

2019 Major Grant Guidelines

The Provident Bank Foundation 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](#).

Overview and Purpose

The Major Grant emphasizes support of sustainable community enhancement, meaningful impact, and short-term change. PBF seeks to build relationships with organizations that have the capacity and drive to create this change.

PBF funding directly supports efforts to enhance the quality of life in the New Jersey and Pennsylvania communities served by Provident Bank through three Funding Priority Areas: Community Enrichment, Education, and Health, Youth & Families.

Major Grant Funding Priority Areas

PBF funds applicants who are prepared to address a need aligned to PBF's Funding Priority Areas. Major Grant applicants must measure their program's impact in a manner appropriate to the selected Funding Priority Area.

Funding Priority Area	
Community Enrichment	PBF's giving 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.
Education	PBF's efforts support innovative programming that expands access to, and improves the quality of, well-rounded educational experiences for people of all ages.
Health, Youth & Families	PBF's contributions 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.

Process and Timeline

PBF will review requests in two stages:

- 1) Eligible organizations **must** submit a Letter of Intent (LOI) which will be reviewed and scored for alignment with the programmatic priorities of the Major Grant.
- 2) Applicants whose LOIs pass the initial review will be invited to submit an Application. Final awards will be made after the review and approval of Applications by PBF's Board of Directors. Key dates in the 2019 calendar year process are shown below.

Cycle 1

Letters of Intent available	January 2
Letters of Intent due	February 1 by 3:00 PM
Notification of Letter of Intent decisions	Week of February 25
Applications due	March 29 by 3:00 PM
Notification of Application decisions	Week of April 29
Check presentations	May 6 through May 31

Cycle 2

Letters of Intent available	April 1
Letters of Intent due	May 1 by 3:00 PM
Notification of Letter of Intent decisions	Week of May 27
Applications due	June 28 by 3:00 PM
Notification of Application decisions	Week of July 29
Check presentations	August 1 through August 30

Cycle 3

Letters of Intent available	July 1
Letters of Intent due	August 1 by 3:00 PM
Notification of Letter of Intent decisions	Week of August 26
Applications due	September 27 by 3:00 PM
Notification of Application decisions	Week of October 28
Check presentations	November 4 through November 22

Applicants that have been declined may request verbal feedback on their request by appointment only.

Program Guidelines

In 2019, a Major Grant will provide funding over \$5,000 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. Programs supported by a Major Grant 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.

PBF seeks programs that will make a meaningful impact on the communities that [Provident Bank](#) serves. Programs that detail reliable methods for measuring change over time will have a competitive advantage, as will programs that feature a regular and sustained presence in the lives of program participants.

What PBF Will Not Fund

As with all grants, The Provident Bank Foundation will not fund the following:

- Individuals
- Organizations not exempt under Section 501(c)(3) of the Internal Revenue Code
- Organizations not classified in Section 509(a)(1) or 509(a)(2)
- Organizations that use a third-party fiscal sponsor's Tax ID number/exempt status
- Grants for scholarships to individuals
- Grants to other grant-making organizations
- Sacramental or theological functions of religious organizations
- Political causes, candidates, organizations, or campaigns
- Multi-year funding requests

In addition, special limitations apply to Major Grants. PBF will not support:

- Sponsorships or fundraising events

Eligibility Guidelines

Tax Status

Organizations seeking a Major Grant from PBF must be certified as a tax exempt public charity under **Section 501(c)(3)** of the Internal Revenue Code and classified as “not a private foundation” under **Section 509(a)(1)** or **509(a)(2)**.

Financial Requirements

PBF supports grantee organizations that meet high standards of governance, accountability, and fiscal management. To apply for a Major Grant, organizations must submit the following:

- **Audited financial statements:** With the Letter of Intent, applicants are **required** to submit the organization's most recent audited financial statements. **If your organization does not have audited financial statements, it is not eligible for a Major Grant.**
- **Form 990:** With the Letter of Intent, applicants are **required** to submit the organization's most recent Form 990.

Geography

Applicants must be based in, serve, or demonstrate proposed program impact within at least one of the following geographies, and specifically within or contiguous to communities where Provident Bank has a physical presence:

- **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

Active Grants and Prior Funding

Requests will not be accepted from organizations with grants from PBF that are active. Organizations that are currently funded by PBF cannot apply for additional funds until:

- The 12-month grant term on the most recent PBF grant has concluded.

- All required progress reports have been submitted.
- The mandatory hiatus period as stipulated by their PBF grant contract has concluded.

Right to Reject

PBF reserves the right to:

- Reject any or all requests submitted
- Reject a request that doesn't include all required attachments
- Adjust program guidelines, including submission deadlines
- Contact you to discuss your request and/or request additional information

Submitting either a Letter of Intent or an Application does not guarantee funding by The Provident Bank Foundation.

