

**GUARANTEE ID:**  
224914

**Organization / Agency Information**

<b>Organization/Agency Name:</b> Planned Parenthood of Wisconsin Inc		
<b>Physical Address:</b> 302 N. Jackson St. <b>City/State/Zip:</b> Milwaukee, WI 53202		
<b>Mailing Address:</b> 302 N. Jackson St. <b>City/State/Zip:</b> 25 Milwaukee, WI 53202		
<b>CEO or Director:</b> Ms Tanya Atkinson <b>Title:</b> President & CEO		
<b>Phone:</b> (414) 289-3747	<b>Fax:</b> (414) 271-3975	<b>Email:</b> tanya.atkinson@ppwi.org
<b>Contact Person:</b> Laura Emir		<b>Title:</b> Director of Development
<b>Phone:</b> (414) 289-3747	<b>Fax:</b> (414) 271-3975	<b>Email:</b> laura.emir@ppwi.org
<b>Web Site Address:</b> http://www.ppwi.org		<b>Tax ID:</b> 39-0863391

**Program / Grant Information**

**Interest Area:** ☐ Animal Protection ☐ Education ☐ Environment ☒ **Health** ☐ Human Dignity

<b>Program/Project Name:</b> Cuidándonos Creceremos más Sanos (CCmaS) Health Education Program			<b>Amount of Grant Requested:</b> \$25,000
<b>Total Organization Budget:</b> \$26,959,757	<b>Per 990, Percentage of Program Service Expenses (Column B/ Column A x 100):</b> 77%	<b>Per 990, Percentage of Management &amp; General Expenses Only (Column C / Column A x 100):</b> 18%	<b>Per 990, Percentage of Management &amp; General Expenses and Fundraising (Column C+D / Column A x 100):</b> 23%
<b>Purpose of Grant Request (one sentence):</b> Train Latina Promotores to educate Latino youth and adults on sexuality and reproductive health to reduce health disparities related to teen pregnancy, STIs and cancer.			
<b>Program Start Date (Month and Year):</b> 1/1/2018		<b>Program End Date (Month and Year):</b> 12/31/2018	
<b>Gimbel Grants Received: List Year(s) and Award Amount(s)</b> 2016: \$50,000			

*09/11/2017*

**2017 S. L. Gimbel Foundation Fund Grant Application****Welcome Page****Welcome to the 2017 S. L. Gimbel Foundation Fund Grant Application**

Thank you for applying to the S. L. Gimbel Foundation Fund Grant. The mission of the S.L. Gimbel Foundation is to enhance the quality of life for people and animals by providing effective support in the Founder's specific fields of interest: Animal Protection, Education, Environmental Protection and Enhancement, Health, and Human Dignity. Please take a moment to review the grant application guidelines before continuing the process (use "Guidelines" link above). After you have read and understood the guidelines, please proceed with the grant application process. Should you have any questions, please check the "FAQs" link above or refer to "Application Procedures" on our website. If your questions are not answered via FAQs or Application Procedures, contact us using the "Contact Us" link above.

**Organization Information**

**NOTE: If you have already started an online application and would like to resume, please [CLICK HERE](#) to login to your Applicant Account Page.**

**Organization/Agency Information**

Organization/Agency Name

(If operating as a DBA, enter DBA name here)

Planned Parenthood Of Wisconsin Inc

Legal Name

Planned Parenthood Of Wisconsin Inc

Tax ID

390863391

Tax Status

501(c)3

Organization Mailing Address

Street Address or P.O. Box

302 N. Jackson St.

City

Milwaukee

State

WI

Zip Code

53202

Organization Physical Address (Street No. and Name, City, State, Zip)

*No residential addresses, please*

302 N. Jackson St.  
Milwaukee, WI 53202

Website Address

<http://www.ppwi.org>

**Organizational Leadership** (Please list CEO, President, Board Chair, Executive Director)

Prefix

Ms

First Name

Tanya

Last Name

Atkinson

Title

President & CEO

Work Phone

(xxx-xxx-xxxx)

414-289-3749

Extension

Cell Phone

(xxx-xxx-xxxx)

Fax

(xxx-xxx-xxxx)

414-271-3975

E-mail Address

[tanya.atkinson@ppwi.org](mailto:tanya.atkinson@ppwi.org)

**Program/Project Contact Person**

Check this box if the Program/Project Contact Person is the same as the organization's primary contact listed above

Fields in this section will auto-fill.

Prefix

Ms

First Name

Laura

Last Name

Emir

Title

Director of Development

Work Phone

(xxx-xxx-xxxx)

414-289-3747

Extension

Fax

414-271-3975

E-mail Address

laura.emir@ppwi.org

## **Organization/Agency Background**

### **Organization Background**

What is the history, mission, and purpose of your organization?

Established in 1935 with the opening of the Maternal Health Center in Milwaukee, the organization became an Affiliate of the Planned Parenthood Federation in 1949. Significant expansion occurred in the 1970s when PPWI opened 17 clinics in urban and rural communities across Wisconsin. Support from the African American and Hispanic communities led to the opening of two new Milwaukee Centers (Mitchell Street and Capital Court) in the 1980s. Today, Planned Parenthood of Wisconsin (PPWI) operates 21 health centers serving almost 60,000 individuals across the state.

The mission of PPWI is to empower all individuals to manage their sexual and reproductive health through health services, education and advocacy. As a strong advocate for women and girls, PPWI's objectives are to: (a) provide the highest quality reproductive and sexual health care at 21 Centers located throughout the state; (b) provide comprehensive, medically accurate and culturally sensitive education; and (c) conduct advocacy to create an atmosphere that fosters legislative support of and activist engagement around public policies that enhance the reproductive health of our state. PPWI is Wisconsin's largest reproductive health care provider.

### **Length of Service (number of years)**

How long has the organization been providing programs and services to the community?

80

## Organizational Accomplishments

What are some of your past organizational accomplishments in the last 3 years?

PPWI's goals are to secure and protect confidential access to comprehensive family planning services, provide comprehensive prevention education, and create an atmosphere that fosters public policies that enhance the reproductive health of our state. In the past three years:

1. PPWI has provided high quality reproductive health services to approximately 60,000 individuals each year. In 2016, PPWI instituted electronic health records and other efficiency strategies to increase availability of staff time with patients. Currently, training is being conducted on the "10 best practices" for contraceptive counseling for all health center staff.
2. Since 2015, PPWI has increased its focus increasing awareness of the need for testing for sexually transmitted infections (STIs). STIs are increasing dramatically among youth and young adults under age 25. Milwaukee, our largest metropolitan area, is ranked in the top 10 U.S. cities for STIs and more than 70% of STI infections are among youth under age 25. PPWI implemented the "Get Yourself Tested" campaign and resulting in a 50% increase in STI testing.
3. PPWI has also increased its focus on training youth as health educators providing one-on-one peer education to more than 400 youth in our health centers.
4. In total, PPWI reaches 8,000 -- 10,000 individuals annually with outreach, education, training and media campaigns designed to promote healthy behaviors that prevent unintended pregnancy and STIs.
5. PPWI has works with parents and caregiver on how to talk to teens about pregnancy and STI prevention. Parents can be the best sexuality education for youth. Our training ensures that adults in our community can provide young people with honest answers about sex and how to stay healthy.
6. Through community organizing and outreach, PPWI has more than 300,000 supporters - many of whom are volunteers who work with us on a regular basis.

## Programs and Activities

What are some of your current key programs and activities? Describe the communities you serve. Include populations and geographic locations.

PPWI reaches women, men and teens across the state in three core service areas:

(a) Reproductive Health Care: In 2016, PPWI provided reproductive health services to 59,762 individuals at 21 health centers in Wisconsin. Services included annual wellness exams, family planning support, contraception and abortion care, screening for breast and cervical cancer, pregnancy testing and counseling, sexually transmitted disease and HIV testing.

(b) Community Education: In 2016, PPWI provided medically accurate and prevention-based education and training to 8,021 Wisconsin youth and adults through workshops, neighborhood outreach and peer education on sexuality and reproductive health. Services included 610 Home Health Parties for 1,135 Latino youth and adults; workshops at 71 school and community-based agencies reaching 1,298 youth; 13 workshops for 262 professionals and information/education for more than 5,000 participants at health fairs and other community events.

