



PROFESSIONAL DIMENSIONS CHARITABLE FUND APPLICATION

Deadline for Submission: Friday, March 1, 2019

GENERAL GUIDELINES

The Professional Dimensions Charitable Fund (PDCF) has been providing grants to organizations for over 30 years. Professional Dimensions (PD), Inc. created PDCF to focus support for projects, programs and/or organizations that enable PD members to pool resources to advance the self-sufficiency of women and girls in our community through shared experiences and financial support. PDCF generally does not support capital projects. Our geographic focus is Milwaukee County.

In addition to offering two years of financial support, our objective is to involve our membership in activities in the selected program of the partner organization. We ensure this connection by requiring that each program that is submitted for a grant have two PD members as liaisons, leaders, and team supporters to help plan activities. We call these liaisons the Champions. The Champions' role is to work with the PDCF Board of Directors to educate members of PD about the organization's and the program's purpose, engage members with the partner organization, encourage members to contribute funds and act as advocates for the issues the organization is working to improve.

PDCF's financial contribution to the selected organization is set at a goal of \$50,000 per year for two years (or \$100,000 over two years) and is a "best efforts" commitment and is not a guaranteed amount. Additional funds may be allocated if available at the discretion of the PDCF Board. To be eligible for additional contributions from PDCF, the organization will outline its use of the additional contributions. PDCF may also hold funds in reserve, utilize funds for community outreach, cover PDCF operating expenses or disperse funds to meet other PDCF Board obligations.

In addition to this financial commitment, PDCF plans to provide up to \$3,000 per year to underwrite the cost of fundraising, awareness-raising and PD member engagement activities related to the PDCF Signature Project. Such funds may be used, for example, to create a brochure, print contribution envelopes and promotion posters, or cover the costs of refreshments and supplies for fundraising events for the PDCF signature project. The Champions are encouraged to seek in-kind donations whenever possible. All such activities and expenditures must be pre-approved by the PDCF Board (or PDCF chair if timing is a consideration).

SELECTION CRITERIA

The Selection Criteria for the PDCF Signature Project:

- Champions are committed to act on behalf of the selected organization and to develop a dedicated team of PD members to support the project. (Team members are expected to be active participants vs. honorary members.)
- The organization selected has a track record of success in advancing the self-sufficiency of women and girls with measurable outcomes and expects to partner with Co-champions to help them be successful.
- The PDCF signature project focus will foster self-sufficiency for women.
- The application provides clearly defined outcomes and strategies for success.
- The results will directly impact the Milwaukee community.
- The signature project has a high likelihood of engagement by the members of PD with the specific program PDCF is supporting.
- The contributions of PD will have an impact on the overall financial support of the organization.
- The organization is stable and has the appropriate infrastructure (staff/board/financial).
- Attributes of the signature project are boldness and clarity in addressing a gap in current service in the community. The project will reflect PD's trailblazing approach to our community work.

All applications must be submitted by two PD members, as the Co-Champions, along with information about team support that will be available. Those applications determined to be complete will be sent to the PDCF Board of Directors. Each Board member will complete a criteria "scorecard" based on the selection criteria above and the Board will select a short list of applicants for an interview and site visit. For the organizations selected, PDCF will provide detailed framework for the interviews. The interviews and site visits will be held in May or as otherwise specified.

SUBMISSION INSTRUCTIONS

Please provide the following information in the order listed below. Your information should be concise. It is not necessary to meet the page maximum limits.

- Application form (1 page)
- Organization information (maximum 3 pages)
- Program information (maximum 3 pages)
- Financial information (1 copy of requested attachments)
- Champions' statement (1 page)
- Supplemental information (**LIMITED to 5 pages**)

Applications and all accompanying materials will only be accepted via e-mail and are due by 5:00 p.m. on Friday, March 1, 2019. Late applications will not be accepted.