Other Policies

- PBF only accepts one request per organization per calendar year at any level. This includes sponsorship and/or event requests.
- An organization whose request is not funded in 2019 may apply in 2020, but not before.
- PBF may choose not to fund a request, to fund a request at a lesser amount, to fund only certain aspects of a request, and/or to attach stipulations to a grant.
- **Non-Discrimination Statement:** Applicant organizations do not, and shall not, discriminate on the basis 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.

Joint Requests and Collaborations

PBF believes in the power of collaboration, and that organizations can achieve more by working together than they can alone. PBF gives special consideration to two or more organizations that seek to create or expand innovative programming together to achieve measurable outcomes for the people they serve.

Collaboration with Nonprofits, Colleges, or School Districts

To submit a joint request with another nonprofit, college, or school district, the following is required:

- One of the collaborating organizations must be designated as the “principal applicant” to apply for, receive, and allocate the grant funds.
- All partner organizations are subject to the same rules and requirements and policies as the principal applicant. All partners must supply the same qualifying paperwork as the primary applicant.
- Joint requests must define the following in the Application:
 - Statement of Need (i.e., Why are you working together on this program?)
 - Proposed Model of Collaboration: Assignment of program responsibilities
- A Memorandum of Understanding (MOU) **from each partner organization** must be submitted with the Application. 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 program. If you are partnering with a school for the proposed program, the MOU must be executed **with the school district**, not with the individual school, to ensure commitment to the program.

Collaboration with Businesses, Vendors, or Contractors

If your organization is utilizing the services of a for-profit business, vendor, or fee-for-service contractor to

facilitate the proposed program, a fully executed contract or service agreement with the partnering entity that clearly states each party's obligations and promises to the other party must be submitted with the Application. The contract should also address the term of the agreement and how the contract may be terminated. **If a contract or service agreement for partnership with a business, vendor, or contractor is contingent upon securing grant funding for the proposed program, this must be stated in the LOI.**

In the Application, the following must be addressed:

- Statement of Need (i.e., Why are you working together on this program?)
- Proposed Model of Collaboration: Assignment of program responsibilities

Assessment Criteria

PBF uses the following assessment criteria to evaluate the innovation, feasibility, efficacy, and reach of proposed initiatives, as well as the likelihood of attaining stated goals and objectives. **In reviewing a Major Grant request, PBF scores the request on the following criteria:**

Scope (15 points)

Program objectives correspond with the purpose and intent of the Major Grant and the selected Funding Priority Area.

Need (15 points)

An immediate need is identified within the community served, and the program realistically addresses the need.

Reach and Community Served (15 points)

Demonstrates potential to reach significant numbers of community members. Information regarding the number of individuals, specific city or cities, neighborhoods, or communities that your proposed program will serve must be provided.

Organizational Capacity (15 points)

Possesses a record of organizational achievement and has the resources relevant to the proposed programming (human capital, expertise, etc.) to implement funded activities within the stated timeline.

Measurable Outcomes (15 points)

Demonstrates potential to yield measurable, tangible goals and objectives for the grant recipient and those it serves, and a plan to track and evaluate the outcomes.

Business Model (15 points)

Demonstrates financial prudence and effective resource allocation at both the organization level and for the requested program.

Sustainability (10 points)

PBF gives significant weight to the organization's plan to sustain the program and its benefits beyond the funding period. Innovative elements of the design and intended implementation of funded activities, including opportunity to replicate, should be highlighted.

Grant Acceptance and Payment

After a grant has been approved, an award letter along with the grant check will be delivered to the grantee at the check presentation (see page 2 for dates). The grantee will sign the award letter and keep a copy for its files and return the original, with an original signature, to PBF as proof that it agrees to comply with the terms and conditions of the grant. PBF refers to this as the Acknowledgement Receipt.

Reporting Requirements for 2019 Major Grants

All grantees are required to submit financial and narrative progress reports throughout the 12-month grant period, including:

- 3-Month Progress Report
- 6-Month Progress Report
- 12-Month Progress Report

Grantees are expected to track and share data about their programs and participants. Performance metrics will be determined by the applicant and listed in the LOI. Program milestones and measurable outcomes will be determined by the applicant and included in the Application, and grantees must respond to these outcomes in the progress reports.

All reports are a requirement of PBF's grant contract. **Failure to comply with reporting requirements will jeopardize future funding.**

Requirements for Letters of Intent

The first stage of the 2019 Major Grant application process is the Letter of Intent (LOI). The LOI is an overview of the organization's request, and how it intends to meet the main elements of PBF's funding requirements. Applicants wishing to submit an LOI must complete a short eligibility quiz prior to starting their LOI.

LOIs must be submitted through PBF's online grant application portal on or before the stated deadline. Late submissions will not be accepted. No changes or additions will be accepted after the deadline.

Any updates to the LOI process prior to the LOI deadline will be published on PBF's website. Applicants are advised to monitor www.TheProvidentBankFoundation.org regularly during all phases of the application process.

