



SIoux VALLEY
ENERGY A Touchstone Energy® Cooperative

CUSTOMERS' TRUST



✉ PO Box 216 Colman, SD 57017 ☎ 800-234-1960

Organization / Agency Application for Donation

1. Name of Non-Profit Organization/Agency/School/Community: _____
2. Address: _____

3. Phone Number: _____
4. E-Mail Address: _____
5. Contact Person: _____
6. Is the organization/agency requesting funding exempt from payment of income tax: ☐ Yes ☐ No
*If yes, a copy of letter [Form 501(c)3] from the Internal Revenue Service or other appropriate form that verifies this entity is non-taxable **must be attached**.*
7. A copy of financial statement(s) for most previous year or your most recent tax filing **must be attached**.
8. Number of individuals, families, or groups served in the last year in any of the following counties:

Brookings County (SD) _____	Moody County (SD) _____
Lake County (SD) _____	Pipestone County (MN) _____
Minnehaha County (SD) _____	Rock County (MN) _____
9. Does the agency serve outside the counties listed in question Number 8? ☐ Yes ☐ No
If yes, please provide information on the number served and location:

County: _____	Number Served: _____
County: _____	Number Served: _____
County: _____	Number Served: _____
10. Specific dollar amount requested from Operation Round Up®: \$ _____

11. State purpose of Organization/Agency/School/Community's request *(Include specifics as to how funds will be used)*:

12. List other sources of funding and the amount provided by each contributor for this project: _____

13. How are programs measured for effectiveness? _____

14. Do you have a need for volunteer help with this project? ☐ Yes ☐ No

15. Please list three references, including phone number and complete address for each:

Place a check to indicate that each of the following items have been included with this application:

- ☐ Copy of IRS Form 501(c)3 indicating you are a non-profit organization (*Question Number 6*)
- ☐ Copy of the most recent financial statement or tax filing (*Question Number 7*)

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

As a condition of receiving and accepting these grant funds, the undersigned agrees that all funds will be used for the project approved and as stated on the application. Any funds not used shall be returned to the Sioux Valley Energy Customers' Trust. The applicant agrees to allow SVE to feature the applicant in its promotional material if a grant is awarded.

On behalf of, and as a representative of the organization, I the undersigned agree to the terms stated above.

Name of Organization: _____

Signature of Representative: _____

Date: _____



Trust Funding Policy and Guidelines

I. Policy and Purpose – The Sioux Valley Energy Customers' Trust will be funded by Operation Round-Up® voluntary contributions from members of the Sioux Valley Energy and from other sources of funds available to the Trust. Operation Round-Up® contributions will be used primarily in the local area served by the Cooperative for charitable and educational purposes, including emergency energy assistance.

II. Major Funding Categories – Although there are many worthy charitable and educational projects and community needs in our local area, the limited availability of funds requires us to establish funding priority categories as follows, with annual budget allocation ranges for each category:

A. Community Service

1. Programs, projects and organizations that are important components of a community's overall quality of life, with emphasis on public safety, health care, self-sufficiency, and basic human needs.
2. Programs and projects that enhance the cultural environment of communities in our local area.

B. Economic Development

1. Programs and projects designed to promote greater economic stability by helping to expand and diversify local economies, with emphasis on business retention and expansion, new business development and tourism.
2. Programs and projects that encourage cooperation among regional and community economic development organizations.

3. Community leadership programs designed to improve problem-solving skills and empower people to become self-reliant in identifying solutions to local economic and social problems.

C. Education and Youth

1. School scholarships and other programs and projects with an emphasis on math and science education and cooperative educational programs.
2. Programs that are designed to combat critical social problems affecting our children and youth, with an emphasis on children and teens at risk.
3. Programs and projects that promote wellness and encourage youth participation in athletics and physical fitness activities.

D. Environment

1. Programs and projects that promote community recycling and natural resource preservation.
2. Community-based environmental quality education programs.
3. Environmentally sensitive agricultural research programs and projects.

E. Emergency Energy Assistance

1. Community Action Programs, Heatshare and other local and statewide fuel funds established by an energy provider, the States of South Dakota and Minnesota or any other entity that collects and distributes money for low-income emergency energy assistance and meets the minimum criteria, including income eligibility criteria, for receiving money from the

Federal Low-Income Home Energy Assistance Program and the Program's Incentive Fund for Leveraging Non-Federal Resources.

2. Funds distributed under this funding category shall comply with Minnesota Statutes Section 268.371, and South Dakota Statutes Section 1-36-20.

F. Disaster Relief – Program and projects to provide disaster relief and food, clothing, shelter, medical care, clean-up and repairs and reconstruction in an emergency following an accident, a severe storm or other causes.

III. Geographic Focus – Contributions will be focused geographically within the area served by the Cooperative and adjacent areas. Organizations which provide programs and benefits to people who live in this geographic area are eligible for funding consideration, even though the organization is located elsewhere.

IV. Funding Restrictions

1. Contributions will generally be made only to non-profit organizations that have been granted tax-exempt status under Internal Revenue Code Section 501(C) (3).
2. Contributions will generally not be made for:
 - a. Lobbying, political and religious organizations,
 - b. Labor organizations;
 - c. Fund-raising dinners, raffles and other events;
 - d. Individuals (except school scholarships and disaster relief);
 - e. Capital fund campaigns;
 - f. National fund drives; and
 - g. Advertising.

V. Evaluation Factors

1. The following factors will be considered in the evaluation of all funding requests:
 - a. Potential benefit to area residents and the entire community;
 - b. Level of community support for the program or project or the organization requesting the funds;
 - c. Fiscal and administrative capability of the organization to deliver a quality service or program; and
 - d. Results that are predictable and can be evaluated.
2. It shall be the responsibility of all Trust Directors to evaluate funding requests and allocate contributions to accomplish the purposes and intent of this policy and these guidelines.

VI. Project Timing

1. Whenever possible, requests for funding should be for projects that will be completed within 12 months following the grant application. Requests for funding for projects that have already been completed will be given less priority.

Adopted 9/20/00 • Revised 3/10/04 • 12/7/2022