



Society of Women Engineers (SWE) Program Development Grants (PDG) Frequently Asked Questions (FAQ)

Updated 07/2022

Contents

<u>SWE PDG Eligibility</u>	4
Who can apply for a PDG?	4
Can I apply for a grant if my section/committee/region already has an existing grant that we have not closed/concluded?	4
What types of events can be funded by PDG? / What is the funding criteria for PDG?	5
<u>Application, Review Cycle & Grant Awarding</u>	7
How do I apply for a PDG?	7
What is the typical review cycle for a request for funds?	7
How much detail does the PDG Committee look for in the application?	7
I have heard that we must have a “balanced budget” when submitting a request for PDG funding. Can you help me understand what this means?	8
What type of detailed information should I include with budgeting information for events?	8
Are there any items typically not funded?	9
Are there any events that are not funded based on the nature of the event?	10
Can PDG funding be used to pre-buy supplies for future events?	10
Can you use PDG funds for Giveaways?	11
What are the judging criteria for PDGs?	11
How do I know if my grant was approved?	13
Once my grant is approved, how do I get the money?	13
<u>Event Best Practices & Closeout</u>	14
What changes do I need to communicate after the award?	14
After my award, some of my costs changed. Do I need to resubmit my request?	14

What do I do when the event is completed?	14
What if I do not use all of my approved funding from PDG?	15
How do we reference the PDG funding at our event?	15
<u>SWE PDG K-12 Outreach Grant Questions</u>	<u>16</u>
How many girls have to participate in order to be eligible? How many volunteers?	16
Can we receive funding if the event includes boys?	16
Can I get funding for events with families and teachers?	16
What is the typical amount of money an outreach event is expected to cost?	16
Do we need to charge an admission fee for attendees (girls and/or adult influencers) for outreach events?	16
Is there guidance on the percentage of time that should be focused on hands-on activities for a K-12 Outreach Event?	17
Can you use PDG funds for volunteer gifts?	17
Are there other sources of funding for K-12 Outreach Events from SWE?	17
Are there any outreach event best practices that the PDG committee recommends?	17
<u>Funding FIRST (For Inspiration and Recognition of Science and Technology) robotics teams</u>	<u>18</u>
Requirements	18
What about FIRST Regional events? Can SWE PDG funding support them?	18
I am a professional K-12 educator member interested in getting some funding to set up a FIRST team at my school. How do I go about doing that?	19
<u>SWE PDG Professional Development Grant Questions</u>	<u>20</u>
How do you define a professional development event?	20
What is the amount of money a professional development event is expected to cost?	20
Are there any precedents, guidelines, or best practices in terms of professional development events?	20
Do we need to charge a fee for attendees for a professional development event?	21
Can you apply for a PDG that has non-SWE members in the audience?	21
What are the policies about events that offer Continuing Education Units (CEU)?	21
Can PDG funding be used for leadership summits?	21
<u>General PDG Information</u>	<u>22</u>
Who is on the SWE PDG Committee?	22
How can I learn more about joining the SWE PDG Committee?	22
<u>Appendix</u>	<u>23</u>

Important Notes:

- Please refer to the electronic version on the SWE PDG Website <https://swe.org/support-swe/program-development-grants/> for the most up to date version of this document, which may be updated from time to time throughout each fiscal year. Paper and local copies of

this document are not controlled.

- *After the webpage, this document is the principal resource that should be used when submitting a request to the SWE PDG Committee for funding consideration. Grant authors / project managers are encouraged to review other references (Budget Worksheet, Sample Forms, etc.) for additional guidance.*

SWE PDG Eligibility

Who can apply for a PDG?

Members of the following SWE organizations can apply for a grant:

- Professional and Collegiate Sections
- Society Committees
- Members-At-Large (MAL)
- Global Affiliates
- Affinity groups

Can I apply for a grant if my section/committee/region already has an existing grant that we have not closed/concluded?

To be eligible to receive funding, your SWE organizational unit must meet all of the following criteria. If you are unsure if you meet these criteria, please email pdg-chair@swe.org and request a check of eligibility. Submitting a request for PDG funding when you are not eligible will delay your grant approval.

E1. SPONSORSHIP: The request for PDG funding must be sponsored by a formal SWE organization, such as a Section, MALs, Society Committee, Affinity Group or Affiliate. SWENext and K- 12 Educator members, along with Collegiate Interest Groups (CIGs) who wish to submit a request for funds must obtain the sponsorship of one of the above-mentioned organizational units.

E2. LEADERSHIP: The event must be SWE or SWE-Affiliate led. For the vast majority of our submitters and project managers, this means that a local SWE section or member must be leading this event. PDG funding cannot be used for events run by an individual or organization not affiliated with the Society.

E3. STANDING: Sections, or MALs requesting funds must be in good standing with the Society.

- a. They should have submitted their annual report to SWE Headquarters at the close of the last fiscal year (as required).
- b. The President and Treasurer or fiscal authority must be paid members of SWE.

