

## SECTION 5 - FUND RAISING PROGRAM

Income to finance the operations of WSI will come from contributions from Businesses, Corporations, Foundations, Philanthropic Individuals, Lions, Lioness, Leos Clubs in District 14-M and the General Public.

A Fund raising committee comprised of the President, Secretary/Treasurer of WSI and five (5) members appointed by the President of WSI which appointees need not necessarily be members of the Board of Directors of WSI, who will obtain information concerning Individuals, businesses, corporations and other organizations to be solicited. The committee will cause letters of request to be mailed to those prospects and seek the assistance of District 14-M Lions, Lioness, and Leos in personally contacting prospective donors. Three sample letters for use in solicitation of funds are enclosed herein.

WSI should be one of the District Governor's projects.

WE SERVE INCORPORATED  
LIONS, LIONESS AND LEOS OF DISTRICT 14-M

Date \_\_\_\_\_

Name of Person \_\_\_\_\_

Name of Company \_\_\_\_\_

Street Address \_\_\_\_\_

Town \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Dear \_\_\_\_\_

You have it in your power to make the world brighter for the blind and ease the silence for the deaf.

You can do this by giving a tax deductible contribution to the Lions, Lioness and Leos of District 14-M Charitable Foundation, WE SERVE INCORPORATED.

The Lions, Lioness and Leos of this District are actively engaged in sight and hearing conservation and aid to persons who are blind and persons who are deaf.

Your contribution will help to provide funds for eye and hearing research, eye examinations, buy glasses for people in need, purchasing hearing aids, provide assistance to handicap and those who have been the victims of a disaster, and humanitarian services in support of the International Association of Lions Clubs.

We hope you will want to be included among the many people and Businesses in our area who support or worthwhile effort.

Please make your check payable to: WE SERVE INCORPORATED

Sincerely, \_\_\_\_\_

Signature \_\_\_\_\_

s a m p l e

s a m p l e

WE SERVE INCORPORATED  
LIONS, LIONESS AND LEOS OF DISTRICT 14-M

(Name of Lions, Lioness or Leo Club)

Date \_\_\_\_\_

(Street Address)

(Town) (State) (Zip Code)

Dear Club President \_\_\_\_\_

The Lions, Lioness and Leo Clubs of District 14-M have supported our district, state and International Association projects over the years.

We hope that your club will also support the Lions, Lioness and Leos of District 14-M Charitable Foundation. WE SERVE INCORPORATED.

Your Club's contribution will help to provide funds for eye and hearing research, glasses and hearing aids, provide assistance to the handicapped, aid to disaster victims and humanitarian services.

We hope you will want to be included among the many Lions, Lioness or Leo Clubs in our district that supports our worthwhile effort and WE SERVE INCORPORATED.

Please make your check payable to: WE SERVE INCORPORATED.

Yours in Lionism,

Signature \_\_\_\_\_

sample

sample

sample



WE SERVE INCORPORATED  
LIONS, LIONESS AND LEOS OF DISTRICT 14-M

Date \_\_\_\_\_

(Name of Lion, Lioness or Leo Member) \_\_\_\_\_

(Street address) \_\_\_\_\_

(Town) (State) (Zip Code) \_\_\_\_\_

Dear Lion or Lioness or Leo \_\_\_\_\_

We Lions, Lioness and Leos have served our local, district, state and International Association communities in many ways through our fund raising projects and personal contributions.

You now have the opportunity to make a personal tax deductible contribution to the Lions, Lioness and Leos of District 14-M Charitable Foundation, WE SERVE INCORPORATED.

Your contribution will help to provide funds for eye glasses, hearing aids, assistance to the blind, handicapped, victims of disasters and humanitarian services.

We hope you will want to be included among the many Lions, Lioness and Leos in our district who support our worthwhile effort and WE SERVE INCORPORATED.

Please make your check payable to: WE SERVE INCORPORATED

Yours in Lionism,

\_\_\_\_\_  
Signature

sample

sample

sample

WE SERVE INCORPORATED (WSI)  
LIONS, LIONESS AND LEOS OF DISTRICT 14-M

CONTRIBUTION FORM

Important: Please complete form correctly to ensure proper credit.