(c) Advocacy: Our goals are to secure, protect and enhance confidential access to comprehensive family planning services, to strengthen the reproductive justice movement in Wisconsin and create an atmosphere that fosters legislative support of and activist engagement around public policies that enhance the reproductive health of our state. PPWI's communications and community organizing activities reached 326,502 supporters and 33,431 email activists in 2016. PPWI staffed 412 neighborhood outreach activities around the state.

The majority of individuals served at our health centers (87%) are women and teen girls, more than 71% live at incomes at or below 150% of the poverty level, and 56% are African American, Hispanic, Asian American, American Indian or multi-racial. PPWI's 21 health centers are located across the state from Kenosha County in southeast Wisconsin to Green Bay (northeast) and Eau Claire (northwest). Six PPWI health centers are located in Milwaukee County, the largest metropolitan area.

## Program/Project Information

### Program / Project Information

#### Interest Area

Health

#### Program or Project Name

Cuidándonos Creceremos más Sanos (CCmaS) Health Education Program

#### Amount of Grant Requested

Use whole dollars, do not use \$ sign, comma, or decimal

25000

#### Total Organization Operating Budget

Use whole dollars, do not use \$ sign, comma, or decimal

26959757

#### Per 990, Percentage of Program Service Expenses

Column B divided by Column A, x 100

77

#### Per 990, Percentage of Management & General Expenses Only

Column C divided by Column A, x 100

18

#### Per 990, Percentage of Management & General Expenses and Fundraising

Column C + Column D, divided by Column A, x 100

23

#### Purpose of Grant Request

Please summarize the project (in 25 words or less).

Train Latina Promotores to educate Latino youth and adults on sexuality and reproductive health to reduce health disparities related to teen pregnancy, STIs and cancer.

#### Project Start Date

Month and Year

January 01, 2018

#### Project End Date

Month and Year

December 31, 2018

#### Gimbel Grants Received

List Years and Award Amounts

**Statement of Need**

Specify the community need you want to address and are seeking funds for.

Latino families are a rapidly growing part of southeast Wisconsin's population. PPWI has worked hand-in-hand with the Latino community to create, build, evaluate and expand outreach, education and other strategies to increase access to culturally competent reproductive health education and care. The Multicultural Program Manager, Maria Barker, has developed a community health worker training for Latinos to become "Promotores" within the community, providing reproductive health education in small group settings. The success of this program has led to more than 800 workshops held annually in several cities in southeast Wisconsin.

Conditions such as institutional and social barriers, language, personal health beliefs, generational differences, and lack of culturally-informed education have led to reproductive health inequities and greater risk for adverse reproductive health outcomes for Latina women and girls.

For instance, although overall there is a significant reduction in Wisconsin teen births, the rate among Hispanic teens in 2015 was still high (34 per 1,000) as compared to White teens (10 per 1,000). The Latino population has the second highest rate of HIV diagnoses for adults and adolescents in Wisconsin (Wisconsin Dept. of Health Services). Cancer is the leading cause of death among Hispanics accounting for 22% of deaths (American Cancer Society Facts & Figures). Invasive cervical cancer incidence rates among Latinas are more than twice those of non-Latina white women, and mortality rates for cervical cancer are over 40% higher among Latinas primarily because Hispanic women are less likely to get regular Pap tests which can detect the disease at an early, curable stage. Latinas are also more likely than white women to be diagnosed with later stage breast cancer. Early detection remains an elusive goal for Latina women, as breast cancer is the leading cause of cancer deaths among Latinas.

During a recent two-year evaluation process, a new curriculum "Cuidandonos Creceremos mas Sanos" (CCmaS) was designed by program participants and Promotores. Promotores have been the essential component to this project -- providing their community knowledge and honesty in creating a culturally inclusive approach, and using the training they receive for peer outreach, education and advocacy.

The CCmaS project continues to build culturally competent strategies to improve health that are embraced by the Latino community.

**Project Description**

Describe your project. How will this project enable this organization to better meet community needs? What is unique and innovative about this project?

The purpose of the CCmaS Program is to recruit, train and utilize skilled Latina Community Health Promoters (Promotores) to provide reproductive health and sexuality education in a culturally supportive model to Latino youth and adults, thereby increasing Latino community knowledge of and confidence in using health resources. Promotores attend a 40-hour training to learn the CCmaS curriculum, how to recruit community members to "host" home health party workshops, and how to facilitate the curriculum topics. Each year, Promotores and staff facilitate more than 500 home health parties with 800 unduplicated attendees (participants attend an average of 3 home health parties). Much of the curriculum and materials have "evolved organically" and are designed to ensure that individuals understand the information provided in order to make appropriate health decisions. The entire curriculum was evaluated in partnership with the Medical College of Wisconsin.

Community Needs: The CCmaS project aims to increase understanding of the need for preventive measures, such as early cancer screening, teen pregnancy prevention measures, and HIV/STI testing among Latino teens and families so that participants access needed health services. Also, combining a discussion of cultural values and accurate information about reproductive and sexual health can drastically



improve health outcomes. On an individual level, participants may feel more empowered about their own body, and experience increased self-knowledge of their own sexual and reproductive health. Promotores also feel more empowered economically by receiving training and remuneration for the education and outreach they provide to their community. Home health parties provide people a safe environment for individuals to learn about that role that cultural beliefs may play in their reproductive and sexual health.

This program is distinctive because of being developed by and for the Latino community. Maria Barker, Multicultural Program Manager, is a bilingual community educator of Mexican origin. She initiated the "home health party" model with Latino families in 2003 to build trust and increase access to cancer prevention screening and sexual and reproductive health education and services. The program has been evaluated and modified over the past ten years based on input from Promotores and participants. Maria has been recognized locally and nationally for her work. Rosario Angulo, the other primary staff person, is a bilingual educator from Peru and provides expert culturally specific education and training of Promotores. Promotores of multiple ethnicity and backgrounds are recruited and trained as facilitators of the home health parties and are provided a stipend for their efforts. Innovative concepts include:

- Creating a "brand" and educational materials informed by the target population via focus groups.
- Training of Latino men, women, and teens, including representatives of institutions such as churches and organizations.
- Recruiting "hosts" to invite friends, family and other members of their social networks to attend "home health parties"
- Providing 3-5 home health party topics to the same group so that the education provided is ongoing and not just a "one time occurrence."
- Providing home health party topics based on the request of the host and his/her group.

**Project Goal, Objectives, Activities, Expected Outcomes, and Evaluation:** In fields below, state in the following order: **1. ONE Project Goal** that is a broad, aspirational statement of purpose for the project and **ONE Objective** that is a specific, measurable, verifiable, action-oriented, realistic, and time-specific statement intended to guide your organization's activities toward achieving the goal. **2. Specify the Project Activities** you will undertake to meet the objective and number of participants for each activity. **3. Expected Outcomes** are the individual, organizational, or community-level changes that can reasonably occur during the grant period as a result of the proposed activities or services. What are the key anticipated outcomes of the project and impact on participants? State in quantifiable and verifiable terms. **4. Evaluation** How will progress towards the objectives be tracked and outcomes measured? Provide specific information on how you will collect relevant data and statistics that meet your objective and validate your expected outcomes in a quantifiable manner as you describe your evaluation process.

## 1. Project Goal and Objective

Planned Parenthood of Wisconsin (PPWI) is committed to reaching vulnerable populations who have limited access to reproductive health education. The goal of the Cuidándonos Creceremos más Sanos (CCmaS) Health Education Program is to improve the reproductive health and knowledge of Latina women and girls and reduce health disparities among this population related to breast and cervical cancer, teen pregnancy and sexually transmitted infections.

The objective is to recruit 20 current and new Latina Community Health Promoters (Promotores) to participate in 40 hours of training from January -- March 2018. In turn, the Promotores who complete the training will provide a four-session comprehensive reproductive health and sexuality education series, in a culturally supportive model, to a minimum of 800 unduplicated Latina women, men and teens in the greater Milwaukee area by the end of 2018.

## 2. Project Activities



A lack of culturally-informed health education has placed Latinos at greater risk for adverse reproductive health outcomes, particularly in low-income, Spanish-speaking only families. The CCmaS project was developed through focus groups with the Latino community for the purpose of providing innovative, culturally competent sexuality and health education by trained Promotores. Promotores have developed a curriculum that speaks directly to the community's needs for assistance with issues ranging from basic reproductive/ sexual anatomy education to increasing health literacy. This program was formed because of barriers such as language, personal health beliefs, social network beliefs, access to health screenings, and a lack of culturally-informed health education.