E4. FINANCIAL: Minimum requests for PDG funding in all months must be at least \$250. PDG funds may only be disbursed to SWE organizations demonstrating a sound fiscal structure capable of accepting payments on behalf of the organization, such as a section, MAL, or affiliate bank account, or other payment and disbursement vehicle as legitimately allowed and utilized in the location.

- a. PDG funds may not be directly disbursed to any individual member.
- b. Sponsoring SWE organizations should be registered for SWE disbursements through bill.com, preferably through the e-pay method as it is the fastest. Contact epay@swe.org to register on bill.com.

- c. SWE Headquarters (SWE HQ) may also mail a check directly to the sponsoring SWE organization's Treasurer or fiscal authority at the organization address on file with HQ.
- d. For global affiliates, PDG HQ will work with you to determine the best course of disbursement.

E5. MEMBERSHIP: PDG funds are intended to support member initiatives that promote the mission of the Society. Funding requests must be submitted by a currently paid SWE member, the project must be managed by a currently paid SWE member, and the Treasurer or fiscal authority must be a different paid member than project manager.

E6. COMMITTEE REQUESTS: Funding requests from Society Committees must include a copy of Board Meeting Minutes or Notes clearly stating approval by the Board of Directors.

E7. FUNDING LIMITS: The sponsoring SWE organization which is requesting funds must meet all of the following criteria:

- a. No more than three open grants, and
- b. No overdue final reports, and
- c. No overdue reimbursements from requestor to SWE PDG,
- d. Maximum amount requested per application must be less than \$5000, and
- e. Total for all open grants and current submissions is less than \$15,000.

E8. REPEAT EVENTS: Your SWE group must meet the following to be eligible for PDG Funding. If your event has occurred or received funding in the past, the committee will evaluate for event development, growth, and work to find future funding. If the event has not grown or obtained new funding, second time events will receive a maximum of 50% of funding. Third time and greater will not be eligible for funding.

What types of events can be funded by PDG? / What is the funding criteria for PDG?

EVENT TYPE: Most PDG funding is limited to events (known date, location, audience, etc.) that fall into two categories:

- Advocacy (includes K-12 and Adult Outreach)
- Professional Development (PD)

Advocacy is defined as activities planned and delivered by SWE members, alone or in concert with others not necessarily SWE members, which further the mission of the Society.

- ***K-12 Outreach*** is defined as activities focused on engaging girls from kindergarten to 12th grade in engineering and technology-related topics via hands-on experiential learning. SWE's partnership with FIRST (robotics) is included. SWENext activities are included. Parent and Educator Programs (PEP) are also included in K- 12 outreach.
- ***Adult Outreach*** would include activities focused on adult influencers including parents and K-12 educators, community college and university students who are not yet engineering students, and similar. More details can be found in the Advocacy Grants section of this document.

Professional Development is defined as an event or series of events planned and delivered by SWE members, alone or in concert with others, focused on learning a skill that advances SWE members professionally as engineers and technologists. Professional development events are targeted to collegiate or professional members; incidental participation of non- SWE members is acceptable. More details can be found in the Professional Development Grants section of this document.

At this time, these are the only type of events funded by PDG.

EVENT DETAILS: Events are defined as having a known date, location, and audience.

- **KNOWN DATE:** If the event is a long-term (several months) program where the event location will change, please provide these details and include the event locations under review or historical locations.
- **AUDIENCE:** A defined audience describes who is going to attend your event. Examples include: professionals, collegiates, 6-8th grade girls, and similar information.
- **LOCATION:** A defined location includes the venue name and address that would facilitate an online review for additional information.

o If your event location cannot be finalized until funding has been secured, please include the assumed event location and any additional locations being considered.

Application, Review Cycle & Grant Awarding

How do I apply for a PDG?

- a. Review your event and determine if it meets the PDG criteria for a sponsored event.
 - i. Make sure your event is at least 45 days after the first of the month in which the grant is to be reviewed.
- b. Review if your SWE organization is eligible to receive PDG funding.
- c. Collect all the information necessary for submission, including proposed project venue, date and duration, leader contact details, participants, learning objectives, activities, schedule, planning, volunteers, and estimated costs, along with relevant details regarding other funding sources.
- d. Submit an application to the cycle you want to be considered for. Application links and deadlines for each cycle are available on the PDG webpage: <https://swe.org/support-swe/program-development-grants/>
- e. All applications are submitted via SmarterSelect and you will need to create a username and password for this system. You are allowed to save and return to your application prior to submission.
- f. You will be required to enter the contact information for your organization's Treasurer or fiscal authority and they will be required to verify financial data for your organization prior to the deadline you are applying for. If verification is not completed by the application deadline, your grant will not be considered.
- g. During the submittal process, you may save a copy of your grant application for your records by using the print (via .pdf) feature.
- h. Your funding request will be identified with a PDG ID number following submittal that will be used for all further tracking.

