

PROFESSIONAL DEVELOPMENT SCHOLARSHIP



The Assisi Foundation
of Memphis, Inc.



United Way
of the Mid-South

PROFESSIONAL DEVELOPMENT SCHOLARSHIP INFORMATION SHEET

United Way of the Mid-South in partnership with The Assisi Foundation of Memphis Inc. offers the Professional Development Scholarship to nonprofit organizations. The creation of the Nonprofit Education and Training Scholarship Fund is made possible through action by our governing Boards and the United Way of the Mid-South Avron B. Fogelman Venture Fund in response to nonprofit community organizations' stated need for opportunities for ongoing training and education of their Boards and staff members.

Applications will be reviewed as follows:

Applications Due

Funding Decisions Made

Eligibility Criteria and Guidelines:

- Applicants must be a staff member, board member, or active volunteer of a 501 (C) 3 organization in the Greater Memphis area.
- Scholarships will not be awarded after the conference has occurred. Conferences, programs, or courses (hereafter referred to as "training") must begin after the decision date.
- Scholarships may be transferable and can be used by other organizational staff.
- If for any reason the scholarship recipient does not attend the training, the entire grant amount must be returned to United Way within 5 days after the beginning of the training date.
- All scholarship recipients must submit to United Way a completed evaluation of the course or conference within two weeks following participation in the course/training.
- **The total scholarship support to any one organization may not exceed \$1,500 in one year.**
- **For more information or to receive a copy of the scholarship application, please contact Tehrian Martin at (901) 433-4330 or Clint Anderson at (901) 433-4327.**

Eligible Conferences, Trainings, Courses, Programs and Workshops

Professional development scholarships may be used for conferences, trainings, courses, programs or workshops that focus on issues such as nonprofit management, resource development, or capacity building and must be related to the applicant's position and agency's mission. The training must improve the applicant's ability to do his or her job and the agency's ability to meet program objectives.



Funds may be used for the following purposes:

- Registration fees and/or associated costs such as travel expenses, lodging costs or books for approved training, i.e. workshops, seminars, conferences, etc.
- Continuing Education Credits
- Costs associated with providing a trainer for staff development. These costs could include travel and payment of the trainer.

Funds may not be applied to:

- Conferences, training, courses, programs or workshops that have already taken place. These funds cannot be used to reimburse the agency for participation in prior trainings.
- Supplement college course work required for a college degree
- College tuition/expense re-imbusement.

Grants provided by the Professional Development Scholarship Committee may require a match from the applicant/applicant organization.

Application Checklist

All applications must be submitted on due date @ 4:00 p.m. in our offices.

All applicants must submit five (5) copies of the entire professional development scholarship application packet. Packets **must** be complete and legible. The packet **must** include:

- a. The application form approved by the Executive Director and/or approved governing official of the organization. If the request is for a Board member or volunteer, the form must be signed by the Board Chair. The Board must also sign for the Executive Director. If funds are requested for a staff member, the form must be signed by the Executive Director. The Treasurer should sign the form for the Board Chair.
- b. Responses to the eight questions
- c. **Itemized budget of training expenses**
- d. **Organization's training budget for staff**
- e. A copy of the organization's IRS 501 (C) 3 tax determination letter
- f. A copy of the conference or course brochure, agenda, or other appropriate materials
- g. A signed copy of the attached Patriot Act Compliance form

Please mail the application form and your responses to the questions to Clint Anderson, United Way of the Mid-South, 6775 Lenox Center Court, Suite 200, Memphis, TN 38115.



Application Requirements

Applicant's applications are limited to two 8½ x 11 pages typed with a 12 point font, if produced by a computer. If handwritten, three pages will be accepted but must be legible.

It is important for the Scholarship Review Committee to understand at a minimum:

- A. The quality and content of the professional development opportunity
- B. The extent to which it relates to the agency's mission and applicant's current position
- C. The extent to which the training will benefit the applicant and the applicant's organization
- D. If there is a training amount for staff in your organization's annual budget

Please submit in narrative form your responses to the following eight statements and questions:

1. Briefly describe your organization's mission and programs.
2. Briefly describe the subject matter of the training for which you would like a scholarship.
3. How is this conference/workshop related to your agency's mission? How will attendance assist you in building the capacity of or strengthen the organization?
4. How will this training help you do your job better? (For volunteers and board members, describe your role at the organization, and how this training will help you perform this role better.)
5. How do you plan to share this information with others (staff members, volunteers, and/or board members, community, etc.)?
6. If the registration fee or total costs (for example, travel expenses or other related costs as necessary) exceed the amount of the scholarship, please explain how the organization plans to cover these costs.
7. Address the rationale for selecting specific training (for example: local availability, quality, cost, etc.).
8. How does your organization plan to integrate staff and education support in future year budgets?