Please e-mail your application to:

Johannah Karstedt St. John, johannah@profesionaldimensions.org

The selection of the signature project is determined by the PDCF Board. The PDCF Board will determine whether a proposed project meets the overall criteria and work with the selected Co-Champions to establish the timetable of the project and the engagement and fundraising campaign. Generally, no more than one project will be sponsored at a given time.

An organization that has been previously selected by PDCF may reapply for consideration for another two-year project cycle.

The promotion of the PDCF signature project and coordination of activities with other PD committees, along with solicitation materials are subject to PDCF Board and PD CEO approval. More detailed explanation of this process is in the PDCF Guide for Co-Champions, attached to this document.

Direct questions regarding this application to:

Janel Hines, JHines@greatermilwaukeefoundation.org

REQUEST FOR PROPOSAL

Please provide the following (in the order listed). Your information should be concise. It is not necessary to meet the page maximums.

ORGANIZATION INFORMATION (3 pages maximum, including list of officers and directors)

Provide a brief summary of the following:

- Mission, goals, and major accomplishments.
- Track record of helping women achieve self-sufficiency.
- Population served, including total number of clients served and other important characteristics.
- Principal geographic area served.
- Total number of paid staff and volunteers.
- Please also provide a list of officers and directors.

PROGRAM INFORMATION (3 pages maximum)

Provide a brief summary of the proposed project/program including program outcomes:

- How does this program advance the self-sufficiency of women and girls and why are you serving them?
- What geographic area does this project/program target? Will this impact Milwaukee County?
- What strategies will be pursued to achieve the proposed outcomes? Include any linkages or collaborations with other organizations.
- How will you know if you have achieved the outcomes proposed (how will progress be tracked and outcomes measured) and how will you use that information to make changes if needed?
- How will the funds be used?
- Are there other principal sources of support for the project or program?
- Describe qualifications of staff/volunteers responsible for the project/program.
- Population served, including total number of clients served and other important characteristics.
- How does the project/program relate to the organization's mission?
- Explain how PD's fundraising will impact the overall financial support of the organization and its programs.
- How will the Signature Project stimulate PD members' engagement and advocacy with the organization's Program?
- If the program is expected to continue beyond the grant period, describe plans for ensuring continued funding after the grant period ends.

FINANCIAL INFORMATION (1 page)

Describe plans for obtaining other funding needed to carry out the program, including amounts requested of other funders.

Please provide 1 copy of each of the following:

- IRS Tax Exemption Determination Letter 501(c)3
- Most recent audited financial statement, if available including notes and IRS Form 990
- Organization's income and expense statement for current fiscal year
- Organization's program income and expense budget for current fiscal year

CHAMPIONS' STATEMENT (1 page maximum)

Please review the Guide for Co-Champions and the PDCF Partner Responsibilities (attached to this application document), acknowledge understanding of your role, the Champion team and describe your commitment to and plans for this program. Please include your relationship to this organization and its mission.

CHARITABLE FUND Co-CHAMPIONS JOB DESCRIPTION
(See attached Guide for Co-Champions for further detail)

Co-Champions report to Charitable Fund Board Chair and are Ad Hoc members of the Charitable Fund Board.

OBJECTIVE

The purpose of this work is to enable PD members to pool resources to advance the self-sufficiency of women and girls in our community through shared experiences and financial support. We do this through educating and engaging PD members as donors, volunteers and advocates for the Signature Project chosen by the PDCF Board.