The LOI should include clear and concise information about the following items:

- ✓ **Funding Priority Area** (See page 1 for more information)
Indicate the Funding Priority Area that your program will address.
- ✓ **Elevator Pitch**
Tell us what you would say if you had only 30 seconds to explain how your program stands out from programs serving a similar population in your area. (150 words)
- ✓ **Use of Funds**
Summarize how you would spend PBF funds to carry out this program. (100 words)
- ✓ **Statement of Need**
Describe the specific need in your community that the program meets and how you know this need exists. Include relevant demographic and community data as support. (100 words)
- ✓ **Target Audience**
Explain who exactly will benefit from the program, including the projected number of individuals, city or cities, neighborhoods, or communities in [Provident Bank's marketplace](#) the program will impact. Use concrete numbers as much as possible. (150 words)
- ✓ **Program Activities**
Describe the actions that grant funding will make possible. Explain who will take these actions and when. Tell us how these activities directly address your Statement of Need. (250 words)
- ✓ **Performance Metrics**
Identify the methods and metrics you will use to measure program impacts. (A more detailed plan will be required at the Application phase of the process.) (100 words)
- ✓ **Capacity**
Explain your organization's qualifications to carry out this program. (100 words)
- ✓ **Joint Request Information** (See pages 4-5 for more information)
If this is a joint request, identify the collaborative partners.

In addition, the LOI submission must include the following attachments as PDF documents:

- Audited financial statements from the most recent fiscal year (See page 3 for more information)
- Form 990 from the most recent fiscal year (See page 3 for more information)

Only complete LOIs will be reviewed. Only applicants whose LOIs demonstrate tight alignment with the Major Grant Funding Priority Areas and desired results will be invited to submit full Applications.

Requirements for Applications

After LOIs have been evaluated, applicants invited to proceed to the Application stage will be contacted by email from Jane.Kurek@Provident.Bank during the stated timeframe, and the Application will be made available in the applicant's Account Portal, https://www.grantrequest.com/SID_1251?SA=AM.

Applications follow the same basic contours of the LOI, but carry additional requirements and are expected to be more detailed.

Applicants must notify PBF in writing if there have been changes to the executive leader or grant request contact prior to submitting the Application.

Applications must be submitted through PBF's online grant application portal on or before the stated deadline. Late submissions will not be accepted. No changes or additions will be accepted after the deadline.

Applications should include clear and thorough information about the following items:

- ✓ **Program Goals**
Describe the results that your program seeks to achieve. (100 words)
- ✓ **Program Activities**
Describe the actions that grant funding will make possible. If invited to submit an Application, you will be able to add or edit what you entered in this field in the LOI. (250 words)
- ✓ **Program Dosage**
Describe how often and with what frequency participants will engage with the program. (100 words)
- ✓ **Timeline**
Present a chronological description of key program activities and anticipated milestones at months three, six, and 12. (300 words)
- ✓ **Program Outcomes**
Referencing the performance metrics listed in the LOI, explain the specific impacts that your program activities will have on your beneficiaries or participants. Outcomes should describe changes in participants' knowledge, skills, health status, behaviors, or other important categories. (150 words)

Applicants must also include 3-5 measurable outcomes that will be tracked over the grant term.

While not required, PBF strongly recommends using a Logic Model to prepare your response. A Logic Model template can be found on [PBF's website](#).
- ✓ **Evaluation Plan**
Specify the methods you will use to measure progress toward the outcomes stated above. (200 words)
- ✓ **Staff Qualifications**
Provide brief descriptions of your program's staffing plan and the qualifications of your staff members to carry out this program. (100 words)
- ✓ **Sustainability**
Explain your plan for sustaining the impact of your program beyond the PBF grant period. PBF is interested in continuation strategies that are not contingent solely on the receipt of new external funding. (100 words)
- ✓ **Communication/Social Media**
Describe the platforms you have at your disposal to communicate information about your proposed program and who are the audiences. (50 words)

- ✓ **Joint Request Information** (See pages 4-5 for more information)
 - Statement of Need (i.e., Why are you working together on this program?)
 - Proposed Model of Collaboration: Assignment of program responsibilities

- ✓ **Demographic Information**
Specify where programming will take place, as well as where program participants will come from.

If applicable, you'll be asked to provide information on the following:

- Statistics on low-to-moderate income individuals served
- Plans for community stabilization or revitalization

Applicants are required to submit the following attachments as PDF documents:

- Organization's annual budget
- Itemized program budget in [PBF's required format](#)
- Program budget narrative
- Names and affiliations of your Board of Directors/Trustees
- List of grants applied for in the past 24 months and amounts received
- Organization's achievements over the past three (3) years (500 words)
- Any additional information or documentation requested by PBF
- *Optional attachment:* Supporting program material, specific to the request

For Joint Requests (see pages 4-5 for more information):

Collaboration with nonprofits, colleges, or school districts:

- Memorandum of Understanding from all partner organizations (For schools, MOUs must be executed **with the school district**)
- Audited financial statements from all partner organizations
- Names and affiliations of Board of Directors/Trustees from all partner organizations

Collaboration with businesses, vendors, or contractors:

- Contract or service agreement from all partner businesses, vendors, or contractors

Click [here](#) to apply