Project Activities are:

1. By March 2018, to increase knowledge and skills of 20 Latina Promotores to facilitate the CCmaS curriculum for Latino youth and adults in home health parties. The training is 40 hours over 12 weeks.
2. Conduct a minimum of 400 health education modules via home health parties reaching 800 unduplicated Latina women, men and teens. The Promotores model builds relationships and trust. Participants attend several introductory modules hosted by community members in their home, based on their choice of topic including: (1) Cultural Values, Effective Communication and Sexuality Across the Life Span; (2) Birth Control Methods, Sexually Transmitted Infections and Reproductive Cancers; (3) Advocacy, Self-Advocacy and Community/Health Resources; and (4) A guided field trip to at least one community resource.
3. Based on HHP participant request, provide further education on specific health topics e.g. HPV and the vaccine, Menopause, Puberty, etc. at 100 home health parties.
4. Continue to work with five youth and young adults as advisors on the project to create new directions for outreach and education with Latino youth.
5. Evaluate and refine this model with members of the target population including Promotores and hosts of home health parties.

### **3. Expected Outcomes**

- 1) 20 youth and adult Latina Promotores will attend 12 weeks of training to implement Cuidándonos Creceremos más Sanos (CCmaS) curriculum (Jan-March 2018); a minimum of 12 will complete training and implement home health parties.
- 2) 800 Latino youth and adults (unduplicated) will participate in at least 500 home health parties in the greater Milwaukee area.
- 3) A minimum of 100 Latinas will participate in "field trips" to health and community-based agencies.
- 4) There will be an increase Latino community knowledge of and confidence in using health resources and advocating for issues such as health access to improve health.

### **4. Evaluation**

Surveys are used for outcomes of training of the Promotores and the Multicultural Program Manager tracks all participation with the program staff. Evaluation surveys are conducted at each home health party to gather information on demographics as well as change in knowledge, attitudes and skills.

Outcome data goals:

- a) 60% (12) Promotores will complete the CCmaS 400hour training.
- b) 800 Latino youth and adults will attend at least one Home Health Party; 75% (600) will attend 2 or more Home Health Parties.
- c) 100 Latino youth and adults will participate in field trips to health centers and/or community-based service agencies.
- d) 75% of program participants completing surveys (500) will improve self-efficacy with regard to using healthier reproductive health and sexual health prevention/risk reduction behaviors; be able to identify two locations where reproductive and other health services are available and; express intent to use reproductive and sexual health services.

The purpose of the evaluation is to not only collect data on participation but also to collect data on

discussions of cultural beliefs regarding reproductive health including cervical and breast cancer prevention, sexuality and reproductive health, and family health issues. The Promotores provide information as well as support a change in beliefs and behavior regarding health promotion and disease prevention and screening actions. They are able to integrate information about health and the health care system with the community's culture, language and value systems. They link friends and neighbors to health care and work to make available services more accessible.

**\*Below are some examples of how to list your Goals, Objectives, Activities, Expected Outcomes, and Evaluation:** Objective, Outcome, and Evaluation should align and should be written in a linear format, using actual numbers and data that are quantifiable and verifiable.

#### **STATE ONE GOAL, ONE OBJECTIVE, ONE OUTCOME:**

- **GOAL:** House all homeless youth ages 18-24 in Mariposa County who are physically, mentally, and legally able to work within 24 hours and help them become self-sufficient in 90 days.
  - **OBJECTIVE:** House up to 145 homeless youth referred or who contact us within 24 hours.
  - **OUTCOME:** We expect to provide rapid rehousing to over 45 homeless youth in 2017.
- EVALUATION:** Using Build Futures' Salesforce database client management and tracking system, generate reports on the number of clients served and housed. Track our role in housing 145 youth. Account for additional success or lower numbers of youth in the program.

#### **Target Population**

Who will this grant serve? How many people will be impacted? Provide a breakdown: Number of children, youth, adults, seniors, animals.

Economically Challenged

#### **Project Timeline**

Provide a timeline for implementing the project. Include timeframes for specific activities, as appropriate.

The timeline for this project is January 1, 2018 -- December 31, 2018. Specific activities are:

- (1) By January 1, 2018, recruit a minimum of 20 Latino youth and adults to participate in a 12-week training to become Promotores (health promoters).
- (2) January 10 -- March 31, implement a 40-hour training, with sessions held weekly, to train new and current Promotores on the CCmaS curriculum, the project objectives of recruiting hosts for home health parties, and how to facilitating the training curriculum for each CCmaS module.
- (3) April 1 -- October 31, 2018: Recruit hosts and conduct a minimum of 500 Home Health Parties (HHP) reaching 800 Latina women and girls in southeast Wisconsin. Led by trained Promotores, HHPs build trust and relationships with members of the community and increase knowledge of the following topics: (1) Cultural Values, Effective Communication and Sexuality Across the Life Span; (2) Birth Control Methods, Sexually Transmitted Infections and Reproductive Cancers; (3) Advocacy, Self-Advocacy and Community/Health Resources; and (4) A guided field trip to at least one community resources. Additional workshops are available to HHP participants upon request based on their specific needs including teen sexuality/puberty, how to talk to teens (for parents), specific screenings and tests for cancer prevention, etc.
- (4) Ongoing in 2018: consult with five youth and young adults who have been involved with the program to assist with recruitment of young adults as Promotores and to advise on curriculum related to teens.
- (5) Ongoing in 2018: with the Promotores providing feedback on their experiences, continue to refine the curriculum.

## Projects in the Community

How does this project relate to other existing projects in the community? Who else in the community is providing this service or has a similar project? Who are your community partners, if any? How are you utilizing volunteers?

In 2012, through our evaluation partnership with the Medical College of Wisconsin, PPWI developed a Community Advisory Board (CAB) and staff continue to use advisors from the CAB on an ad hoc basis. Other advisors include Promotores, youth health promoters and community partners including: Voces de la Frontera, CORE/El Centro, Common Ground, United Voices (a statewide collective of Health Promoters of color), and other Latino-serving organizations including Centro Hispano/the Spanish Center, and the UMOs Latina Resource Center.

Over the past 12 years, PPWI has recruited trained and utilized more than 200 Latino Community Health Promoters to facilitate home health parties focused on sexual and reproductive health. Another agency, CORE/El Centro, has also trained Latino Community Health Promoters with a focus on chronic health conditions/disparities such as diabetes and hypertension. These two agencies have collaborated and support each other in expanding health education with the Latino community. Voces de la Frontera works with PPWI and trains health promoters on organizing and public speaking. Several of the Latino-serving organizations above assist with recruiting Promotores for the PPWI training. Promotores receive a small stipend for their work and recruit more than 120 volunteers to host home health parties.

## Project Future

### Project Future / Sustainability

Explain how you will support the project after the grant performance period. Include plans for fundraising or increasing financial support designated for the project.

reproductive health education and services. The agency has committed staff and resources to evaluating the CCmaS curriculum as well as the expansion of program strategies. Support for this project comes from many sources. The Medical College of Wisconsin assisted with a two-year grant to evaluate the model; local foundations and individual donors have provided partial financial support, and community partners have assisted with recruiting Promotores. To help with building a sustainable model that allows hundreds of participants to access multiple workshops, Promotores are recruited and trained to lead home health parties (provided a small stipend). Their strengths and resources assist with reaching a new and wider audience each year. The result is a lower cost program reaching more than 500 participants in a series of workshops on diverse reproductive health, sexuality and advocacy topics. Participating in several workshops reinforces information, opens communication and strengthens change in behaviors.

We will continue to utilize our funding development staff and plan to request funding from local and national foundations. We will also continue to highlight this program in our outreach to individual donors.

## Governance, Executive Leadership, and Key Personnel / Staff Qualifications

### Governance

Governance: Describe your Board of Directors and the role it plays in the organization. What committees exist within your Board? How does your Board make decisions?

