS ARE DUE MAY 1ST 2024. ATTACH THE FOLLOWING DOCUMENTS WITH YOUR GRANT APPLICATION FORM

1. Detailed Purpose for Request document (500 words recommended)
2. Full project or program budget
3. 2023 Grant Report (if applicable)
4. Most recently filed IRS Form 990 or 990-EZ (if applicable)

Please attach all documents in a single email addressed to holzfamilyfoundation@gmail.com

Grant Application Information

Blank Grant Application Forms can be downloaded at holzfamilyfoundation.com. Completed Grant Application Forms and all accompanying documents should be emailed as attachments to holzfamilyfoundation@gmail.com

Please be sure to include all of the required accompanying documents listed in the grant application when submitting.

1. Detailed Purpose for Request document (500 words recommended)
2. Full project or program budget
3. 2023 Grant Report (if applicable)
4. Most recently filed IRS Form 990 or 990-EZ (if applicable)

Completed grant applications are accepted between January 1st and May 1st in each year. Without exception, grant applications received between May 2nd and December 31st will not be considered.

Grants are made only to operating non-profit organizations exempt from Federal taxation under the Internal Revenue Code.

Grant Application Procedure

Completed grant applications are accepted between January 1st and May 1st in each year. Without exception, grant applications received between May 2nd and December 31st will not be considered. Additional information and/or clarification may be requested prior to final grant determinations.

Completed grant applications are reviewed annually by the trustees at our summer meeting, generally held in June or early July. If your grant application is approved, a check will be issued in August. Grant Acknowledgement Forms will be mailed with grant checks. All grantees are required to sign and return the Grant Acknowledgment Form immediately after the check is received.

Eligible Organizations

Grants are made only to operating non-profit organizations exempt from Federal taxation under the Internal Revenue Code.

Applicant organizations must confirm status as an Equal Opportunity Employer that complies with all laws and regulations prohibiting employment or other discrimination.

Applicant organizations must affirm a commitment not to discriminate against any employee, applicant for employment, customer, volunteer or any person eligible for services by their organization because of age, race, religion, color, handicap, sex, physical condition, developmental disability, gender identity and expression, sexual orientation or national origin.

Grants are not made to individuals.

Grants are not made for general fund raising, deficit financing, or loans.

Grants are not made for religious purposes.

Grants are not made to labor or political organizations.

Grant Giving Focus

Priority will be given to projects and programs in Milwaukee and Waukesha Counties that benefit:

- Education for children and young adults
- Food and housing security for children and families
- Funding for cultural and scientific institutions
- Civic support for Jerry and Dorothy's hometown, Hales Corners, Wisconsin

The Jerome J. and Dorothy H. Holz Family Foundation will operate without discrimination towards individuals or organizations because of age, race, religion, color, handicap, sex, physical condition, developmental disability, gender identity and expression, sexual orientation, or national origin.

Discretionary Grant Giving

The Jerome J. and Dorothy H. Holz Family Foundation appreciates the interest and passions of its board members that extend beyond the geographic focus or project priorities of the Foundation. Board members may recommend grant applications to the full board from organizations that do not fit within the grant giving focus, outlined above.

No more than 10% of the total dollar amount granted in a given year will be allocated to discretionary grants. Organizations considered for discretionary grants must fit all of the Foundation's requirements as eligible organizations, outlined above. Organizations seeking discretionary grants must follow all of the grant application procedures and deadlines of the Jerome J. and Dorothy H. Holz Family Foundation. Grant applications recommended for discretionary giving must be approved by the full foundation board at the annual meeting before any distribution of funds.