Club Name \_\_\_\_\_

This is a club donation \_\_\_\_\_ Personal Donation \_\_\_\_\_ Other \_\_\_\_\_

Donor \_\_\_\_\_ Amount \_\_\_\_\_

\_\_\_\_\_  
(Street) (City) (State/County) (Postal Zip Code)

Name for recognition: \_\_\_\_\_

Send Recognition to: \_\_\_\_\_

\_\_\_\_\_  
(Street) (City) (State/County) (Postal Zip Code)

Donation in Memory of: \_\_\_\_\_

Send memorial Card to: \_\_\_\_\_

\_\_\_\_\_  
(Street) (City) (State/County) (Postal Zip Code)

Relation to deceased \_\_\_\_\_

Make check payable to: WE SERVE INCORPORATED

Mail donation and this form to: Secretary/Treasurer  
We Serve Incorporated

Name and address is in the \_\_\_\_\_  
District Directory

Please send a copy of completed form to President of We Serve Incorporated  
whose name and address is listed in the District Directory.

This form may be reproduced

WE SERVE INCORPORATED  
LIONS, LIONESS AND LAD OF DISTRICT 14-M

GRANT CRITERIA

The mandate and challenge to We Serve Incorporated (hereinafter referred to as WSI), is to achieve significant humanitarian results with the funds available. All grants authorized should meet one or more of WSI's objectives: Humanitarian Services, Vocational Assistance, or Disaster Relief that are beyond the scope of traditional Lions Club financing.

Wherever the word "Club" appears in this document, it applies to the Lions, Lioness, or Lad Club. As authorized by District 14-M, Multiple District 14 of the International Association of Lions Clubs.

# LIONS OF DISTRICT 14-M WE SERVE, INC. FOUNDATION

## -GRANT CRITERIA-

1. Where grants are authorized for projects of a permanent nature, such projects shall carry a definite identification as having been made possible through WSI. Specifications for such identification shall be provided by WSI. Documentation of identification shall be included in the final report on the project to be submitted by the Club.
2. Where grants are approved for a single project, no further grants will be permitted to cover continuing operating expenses.
3. Because of limited resources, grants shall not be made on a continuing basis to any one project.
4. Applicant Clubs must not only indicate the nature and extent of their planned participation in the grant project, they must also make a significant financial commitment on behalf of the project.
5. Each grant application shall be judged solely on its own merit and the degree to which it meets these criteria and the operating policies of WSI as established by the Board of Trustees.



WE SERVE INCORPORATED  
LIONS, LIONESS AND LEOS OF DISTRICT 14-M

GRANT CRITERIA

The mandate and challenge to We Serve Incorporated (hereinafter referred to as WSI), is to achieve significant humanitarian results with the funds available. All grants authorized should meet one or more of WSI's objectives- Humanitarian Services, Vocational Assistance, or Disaster Relief that are beyond the scope of traditional Club fundraising.

Wherever the word Club, Clubs or members appears in this publication, it applies to the Lions, Lioness and Leo Clubs and their members in District 14-M, Multiple District 14 of the International Association of Lions Clubs.

SECTION 1 - CRITERIA FOR STANDARD GRANTS

1. Grants shall be authorized for projects meeting diverse human needs not adequately addressed by other programs, having a distinct Lions identification and character such as:
  - A. Assistance to the handicapped.
  - B. Assistance to Blind or visually impaired.
  - C. Educational assistance-acquiring educational aids.
  - D. Assistance to hearing impaired.
  - E. Medical Assistance.
  - F. Assistance to Disaster Victims.
2. WSI does not provide assistance to offer services otherwise available through governmental, religious, charitable, social welfare or comparable service programs. Nor does it attempt to fund projects more appropriately the responsibility of the Clubs.
3. Where grants are authorized for projects of a permanent nature, such projects shall carry a definite identification as having been made possible through WSI. Specifications for such identification shall be provided by WSI. Documentation of identification shall be included in the final report on the project to be submitted by the Club.
4. Where grants are approved for a single project, no further grants will be permitted to cover continuing operating expenses.
5. Because of limited resources, grants shall not be made on a continuing basis to any single project.
6. Applicant Clubs must not only indicate the nature and extent of their planned participation in the grant project, they must also make a significant financial commitment on behalf of the project.
7. Each grant application shall be judged solely on its own merit and the degree to which it meets these criterias and the operating policies of WSI as established by the Board of Trustees.