The PPWI Board of Directors is legally and financially responsible for the conduct of the organization. It oversees policy, budgeting, planning, fundraising, human resources and board development. The standing committees of the Board are Governance, Finance, Strategic Planning, and Development. PPWI has committee chairs that are chosen by the Board Chair, who makes the recommendation to the Governance Committee. The Governance Committee then presents the slate of new directors and board leadership to the board for a vote at the annual meeting in February. They are elected by a majority vote. According to the Bylaws, "The act of the majority of the Directors present at a meeting at which a quorum is present shall be the act of the Board of Directors, unless the act of a greater proportion is required by Chapter 181,

Wisconsin Statutes, the Articles of Incorporation, the Bylaws, or resolution of the Board of Directors."

### Executive Leadership

Management: Describe the qualifications of key personnel/staff responsible for implementing the project.

Meghan Benson, MPH, CHES, Director of Education has extensive experience with sexual and reproductive health program planning, implementation, and evaluation. Ms. Benson joined PPWI in 2008 and manages all education and training programs. Maria Barker, Multicultural Program Manager, has worked with Planned Parenthood of Wisconsin for over 30 years. She is a bilingual community educator of Mexican origin. She initiated the "home health party" model in 2003 with Latino families and continues to increase the visibility and the respect for this program in the community. Maria has been received awards locally and nationally for her work with the CCmaS program. Rosario Angulo (bilingual from Peru) provides expert education and training and Promotores of multiple ethnicity and backgrounds are recruited as facilitators, provided a stipend for their efforts with the program, and are an essential part of the sustainability of this project.

## Attachments

### Attachments

**REQUIRED .PDF ATTACHMENTS:** The maximum size for all attachments combined is 25 MB. Please note that files with certain extensions such as ".exe", ".com", ".vbs", or ".bat" cannot be uploaded. You must **1.**

**BROWSE FILES** on your computer, **2. SELECT FILES**, then **3. CLICK UPLOAD** to attach files.

**\*IMPORTANT:** For each set of required documents below, please scan all pages of each set into one .pdf, as only a single document upload is permitted for each item being requested.

#### 1. Project Budget and Budget Narrative

Please provide a detailed line-item budget for your **entire** project. Download the **V. Project Budget and Narrative Worksheet**, complete, and **Upload**. SEE **SAMPLE Budget & Narratives Worksheet**,

**2017-Gimbel-App-Project-Budget-and-Narrative-8-31-17.pdf**

#### 2. Sources of Funding

Please list your current sources of funding and amounts. Download the **VI. Sources of Funding Worksheet**, complete, and **Upload**.

**2017-Gimbel-App-Sources-of-Funding-8-31-17.pdf**

#### 3. Financial Analysis

Please provide all information requested for your **entire organization**. Included any notes that may explain any extraordinary circumstances. Download the **VII. Financial Analysis Worksheet**, complete, and **Upload**.

**2017-Gimbel-App-Financial-Analysis -8-31-17.pdf**

#### 4. Current Year Operating Budget

Please provide a copy of your current year's operating budget

**2017-PPWI-FYE-Budget.pdf**

#### 5. Budget Comparison

Download the **SAMPLE Budget Comparison Worksheet**, complete, and **Upload**.

**2017-Gimbel-App-Budget-Comparison-8-31-17.pdf**

#### 6. Part IX only of the 990 form

Statement of Functional Expenses (one page). If you completed a 990-EZ, Download the **Part IX Functional Expenses sample** of the 990 form using figures from your 990 EZ, complete, and **Upload**.

[Part IX-Form 990-PPWI-2016.pdf](#)

## **7. Financial Statements**

Please provide a copy of your most recent year-end financial statements (audited, if possible)

[2016-PPWI-Audit.pdf](#)

## **8. Most Recent 990**

Please provide a copy of your most recent 990 form

[2016 Form 990.pdf](#)

## **9. Tax Exemption Letter**

Please provide an electronic copy of your IRS 501 (c) (3) determination letter.

[PPWI-501c3Letter-10-9-15.pdf](#)

## **10. Board of Directors List**

Please provide a list of your current Board of Directors, including their name, position on the board, and professional affiliation(s).

[2017-2018-PPWI-Board-Affiliations.docx](#)

## **11. Evaluation & Expenditure Report**

For past grantees, provide a copy of your most recent final evaluation report, including your most recent expenditure report.

[2016-Report-Gimbel-Fdn-PPWI-for 2017 grant.docx](#)

## 2017 S.L. Gimbel Foundation APPLICATION

### V. Project Budget and Narrative (Do not delete these instructions on your completed form).

A) **Budget Table:** Provide a detailed line-item budget for your **entire project** by completing the table below. Requested line items should be limited to Ten (10) line items. The less the better.

A breakdown of specific line item requests and attendant costs should include:

- 1) Line item requests for materials, supplies, equipment and others:
  - a. Identify and list the type of materials, supplies, equipment, etc.
  - b. Specify the unit cost, number of units, and total cost
  - c. Use a formula/equation as applicable. (i.e. 40 books @ \$100 each = \$4000)
- 2) Line item requests for staff compensation, benefits: **Do not use FTE percentages.**
  - a. Identify the position; for each position request, specify the hourly rate and the number of hours (i.e. \$20/hr x 20 hours/week x 20 weeks = \$8,000)
  - b. For benefits, provide the formula and calculation (i.e. \$8,000 x 25% = \$2,000)
- 3) Line items on Salaries/Personnel included in budget (contribution or in-kind) but NOT requested from the Gimbel Foundation must be broken down per number 2) above:  
Provide rate of pay per hour and number of hours.

Line Item Request	Line Item Explanation	Support From Your Agency	Support From Other Funders	Requested Amount From Gimbel/TCF	Line Item Total of Project
Multicultural Program Manager	32 hours/week @ \$30.96/hr x 52 weeks = \$51,521		\$41,521	\$10,000	\$51,521
Bilingual Health Educator	40 hours/week @ \$24/hour x 52 weeks = \$49,918		\$44,918	\$5,000	\$49,918
Director of Education	2 hours/week @ \$30.20/hr x 52 weeks = \$3,141	\$3,141			\$3,141
Fringe Benefits	= \$104,580 x 22%		\$23,008		\$23,008
Latina Health Promoters Stipends	Stipends are estimated at \$35,000 based on @ \$70 per Home Hc		\$30,000	\$5,000	\$35,000
Mileage and telephone for program staff	Estimated at 16,363 miles @ 0.55, parking for workshops = \$9,000	\$11,000			\$11,000
Program Supplies and promotion	a) Supplies for 500 Home Health Parties at \$50 each plus education	\$4,000	\$34,800	\$5,000	\$43,800
Occupancy and Information Technology	Occupancy costs are estimated at 6% for each PPWT project = \$23,912	\$23,912			\$23,912
Management/ Overhead	@ 14% of program = \$217,388 X 14% = \$30,434	\$30,434			\$30,434
<b>TOTALS:</b>		<b>\$72,487</b>	<b>\$174,247</b>	<b>\$25,000</b>	<b>\$271,734</b>

B) **Narrative:** The budget narrative is the justification of “how” and/or “why” a line item helps to meet the project deliverables. Provide a description for each line item request as necessary. Explain how the line item relates to the project. If you are requesting funds to pay for staff, list the specific duties of each position. See attached SAMPLE Project Budget and Budget Narrative

1. Personnel:

a. The Multicultural Program Manager @ 32 hours/week supervises all staff, directs the programs, conducts the 10-week training for Latina Health Promoters, and collects data to evaluate the program = \$51,521

b. The Bilingual Health Educator @ 40 hours/week works in tandem with the Multicultural Program Manager, assists with training, recruits new Promotores, and assists with organizing the Home Health Parties conducted by the Promotores throughout the year = \$49,918.

c. The Director of Education @ 2 hours/week oversee the program staff, provides direction and evaluates the program = \$3,141.

2. Fringe Benefits are allocated for salaries at 22% of salaries = \$23,008

3. Latina Health Promoters: 20 Promotores will be trained from January to March 2018 to conduct home health parties in 2018. Promotores also recruit Home Health Party hosts and provides the education for each of the six health modules. This is estimated at \$70 per home health party for 500 HHPs = \$35,000.

4. Mileage/telephone = \$11,000. Mileage and parking for 3 staff and 15-20 Promotores is estimated at \$9,000. This is estimated at 16,363 miles @ 0.55/ mile; plus, parking as needed. This program is delivered in Milwaukee and surrounding counties so mileage is an important factor for this program. Telephone is \$2,000 for direct service staff for cellphone.