What is the typical review cycle for a request for funds?

The PDG Committee reviews grant applications on a periodic basis. Minimum requests for PDG funding must be at least \$250. Please view the submittal calendar on our website for application deadlines and links.

A best practice is to submit your grant 3-4 months prior to the event (for global affiliates, this extends to 5-6 months due to the complexities in sending funds).

- a. **Grants cannot be submitted during an event or after an event has occurred.**
- b. Requests submitted with 45 days or less between the event date (the first occurrence if an event is recurring) and the first of the month in which it is reviewed are not eligible for funding.
- c. If a grant author / project manager decides to purchase items for the event and / or hold the event prior to receiving funding notification from SWE; they are doing so at their own risk. **There is no implied approval of funding from SWE PDG.**

How much detail does the PDG Committee look for in the application?

The PDG committee will review the event and will be looking for a clear description of the event, participants, organizers, duration and agenda, and budget, including the funding total, amount requested from the PDG, and the rest of the sources of funding, including:

- Who is this event for?
- What is the target number of participants?
- How much money, total and per person, is being requested?
- What is the agenda for the event?
- What are the learning objectives and associated activities?

- Is SWE collaborating with other organizations?

I have heard that we must have a “balanced budget” when submitting a request for PDG funding. Can you help me understand what this means?

Yes, a balanced budget needs to sum to \$0.00; meaning that you have a balance between your expenses and income. You cannot request more PDG funding than your event needs, nor can any extra PDG funds be applied to the organization's funds.

It is important to list all sources of income, including sponsorship and in-kind donations. The in-kind donations need to be listed at the fair market value of the donation to best represent the true cost of doing the event.

If you are requesting PDG funding to cover some of the costs of an event, but not all of them (i.e., you have other funding sources), please clearly specify which costs you are requesting be covered by PDG.

Submittal of the Budget Worksheet is required. It can be downloaded from the PDG website: <https://swe.org/support-swe/program-development-grants/>

Note that when submitting the final report after an event, only actual expenses will be reimbursed, up to the total awarded grant.

What type of detailed information should I include with budgeting information for events?

The budget worksheet defines several categories of expenses and income and has a column for you to include notes or calculations. These need to be filled out in detail:

- **Professional and contracted services** – Detail what professional services are needed and why, such as security, speaker fees, substitute teacher fees, data entry for surveys, online registration fees, child care services, etc.
- Include insurance here, if needed – this can be provided through SWE Headquarters and is typically free to about \$0.50 per attendee
- **Food** – Detail the meals and/or snacks that will be served and for how many.
 - PDG funding for outreach can be used for food for the event based on the length of the event:
 - 4 hours or less: snack only (usual and customary for USA \$2-\$6/person)
 - 4 – 6 hours: meal (usual and customary for USA \$8-\$10/person)
 - 6 – 8 hours: meal + snack
 - Over 8 hours: two meals
 - Virtual events may include food costs pending the above guidelines. The gift card or food order must be limited to the event date/time.
 - Professional development events do not have a minimum duration to allow meals, since it is expected that members pay for their own meals.
 - **Materials:** Detail what is needed, for how many attendees
 - Consumables – Materials for activities, brochures and/or other hand-outs, and giveaways which must be purchased.
 - It is recommended and expected that the cost for any giveaways at professional development events be paid through registration fee or by sponsoring section(s).

Small events	(1-45 attendees)	\$8-\$10 per attendee
Medium events	(46-75 attendees)	\$8-\$10 per attendee
Large events	(>76 attendees)	\$6-\$8 per attendee
Recurring events		\$15-\$25 per attendee

Recurring events examples FIRST teams, multi-week after school events

- SWE PDG funding may be used to purchase t-shirts if the event is at least 4 hours in duration, that is, the period when participants are interacting with SWE members and other volunteers.
 - T-shirts may also be purchased for volunteers if they are to be worn at the event to help participants find volunteers. T-shirt cost is expected to be in the range of \$8-14 per shirt. This range allows for ordering youth and adult sizes as well as geographical adjustments.

Small events	(1-45 attendees)	\$14 per shirt
Medium events	(46-75 attendees)	\$8 per shirt
Large events	(>76 attendees)	\$8 per shirt

- If you need assistance locating a supplier that can meet this target, please reach out to the K-12 Outreach Committee or PDG Committee Leadership Team.
- **Publications** – Detail what needs to be printed and how many copies. It is expected that online resources will be utilized where available.
- **Facilities** – Detail what facility costs apply and why, include A/V and staging here -- applicants should try to get these donated in-kind.
- **Publicity** – Detail costs for mailings and other promotional costs. It is expected that electronic resources will be utilized where available.
- **Income** – Detail what income is available (if any) – examples include registration fees, in-kind donations, and corporate sponsorships.
- **Insurance** – To determine if extra insurance coverage is needed, use this form: https://swe.org/wp-content/uploads/2019/05/swe_insurance_request_form_and_guidelines.docx

Are there any items typically not funded?