## SECTION 2 - REGULATIONS FOR STANDARD GRANTS

- The need for WSI assistance for Individuals must be documented by submission of WSI Individual Grant Application Form, WSI Form 2 (10/94). The application must be completed in detail to show the applicant's name, address, purpose of the request and financial information.
- The need for WSI assistance for projects must be documented by submission of WSI Project Application Form WSI Form 3 (10/94). The application must show specific project plans and benefits, a project budget and all other pertinent factors which may be requested by the Board of Trustees. The project budget should clearly detail all project income and expenses, including allocations by item and detail. It must show all sources of income and expense, both received and projected. Project income should equal project expenses.
- Grant applications may originate from any Club in District 14-M.
- Any Club's Individual or Project application must have approval of the Club's Board of Directors before consideration by the Trustees of WSI. The amount of Club's financial support must be indicated in the sources of income section of the Grant Application.
- WSI grant funds cannot be used to repay loans or to establish reserve funds.

Grants issued to Clubs will be made payable to the appropriate Club. Such grants are to be administered by the Club President who is in office at the time the grant is approved by the District 14-M voting cabinet. It shall be his/her responsibility to disburse and account for WSI grant funds in his/her possession. If the project is carried over into a new fiscal year, the grant administrator may upon approval of the voting cabinet, delegate his/her authority to the current Club President.

*→ should be changed to shall*  
~~Lions, Lioness and Leos or their families should not receive direct or professional benefit or have proprietary interest in projects/Individuals receiving WSI assistance.~~

Grant applications must be received in the WSI office, in completed form, at least 30 days before a scheduled meeting of the District 14-M Cabinet. District 14-M cabinet meetings are scheduled and listed in District directory.

Clubs failing to answer correspondence concerning their pending application will be given notice that their application will be automatically withdrawn unless a response is received within 30 days starting with the date of the notice.

Now applications for previously withdrawn or rejected projects may be submitted if there is a reason to believe the project or the existing conditions are now such that the application is likely to be approved.



11. The maximum limit of a grant shall be \$5,000.00.

12. Grant recipients are responsible for submission of a thorough report upon completion of their project and grants to individuals. Appropriate forms will be provided to the designated administrator at the time a grant is made. The report form will request details concerning the results of the project or individual grant and in particular, information concerning the exact use of the funds made available through WSI. Where feasible, the report should include photographs, newspaper clippings and other documentation of work completed or awards made. An applicant failing to submit such a report will not be eligible to receive any additional grants.

13. It is the responsibility of the Grant Administrator to return any unused grant funds to Secretary/Treasurer of WSI.

### SECTION 3 - EMERGENCY GRANTS CRITERIA

1. Emergency Grants may be approved by the WSI President for immediate assistance following a natural disaster. They may also be approved by the District Governor of 14-M in the absence of the president of WSI. Emergency Grants are not to exceed \$700 per request.

2. Request for emergency disaster aid from WSI that has already been requested or received funding from any other District 14-M funding committee will not be eligible for funding from WSI.

3. The President of WSI or in his absence the District Governor, in making emergency grants, will be guided by the information given in respect to the urgent need for clothing, medical supplies, food, blankets and shelter that is not available from other agencies. A specific aid program must be presented prior to approval of the emergency grant.

4. An emergency grant recipient shall be obligated as soon as reasonably possible, to complete a grant application form and supply all the information required under the usual grant application process as a condition of acceptance of an emergency grant.

5. WSI shall not be a primary relief agency like the Red Cross nor shall it seek to duplicate the work of such agencies in their efforts to meet immediate disaster needs, nor attempt to assume responsibilities of governments, insurance carriers, or private efforts, except where flagrant and otherwise irremediable omissions occur.

6. Receipt of an emergency grant will not necessarily preclude further application being made under general criteria for natural disasters.

7. Emergency grant recipients are obligated to use grant funds for the original purposes intended, within 30 days of receipt of the grant. If said grant is not used within this time period, it is the obligation of the recipient to return the grant or any unused funds.

WSI Publication "Grant Criteria"

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Name of Club \_\_\_\_\_

## SECTION 4 - INSTRUCTIONS FOR COMPLETING GRANT APPLICATION

### 1. APPLYING FOR A STANDARD GRANT

Please read "Grant Criteria" before completing application. Send completed grant application and all supporting documents to the Secretary/Treasurer of WSI. If additional information is required, a letter requesting this information will be sent to the President of the sponsoring Club. Clubs failing to respond to this letter within 30 days will be notified that the application has been withdrawn. Applications must be received by the Secretary/Treasurer of WSI, in completed form, at least 30 days prior to schedule District 14-M Cabinet meeting.

### 2. APPLYING FOR AN EMERGENCY GRANT

WSI emergency grants are limited to \$700.00 and must be used to provide food, clothing, shelter or medical supplies to those affected by a natural disaster. To apply for an emergency grant, a Club President may contact the President of WSI or in the President's absent the District Governor. Request for emergency assistance must include:

1. a description or extent of damages, injuries and/or fatalities.
2. the specific amount of funding requested.
3. a definite plan for the use of the funds.
4. a description of current relief efforts including requesting Club's participation.