5. Program Supplies and Promotion - \$43,800:

a. Supplies for Home Health Parties estimated at \$50 for supplies, food and beverages for each event =  $500 \times \$50 = \$25,000$ ; plus educational materials (paper, file folders, printed forms, educational packets for training estimated at \$5,000 and child care as needed estimated at \$2,850 for a total of \$32,850.;

b. Meeting supplies, food/beverage, and child care for 12-week training for 20 Promotores; meetings throughout the year estimated at \$200 for each training /meeting = \$4,950;

c. \$2,000 for annual family event: Program materials, food, beverages @ \$10/person for 200 people.

d. Flyers, posters, advertising are estimated at 3,000 pieces @ \$1.00 each) plus advertising placement in local print media @ \$1,000 = \$4,000.

6. Occupancy and information technology = \$23,912. Occupancy costs are estimated at 8% for each PPWI project =  $\$217,388 \times 8\% = \$17,390$ . Information technology is estimated at 3% for each project =  $\$217,388 \times 3\% = \$6,522$ .

7. Management: Overhead expense is estimated at 14% for each PPWI project =  $\$217,388 \times 14\% = \$30,434$ .



**2017 S.L. Gimbel Foundation APPLICATION**

**VI. Sources of Funding:** Please list your current sources of funding and amounts.

*Secured/Awarded*

<b>Name of Funder: Foundation, Corporation, Government</b>	<b>Amount</b>
Potawatomi Community Foundation	\$5,000
Jewish Women's Endowment Fund	\$5,000

*Pending*

<b>Name of Funder: Foundation, Corporation, Government</b>	<b>Amount</b>	<b>Decision Date</b>
The Aylen Foundation	\$25,000	Dec 2017
The Birnschein Foundation	\$25,000	Dec 2017
The Demmer Foundation	\$12,500	Dec 2017
The Gardner Foundation	\$2,500	Dec 2017

**Diversity of Funding Sources:** A financially healthy organization should have a diverse mix of funding sources. Complete those categories that apply to your organization using figures from your most recent fiscal year.

<b>Funding Source</b>	<b>Amount</b>	<b>% of Total Revenue</b>	<b>Funding Source</b>	<b>Amount</b>	<b>% of Total Revenue</b>
Contributions	\$ 6,007,052	21.7%	Program Fees	\$ 14,699,871	53.1%
Fundraising/Special Events	\$ (counted above)		Interest Income	\$ 452,106	1.6%
Corp/Foundation Grants	\$ 978,875	3.5%	Other: Misc	\$ 1,496,296	5.4%
Government Grants	\$ 4,078,372	14.7%	Other:	\$	

**Notes:**

Individual contributions are utilized for a portion of the proposed project in this grant application. PPPWI works hard to create diverse streams of funding for all of its programs.

## 2017 S.L. Gimbel Foundation APPLICATION

### VII. Financial Analysis

Agency Name: Planned Parenthood of Wisconsin, Inc.

Most Current Fiscal Year (Dates): From 9/30/16 To: 9/30/16

This section presents an overview of an applicant organization's financial health and will be reviewed along with the grant proposal. Provide all the information requested on your **entire organization**. Include any notes that may explain any extraordinary circumstances. Information should be taken from your most recent 990 and audit. **Double check your figures!**

#### Form 990, Part IX: Statement of Functional Expenses

**1) Transfer the totals for each of the columns, Line 25- Total functional expenses (page 10)**

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
\$ 27,623,168	\$ 21,217,394	\$ 5,091,104	\$ 1,314,670

**2) Calculate the percentages of Columns B, C, and D, over A (per totals above)**

- Program services (B) – A general rule is that at least 75% of total expenses should be used to support programs
- Management & general administration (C) – A general rule is that no more than 15% of total expenses should be used for management & general expenses
- Fundraising (D) – A general rule is that no more than 10% of total expenses should be used for fundraising

(A) Total Expenses	(B) Program service expenses	(C) Management & general expenses	(D) Fundraising expenses
	Columns B / A x 100	Columns C / A x 100	Columns D / A x 100
Must equal 100%	76.8 %	18.4 %	4.8 %

**3) Calculate the difference between your CURRENT year budget for management & general expenses and your previous management & general expenses per your 990 (Column C)**

Percentage of Organization's <u>Current</u> Total Budget used for Administration	Column C, Management & general expenses per 990 above	Differential
18.4 %	18.4 %	0 %

If the differential is above (+) or below (-) 10%, provide an explanation:

## **2017 S.L. Gimbel Foundation APPLICATION**

**Quick Ratio:** Measures the level of liquidity and measures only current assets that can be quickly turned to cash. A generally standard Quick Ratio equals 1 or more.

<b>Cash</b>	<b>+ Accounts Receivables</b>	<b>/Current Liabilities</b>	<b>= Quick Ratio</b>
\$ 2,162,993	\$ 2,298,666	2,101,067	2.12

---

### **Excess or Deficit for the Year:**

<b>Excess or (Deficit) Most recent fiscal year end</b>	<b>Excess or (Deficit) Prior fiscal year end</b>
\$ (887,069)	\$ 2,898,778

### **Notes:**

PPWI initiated a 3-year campaign in 2015 for capital and program enhancement funds to move the agency forward in its strategic plan. As such, there was excess at the end of FY2015 to be utilized for capital and program expansion. The Board of Directors approved a FY 2016 operating budget that showed a deficit in order to continue to move forward with the agency's strategic goals. At the end of FY 2016 (the most recent fiscal year), there was a deficit.

**Planned Parenthood of Wisconsin, Inc.  
FYE September 2017 Budget Summary**

**Revenue:**

Contributions	4,473,923
Title X - Federal Grants	3,468,000
Other Grant Revenue	173,994
Patient Fees	17,440,000
Total Revenue	25,555,917

**Expenses:**

Salaries	10,540,317
Payroll Taxes and Benefits	2,845,886
Total personnel services	13,386,203

Contracted Physicians	820,000
Professional Services	1,282,586
Travel	437,450
Conferences	89,075
Recruitment and Advertising	435,500
Meeting Expenses	275,200
Supplies	1,197,750
Contraceptives	3,114,484
Rent	968,600
Utilities and Maintenance	794,935
Equipment Leases and Maintenance	619,900
Insurance	191,754
Dues	367,150
Copying, Printing and Subscriptions	223,975
Postage and Mailing Services	296,370
Telephone	1,010,330
Delegate Payments	705,745
Depreciation	500,000
Miscellaneous Expense	242,750
Total Expenses	26,959,757

Net Surplus (Deficit)	(1,403,840)
-----------------------	-------------

The Board of Directors approved a budget deficit in order to advance the goals of the 2015-2018 Strategic Plan.

**Part IX Statement of Functional Expenses**

Section 501(c)(3) and 501(c)(4) organizations must complete all columns. All other organizations must complete column (A).

Check if Schedule O contains a response or note to any line in this Part IX ☐

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.	(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1 Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21	2,132,835.	2,132,835.		
2 Grants and other assistance to domestic individuals. See Part IV, line 22				
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	974,252.		974,252.	
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	9,533,569.	7,825,909.	1,176,797.	530,863.
8 Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)	357,329.	306,032.	30,253.	21,044.
9 Other employee benefits	1,550,984.	1,207,148.	260,827.	83,009.
10 Payroll taxes	610,580.	457,751.	121,350.	31,479.
11 Fees for services (non-employees):				
a Management				
b Legal				
c Accounting				
d Lobbying				
e Professional fundraising services. See Part IV, line 17				
f Investment management fees				
g Other. (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Sch O.)	2,142,878.	1,017,082.	769,722.	356,074.
12 Advertising and promotion	363,359.	5,057.	356,335.	1,967.
13 Office expenses	1,446,092.	1,113,114.	241,691.	91,287.
14 Information technology				
15 Royalties				
16 Occupancy	1,731,071.	1,628,215.	86,428.	16,428.
17 Travel	702,369.	469,271.	126,745.	106,353.
18 Payments of travel or entertainment expenses for any federal, state, or local public officials				
19 Conferences, conventions, and meetings				
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization	486,618.	462,642.	18,151.	5,825.
23 Insurance	202,007.	189,034.	11,606.	1,367.
24 Other expenses. Itemize expenses not covered above. (List miscellaneous expenses in line 24e. If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O.)				
a MEDICAL CLINIC SUPPLIES	4,395,816.	4,205,397.	182,307.	8,112.
b MEMBERSHIP DUES	320,073.	13,864.	303,389.	2,820.
c TEMPORARY HELP	17,174.	17,174.		
d				
e All other expenses	656,162.	166,869.	431,251.	58,042.
25 Total functional expenses. Add lines 1 through 24e	27,623,168.	21,217,394.	5,091,104.	1,314,670.
26 Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation.				

