

# 2020 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 **one** Funding Priority Area.

Funding Priority Area	
<b>Community Enrichment</b>	Programs that drive economic development, contribute to a more well-rounded community experience, serve those with special needs, and provide increased access to information and culture.
<b>Education</b>	Innovative programming that expands access to, and improves the quality of, well-rounded educational experiences through strong academic support and curriculum development.
<b>Health, Youth &amp; Families</b>	Programs that ensure people of all ages and means have the ability to live healthier, more fulfilling lives, including access to quality healthcare, nutrition and wellness, and mentorship opportunities.

## 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 2020 calendar year process are shown below.

### Cycle 1

Letters of Intent available	January 2 at 9:00 AM EST
Letters of Intent due	January 24 by 3:00 PM EST
Notification of Letter of Intent decisions	Week of February 17
Applications due	March 13 by 3:00 PM EST
Notification of Application decisions	Week of April 27
Check presentations	May 1 through May 29
<b>Grant term</b>	<b>May 1, 2020–April 30, 2021</b>

### Cycle 2 – **POSTPONED FOR 2020**

Letters of Intent available	April 1 at 9:00 AM EST
Letters of Intent due	April 24 by 3:00 PM EST
Notification of Letter of Intent decisions	Week of May 18
Applications due	June 12 by 3:00 PM EST
Notification of Application decisions	Week of July 27
Check presentations	August 3 through August 31
<b>Grant term</b>	<b>August 1, 2020–July 31, 2021</b>

### Cycle 3 – **ADJUSTED**

Letters of Intent available	July 1 at 9:00 AM EST
Letters of Intent due	July 24 by 3:00 PM EST
*Notification of Letter of Intent decisions	*Week of August 31
*Applications due	*September 25 by 3:00 PM EST
Notification of Application decisions	Week of November 2
Check presentations	November 9 through December 4
<b>Grant term</b>	<b>November 1, 2020–October 31, 2021</b>

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

## Program Guidelines

In 2020, 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.

Applicants invited to proceed to the Application will be required to submit the following:

- **Itemized program budget using PBF's budget form template** – The required budget form template can be found on [PBF's website](#).

### 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 active grants from PBF. Organizations that are currently funded by PBF cannot apply for additional funds **until the following requirements have been met:**

- 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 (if applicable).

## 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 (1) request per organization per calendar year at any level. This includes sponsorship and/or event requests.
- An organization whose request is not funded in 2020 may apply in 2021, 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 align 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 must be provided regarding the number of individuals and the specific communities your proposed program will serve.

### 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, grant contract, and the grant check will be delivered to the grantee either by mail or at a scheduled check presentation (see page 2 for dates). The grantee will sign the grant contract 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.

## Reporting Requirements for 2020 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, program milestones, and measurable outputs will be determined by the applicant and included in the Application; grantees must respond to each 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 2020 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](http://www.TheProvidentBankFoundation.org) regularly during all phases of the application process.

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

- ✓ **Program Start Date** (See page 2 for grant terms)
- ✓ **Funding Priority Area** (See page 1 for more information)
- ✓ **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)
- ✓ **Alignment**  
Describe how this program aligns with the selected Funding Priority Area. (100 words)
- ✓ **Target Audience**  
Who or what (clients, participants, communities, environments) do you hope will change or benefit as a result of your program's efforts? Include any key details about them that might impact your approach, including the number of individuals you anticipate serving. (200 words)
- ✓ **Statement of Need**  
Describe the specific need of the target audience that the program meets and how you know this need exists. Include relevant demographic and community data as support. (100 words)
- ✓ **Community**  
List the cities, neighborhoods, or communities the program will impact. If your program will serve multiple cities, list up to the top five (5) served.
- ✓ **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 target audience and their needs. (250 words)
- ✓ **Outcome Statement**  
List the most important outcomes you are seeking to achieve. How do you expect your target audience will change or benefit as a result of your program? Outcomes should describe changes in participants' knowledge, skills, health status, behaviors, or other important categories. (150 words)
- ✓ **Use of Funds**  
Summarize how you would spend PBF funds to carry out this program. Include detail on what percentage of grant funds would support program expenses, and what percentage would support general operations. (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 PBF's 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 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](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 are required to use PBF's [budget form template](#) when completing their Application.

**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 with all required attachments 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 Need**  
How was the need for this program determined? How does it directly relate to the need of your target audience outlined in the LOI? (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 to 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)
- ✓ **Program Outreach**  
How will you reach your target audience? What methods of communication will you use to communicate about the program? (100 words)
- ✓ **Timeline**  
Present a chronological description of key program activities and milestones at months three, six, and 12 based on the grant term. (300 words)
- ✓ **Outcome Statement**  
List the most important outcomes you are seeking to achieve. How do you expect your target audience will change or benefit as a result of your program? You may add to or edit your response from the LOI. (150 words)
- ✓ **Measurable Outputs**  
List 3–5 measurable outputs you will take with your target audience over the grant term to create the desired changes or benefits outlined in your Outcome Statement. Outputs should be listed with their anticipated 12-month results.
- ✓ **Evaluation Plan**  
Specify the methods you will use to measure progress toward the stated outputs. (200 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)
- ✓ **Contingency Planning**  
What happens if activities, outcomes/outputs, or other program aspects do not work out as designed or anticipated? How will you change or adjust the program to make course corrections? (150 words)
- ✓ **Joint Request Information** (if applicable)
  - 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 and how many will be served.

You'll also 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