The following items are not funded by the grants:

- **Alcohol is never funded by SWE**
- **Cash prizes**
- Professional services such as secretarial, personal care/grooming, or meeting planning
- Travel expenses such as hotel rooms or local transportation for volunteers or adult influencers (other than in-lieu-of expenses for speakers, as approved)
- Gift cards as give-aways or speaker gifts
- Speaker gifts (if the speaker is being paid a fee to speak)
 - If your speaker was paid (even if not via PDG funding), you can use PDG funding to buy a greeting card and print a certificate for your speaker (~\$3-5). A gift in addition to the speaker fees is not recommended and will not be funded by PDG.
 - If your speaker would normally be paid to speak on this topic and volunteered their time for this event, you may use PDG funding to buy a small token of appreciation. The expense should be no more than \$50 and should not be cash or gift card.
- Capital equipment such as computers, printers or photography equipment
- Professional photography
 - In general, PDG funding cannot be used for photography/videography or

photographers/videographers as there is a potential issue with ownership and rights of the photos (especially with releases for minors). However, if the request is for an event which specifically involves photography/videography, such as creating an outreach video or bringing in a professional photographer to prepare head shots for professional portfolios, an exception may be justified.

- Salaries including camp counselor stipends
- General section planning meetings
- Scholarship awards
- Television ads
- Fundraising events
- SWE memberships (including Collegiate to Career memberships, transitions, and K12 Educator memberships)

If a grant author / project manager believes they require funding of these items for the event, they can include them in the budget with a full explanation of why the exception is requested.

Are there any events that are not funded based on the nature of the event?

There are several types of events that are typically not funded. They are:

- University recruitment or orientation events
- Outreach events that are for boys only –
 - If an event is open to both girls and boys, the PDG Committee will determine how much to fund at their discretion, typically by percentage of attendee gender
 - If events are open to both, activities should be targeted to girls and HOW should be explained in the submission.
- Non-SWE lead events – Events where it appears that SWE is not one of the key event planners
- Events that do not have significant hands-on or learning activity/activities for a major percentage of the contact hours (typical K-8 events should have at least 50% hands-on activity time, 9-12 should have at least 33% with additional educational activities such as lab tours or panels)
- Purely social events
- Networking events
- Fundraising events
- Region-sponsored conferences or leadership summits
- SWE section development events
 - Portions of the event may be funded due to their professional development nature
- Non-specific grants (i.e.: grants for stocking the shelves for various future events)
- Free professional events – in general, attendees are expected to pay a fee to attend events, even collegiate and outreach events.
 - Outreach scholarships are available for recipients of free and reduced lunches

Can PDG funding be used to pre-buy supplies for future events?

PDG funding can only be requested for a specific, already planned event and approved funding can only be used for that event. PDG funding cannot be used to “stock the shelves” for future, unplanned events and extra supplies for future events cannot be purchased. If SWE organizations can define multiple similar dated events at which supplies or collateral will be used, they may group events in a single request.

Can you use PDG funds for Giveaways?

For K-12 Outreach events, if the giveaway is essential or adds to the event and helps promote SWE's brand – yes, depending on the cost. An example would be a small bag for their take home activities that is branded with the SWE logo.

For Professional Development events, it is rare to pay for a giveaway and we often require that attendees' admission fee cover these expenses.

What are the judging criteria for PDGs?

Overall, we are looking for well-organized, fiscally responsible events that meet our criteria for funding. Requests for PDG funding should address at least one of the Society's strategic objectives:

- Advocating for females in engineering and technology
- Aspiring towards professional excellence
- Encouraging globalization

A prioritization process based on the criteria in Figure 1 will be used to finalize awards for the month. Grants which are not funded due to low priority may be resubmitted in future cycles.

For FY22, Recurring events that have been funded by PDG grants in past years will only be funded up to 50% of the total event cost (adhering to upper grant amount caps). This will be reflected in the Originality scoring.

		Evaluation Criteria	
	<i>Weighting</i>	0	9

Originality	9	Event is a repeat of previously funded event	Event uses customized off-the-shelf programming from SWE (Wow! That's Engineering, FIRST) or others (GSUSA badge activities)	Event uses original programming
Need	9	Applicant does not meet Financial Need Submitting organization's reported ratio of unrestricted assets to operating budget is greater than 2	Applicant operating with financial risk Submitting organization's reported ratio of unrestricted assets to operating budget is less than 0.5 but greater than zero (0)	Submitting organization's reported ratio of unrestricted assets to operating budget is between 0.5 and 2.0.
Alignment with SWE Strategic Outreach Goals	5	Proposed programming is not aligned to SWE objectives	Proposed programming aligns with/includes at least one of the following SWE strategic Outreach elements: SWENext involvement, Parent Educator Program (PEP), or K- 12 Educator outreach program	Proposed programming aligns with/includes ALL of the following SWE strategic Outreach elements: SWENext involvement, Parent Educator Program (PEP), or K-12 Educator outreach program
		¹ Net Assets to Operating Expenses ratio < zero (0) or > 3 will score zero (0) and are subject to review		
		² No specific Professional Development Strategic objectives have been identified		

Figure 1. PDG Rubric

For clarity, need will be characterized by the ratio between Net Assets and operating Expenses from the annual section financial report or EZ Form financial statement. At the end of each fiscal year, section Treasurers complete a financial report to headquarters online and should be able to provide an electronic or scanned paper copy of that to the member submitting the PDG request online for their information.

