



# **2018 Major Grant Guidelines**

*Revised 3/29/2018*

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Kindly read these guidelines before submitting an application.  
Applications must be submitted using the online form.

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### MISSION

The Provident Bank Foundation (PBF) was established in 2003 with the intent of supporting not-for-profit groups, institutions, schools and other 501(c)(3) organizations that provide valuable services to the communities served by Provident Bank. The Provident Bank Foundation is committed to strengthening and sustaining its relationship with communities in the [Bank's marketplace](#).

### FUNDING PRIORITY AREAS

PBF is committed to enhancing the quality of life in the New Jersey and Pennsylvania communities served by Provident Bank. PBF makes grants in three priority areas: **community enrichment, education, and health, youth & families.**

- Our giving to **community enrichment** focuses on programs that drive economic development, contribute to a more well-rounded community experience, and provide increased access to information and specialized learning opportunities.
- Our efforts in **education** support innovative programming that expands access to, and improves the quality of, well-rounded educational experiences for people of all ages.
- Our contributions to **health, youth & families** aim to ensure people of all ages and means have the ability to improve the quality of their lives, including having a safe place to live and access to quality healthcare.

### MAJOR GRANTS

**In 2018, a Major Grant will provide funding over \$5,000 and up to and including \$25,000.**

The goal of the Major Grant is to support organizations that have identified an immediate need in the community and for the individuals they serve. A Major Grant funds programs/projects that address one or more of PBF's funding priority areas. These programs/projects are typically more structured and robust than those supported through PBF's Community Grants, but of lesser scale than those supported through PBF's Signature Grants.

Major Grant deadlines are detailed in the *Proposal Process & Timeline* section of these guidelines. A Letter of Intent (LOI) must be completed through PBF's online application portal located [on our website](#). PBF notifies all applicants of funding decisions within one month of the LOI deadline. Formal application is by invitation only.

The Major Grant emphasizes support of sustainable community enhancement and short-term change. We seek to build relationships with organizations that have the capacity and drive to create this change.

**The Provident Bank Foundation cannot provide funding for the following:**

- Individuals
- Organizations not exempt under Section 501(c)(3) of the Internal Revenue Code and as an organization described in section 509(a)(1) or 509(a)(2)
- Religious congregations

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- Organizations that use a third-party fiscal sponsor's Tax ID number/exempt status
  - Political causes, candidates, organizations, or campaigns
  - Multi-year funding requests

**PLEASE NOTE, these grants are not for sponsorships or fundraising events.**

If these guidelines do not fit within your organization's mission and objectives, [click here](#) to go back to our website and review PBF's other grant offerings.

### REQUIREMENTS TO SEEK FUNDING FROM PBF

**Eligibility:** Organizations seeking funding from The Provident Bank Foundation must be determined as exempt from Federal income tax as a 501(c)(3) public charity of the Internal Revenue Code and as an organization described in section 509(a)(1) or 509(a)(2). PBF seeks grantee organizations that show passion for their mission and meet high standards of governance, accountability, and fiscal management.

**Geographic Requirements:** Applicant must be based in, serve, and/or demonstrate proposed project impact in at least one of the following geographies, including towns contiguous to Bank locations:

- **New Jersey:** Bergen, Essex, Hudson, Hunterdon, Mercer, Middlesex, Monmouth, Morris, Ocean, Passaic, Somerset, Union and/or Warren Counties
- **Pennsylvania:** Lehigh Valley (eastern portion of Lehigh County and southeastern portion of Northampton County) and/or Bucks County

**Progress Reports:** Grantees must comply with PBF's financial and narrative reporting requirements throughout the grant period, including 3-month, 6-month, and 12-month progress reports. All required progress reports from previous PBF grants must be received and confirmed prior to submitting a new request. **Failure to comply with this requirement will jeopardize future funding.**

### POLICIES & PROCEDURES

- PBF only accepts one request per organization per calendar year at any level. This would include any sponsorship and/or event requests.
- An organization whose request is not funded in 2018 may reapply in 2019, but not before.
- PBF may choose not to fund a grant, to fund a grant at a lesser amount, to fund only certain aspects of a grant, and/or to attach stipulations to a grant.
- Major Grant recipients agree to a **one (1) calendar year hiatus** and cannot seek additional funding from PBF during that time; i.e., recipients of a 2018 Major Grant are not eligible to apply for PBF funding until 2020.
- **Non-Discrimination Statement:** Applicant organizations do not, and shall not, discriminate on the basis

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of race, color, religion (creed), gender, gender expression, age, national origin (ancestry), disability, marital status, sexual orientation, or military status, in any of its activities or operations.

If these guidelines do not fit within your organization's mission and objectives, [click here](#) to go back to our website and review PBF's other grant offerings.

