

## PMI Educational Foundation Grant Guidelines

The following sets forth guidelines that the Project Management Institute Educational Foundation (“PMIEF”) will rely upon in evaluating requests for grant funds and making grant awards.

### A) Grant Pre-Award Guidelines

#### (1) Eligibility Criteria for Grants

To be considered for a PMIEF grant, an organization must:

- be a 501(c)(3) nonprofit organization, not for profit academic institution (including primary and secondary schools as well as colleges and universities) or not for profit research institute (organizations chartered by PMI or affiliated organizations of PMI may partner with 501(c)(3) organizations to submit a grant request, but the grant request must be submitted by the 501(c)(3) organization);
- operate, organize and disseminate services without regard to race, religion, gender, age, national origin, sexual orientation, or disability; and
- if outside of the United States, comply with the Foreign Equivalency rules.

#### (2) Evaluation Criteria for Grants

PMIEF seeks proposals that permit potential widespread application, replication and sustainability. This better ensures that multiple, geographically diverse audiences benefit from its funding. Funding decisions are based on the proposed initiative’s scope, reach, anticipated outcomes and impact, and duration. The PMIEF Board of Directors will only consider applications that request funding for a single initiative or phase within an initiative. In addition, no additional resources beyond the grant should be expected. The PMIEF Board of Directors will not provide grants for general operating costs, endowment drives, capital campaigns, deficit financing, building campaigns, or travel (unless travel is required as an integral part of the proposed initiative).

PMIEF provides funding in three primary areas, reflecting the interests of its donors and the special responsibility of the Foundation to support a range of activities that together strengthen the fabric of its community:

- Building a better prepared workforce through academic scholarships, awards, internships, doctoral research grants, and professional development scholarships.
- Preparing youth for success in life through educational resources, programs, and workshops in project management for youth and their teachers.
- Helping people in need and those struck by disaster by aiding disaster relief, nonprofit, and nongovernmental organizations to better utilize their limited resources.

In addition to these principles, the Foundation considers numerous criteria in evaluating grant applications:

- Is there demonstrated need and demand for the proposed project?
- Will the proposed project benefit a meaningful number of people?
- Does the organization have the institutional capacity, including qualified staff, to successfully undertake the proposed project?
- Are there appropriate governance and oversight responsibilities?
- Has the proposed project been thoroughly developed and carefully planned?
- Have the individuals expected to benefit from the project been consulted in its development?
- Is the budget for the proposed project detailed, realistic, and cost-effective?
- Are metrics and performance standards in place?
- Is PMIEF the most appropriate source of funding?
- What other sources of support have been requested?
- Has a long-term funding plan been developed to support the proposed project beyond the term of the Foundation's support?

The Foundation does not make grants from its unrestricted funds for:

- sectarian or religious activities;
- grants to private foundations;
- endowments or memorials;
- direct or grass-roots lobbying efforts; and
- sustained support for recurring operating expenses.

### (3) Application Schedule for Grants

A grant application may be submitted at any time and applications will be processed and considered for funding throughout the year on a rolling basis. Applications will be processed, considered and decided upon within six months of submission.

### (4) Application Guidelines for Grants

Applicants must complete the online PMIEF grant application. The following must be included in the application.

The **Application Summary** for the grant application must include:

Contact Information

- *Applicant name*
- *Applicant address*
- *Applicant telephone number*
- *Applicant e-mail address*
- *Name of grant receiving organization*
- *Organization address*
- *Organization telephone number*

Organization Documents

- *Articles of Incorporation, 501(c)(3) tax-exempt status determination letter or equivalent, or other chartering document*
- *Organization operating budget*
- *Organization year-to-date financial statement for the most recently completed fiscal year*
- *If available, must recent independent financial audit, review or compiled financial statements*
- *A list of current organization board members*
- *Resumes of key staff for proposed project/program*
- *Nondiscrimination policy*
- *Letters of agreement from partner organizations (if applicable)*
- *Signed non-U.S. organization affidavit (if applicable)*

Project Overview

- *Project/program name*
- *Anticipate start and completion dates*
- *Name and title of contact person*
- *Total cost of project/program (USD\$)*
- *Amount requested from PMIEF (USD\$)*
- *Type of grant requested*
- *Focus area of grant*

Grant applicants must also upload their project/program essays, budget and schedule, and signed grant authorization form.

The **Project/Program Essay Questions** for the grant application must include:

Project Narrative

1. *A description of the proposed project/program for which the requested funds will be used.*
2. *A statement of the unmet need that the project/program will fulfill.*
3. *A description of the project/program goals.*

4. *A description of project/program assumptions.*
5. *A description of any project/program limitations.*
6. *A description of future plans for funding should the project/program continue beyond the PMIEF grant period.*
7. *A list of project/program team members, including their roles and responsibilities.*

#### Project/Program Organization Narrative

1. *A description of the organization's mission.*
2. *A description of how the proposed project/program fulfills the organization's mission.*
3. *A brief summary of the organization's history.*
4. *A description of the organization's experience in successfully completing similar projects/programs.*
5. *A list of current key organization staff*

#### Project/Program Integration with PMIEF

1. *A description of how the proposed project/program links to the purpose and goals of PMIEF.*
2. *An explanation of within which PMIEF focus area the project/program best fits.*
3. *A description of how the project/program will advance this PMIEF focus area.*
4. *A description of anticipated project/program changes in two year if it is to last beyond one year.*

#### Project/Program Targets

1. *A description of the target audience, constituents and geographic communities that will benefit from the project/program.*
2. *A description of how the project/program will impact the designated audience.*
3. *A description of problems/issues that will be the focus of the project/program.*

#### Project/Program Interaction with Others

1. *A description and explanation of organizations that will serve as partners for the project/program.*
2. *A description of other support for the project/program that is expected.*
3. *A description of risk mitigation strategies should other funding required to support the project/program become not be available.*
4. *An explanation of how the project/program will proceed if PMIEF does not support it.*
5. *A description of other organization that address the same project/program as well as how the proposed work will be unique.*
6. *A description of foreseeable obstacles to the project/program.*
7. *A summary of the publicity plan for the project/program.*

#### Project/Program Objectives and Evaluation/Measurement

*A list of project/program objectives and the respective evaluation/measurement methods for each.*

## B) Additional Considerations

- PMIEF reserves the right to discontinue or modify the grant program, or any component thereof, and to revise any or all of the grant requirements, processes, or eligibility criteria at any time.
- Any material misrepresentation of the facts in the prospective grantee's application and supporting materials, whether discovered during the verification process or later, will result in withdrawal of the application from consideration. Following notice to the prospective grantee of the discovery of the misrepresentation, and the opportunity for the prospective grantee to explain the circumstances of the erroneous submission, the candidate may be banned from applying again for PMIEF grants in the future if intentional misrepresentation to gain competitive advantage is proven to be true.

## C) Grant Post-Award Guidelines

### (2) Grant Follow-up and Requirements

Grant recipients are required to submit an interim report of progress and activities to PMIEF at specified intervals. In addition, all grant recipients are required to submit a final report on program outcomes within 30 days following the end of the grant period. Both interim and final reports must include an itemized budget of grant expenditures, key metrics about reach and impact, and key deliverables that exemplify funded activities.

### (3) Use of the PMIEF logo

The PMIEF name, logo or other identification or intellectual property can only be used with the expressed prior written permission of the PMIEF Board of Directors.