For global affiliates, affinity groups and sections not subordinate to SWE from a tax perspective, the EZ Form (Appendix) will need to be completed (available as spreadsheet in Resources on website after Login).

For all requesters, this should be submitted with their application. If the assets to expenses ratio is greater than 3.0, please also include details of assets, including bank statements, endowed scholarship accounts, etc.

For PDG prioritization purposes, any SWE organization who has negative net assets, or net assets greater than three (3) times operating expenses for the prior year, will be scored zero (0) on Need and may be rejected or have reduced award due to imprudent fiscal practices.

How do I know if my grant was approved?

You will receive a notification letter with further instructions. You may ask the committee chair for additional information. Committee members cannot give out the results of the committee decision.

Once my grant is approved, how do I get the money?

SWE-HQ will process payment to the SWE organization sponsoring your request based upon your banking information (for Global affiliates, SWE HQ will work with you to determine the best course of funding.). Typically, funding is received within 30 days that SWE-HQ sends you an award letter.

Event Best Practices & Closeout

What changes do I need to communicate after the award?

Communicate major changes. The grant author / project manager is required to communicate with SWE HQ and the PDG Committee Leadership Team if any of the following occurs:

- The grant author / project manager changes for your event,
- The Treasurer, or fiscal authority or official organization mailing address changes for your sponsoring group,
- The event is canceled, or
- The event is rescheduled for more than 1 month.

After my award, some of my costs changed. Do I need to resubmit my request?

If you are seeking additional funds, contact the PDG chair immediately for assistance at pdg-chair@swe.org. However, it is rare that additional funding would be provided. You should pursue other sources of funding or scale back your event to affordable limits.

If you are NOT seeking additional funding, you may re-distribute funds (within reason), as long as it is within the approved categories of expense and your event stays substantially the same. Receipts will still need to be provided for actual costs during the reconciliation process.

What do I do when the event is completed?

Submit the final report. You are required to submit your final report, including your final budget with actual amounts and receipts/invoices, *no later than 30 days after your event*. If you are a collegiate section, please submit by the end of the respective semester. Find the appropriate links on the PDG website: <https://swe.org/support-swe/program-development-grants/>

A final report should also include proof of event along with itemized receipts for all reimbursable expenses; proof of event may include, but is not limited to such items as:

- Surveys
- Photos
- Sign-in sheets

SWE PDG may request specific proof of event items as a condition of funding approval and failure to provide proof of event as requested, may result in incomplete or unsatisfactory final reports that may affect future PDG eligibility.

The committee reviews final reports and works to close out projects as they are submitted. It may take up to 2 months for a final report to be fully processed.

It is recommended that the organization's Treasurer or fiscal authority review receipts prior to submitting the final report. It is recommended to organize and label your receipts by budget category according to your submitted budget. The PDG committee will reconcile expenses vs. disbursements to determine if unused funds must be returned to SWE. If unused awarded funds are less than \$100, the organization will be allowed to retain funds for use in a future event. If unused awarded funds are more than \$100, they must be returned to SWE-HQ to be applied back to other PDG grants.

No funds will be released in excess of the amount used for the event and any unused funds must be returned to SWE HQ. **Failing to return excess funding to SWE HQ in a timely manner will result in the sponsoring group being ineligible for future PDG funding.**

What if I do not use all of my approved funding from PDG?

Funds are awarded specifically for each event. Unspent funds are not allowed to be retained by the grant author / project manager and must be returned to SWE HQ during the grant closure process except overages of less than \$100. These may be retained for use with future events. Unspent funds cannot roll over to another event.

Instructions on returning unspent funds will be sent to the grant authors / project managers during the closeout process. Please wait until the final report has been submitted and your grant is in the closeout process to return unused funding as you will receive a detailed email with the instructions. Returning funds outside of this process will delay future funding notifications.

How do we reference the PDG funding at our event?

It is a requirement to give credit for the PDG funding you receive, typically in the form of:

Opening Presentation: Credit should be part of the introduction of the event and should appear in opening presentations using the same text as below under Programs and Proposed Schedule.