Emergency grants are issued upon approval of the President of WSI or in his absent, the District Governor. The Club remains responsible for submitting a completed written grant application as soon as possible, and for submitting a final report on the use of funds. Emergency grants for Individuals will be documented using WSI Form 2 (10/94). Emergency grants for communities will be documented using WSI Form 3 (10/94).

### 3. REPORTING USE OF WSI GRANT FUNDS

WSI must complete its files on all grants to comply with U.S. government regulations, which require a full accounting and complete financial report on the use of donated funds. WSI GRANT REPORT FORM WSI Form 4 (10/94) will be used for that purpose.

Grant Administrator (Club President in office at the time grant was approved) will be responsible for completion of WSI Grant Report Form. Instructions for the proper completion of the form is included on the form.



WE SERVE INCORPORATED (WSI)  
LIONS, LIONESS AND LEOS OF DISTRICT 14-M

WSI INDIVIDUAL GRANT APPLICATION FORM

Before attempting to complete this form, read WSI Publication "Grant Criteria" in its entirety. Each of the following items must be completed before this application is considered and the Directors of WSI has the right to request additional information pertinent to request.

1. Date submitted \_\_\_\_\_ 19 \_\_\_\_\_
2. Amount requested \$ \_\_\_\_\_
3. Reason for request \_\_\_\_\_
4. Applicant's Name \_\_\_\_\_ Soc. Sec. # \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_
5. Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_
6. Rent \_\_\_\_\_ Own \_\_\_\_\_ How long at address \_\_\_\_\_ Martial Status \_\_\_\_\_
7. Present age \_\_\_\_\_ Telephone # \_\_\_\_\_ Spouses Name \_\_\_\_\_
8. Number Dependents \_\_\_\_\_ Ages \_\_\_\_\_
9. Name of personal reference \_\_\_\_\_  
Address \_\_\_\_\_ Phone # \_\_\_\_\_

MONTHLY INCOME AND SOURCE (List Amounts)

10. Employed by \_\_\_\_\_ Income \$ \_\_\_\_\_
11. Social Security \$ \_\_\_\_\_ Unemployment \$ \_\_\_\_\_ Pension \$ \_\_\_\_\_
12. Public Assistance \$ \_\_\_\_\_ Food Stamps \$ \_\_\_\_\_
13. All other Income Sources \$ \_\_\_\_\_ List Sources \_\_\_\_\_

MONTHLY EXPENSES (List Amounts)

14. Mortgage or Rent \$ \_\_\_\_\_ Food \$ \_\_\_\_\_ Gas \$ \_\_\_\_\_ Car \$ \_\_\_\_\_
15. Heat \$ \_\_\_\_\_ Electric \$ \_\_\_\_\_ Garbage \$ \_\_\_\_\_ Medical \$ \_\_\_\_\_
16. Other Expenses \$ \_\_\_\_\_ List \_\_\_\_\_
17. Have you ever received assistance from WIS? Yes \_\_\_\_\_ No \_\_\_\_\_ When \_\_\_\_\_
18. Have you ever received assistance from a Lions Club? If yes When \_\_\_\_\_  
Name of Club \_\_\_\_\_



19. Did applicant apply for the assistance requested with any other non-profit organization? If yes, what was the result of that request and name of organization. \_\_\_\_\_

20. How much financial assistance can the sponsoring Club provide towards this request? \$ \_\_\_\_\_

21. Applicant's Signature \_\_\_\_\_

22. Signature of Club Member who conducted interview \_\_\_\_\_

STATEMENT BY CLUB PRESIDENT

This is to certify that I have reviewed the WSI Grant Criteria and Grant application. To the best of my knowledge the information submitted is accurate and the need exists as indicated. I endorse this proposal and will do everything in my power, as administrator of any funds granted to assure their proper and efficient use, proper accounting and regular reporting to WSI.