RESPONSIBILITIES/DUTIES

1. Serve as Co-Champions of the two-year PDCF Signature Project and be ad hoc members of the PDCF Board for the length of the project.
2. The PD board and PDCF board members give at a minimum of \$250 annually. A similar gift from Co-Champions would be expected.
3. Select and head a team to develop education, engagement, and fundraising activities for the signature project. Committee members are to have specific roles and responsibilities.
4. Report in person or in writing to the PDCF Board monthly on the status of financial outcomes, planned activities, educational, engagement and fundraising efforts.
5. Work with the Program and Sacagawea Committees to develop content that educates PD members and the community on the societal issues affecting the signature project and inspire them to engage and contribute to the designated program. One PD member program annually will feature the signature project. Champions and/or team members will staff PDCF project table at all PD member programs.
6. Work with the partner organization to develop meaningful content about the signature program, volunteer opportunities and promote these opportunities to PD members.
7. Serve as a spokesperson and advocate for the signature project within PD and in the community. This may include developing Professional Dimensions newsletter articles, public relations and communications materials.
8. Engage as many PD members as possible in the signature project as volunteers and/or community advocates.
9. Encourage PD members to donate to the signature project, including asking for major gifts.
10. Document the year's activities in a wrap-up report for the PDCF Chair to include in the Annual Report. Please separately note any recommended changes and improvements for future Co-Champions.
11. Obtain expense pre-approval from the PDCF board prior to committing to the various additional underwriting and thank you events noted on the first page of this application.

APPLICATION FORM

Leadership Information:

Champions' Names / Contact Information	
Champion Name / Signature	
Champion Name / Signature	

Note to Champions: Please review job description to determine responsibility and expectations (attached) and prepare your "Champions Statement" separately.

Organization Information:

Name	
Address	
Chief Staff Officer	
Phone	
Fax	
Email	

Contact Person / Title	
Phone	
Fax	
Email	
Board Chairperson Name / Contact Information	
Organization's Date of Establishment	
Organization's Fiscal Year Date	

Has the governing board approved a policy stating that the organization does not discriminate as to age, race, religion, sex or national origin? **Yes No**

Is this organization woman or minority led? **Yes No**

What percentage of the organization's board of directors are women? _____

Does the organization have federal 501(c)3 tax exempt status? **Yes No If no, please explain:**



PDCF Guide for Co-Champions

Thank you for your interest in sponsoring a signature project to be funded by the Professional Dimensions Charitable Fund (PDCF) for the next two years. The PDCF board appreciates your commitment and, if your project is selected, we look forward to working with you to achieve our shared goals of raising funds to advance the self-sufficiency of women and girls in our community while educating and engaging PD members and the community in the process.

PDCF project application includes a job description for project Co-Champions. The purpose of this Guide is to further describe the working relationship between the Co-Champions, PDCF Board, PD Office and the partnering charitable organization, address frequently asked questions, and offer practical tips to get you started. At the end of this document is a summary chart that outlines these responsibilities.

Forming Champions Team: One of the first orders of business should be to make sure you have a strong Champions Team in place to assist in:

- education
- engagement/volunteer opportunities
- fundraising

Past Co-Champions emphasize the importance of establishing a strong core of PD members at the outset of the project who will commit to following through on assignments. Provide clear expectations to your team, assign specific roles and responsibilities to each member and be ready to recruit new members along the way. Also, you may wish to engage others from the team's community network, outside of PD, in educational, engagement and fundraising opportunities in concert with the partner charitable organization.

Note: It can be tempting to just do this work with one or two people, but an important job of the Co-Champions is to engage PD members and the Champion Team.

Champions' Communications with PDCF Board and Reports: The signature project Champions report to the PDCF Board. It is important to maintain close communications with the PDCF Board to ensure successful education, fundraising and engagement among PD members.

Within 30 days of the PDCF signature project selection, the Co-Champions will be asked to meet with designated mentors from the PDCF Board and the PD CEO to develop an initial education, engagement and fundraising plan for the project to be presented to the PDCF Board for discussion and approval.

The Co-Champions formally report to the PDCF Board on a monthly basis, either by attending PDCF Board meetings and/or submitting written reports to the PDCF Chair in advance of monthly board meetings. Reports should include the status and impact of planned activities, educational, engagement, and fundraising opportunities.