Programs and Printed Schedule: In text, this should be as follows:

“This event was made possible by a Program Development Grant with the Society of Women Engineers”

LOGOS: If you need to recognize your PDG funding in a graphical format (such as on t- shirts), use the SWE logo with “This event was made possible by a Program Development Grant from the Society of Women Engineers.” under the logo. Be sure to follow SWE’s logo and usage guidelines (details and downloads can be found in the “SWE Resources” area once you have logged into the swe.org homepage).

SPONSORSHIP LEVELS: If you have other sponsors for your event, you are expected to provide SWE the level of branding that any sponsor would receive for the same dollar amount. For example, if your grant is funded at \$3,225 and your event has a Gold Sponsorship at \$3,000 – SWE should be listed as a Gold Sponsor and receive the same branding.

You must acknowledge SWE in all publicity and press releases.

Please send any press releases to Trish Kolar at trish.kolar@swe.org in advance of the release to receive approval.

SWE PDG K-12 Outreach Grant Questions

How many girls have to participate in order to be eligible for a grant?

How many volunteers?

You can have as few as a handful of girls and one SWE volunteer and qualify for PDG funding. The more girls that participate, the better, but many small grants can be as good as a few big ones. Typically, we like to see girl-to-volunteer ratios of 6:1 or better. All volunteers do not have to be SWE members, but SWE must be leading the grant activity.

Can we receive funding if the event includes boys?

It depends. PDG funds are earmarked primarily for females and the adults who influence them (K-12 Outreach). PDG will likely determine the percentage of females, which determines funding to be awarded.

For example, let's say a SWE organization sponsored an Introduce a Girl to Engineering Day event, and there were 250 girls and 250 boys participating, along with 150 volunteers. Lunch for the volunteers runs \$10/ head, plus they need supplies totaling \$1500.

SWE PDG funding would cover half of the volunteers' lunches (\$750) and half of the supplies (\$750) under the assumption that half of each were being used to support the girl participants. As the percentage of girls goes up or down, so does the funding.

Can I get funding for events with families and teachers?

Absolutely, adult influencers are a critical piece of SWE's mission and goals.

What is the typical amount of money an outreach event is expected to cost?

It depends on the event or activity venue, the number of participants and volunteers, and the Event complexity. Looking at consumables and take-home expenses: \$15-\$35 per girl is considered average for events (depending on event duration) along with \$15 per volunteer or adult influencer (volunteer cost includes a T-shirt, the adult influencer cost includes items such as brochures and other hand-outs).

Small events	(1-45 attendees)	\$20-\$35 per attendee
Medium events	(46-75 attendees)	\$15-\$25 per attendee
Large events	(>76 attendees)	\$12-\$20 per attendee

If your event is significantly more expensive than these guidelines, you should re-examine your costs or scale back your event as you are likely spending more than necessary for a high quality outreach event.

Do we need to charge an admission fee for attendees (girls and/or adult influencers) for outreach events?

Yes! Feedback indicates better attendance and fewer no-shows when a nominal admission fee is charged. Data shows that the percent of event no-shows dramatically decreases when even a small admission fee is charged for events that have pre-registration. It does depend on the event

or activity venue, but in general, it is expected that participants will pay a nominal fee (approximately \$5-\$10 per attendee). However, if the event is specifically targeted towards underrepresented students (commonly defined as eligible for reduced price lunch program at their school), the event can be free to attendees. Please be sure to specify this income in your application.

Is there guidance on the percentage of time that should be focused on hands-on activities for a K-12 Outreach Event?

It is recommended that a minimum of 40-50% of the event should be spent on hands-on activities for middle school and younger, 30-40% for high school attendees.

Based on SWE's K-12 Outreach Committee's recommendations, requests should contain the necessary information to calculate the percentage (%) of hands-on activities during the event (for example, a detailed schedule or agenda for the day). Research shows that hands-on activities are the most impactful part of K-12 Outreach events. We recommend the percentage of hands-on be as high as possible, but it will vary based on the age range and event.

Can you use PDG funds for volunteer gifts?

In general, no, but you may use PDG funding to buy a greeting card and print a certificate for your volunteers (~\$3-5). No other gifts may be funded.

Are there other sources of funding for K-12 Outreach Events from SWE?

At times, the SWE K-12 Outreach Committee accepts grants for specific events (for example, WOW! Innovation Challenge, Girls Inc., or FIRST). These grants fall outside the PDG Committee jurisdiction; please contact the K-12 Outreach Chair at outreach-chair@swe.org for more information.

Are there any outreach event best practices that the PDG committee recommends?

The program development grant committee recommends the following things when planning an outreach event:

- Hold a face-to-face volunteer training prior to the event. At this training, provide volunteers with a detailed schedule of the event as well as the opportunity to complete the activity the children will be doing and ask questions about it so things go smoothly the day of the event.
- Provide additional optional activities to be done during registration and at the end of the rotations to keep girls occupied if they finish early.
- Partner with other organizations to plan the event. Potential organizations include other SWE sections, companies on SWE's Corporate Partnership Council, technical organizations, schools and universities, and local science centers.
- For a step-by-step process you can refer to when planning your outreach event or program, please visit SWE's [Outreach Toolkit](#) weblinks.