Check here ☐ If following SOP 98-2 (ASC 958-720)

# MEMO

## Report for Grant # 20160266 from the S.L. Gimbel Foundation Advised Fund at The Community Foundation

**From:** Planned Parenthood of Wisconsin, Inc.  
**Date:** June 15, 2017  
**Attention:** Celia Cudiamat  
[ccudiamat@thecommunityfoundation.net](mailto:ccudiamat@thecommunityfoundation.net)  
[grant-info@thecommunityfoundation.net](mailto:grant-info@thecommunityfoundation.net)

1. **Organization Name:** Planned Parenthood of Wisconsin, Inc.
2. **Grant #:** 20160266
3. **Grant Period:** May 16, 2016 – May 16, 2017
4. **Location of Services:** Milwaukee, Wisconsin
5. **Name and Title of person completing application:** Laura Emir, Director of Development
6. **Phone Number:** 414-289-3747
7. **Email Address:** [laura.emir@ppwi.org](mailto:laura.emir@ppwi.org)
8. **Total number of clients served through this grant funding.**  
Our goal was to serve a minimum of 3,570 youth and adults through the program strategies and objectives. We were able to serve 7,340 youth and adults during the project period. The results are outlined below.
9. **Describe the project's key outcomes and results based on the goals and objectives.**  
  
The "Embody Sexuality Education and Training Program" goals are to:
  - A) Deliver comprehensive, medically accurate, age appropriate, sexuality education and training in a manner that is culturally and linguistically sensitive;
  - B) Empower youth to make responsible and informed decisions regarding sexual and reproductive health; and
  - C) Provide those we train with the confidence and knowledge to educate others to collectively keep our communities safe, healthy and strong.

### Objectives and Results for May 15, 2016 to May 15, 2017:

- 1) **Provide sexuality education to 1,200 youth in Milwaukee** through workshops in schools and community organizations with a focus on reaching African American and Latino youth, and through participation in 5-6 health fairs providing prevention education information to 2,000 participants.

**Results:** During the project period, we provided sexuality education to 1,586 youth (ages 13-24) in Milwaukee. We conducted 56 workshops, with youth assisting as facilitators in community organizations and schools. PPWI staff and youth health educators also participated in 14 health fairs providing prevention education information to approximately 4,100 participants. Youth, staff and volunteers set up booths to provide information at outreach at events such as Juneteenth Day, PrideFest, and other neighborhood events. This outreach provided materials and information about PPWI health services, the Youth Health Clinic, and the Safe Healthy Strong Text Line.

- 2) **Work with Latino youth ages 15-22** to develop and implement peer outreach and education, assist with the October Family Summit for Latino and African American families, and to help design prevention education materials.

**Results:**

- Three Latina youth (ages 18-22) have been advisors to the Latina Health Promoter project for the past year. Their primary role is to advise on the Promotores de Salud project and the Cuidándonos Creceremos más Sanos (CCmS) curriculum that was developed by and for the Latino community. They reviewed the curriculum to make it more youth friendly as more youth are served in the CCmS program.
  - During the project period, Latina Promotores provided Spanish-language education to 1,124 youth, parents, grandparents and other adults at 591 home health parties. Most participants in the program attended six home health parties (diverse topics), and many also attended an optional visit to a PPWI health center or other health or social service provider in the community to learn more about health and resources.
  - Several African American and Latino youth volunteered to at the Family Unity Night in October 2016. This event, organized with United Way of Greater Milwaukee and Waukesha County, hosted 150 individuals (30-40 families) for dinner and an evening of fun and education.
- 3) **Train and utilize youth leaders to provide one-on-one peer education** to 150 youth and to conduct outreach at 10-12 neighborhood events to promote and encourage STI testing for youth in Milwaukee.

**Results:**

- From September to November 2016, four (4) teens were trained as Youth Health Educators and started providing the Safer Sex Intervention in one-on-one peer education sessions with youth accessing PPWI health centers. Youth are trained in the Safer Sex intervention, which uses motivational interviewing to support youth in decision-making. During the project year, Youth Health Educators met with 223 youth to discuss sexuality, pregnancy/STI prevention and their concerns regarding sexuality and health. PPWI effectively uses this peer strategy because of its effectiveness and the readiness of youth to seek peer support.
  - In April/May 2016, the number of people receiving sexually transmitted infections (STI) testing increased by 50% due to increased outreach and education during the “Get Yourself Tested” (GYT) campaign held statewide to promote sexually transmitted infection (STI) testing. PPWI staff and youth volunteers conducted many outreach events to increase awareness of STI testing and why it is important for young people. This was replicated in April and May 2017, with more than 10 outreach events held in Milwaukee.
- 4) Provide training for youth leaders and adult professionals at the Safe Healthy Strong Conference in March 2017.



**Results:** Safe Healthy Strong 2017 was a three day conference held March 21-23, 2017. The conference featured four learning tracks and specialized workshops: a) Workshops for Health Care Providers; b) Sessions on Communication and Social Media; c) Workshops focused on Justice and Inclusion; and d) Spanish-Language Workshops. More than 150 unduplicated attendees came over 3 days and participated in 24 workshops/sessions. Additionally, this conference featured a panel of Faith partners entitled "Allies in Faith-Based Spaces" to discuss how faith, sexuality and reproductive health can be united through interfaith dialogue and inquiry. Also new this year were six presentations in Spanish for our community health workers and Promotores working in bilingual communities. The conference highlighted several youth and student presenters and welcomed 10 student attendees from local high schools and universities. Bevan K. Baker, Commissioner of Health with the City of Milwaukee served as an inspirational key note speaker. Other participants included family planning clinicians, health care providers, community health workers from public health agencies, representatives from universities, youth-serving organizations, and nonprofit organizations, and teachers/educators from school districts around the state.

**10. Please describe any challenges/obstacles the organization encountered (if any) in attaining stated goals and objectives.**

There were few challenges to this program because of PPWI's strong history of providing sexuality education and training for diverse populations. Each year we train community health promoters and youth to provide peer education and support to community members. As we reach into diverse communities, more individuals come forward to volunteer and become part of our program.

However, Milwaukee continues to address high rates of teen pregnancy among African American and Latino youth, STIs among teens and young adults, and health access in communities of color. The challenge of meeting the high need, and requests for education and training, is difficult with limited staff and resources. The support of individuals and foundations for these programs are essential to meet the needs of our community.

**11. How did the organization overcome and/or address the challenges and obstacles?**

Recruiting and training youth and adults to become peer educators expands the reach of our education and training programs into communities that have not had access to health education. We also create our education and training plan each year, prioritizing areas of need based on high rates of teen pregnancy and STIs in specific communities.

**12. Describe any unintended positive outcomes as a result of the efforts supported by this grant.**

Our project was able to address community needs such as high rates of teen pregnancy and STIs among Latino and African American youth. Our strategies of using youth as peer educators, developing education and training by and for Latino youth and adults, and peer outreach were very successful.

PPWI's Youth Health Educators have also created presentations that they can provide to others including the ACLU Youth advocacy day (November 2016), PPWI's Safe Healthy Strong conference (March 21-23, 2017), and the Providers and Teens Communicating for Health (PATCH) Symposium (May 17, 2017).

In addition, education for parents, on how to talk to their children about sexuality and other health concerns, is on the rise. The majority of adults reached through the agency's Promotores program in the Latino community, are parents of children age 2 to 17. The Home Health Party workshops improve parents' comfort in talking about sexuality in families, including the ability to discuss personal values. We encourage parents to be the first sex educators in their children's lives.

With the support of this grant, PPWI has also increased its collaborations with schools, community organizations, teachers, youth-serving professionals, and others, especially those serving high-risk youth. We are working with United Way of Greater Milwaukee and Waukesha County by partnering with community-based organizations serving Latino and African American youth to conduct "Family Unity Night." We also improved our connection with the Milwaukee Health Department's Keenan Health Center to fill in gaps and address the increasing rates of sexually transmitted infections among people under age 25.

