

## SAMPLE ENTRY

- a. **58. BADER (HELEN) FOUNDATION**
- b. 233 N. Water St.  
4th Floor  
Milwaukee, WI 53202  
(414) 224-6464
- c. <http://www.hbf.org>
- d. **Contact Person:** Bader, Daniel J. (p,d)
- e. **Email:** [apply@hbf.org](mailto:apply@hbf.org)
- f. **Officers & Directors:** Bader, Daniel J. (p,d); Bader, Linda C. (d); Britt, Deirdre H. (d); McGaffey, Jere D. (s,t,c); Wolff, Frances Klitsner (d)
- g. **Established:** 1991
- h. **Donors:** Daniel Bader Charitable Trust; David Bader Charitable Trust
- i. **Assets:** \$2,387,988 **FYE Date:** 8/31/03
- j. **Gifts Received:** \$13,100,000
- k. **Grants Paid/Number:** \$11,969,651 (327)
- l. **Range/Median:** \$275-1,200,000 (14,500)
- m. **Purpose:** Supports innovative projects and programs which advance the well being of people, and promote successful relationships with their families and communities.
- n. **Geographic Focus:** Giving is primarily in the Greater Milwaukee, WI area for community initiatives, economic development, Jewish education & culture, and Sankofa-Youth Development programs. Alzheimer's and Dementia grants are given both locally and nationally. Israel focuses within the country of Israel.
- o. **Limitations:** The foundation does not provide direct support to individuals, including individual scholarships. Grants are given only to US organizations which are tax exempt under Section 501 (c) (3) of the Internal Revenue Code or to government entities. Grants will only be approved for foreign entities which meet specific charitable status requirements.
- p. **Application Procedure:** Guidelines, mission statement and preliminary application form available on website. Preliminary applications due 16 weeks prior to scheduled Board meetings. Please contact foundation for deadlines. Fax no. 414.224.1441. Online application form available on website.
- q. **Deadline:** See website.
- r. **Other Information:** Member of the Donors Forum of Wisconsin. Assets from 2002.
- s. **Samples:** Alzheimer's Disease & Related Disorders Assn. of Greater WI. 61,000; Economic Development Corp., Milw, 35,000; Milwaukee Jewish Federation, 1,200,000; Milwaukee Public Schools, 40,000
- t. **Interests:** 10, 11, 15, 17, 20, 21, 23, 24, 25, 31, 32, 33, 34, 35, 36, 37, 39, 40, 50, 51, 53, 55, 61, 63, 64, 65, 81, 82, 83, 84, 85, 86, 87, 88

## ENTRY ELEMENTS

- a. **Name of Foundation:** The Directory is arranged alphabetically by the name of the foundation. Foundations having personal names are arranged by surnames.
- b. **Address:** When several addresses are available, this will be the preferred address for applicants. In most cases, the phone number listed is at this address but is not necessarily the phone number of the contact person.
- c. **Web Address:** When available, the web address will be listed here.
- d. **Contact Person:** Designates the principal officer or the contact person. The person to whom applications and correspondence should be addressed.
- e. **Email:** Can be the address of either the contact person or a general address for the foundation.
- f. **Officers & Directors:** The trustees and/or officers of each foundation are listed in alphabetical order. The contact person is normally also an officer or trustee but will not be listed again in this section. Please see the contents page for abbreviation listings.
- g. **Established:** Year of incorporation or first IRS filing.
- h. **Donor(s):** Principal contributor(s) to the foundation, including individuals, families and corporations. Names are carried over from year to year.
- i. **Assets:** Year end total net worth at market value. **FYE:** Latest available fiscal year ending date.
- j. **Gifts Received:** The total of all donations received by the foundation for the current FYE only, amounts will not be carried over from year to year. It is not always possible to verify if the donors listed are the current donors.
- k. **Grants Paid:** This figure represents the total dollar disbursements for grants only. Expenses and grants approved for future payment are not included. **Number:** This figure represents the total number of grants disbursed during the fiscal period.
- l. **Range:** The lowest and highest grant given during the year listed. **Median:** When grants are arranged by dollar amounts, highest to lowest, the median grant falls in the middle.
- m. **Purpose:** A statement of purpose is given if it was included on the IRS form, or if supplied by the foundation manager.
- n. **Geographic Focus:** The locations the foundation prefers to support.
- o. **Limitations:** Types of grants the foundation will not support.
- p. **Application Procedure:** The requested method for approaching and applying to the foundation.
- q. **Deadline:** The requested deadline for applications.
- r. **Other Information:** Information that does not fit the above categories.
- s. **Samples:** Samples of grants given during the fiscal reporting period, usually includes a variety of subjects and amounts.
- t. **Interests:** The numbers which follow the term "Interests" represent the subject areas of support during the fiscal year listed; see page 249 for the listing of Area of Interest Categories.