The Co-Champions will be asked to prepare a summary of the PDCF signature project for the Sacagawea program in March, and to document the year's activities in a wrap-up report for the PDCF Chair to include in the PD Annual Report. (This is typically due early May.)

The Co-Champions will be involved in developing Professional Dimensions newsletter articles, and public relations and communications materials. The Co-Champions also may be asked to serve as spokespersons for the signature project within PD and in the community, in coordination with the PDCF Chair and PD CEO.

Amount and Timing of Financial Contributions:

PDCF's financial contribution to the selected organization is set at a goal of \$50,000 per year for two years (or \$100,000 over two years) and is a "best efforts" commitment and is not a guaranteed amount. Additional funds may be allocated if available at the discretion of the PDCF Board. To be eligible for additional contributions from PDCF, the organization will outline its use of the additional contributions. PDCF may also hold funds in reserve, utilize funds for community outreach, cover PDCF operating expenses or disperse funds to meet other PDCF Board obligations.

The PDCF Board will review its financial statements annually in January and May (or when practical) and determine the amount(s) to contribute to the signature project. The PDCF Board will confer with the Co-Champions, and a mutual plan will be agreed upon to present the contribution(s) to the partner organization.

Fundraising: The sources of funds to support the signature project historically have been raised from three primary areas: (1) The Sacagawea Awards Dinner, which PD's Sacagawea Committee is responsible for planning, (2) PD member donations in response to the Champions and PDCF Board's periodic solicitations, and (3) special events planned by Co-Champions.

Funds raised will be utilized to fulfill the \$50,000 goal for the designated charity, outreach to the community via sponsorships, and administrative expenses to operate PDCF.

All donations are to be directed to the PDCF rather than directly to the partner organization to ensure accurate accounting and to provide the ability to monitor progress toward the PDCF's funding goal. A colored ribbon will be selected for the PDCF signature project and placed on the nametags of PD members who donate a minimum of \$100 each year. PDCF and PD office will be responsible for sending a personal thank you to each donor within the month after the donation is received.

While the PDCF Board encourages Co-Champions to be creative in planning and executing special fundraising events for the signature project, it is important to remember that such fundraising activities are undertaken under the auspices of the PDCF and we request they be pre-approved by the PDCF Board, or PDCF chair if timing is a consideration. Important considerations include the number and timing of such special events relative to other PD events, how the proposed special events fit within the PDCF's overall fundraising plan, the number of PD members who would be engaged, and overall cost/benefit analysis.

Similarly, while the Champions are encouraged to draft special event notices and other communications to PD members regarding the CF Project, all such communications need to be reviewed by the PD office and will be sent by the PD office on PD letterhead consistent with PD's communications policies. Such communications will state funds are being raised for PDCF and will reference the PDCF signature project.

PD Member Engagement: A key responsibility of the Co-Champions is to help involve PD's membership in activities of the selected organization. The Champions are expected to lead efforts according to their plan to educate PD members about the partner organization and the signature program's purpose, encourage members to contribute funds, and act as advocates for the issues the selected organization is working to improve.

History has shown the most successful signature projects are those where there have been significant opportunities for PD members to interact within the partner organization. It is important for the Co-Champions to maintain close communications with the leadership of the designated charitable organization to evaluate ongoing engagement opportunities for PD members.

To introduce the signature project to PD members, the Co-Champions are to work with the PD Program Committee to develop a program that educates PD members on the societal issues that create the need for this project/program. This should occur at least once during the year, preferably at the beginning of the program year. At these kick-off programs, the Co-Champions should:

- a. Educate the PD membership on the cause and goal of the signature project
- b. Highlight opportunities for use of members' talents, i.e. fundraising, marketing, board development, etc.
- c. Highlight how members can volunteer
- d. Make an ask for donations

In addition to these formal programs, the following are opportunities for Co-Champions to communicate with PD members about the signature project throughout the year. (These are great areas to assign responsibility for Champion team members.):