Funding FIRST (For Inspiration and Recognition of Science and Technology) robotics teams

Requirements

- i. **SWE LEAD:** To qualify as SWE-led, at least one SWE member must be with the team (face to face) for at least 50% of the time the team meets. For example, if the team meets two days a week for an hour each day; there must be a SWE member present for one of those meetings. K-12 educator members qualify as SWE members.
- ii. **SWE SPONSOR:** To qualify as SWE-sponsored, a SWE organization (such as collegiate or professional sections, MALs, or others), must agree to sponsor the grant request and disburse funding after PDG disburses to the Treasurer of record.
 - If such FIRST sponsorship causes the SWE organization to reach their three-grant cap, the cap will be waived until the grant is closed, should the section wish to submit an interim request.
 - It is up to the Submitter to solicit collaboration from the local SWE organization. If you can't find a local section nearby using this link, <https://swe.org/membership/sections/>, contact the PDG chair at pdg-chair@swe.org.
- iii. **TEAM MAKEUP:**
 - The team must be at least 50% girls, all members of SWENext.
 - New teams may start with fewer than 50% girls with the understanding that the team would achieve > 50% for future year funding.
 - At least two girls must be in leadership roles such as president, captain/co-captain, design leader, build leader, driver, or similar.
- iv. **COVERED EXPENSES:** Expenses may include registration fees, mileage (at \$0.575/mi), snacks, facility rental (if free space is not available for building and testing), supplies (including kits), and team collateral. They may not include any capital equipment as defined by the United States IRS, nor may they include lodging or professional fees.
- v. **OTHER DONATIONS OR INCOME:** If other donations or additional income is received by team after award that is not identified at the time of submittal, overages will be applied to PDG grants first at the time of final report and reconciliation.
- vi. **TOURNAMENT REGISTRATION FEES:** PDG funding can be requested for the registration fees for up to 2 tournaments. If the team qualifies (merit based) / places for additional tournaments, the registration fees for those additional tournaments will be considered for funding.
 - If the team qualifies for additional tournaments, please contact the PDG Chair ASAP for consideration of additional funding.

What about FIRST Regional events? Can SWE PDG funding support them?

It depends. PDG funds are earmarked primarily for females and the adults who influence them (K-12 Outreach). Determine the percentage of females, which determines funding to be awarded.

So, let's say a SWE organization sponsored a FIRST regional event, including a SWENext and local section booth, and there were 250 girls and 250 boys participating, along with 150

volunteers in various capacities as judges, referees, inspectors, etc. Lunch for the volunteers runs \$10/ head, plus they need AV at another \$1500.

SWE PDG funding would cover half of the volunteer lunches and all of the AV, the logic being the AV is needed to serve the girls first. As the percentage of girls goes up or down, so does the funding.

I am a professional K-12 educator member interested in getting some funding to set up a FIRST team at my school. How do I go about doing that?

SWE PDG does not disburse funds directly to any SWE members – all payments go through the various organizations' Treasurers or fiscal authority to allow traceability of funds and some fiscal oversight at the source. K-12 Educator members should collaborate with their local SWE organizations to facilitate funding

SWE PDG Professional Development Grant

Questions

How do you define a professional development event?

In order to be funded, a professional development event must have a learning objective and accomplishment of the learning objective must be reinforced throughout the event agenda. For example, if the professional development event was to teach the skill of negotiation, the ideal agenda might include a speaker giving an overview of the skill and the networking time on the agenda would include structured events to practice this skill and increase the impact and learning.

The agenda will be reviewed by looking at the percent (%) of time spent during the event on learning and practicing the skill.

What is the typical amount of money a professional development event is expected to cost?

It depends on the event or activity venue, the complexity of the event, and the number of participants. \$15-\$60 per attendee is considered average. The cost is largely driven by the venue and meal choices so it is important to consider when planning events.

Small PD events	(1-15 attendees)	\$15-\$60 per attendee
Medium PD events	(16-30 attendees)	\$30-\$50 per attendee
Large PD events	(>31 attendees)	\$40-\$45 per attendee

Are there any precedents, guidelines, or best practices to be aware of in terms of professional development events?

Yes, while we cannot list everything here, below are some of the common ones:

- Provide speakers with expectations at the beginning – who is the target audience, what should the speaker provide, how long is the presentation, how technical should the presentation be, can the speaker discuss their company/its products/sell those products/services, etc.
- Start the event off with an icebreaker or an interactive team event to get people talking to each other
- Partner with other organizations to plan the event. Potential organizations include other SWE sections, companies on SWE's Corporate Partnership Council, technical organizations, schools and universities, and local science centers.
- The general guide for a room rental rate should be no more than \$100/hour for a room size of 50 adults. Look for opportunities to leverage free rooms at sponsoring company sites or universities.
- Professional speakers that are charging a speaker fee should give a not-for-profit discount when speaking to any SWE organization; you should list the discount as an in-kind donation from the speaker in your budget. A typical speaker fee ranges from \$0 (donated in kind) to \$1000 with \$500 as the average amount paid.
- PDG funding cannot be used for photography or photographers; as there is a potential issue with ownership and rights of the photos.
- To qualify as a Professional Development Event, there must be a learning objective to gain one or more skills and corresponding activity. Your submission needs to state this objective (i.e.: session learning objectives, speaker abstracts, etc.) and the agenda for the event should add value to this skill.