**13. Briefly describe the impact this grant has had on the organization and community served.**

The \$50,000 grant from the S.L. Gimbel Foundation Advised Fund at The Community Foundation represents a significant investment in the expansion of our education and training services. As the objectives and outcomes above indicate, PPWI staff and volunteer educators were able to reach more than double the number of participants anticipated. This success highlights what community investment in teen pregnancy and STI prevention and to for the health of young people.

**14. Please provide a narrative on how the funds were used to fulfill grant objectives.**

The \$50,000 received from the S.L. Gimbel Foundation Advised Fund at The Community Foundation was used as follows:

- Youth Programs Coordinator = \$15,934: Funds from the grant were used for 40% of the Youth Programs Coordinator, Jocelyn Mason-Saffold. She works with youth volunteers to implement educational workshops in the schools and community agencies with a focus on teen pregnancy and sexually transmitted infection prevention.
- Community Outreach Coordinator Milwaukee = \$14,569. Funds from the grant were used for 40% of the Community Outreach Coordinator for Milwaukee, Mia Noel. Mia works with staff and youth to participate in neighborhood events, including health fairs, held in diverse communities with a focus on reaching youth with prevention education information.
- Fringe Benefits = \$7,626; based on 25% of salaries.
- Youth Health Educators = \$5,000. The project utilized 4 youth @ \$8.14/hour for 12/hour a week for 26 weeks during the project period. \$5,000 of the grant was used to fund Youth Health Educators who provided peer education to 223 youth during the project period.
- Meetings and training supplies for workshops = \$3,500: Approximately 15 trainings and meetings were held with youth in the program, and 50 workshops and trainings were held with youth in the community. \$3,500 of the grant was used for room rental, program materials and refreshments.
- Promotions for outreach, flyers, materials = \$3,371. Staff and youth participated in 14 outreach events, primarily health fairs, reaching diverse youth in the community. \$3,371 of the grant was used for outreach/educational materials, t-shirts for youth and flyers for events.

### **15. Please relate a success story.**

PPWI's focus on providing culturally competent education and training to Latino youth and adults – to become peer educators in their communities – yields several success stories each year. Below is an example:

Carlos Mesa, 19 years old, trained to become a Latino Community Health Promoter (Promotores) along with his parents. He watched his parents work full-time, go to school ½ day a week and engage children and extended family members in fun activities. After graduating high school, he decided to train with his parents to become a Promotores because he saw it as an educational opportunity. This is a 10-week training. At first, he was unsure, but then after he completed a few of the training sessions, he recognized that the reproductive health, sexuality and pregnancy/STI prevention information was important. He said he has a lot of friends and family members who don't have accurate information, especially regarding prevention. After the training was completed, his mom and dad continued in the program and facilitated Home Health Parties with first generation Latinos. Carlos was more interested in advocacy and spreading the word among friends and social networks.

Another example: Desiree, a young bilingual young woman who works with Latino youth at Centro Hispano, took the training to learn more about how to talk to young people. She said the curriculum helped her to talk to young people at her agency about sexuality and reproductive health and she uses it every day in her programs.

### **Optional Questions**

### **16. Additional success story**

Youth Health Educators are able to reach youth in a way that is personal, supportive and comfortable for teens and young adults coming to PPWI health centers. They are trained in listening and motivational interviewing. Younger teens, especially, respond to these techniques and often come for 2-3 sessions to ask questions and receive guidance on prevention methods. Here are some things that teens have said about being able to talk to Youth Health Educators (who are their peers):

- Talking with "Kim" made it easier to talk to my partner about sex, pregnancy prevention and other topics that I was uncomfortable talking about."
- Many youth felt it was more "Relatable" to talk to someone their age and that the Youth Health Educators created a safe comfortable space.
- Many youth indicated that they left with much more knowledge to share with others (than they came in with).
- Youth also ask for help in talking to family members. Working with the Youth Health Educator "helped to guide family members with knowledge gained."
- Youth indicated that talking with Youth Health Educators eased their feelings of being overwhelmed because they were able to talk to someone who both knew the procedures and was around the same age.

### **17. Additional success story**

PPWI is a primary partner with United Way of Greater Milwaukee and Waukesha County and their teen pregnancy prevention initiative. In 2008, the partners in the Collaborative working with United Way to reduce teen pregnancy set a goal of reducing teen birth rates by 46% by 2015. In 2006, Milwaukee had

one of the worst teen pregnancy rates in the country. United Way and its partners committed significant resources to aggressively address the issue and fund a range of strategies including marketing, education and training programs. As a result, teen birth rates in Milwaukee have dropped 65% in Milwaukee since 2006 (2015 numbers). The initiative's success is attributed to an all-hands-on-deck approach adopted by the community, which has been honored nationally as a model for other cities.

**18. Which category best describes the organization?**

Health/Health Education

**19. What is the organization's primary program area of interest?**

Sexuality Education and Training and peer outreach to engage youth to make informed health decision

**20. Approximate percentage of clients served through grant in each ethnic group category**

45% Latino

15% African American

25% White

5% Asian

5% Other

5% unreported

**21. Approximate percentage of clients served in each age category**

45% under age 19

10% ages 19-24

45% age 25 and older (primarily parents)

**22. Approximate percentage of clients served with disabilities from grant funds.**

This data is not collected.

**23. Approximate percentage of clients served in each economic group.**

56% are at or below 100% of federal poverty level

15% are 101-150% of FDL

**24. Approximate percentage of clients served from grant funds in each population category.**

## Expenditure Report

Line Item Request	Line Item Explanation	Requested Amount From TCF	Amount Expended from TCF
Youth Program Coordinator	40 hours/week x \$15.86/hour = \$32,989	\$15,000	\$15,934
Community Outreach Milwaukee	32 hours/week x \$17.68/hour = \$29,419	\$15,000	\$14,569
Fringe Benefits	= \$96,068 x 25%	\$7,500	\$7,626
Youth Health Educators	6 youth @ \$8.14/hour for 12 hours/week for 26 weeks = \$15,238	\$5,000	\$5,000
Meetings: food, beverage and room rental for workshops	\$75-125 each for trainings, workshops, and youth meetings (estimated at 80 meetings = \$8,000)	\$5,000	\$3,500
Promotions for Outreach, Advertising	Flyers, posters, t-shirts outreach materials = \$12,000	\$2,500	\$3,371
Total			

The \$50,000 received from the S.L. Gimbel Foundation Advised Fund at The Community Foundation was used as follows:

- Youth Programs Coordinator = \$15,934: Funds from the grant were used for 40% of the Youth Programs Coordinator, Jocelyn Mason-Saffold. She works with youth volunteers to implement educational workshops in the schools and community agencies with a focus on teen pregnancy and sexually transmitted infection prevention.
- Community Outreach Coordinator Milwaukee = \$14,569. Funds from the grant were used for 40% of the Community Outreach Coordinator for Milwaukee, Mia Noel. Mia works with staff and youth to participate in neighborhood events, including health fairs, held in diverse communities with a focus on reaching youth with prevention education information.
- Fringe Benefits = \$7,626; based on 25% of salaries.
- Youth Health Educators = \$5,000. The project utilized 4 youth @ \$8.14/hour for 12/hour a week for 26 weeks during the project period. \$5,000 of the grant was used to fund Youth Health Educators who provided peer education to 223 youth during the project period.
- Meetings and training supplies for workshops = \$3,500: Approximately 15 trainings and meetings were held with youth in the program, and 50 workshops and trainings were held with youth in the community. \$3,500 of the grant was used for room rental, program materials and refreshments.
- Promotions for outreach, flyers, materials = \$3,371. Staff and youth participated in 14 outreach events, primarily health fairs, reaching diverse youth in the community. \$3,371 of the grant was used for outreach/educational materials, t-shirts for youth and flyers for events.