A limited number of professional development scholarships (not to exceed \$1,500 to any one organization in a year) will be awarded on a competitive basis.

Scholarship checks will be made payable to the applicant organization following notification.

In accepting a scholarship, your agency agrees to the following:

- Return a signed copy of the scholarship notification letter to confirm acceptance of any scholarship funds.
- Attend the training(s) for which funds were received and accepted.
- Notify at least 3 business days in advance if the approved recipient is unable to attend the training for which scholarship funds were awarded or within 48 hours of the initial date of the training if the attendee is a "no show".
- Submit an evaluation of the training within two weeks of completing the training.



PROFESSIONAL DEVELOPMENT SCHOLARSHIP APPLICATION FORM

Title of Professional Development Opportunity: _____

Name of Applicant: _____

Applicant Organization: _____

Organization's Address: _____

Telephone: _____

Fax: _____

Alternative Number: _____

Email: _____

Auditing Firm: _____

Date Last 990 Filed: _____

Date of last audited financial statement: _____

Date Last Annual Report: _____

Organization's current operating budget: \$ _____

Check one: _____ Private Nonprofit _____ For Profit (General)

Public (specify): _____

Fiscal Year: From (Month): _____ to (Month): _____

Tax ID#: _____

IRS Exemption Classification: _____

Staff Name & Title: _____

Staff Role: _____

Board Member Name: _____

Volunteer Role: _____

Applicant's years with organization: _____

For volunteers-hours contributed (average per month): _____



This person/organization has received a professional development scholarship before: Check _____ Yes _____ No

Program Title: _____

Program Description: _____

Sponsor's Web Site: _____

Sponsor's Address: _____

Program Date(s): _____

Location: _____

Registration Fee & Deadline for Discount: \$ _____

Registration Fee Without Discount: \$ _____

Amount Requested: \$ _____

Total Cost: \$ _____

Certification and acceptance: I certify this request has been authorized by the governing body. I certify this organization does not discriminate on the basis of sex, age, race, color, religion, nationality, or handicap. I certify the statements herein are true and complete to the best of my knowledge, and accept the obligation to comply with the terms and conditions if a scholarship is awarded as the result of the application.

Name & Title: _____

Address: _____

Telephone: _____ Fax: _____

Signature: _____ Date: _____

Title: _____

(Must be an officer of the governing body or executive director)



FORM 4: COUNTERTERRORISM COMPLIANCE

In compliance with the spirit and intent of the USA PATRIOT Act and other counterterrorism laws, the United Way of the Mid South requests that each funded agency ("Organization") certify that it is in compliance with the United Way of the Mid South's and the United Way of America's ("UWA") compliance program.

ORGANIZATION NAME: _____

Check the appropriate line to indicate your compliance with each of the following statements below:

Comply _____ **Do Not Comply** _____

This Organization is not on any federal terrorism "watch lists," including the list in Executive Order 13224, the master list of specially designated nationals and blocked persons maintained by the Treasury Department, and the list of Foreign Terrorist Organizations maintained by the State Department.

This Organization does not, will not and has not knowingly provided financial, technical, in-kind or other material support or resources* to any individual or entity that is a terrorist or terrorist organization, or that supports or funds terrorism.

This Organization does not, will not and has not knowingly provided or collected funds or provided material support or resources with the intention that such funds or material support or resources be used to carry out acts of terrorism.

This Organization does not, will not and has not knowingly provided financial or material support or resources to any entity that has knowingly concealed the source of funds used to carry out terrorism or to support Foreign Terrorist Organizations.

This Organization does not regrant to organizations, individuals, programs and/or projects outside of the United States of America with out compliance with IRS guidelines.

This Organization takes reasonable, affirmative steps to ensure that any funds or resources distributed or processed do not fund terrorism or terrorist organizations.

This Organization takes reasonable steps to certify against fraud with respect to the provision of financial, technical, in-kind or other material support or resources to terrorists and terrorist organizations.

* In this form, "material support and resources" means currency or monetary instruments or financial securities, financial services, lodging, training, expert advice or assistance, safehouses, false documentation or identification, communications equipment, facilities, weapons, lethal substances, explosives, personnel, transportation, and other physical assets, except medicine or religious materials.

I certify on behalf of the Organization listed above that the foregoing is true.

Print Name: _____

Title: _____

Signature: _____

Date: _____