- Each objective should be in the form of: *By the end of this event, the participant will be able to...*
- If your event has a Professional Speaker, PDG funding can only be used to either:
 - Pay the speaker a fee for their services, or
 - Pay the direct travel and lodging expenses for the speaker.

You cannot request both with PDG funding.
- If your event has a professional speaker that is charging a fee, you must submit a formal speaker biography or website link with your grant submission. This will be used to make sure the speaker is at the appropriate level (i.e.: would be able to provide CEUs).
- Continuing Education Units/Professional Development Hours, if needed, can be provided through SWE Headquarters. Contact learning@swe.org for details on submitting paperwork for consideration of CEU/PDH.

Do we need to charge an admission fee for attendees for a professional development event?

Yes. In general, it is expected that participants will pay anywhere between \$5-\$100 per attendee depending on duration and intent of the event. SWE professional members are generally expected to at least pay for their food and giveaways. Please be sure to specify this fee and resultant income in your request. Typical meal costs:

Small PD events	(1-15 attendees)	\$15-\$60 per attendee
Medium or Large PD events	(>16 attendees)	\$20 per attendee

Can you apply for a PDG that has non-SWE members in the audience?

Yes, but you must structure the event to have a graduated registration cost based on membership. For example, a non-SWE member should pay more for the event than a SWE member. This helps strengthen our benefits of membership.

What are the policies about events that offer Continuing Education Units (CEU)?

PDG funding may be used to pay fees associated with processing CEUs for your event when SWE HQ is used to process them or the cost is equivalent to SWE HQ's processing fees.

Events that offer CEUs need to have a graduated pay scale for membership that is significant between members and non-members.

Can PDG funding be used for leadership summits?

Local sections may request and sponsor portions of leadership summits, such as a K-12 outreach event or a professional development event that would be open to more than just the section attendees.

General PDG Information

Who is on the SWE PDG Committee?

The SWE PDG Committee consists of SWE members representing diverse geographical regions, varying levels of experience, and membership (collegiate, professional, life, etc.). They are a group of individuals who are passionate about helping SWE fund programs to advance our mission.

The Committee has a leadership structure that includes a Chair, Chair-Elect, Board of Directors Representative (Society Treasurer), and a SWE HQ Staff Liaison.

How can I learn more about joining the SWE PDG Committee?

Please contact the SWE PDG Committee Leadership Team (pdg-chair@swe.org) for more details on the responsibilities of committee membership and any openings.

Appendix - EZ Form

Fiscal Year: July 1, 20_____through June 30, 20_____ YTD Final

This report is due no later than 30 days following the close of the fiscal year (June 30).

Section Number_____ SWE Org Name _____
 Taxpayer Identification Number (TIN) _____
 President/Section Permanent Address _____

Income		
Dues Rebate Income	(1)	
Donation Income (Attach lists of donors and amounts)		
Scholarship Donations	(2)	
Donations for Specific Projects	(3)	
General Donations	(4)	
Interest Income	(5)	
Other Income (please describe)	(6)	
Receivables (Donations promised but not yet received)	(7)	
Total Income (Sum of lines 1-7)	(8)	\$0.00
Expenses		
Scholarships Awarded (Attach list of recipients and amounts)		
Administrative Expenses	(9)	
Other Expenses	(10)	
Payables	(11)	
Total Expense (Sum of lines 9 - 12)	(12)	\$0.00
Net Income (Subtract line 13 from line 8)	(13)	\$0.00
Assets and Liabilities		
(Attach copies of your most recent account statements from banks, school, & other financial institutions.)		
Cash, Checking Accounts, etc.	(14)	
Receivables (from line 7)	(15)	\$0.00
Payables (from line 12)	(16)	\$0.00
Estimated Net Assets at End of Fiscal Year (Add lines 15 & 16, subtract line 17)	(17)	\$0.00



Name _____ Signature: _____ Date: __
Address: _____

Mail/Zip
City: _____ State _____ Code: _____

Phone: _____ E-Mail Address: _____

-



Name _____

Signature: _____ Date: __ Address: _____

Mail/Zip
City: _____ State _____ Code: _____

Phone: _____ E-Mail Address: _____

-

130 East Randolph Street, Suite 3500 Chicago, Illinois 60601
T: 312.596.5223 F: 312.596.5252 E: hq@swe.org