Signed \_\_\_\_\_ (Club President) \_\_\_\_\_ (Club Name)

Address \_\_\_\_\_ (PO Box# - Street) \_\_\_\_\_ (City) \_\_\_\_\_ (State) (Zip) \_\_\_\_\_ (Telephone #)

Attached is a copy of Club's Board meeting and Itemize list for use of funds. \_\_\_\_\_

CERTIFICATION BY WE SERVE INCORPORATED

This is to certify that I have reviewed the Grant Application and that I have presented it to the WSI Board of Directors for consideration. Accordingly, the Board at a meeting held on \_\_\_\_\_ 19\_\_\_\_ with a quorum present, \_\_\_\_\_ approved the Grant requested; \_\_\_\_\_ rejected the Grant request; \_\_\_\_\_ Approved the Grant request subject to \_\_\_\_\_

Comments \_\_\_\_\_

Signed \_\_\_\_\_ (President, WSI) \_\_\_\_\_ (Date)

CERTIFICATION OF DISTRICT 14-M

This Grant Application was presented to the Voting members of District 14-M Cabinet on \_\_\_\_\_ 19\_\_\_\_ with a quorum present, was \_\_\_\_\_ approved; \_\_\_\_\_ rejected.

Comments \_\_\_\_\_

Signed \_\_\_\_\_ (District Governor 14-M) \_\_\_\_\_ (Date)

WE SERVE INCORPORATED (WSI)  
LIONS, LIONESS AND LEOS OF DISTRICT 14-M

WSI PROJECT GRANT APPLICATION FORM

Before attempting to complete this form, read WSI Publication "Grant Criteria" in its entirety. Each of the following items must be completed before this application is considered and the Directors of WSI has the right to request additional information pertinent to request.

1. Is the organization receiving this Grant a tax exempt organization under Section 501 (c) (3)? Yes ( ) No ( )
2. Date submitted \_\_\_\_\_
3. Project name \_\_\_\_\_
4. Amount of funds requested \_\_\_\_\_
5. Estimate the number of people to be served on a monthly or yearly basis by the project \_\_\_\_\_
6. Project plans. Attach a description and detailed plan of this project. Describe existing conditions and give detail reasons for the project. What is the current problem and how do you plan to solve it? Include a physical description of project. Blueprints, brochures and clear photographs showing project activity should also be included if applicable.
7. Future expenses. Describe how the project will meet its future operating expenses \_\_\_\_\_
8. Lions identification. Describe how the project will be identified as a Lions, Lioness and Leos supported program. Will the Lions, Lioness and Leos name be used in conjunction with the facility or equipment. Describe promotional plans for the project, as well as an explanation of how Lions, Lioness and Leos will be involved with the project after it is completed.
9. Describe plans for identifying the project as having been made possible by WSI.

PROJECT BUDGET

Please list individually all sources of funding for this project (Clubs, Community Business). Include the amount that the sources are providing. Indicate if the funds have been collected, or if they are anticipated amounts. WSI grant should be listed as source of funding. This amount cannot be in excess of \$5,000.00. Please attach a separate sheet of paper using the format shown below.

INCOME

EXPENSE

<u>Source</u>	<u>Amount</u>	<u>Item</u>	<u>Amount</u>
_____	_____	_____	_____
_____	_____	_____	_____



Total project cost must equal the funding received. Any unused grant funds must be returned to Secretary/Treasurer WSI.

STATEMENT BY CLUB PRESIDENT

This is to certify that I have reviewed the WSI Grant Criteria and Grant Application. To the best of my knowledge the information submitted is accurate and the need exists as indicated. I endorse this proposal and will do everything in my power, as administrator of any funds granted to assure their proper and efficient use, proper accounting and regular reporting to WSI.

Signed \_\_\_\_\_  
(Club President) (Club Name)

Address \_\_\_\_\_  
(PO Box# - Street) (City) (State) (Zip) (Telephone #)

Attach a copy of Club's Board meeting approving this project.

CERTIFICATION BY WE SERVE INCORPORATED

This is to certify that I have reviewed the Grant Application, and that I have presented it to the WSI Board of Directors for consideration. Accordingly, the Board at a meeting held on \_\_\_\_\_ 19\_\_\_\_ with a quorum present, \_\_\_\_\_ approved the Grant requested; \_\_\_\_\_ rejected the Grant request; \_\_\_\_\_ approved the Grant request subject to \_\_\_\_\_

Comments \_\_\_\_\_  
Signed \_\_\_\_\_  
(President, WSI) Date \_\_\_\_\_

CERTIFICATION OF DISTRICT 14-M

This Grant Application was presented to the Voting members of District 14-M Cabinet on \_\_\_\_\_ 19\_\_\_\_ with a quorum present, was \_\_\_\_\_ approved \_\_\_\_\_ rejected.

Comments \_\_\_\_\_  
Signed \_\_\_\_\_  
(District Governor 14-M) (Date) \_\_\_\_\_