### FINANCIAL REPORTING REQUIREMENTS

- **Itemized program/project budget and budget narrative:** Applicant is required to submit an itemized budget for the requested program/project with a narrative for how the grant funds will be allocated. A *budget template can be found on our website under the [Guidelines tab](#).*

A detailed narrative should address the following:

- Amount of funding requested
  - Explanation and justification for all operating expenses
  - Brief list of other major sources of financial support for the organization
  - Financial and/or other forms of support (i.e., "in-kind" support), if any, that the recipient organization will commit to the project for which funding is requested.
- **Organization's annual budget:** Applicant is required to submit with the LOI their organization's current year annual budget.
  - **Most recent Form 990:** If you file a 990-N (e-postcard), you must provide organization's financials and IRS determination letter. Confirmation of filing is not accepted.
  - **Most recent audited financials:** Applicant is required to submit with the LOI their organization's audited financials from the most current year.

### GRANTEE RESPONSIBILITIES

*Organizations accepting a Major Grant will comply to use the funds in the manner and for the purpose(s) for which the grant is intended. Grant recipients will be required to sign an award agreement letter that states:*

- Major Grant recipients agree to a **one (1) calendar year hiatus** and cannot seek additional funding from PBF during that time; i.e., recipients of a 2018 Major Grant are not eligible to apply for PBF funding until 2020.
- **Progress Reports:** Grantees must comply with PBF's financial and narrative reporting requirements throughout the grant period, including 3, 6, and 12-month progress reports. *Failure to comply with this requirement will jeopardize future funding.*
- **Promotion & Publicity:** Grantees are required to coordinate promotion and publicity of grants with PBF. This includes print, social media, and other media outlets. PBF support must be acknowledged in all publicity. The complete Foundation name, **The Provident Bank Foundation**, must be used in all documents referring to your grant. The use of the current PBF logo is required on all promotional

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materials and will be made available upon request.

- **Evaluation Activities:** Grantees must participate in PBF's required evaluation activities, which may include, but are not limited to, periodic updates, interviews, and site visits.

### JOINT REQUESTS/COLLABORATION

The Provident Bank Foundation believes in the power of collaboration and that organizations can achieve more working together than they can alone. PBF gives special consideration to two or more organizations that seek to create or expand innovative programming to achieve measurable outcomes for the people they serve. **To submit a joint request, the following is required:**

- One of the collaborating organizations must be designated as the "principal applicant" to receive and allocate grant funds.
- All partner organizations are subject to the same rules and requirements as the principal applicant.
- Joint requests/collaboration proposals must define the following in the LOI:
  - Statement of Need – *Why are you working together on this project?*
  - Proposed Model of Collaboration – *Assignment of program/project responsibilities.*
  - Description of Planning Process
  - Timeline for Planning
- A Memorandum of Understanding (MOU) from each participating partner organization **must be submitted with the LOI**. The MOU details an agreement between two or more collaborating organizations that states the roles and responsibilities of each agency for the duration of the project.
- Audited financial statements and Board of Directors lists with affiliations for each participating partner organization **must be submitted with the LOI**.

### COLLABORATION WITH SCHOOLS

If your organization is partnering with a school district and/or individual schools for the proposed program/project, a fully executed Memorandum of Understanding (MOU) **must be submitted with the LOI**. It should address the following:

- Statement of Need – *Why are you working together on this project?*
- Proposed Model of Collaboration – *Assignment of program/project responsibilities.*
- Description of Planning Process
- Timeline for Planning

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If you have a fully executed, current MOU with the school district and/or individual schools, please submit it with the LOI.

### PROPOSAL PROCESS & TIMELINE

Applicants must follow a two-step application process:

1. Submit a Letter of Intent (LOI) through the [online LOI form](#). The LOI must describe the initiative for which you seek funding, the specific goals of the project, and your organization’s track record and capacity. The LOI should reflect clear awareness of PBF’s assessment criteria described below.
2. If PBF approves your LOI, you will receive an electronic communication directing you to access the online application. Those invited to submit a formal application must do so online through the Account Information Portal. For any technical questions and accessing draft applications and/or to access progress report forms, review the [Guide to Navigating Online Forms](#) on our website.