- Send out email blasts
- Draft PD newsletter articles

- Make announcements or give updates at PD meetings
- Set-up a booth or table at PD meetings
- Specialized fundraising such as the holiday party
-

Project Support: PDCF plans to provide up to \$3,000 per year to underwrite the costs of fundraising, awareness raising and PD member engagement activities related to the signature project. Such funds may be used, for example, to create a brochure, print contribution envelopes and promotion posters, or cover the costs of refreshments and supplies for fundraising events. The Co-Champions are encouraged to seek in-kind donations whenever possible. All such activities and expenditures must be pre-approved by the PDCF Board (or PDCF chair if timing is a consideration), so that we are aware across PD of requests going to sponsoring organizations.

Questions: The Co-Champions are encouraged to confer with the PDCF Board mentors, PDCF Board Chair and/or the PD office on an ongoing basis throughout the two-year project period as questions arise. The PDCF Board thanks the Co-Champions for all your efforts and looks forward to celebrating the success of the signature project with you.

**PROFESSIONAL DIMENSIONS CHARITABLE FUND
SIGNATURE PROJECT PARTNER RESPONSIBILITIES**

Every two years, the Professional Dimensions Charitable Fund selects a new signature project with a nonprofit partner to support as we carry out our mission to: *enable members to pool resources to advance the self-sufficiency of women and girls in our community through shared experiences and financial contributions.*

A successful project:

- Educates Professional Dimensions members about important issues women and girls in our community face
- Engages a significant component of the Professional Dimensions membership as Charitable Fund donors (50%) and volunteers (20%) for the partner organization
- Raises \$100,000 over two years for the signature project for the partner organization (goal not “commitment”)

Working collaboratively, the Professional Dimensions Charitable Fund Board, Professional Dimensions office, Project Co-Champions, and partner organization create the atmosphere for success. The chart below indicates the primary responsibilities of each group, and how they work together.

	PDCF Board of Directors	PD OFFICE	PROJECT Co-CHAMPIONS	PARTNER ORGANIZATION
Primary Responsibility	Stewards of the Charitable Fund Manages Fund Resources Provides Oversight of Project	Manage the PDCF finances Manage external funding relationships Carry out administrative responsibilities	Members who volunteer to lead the signature project and engage the PD membership	Make the case that the issue and organization fulfill the PDCF mission Help develop opportunities for member engagement Serve as SME* for given cause
Specific Obligations	<ul style="list-style-type: none"> • Selects signature project • Provides oversight of Champion Team and all project activities • Raises funds for the PDCF as a means to support partner organizations (ex: annual solicitation, major gifts) • Supports the Sacagawea Planning Committee • Manage the funds donated to PDCF • Plans for the PDCF future; • Offers additional opportunities for member support (ex: Legacy Fund) • Has discretion to award complimentary membership to the highest female professional on project partner staff 	<ul style="list-style-type: none"> • Maintain donor database • Process donations • Facilitate donation acknowledgment process • Manage sponsorship solicitations for PD/PDCF/Sacagawea • Publicize project activities • Facilitate mass communications and solicitations (Mail/email) • Coordinate with Sacagawea and Program committees to include Signature Project 	<ul style="list-style-type: none"> • Develop project application • Work with partner org. to develop educational, volunteer and fundraising plan • Manage all plan activities • Identify opportunities for partner to engage with PD members • Promote participation in project activities • Partner w/PDCF Board to solicit individual PD members, incl. major gifts • Staff partner table at PD meetings and events • Report to PDCF board on project regularly 	<ul style="list-style-type: none"> • Help Champions write application for PDCF support • Help Champions develop educational programs & materials for PD membership • Help Champions identify volunteer opportunities for PD members individually and/or collectively • Provide information about partner events for Champions and PD to support • Support Champions in organizing fundraising, volunteer and educational events • Organization leadership to attend one PD meeting and the Sacagawea Awards annually (complimentary attendance) <p>*SME: Subject Matter Expert</p>