**Planned Parenthood of Wisconsin, Inc.  
2017 S.L. Gimbel Foundation APPLICATION**

	<b>FYE September 2016 Actual</b>	<b>FYE September 2017 Budget</b>	<b>Increase (Decrease) FYE 2017 Budget vs FYE 2016 Actual</b>
<b>Revenue:</b>			
Contributions	4,488,302	4,473,923	(14,379)
Title X - Federal Grants	3,938,843	3,468,000	(470,843)
Other Grant Revenue	156,442	173,994	17,552
Patient Fees	15,191,871	15,400,000	208,129
Other Revenue	1,479,383	2,040,000	560,617
<b>Total Revenue</b>	<b>25,254,841</b>	<b>25,555,917</b>	<b>301,076</b>
<b>Expenses:</b>			
Salaries	10,625,733	10,540,317	(85,416)
Payroll Taxes and Benefits	2,728,613	2,845,886	117,273
<b>Total personnel services</b>	<b>13,354,346</b>	<b>13,386,203</b>	<b>31,857</b>
Professional Services	2,062,156	2,121,936	59,780
Travel and Conferences	738,603	801,725	63,122
Recruitment and Advertising	503,401	435,500	(67,901)
Supplies	4,371,714	4,292,884	(78,830)
Occupancy	1,789,404	1,763,535	(25,869)
Equipment Leases and Maintenance	552,383	619,900	67,517
Insurance	202,583	191,754	(10,829)
Dues	353,161	367,150	13,989
Copying, Printing and Subscriptions	173,606	223,975	50,369
Postage and Mailing Services	270,252	296,370	26,118
Telephone	1,000,563	1,010,330	9,767
Delegate Payments	831,318	705,745	(125,573)
Depreciation	494,377	500,000	5,623
Miscellaneous Expense	224,474	242,750	18,276
<b>Total Expenses</b>	<b>26,922,341</b>	<b>26,959,757</b>	<b>37,416</b>
<b>Net Surplus (Deficit)</b>	<b>(1,667,500)</b>	<b>(1,403,840)</b>	<b>263,660</b>

The actual and budget above reflect results from operations. The 990 also includes nonoperating activities.

The PPWI Board of Directors approved a FY 2016 budget deficit in order to advance the goals of the 2015-2018 Strategic Plan.

## **2017 – 2018 Board of Directors** (updated 8/16/17)

### **BOARD OF DIRECTORS**

#### **OFFICERS**

Mary Lynne Donohue, Chair *(Retired Attorney)*  
Lisa Remby, Chair Elect *(Community Volunteer)*  
Shaleta Dunn, Vice Chair *(Manpower)*  
Christopher Bugg, Treasurer *(Buttonwood Partners, Inc.)*  
Rick Wetzel, Secretary *(Community Volunteer)*

#### **DIRECTORS**

Linda Bochert *(Michael Best & Friedrich, LLP)*  
Elizabeth Brenner *(Community Volunteer)*  
Eileen Force Cahill *(Community Volunteer)*  
Kelly Eakin *(Laurits R. Christensen Associations, Inc.)*  
Sarah Fierek *(88Nine Radio Milwaukee)*  
Kathy Flores *(Diverse & Resilient, Showing Up for Racial Justice (SURJ)  
Appleton, The National Coalition of LGBTQ Anti-Violence  
Programs)*  
  
Marcela Garcia *(Community Volunteer)*  
Andrea Khan *(Community Volunteer)*  
Carrie Norbin Killoran *(Aurora Health Care)*  
Rev. Julianne Lepp *(Unitarian Universalist Congregation in Eau Claire, Unitarian  
Universalist Women's Federation)*  
  
Madeleine Kelly Lubar *(Community Volunteer)*  
Judith McGregor *(Community Volunteer)*  
Paul Nannis *(Strategic HealthCare Solutions, LLC)*  
Khary Pennebaker *(Moms Demand Action/Everytown For Gun Safety's Gun Violence  
Survivor Fellow, WAVE (Wisconsin Anti-Violence Effort))*  
  
Edie Brengel Radtke *(Community Volunteer)*  
JoAnne Robbins *(Community Volunteer)*  
Diane Seder *(Milwaukee Valve Company)*  
Amy H. Shapiro *(Alverno College, Nathan and Esther Pelz Holocaust Education  
Resource Center, Milwaukee Jewish Community Center)*  
  
Genie Smith *(Community Volunteer)*  
Tia Torhorst *(Community Volunteer)*  
Max Welsh *(Community Volunteer)*

#### **EX-OFFICIO**

Barb Notestein *(Consultant, Strategies for Change)*





Department of the Treasury  
Internal Revenue Service

P.O. Box 2508  
Cincinnati OH 45201

In reply refer to: 0248359979  
Oct. 09, 2015 LTR 4168C 0  
39-0863391 000000 00  
00015588  
BODC: TE

PLANNED PARENTHOOD OF WISCONSIN INC  
302 N JACKSON ST  
MILWAUKEE WI 53202



021308

Employer Identification Number: 39-0863391  
Person to Contact: Ms. Sene  
Toll Free Telephone Number: 1-877-829-5500

Dear Taxpayer:

This is in response to your Sep. 30, 2015, request for information regarding your tax-exempt status.

Our records indicate that you were recognized as exempt under section 501(c)(3) of the Internal Revenue Code in a determination letter issued in May 1953.

Our records also indicate that you are not a private foundation within the meaning of section 509(a) of the Code because you are described in section(s) 509(a)(1) and 170(b)(1)(A)(vi).

Donors may deduct contributions to you as provided in section 170 of the Code. Bequests, legacies, devises, transfers, or gifts to you or for your use are deductible for Federal estate and gift tax purposes if they meet the applicable provisions of sections 2055, 2106, and 2522 of the Code.

Please refer to our website [www.irs.gov/eo](http://www.irs.gov/eo) for information regarding filing requirements. Specifically, section 6033(j) of the Code provides that failure to file an annual information return for three consecutive years results in revocation of tax-exempt status as of the filing due date of the third return for organizations required to file. We will publish a list of organizations whose tax-exempt status was revoked under section 6033(j) of the Code on our website beginning in early 2011.

0248359979  
Oct. '09, 2015 LTR 4168C 0  
39-0863391 000000 00  
00015589

PLANNED PARENTHOOD OF WISCONSIN INC  
302 N JACKSON ST  
MILWAUKEE, WI 53202

If you have any questions, please call us at the telephone number  
shown in the heading of this letter.

Sincerely yours,

*Doris P. Kenwright*

Doris Kenwright, Operation Mgr.  
Accounts Management Operations 1



Strengthening Inland Southern California through Philanthropy

BOARD OF DIRECTORS

Sean Varner  
Chair of the Board

J. Sergio Bohon  
Vice Chair of the Board

Pat Spafford, CPA  
Chief Financial Officer

Dr. Paulette Brown-Hinds  
Secretary of the Board

Rabbi Hillel Cohn

Paul Granillo

Stanley Grube

Dr. Fred Jandt

Andrew Jaramillo

Nefertiti Long

Kirtland Mahlum

Brian McDonald

Meredyth "Charlie" Meredith

Susan Ovitt

Teresa Rhyne

Kathleen Sawa

Philip Savage IV  
Immediate Past Board Chair

Dr. Henry Shannon

Tamara Sipos

Beverly Stephenson

Randall Tagami

Diane Valenzuela

Paula Myles  
Interim President and CEO

November 30, 2017

*S. L. Gimbel Foundation Fund*

Ms. Tanya Atkinson  
President & CEO  
Planned Parenthood of Wisconsin, Inc.  
302 North Jackson Street  
Milwaukee, WI 53202

Dear Ms. Atkinson:

Congratulations! A grant has been approved for **Planned Parenthood of Wisconsin, Inc.** in the amount of **\$25,000.00** from the S.L. Gimbel Foundation. **The performance period for this grant is December 1, 2017 to November 30, 2018.** Additional funding beyond the performance period is not guaranteed. It is highly recommended that alternative funding sources be sought accordingly. The grant is to support the following as specified in your proposal:

*For staff training & education for Latino youth/adults  
on sexuality/reproductive health*

This grant is subject to the terms outlined in the enclosed Grant Agreement. After you have reviewed the terms and conditions of the Grant Agreement, **please sign and date the agreement and return with original signature to The Community Foundation by Friday, December 29, 2017.** Be sure to copy the signed agreement for your records. Funds will be released upon receipt of the signed Grant Agreement.

A condition of this grant is that you agree to submit the Grant Evaluation Form which includes a narrative report and fiscal report. **The Grant Evaluation is due by December 15, 2018** and will be available online at:  
<https://www.thecommunityfoundation.net/grants/grants/forms>.

We wish you great success and look forward to working with you during the grant performance period. If you have any questions, please feel free to contact me at 951-241-7777.

Sincerely,

Celia Cudiamat  
Executive Vice President of Programs

22494 Planned Parenthood of Wisconsin, Inc.

20170862 GIMB