The 2018 LOI and application timeline for a Major Grant is as follows. **Access to LOI and application forms will CLOSE at 5 p.m. EST on the dates listed.**

Cycle	LOI Due	Formal Application Due (by invitation only)	Notification from PBF
<b>Cycle 1</b>	February 1 at 5 p.m. EST	April 2 at 5 p.m. EST	May 2
<b>Cycle 2</b>	May 1 at 5 p.m. EST	July 2 at 5 p.m. EST	August 6
<b>Cycle 3</b>	August 1 at 5 p.m. EST	October 1 at 5 p.m. EST	November 5

### ASSESSMENT CRITERIA

*PBF uses the following assessment criteria to evaluate the creativity, feasibility, efficacy, and reach of proposed initiatives, as well as the likelihood of attaining stated goals and objectives.*

**In reviewing a Major Grant, PBF is sensitive to the following areas:**

- **Scope:** PBF seeks proposals that promise innovation and change or a significant enhancement of existing services. The objective of the proposal corresponds with the purpose, intent, and funding categories of PBF’s initiative.
- **Need:** A genuine need is identified and the program/project realistically addresses identified need or issue in the community.
- **Reach:** Demonstrates potential to reach a significant number of community members. Proposals should clearly identify the target population(s), the numbers served and the specific impact that success will bring.
- **Measureable Outcomes:** Demonstrates potential to yield measurable, tangible benefits for grant recipient and those it serves, and a plan to track them.

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- **Business Model:** Proposals demonstrates financial prudence and effective resource allocation.

### Specifically, requests should exhibit and include:

- **Funding Priority Area:** The request must be specific to one funding priority area: **community enrichment, education, or health, youth & families**. *For more information, refer back to the Funding Priority Area descriptions on page 2.*
- **Geographic Requirements:** Applicant must be based in, serve, and/or demonstrate proposed project impact in at least one of the following geographies, including towns contiguous to Bank locations:
  - **New Jersey:** Bergen, Essex, Hudson, Hunterdon, Mercer, Middlesex, Monmouth, Morris, Ocean, Passaic, Somerset, Union and/or Warren Counties
  - **Pennsylvania:** Lehigh Valley (eastern portion of Lehigh County and southeastern portion of Northampton County) and/or Bucks County
- **Community Served: (Required)** Applicant must identify which towns/cities will receive the greatest portion of funding or the bulk of services as a result of the grant and list—in order of importance—the towns/cities and the neighborhoods/wards the program/project impacts. The target population, the number of unduplicated individuals served (not percentages), and the specific impact that success will bring to the community must be detailed.
- **Request Description:**
  - The description of the proposed funding request must be detailed and specify measureable and realistic project objectives
  - The program/project budget should be commensurate with its anticipated impact
  - Background and significance of the specific need or issue that the proposed program/project will address
- **Outcomes:** A logic model is recommended when preparing this part of the application; a logic model template can be found on our website under the [Guidelines tab](#). Details on the following must be included:
  - Timeline of milestones anticipated at months 3, 6, and 12;
  - 3-5 measureable outcomes of the proposed program/project
  - How the program/project will be tracked and evaluated over the duration of the grant
- **Organizational Capacity:** Applicant must demonstrate the ability to implement proposed activities and track progress within the stated timeline.
- **Business Model Integrity:** Applicant and the proposed program/project must exhibit financial prudence and effective resource allocation. A copy of a current and satisfactory **audited financial statement** conducted by a certified public accountant must be included with your LOI.
- **Itemized Program/Project Budget and Budget Narrative:** Applicant is required to submit an itemized budget for the requested program/project with a narrative for how the grant funds will be allocated. *For*

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*more information, refer to the Financial Reporting Requirements section on page 4.*

- **Sustainability:** PBF gives significant weight to the organization's plan to sustain the program/project and its benefits beyond the funding period.
- **Commitment:** A record of, and a passion for, delivering high-quality, impact-oriented programming that serves as many people as possible is a consistent hallmark of successful applications.
- **Innovation:** Be sure to call attention to innovative elements of the design and intended implementation of funded activities, including opportunity to replicate.

### REQUIRED ATTACHMENTS

#### Letter of Intent (LOI)

Organizations submitting a LOI for a Major Grant are **required** to provide the following PDF documents in the Attachments section of the application:

- Itemized program/project budget and budget narrative
- Organization's annual budget
- Most recent Form 990 (Confirmation of filing is not accepted)
- Most recent audited financials
- List of all grants applied for in the past 24 months
- Board of Directors and board member affiliations
- Organization's achievements over the past three (3) years (limit 500 words)

For Joint Requests/Collaborations, applicants are **required** to provide the following PDF documents for each partnering organization:

- Memorandum of Understanding from all partner organizations
- Audited financials from all partner organizations
- Board of Directors and affiliations from all partner organizations

For collaborations with schools, applicants are **required** to provide the following PDF document for each partnering organization:

- Memorandum of Understanding from all partner organizations  
*See page 5 for more information regarding this requirement.*



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Optional, but recommended, PDF documents to submit include:

- Logic model – *A logic model template can be found on our website under the [Guidelines tab](#)*
- Supporting program material, specific to the request

### **Application**

Organizations invited to submit a full application may be required to submit the following:

- Revised program/project budget and budget narrative
- Supporting program material, specific to the request

Any questions should be emailed to The Provident Bank Foundation at [Foundation@Provident.Bank](mailto:Foundation@Provident.Bank).