



PROFESSIONAL DIMENSIONS CHARITABLE FUND

SIGNATURE FUND PACKET CHAMPIONS INFORMATION AND APPLICATION FOR FUNDING

Deadline for Submission: Friday, June 4, 2021 by 5 p.m. Late submissions will not be accepted.

BACKGROUND

The Professional Dimensions Charitable Fund (PDCF) has been providing grants to non-profit organizations for over 30 years. Professional Dimensions (PD), Inc. created PDCF to fundraise and 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 does not support capital projects through the signature project. Our geographic focus is Milwaukee County.

In addition to offering two years of financial support for our signature project, we strive to involve our membership in activities related to the funded project/organization. We maximize this connection by requiring organizations applying for funding be sponsored by two PD members who serve as Champions. As Champions, they act as liaisons, leaders, and team supporters to keep the membership informed and engaged, taking the lead in planning meaningful engagement opportunities. The Champions' role is to work with the PDCF Board of Directors to educate the membership about the organization and the funded project'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 aims to provide \$50,000 per year to the selected organization (or \$100,000 over two years) and this is a "best effort" commitment based on annual fundraising efforts, not a guaranteed amount. Additional funds may be allocated to the project, 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.

In addition to its financial commitment, PDCF may provide up to \$3,000 per year to underwrite the awareness-raising and PD member engagement activities related to the PDCF Signature Project. Such funds may be used, for example, to create a brochure, promotion posters, or cover the costs of refreshments and supplies for project-related stewardship (recognizing previous donors and encouraging more annual donations) events. 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).

Acknowledging that we are still impacted by the global pandemic, the PDCF has taken this context into consideration as we envision the next PDCF signature project. In alignment with our commitment to advancing women and girls, we recognize that meeting basic needs is a significant challenge in our community now. We encourage signature projects that will help women and girls connect to basic needs. Given these unprecedented times we will support general operations for organizations dedicated solely to women and girls, and/or programs for women and girls run by organizations that serve all genders. As social distancing guidelines may remain in place to some degree during the 21/23 signature project year, we also recognize that member engagement and volunteerism may be impacted by this uncertainty. For the nonprofit recipient, PDCF wants to ensure that our signature project member engagement supports realistic needs for issue education and volunteerism; we do not want the nonprofit recipient to be inconvenienced by creating unrealistic engagement opportunities.

Included in this packet are:

- 1. SELECTION CRITERIA FOR THE PDCF SIGNATURE PROJECT**
- 2. SUBMISSION INSTRUCTIONS FOR PD SIGNATURE PROJECT FUNDING**
- 3. APPLICATION FORM FILLED OUT BY PD CHAMPIONS TO SUBMIT WITH NONPROFIT APPLICANT PROPOSAL**

****NOTE: We prefer that the grantee organization share their application and materials with their PD Champion for the Champion's submission.***

SELECTION CRITERIA FOR THE PDCF SIGNATURE PROJECT

Grant Partner

- The PDCF Signature Project Partner is an organization located in Milwaukee County and fosters self-sufficiency for women and girls.
- The grant partner has a measurable track record of success.
- A successful application provides clearly defined outcomes and strategies for success.
- The organization is stable and has the appropriate infrastructure (staff/board/financial).

Champion Partner

- Champions are committed to act on behalf of the selected organization and to develop a dedicated team of PD members to support the project.
- The signature project has a high likelihood of engagement by the members of PD.
- The contributions of PD will have an impact on the overall sustainability of the organization.

The request for funding an application will be submitted by two PD Champions, along with their statement of PD engagement and support. Applications will be directed to the signature project workgroup of the PDCF Board of Directors. The workgroup will meet with the top three applying organizations and will make a funding recommendation to the PD Board of Directors.

The PDCF Board will vote on the signature project. The Champions will establish the fundraising and member engagement strategies and timeline.

Organizations previously selected as a Signature project by PDCF are not eligible for funding.

The promotion of the PDCF Signature project and coordination of activities with other PD committees, along with engagement materials are subject to PDCF Board and PD CEO approval.

SUBMISSION INSTRUCTIONS FOR PD SIGNATURE PROJECT FUNDING

Champions and applying organizations, please provide the following information in the order listed below to info@professionaldimensions.org with the subject line "PDCF signature project submission." Your information should be concise. It is not necessary to meet the page maximum limits.

Application includes (see details below):

- Organization information (maximum 1 page)
- Funding request program information (maximum 3 pages)
- Financial information
- Board of Directors list including % of women membership
- Champions' statement (1 page)

Applications and all accompanying materials will only be accepted via email and are due by Friday, June 4 at 5 p.m. Late applications will not be accepted. Any questions regarding this application should be directed to Anne Summers via email at asummers@twbfundraising.com.

We will also be hosting an informational session on Thursday, May 6 at 4:30 p.m. via zoom for nonprofit organizations interested in applying for the Signature Project, and PD members interested in being Champions. Please [click here](#) to register for the session.

INFORMATION TO INCLUDE IN YOUR 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 Provide a brief summary of the following:

Mission, goals, population served, including total number of clients served and other important characteristics

Major accomplishments of organization

Track record of helping women and girls achieve self-sufficiency

Principal geographic area served

Total number of paid staff and volunteers

FUNDING REQUEST 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 in Milwaukee?
- How does the project/program relate to the organization's mission?
- What strategies will be pursued to achieve the proposed outcomes?
- How will progress be tracked and outcomes measured?
- How will the funds be used? What are the other principal sources of support for the project or program?
- Describe qualifications of staff/volunteers responsible for the project/program.
- How do you want PD members to engage and advocate for the project?

FINANCIAL INFORMATION Please provide:

- IRS Tax Exemption Determination Letter 501(c)3
- Most recent audited financial statement, if available include 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

I. PD CHAMPIONS' STATEMENT (1 page maximum)

Please describe your relationship to the applicant organization and its mission. Describe your desired roles as Champions (please refer to the Guide for Champions and PDCF Partner Responsibilities below about expected leadership responsibilities) and describe your time commitment and program plans to engage the membership.

**APPLICATION FORM TO BE FILLED OUT BY CHAMPIONS
AND SUBMIT WITH REQUESTED MATERIALS**

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

Organization Partner 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**

PROFESSIONAL DIMENSIONS CHARITABLE FUND SIGNATURE PROJECT/PARTNER RESPONSIBILITIES

	PDCF Board of Directors	PD OFFICE	PROJECT CHAMPIONS	PARTNER ORGANIZATION/Grantee
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 to advance women and girls Help develop opportunities for member engagement. Serve as SME* for given cause
Specific Obligations	<ul style="list-style-type: none"> Champions signature project Provides oversight of Champion Team and project activities Raises funds for PDCF as a means to support partner organizations (ex: annual solicitation, Legacy Fund) Supports the Signature Project Champion Team Manage the funds donated to PDCF Plans for 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/event Publicize project activities Facilitate mass communications and solicitations mail/email) 	<ul style="list-style-type: none"> Develop project application Work with partner organization to develop educational, volunteer and stewardship plan Manage all plan activities Identify opportunities for partner to engage with PD members Promote participation in project activities Partner w/PDCF Board on solicitation efforts 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 educational and stewardship events Organization leadership to attend at least one PD meeting and the PD Imprint Awards annually (complimentary attendance) Female executive to participate in PD as a Complimentary member <p>*SME: Subject Matter Expert</p>