

Request for Proposals

Working to Strengthen our Communities

Introduction

Ponce Bank, a wholly owned subsidiary of Ponce Financial Group (PFG), is a Minority Depository Institution (MDI), a certified CDFI and a certified SBA lender. Ponce Bank is a federally chartered savings association with deep New York City roots and steadfast commitment to equitable access to banking.

Ponce was founded in 1960 by Latino community members of the South Bronx to address the under-serving and under-banking that existed in communities of color and counter the targeted disinvestment in those neighborhoods.

Our Bank has earned a reputation for serving the needs of our communities by emphasizing the importance of personal banking and by promoting local economic development. We employ a highly qualified and professional staff and offer a wide variety of products and services designed to meet the needs of our customers and our communities. We are honored to serve our communities and will be honored to serve you through the Ponce De Leon Foundation.

Ponce De Leon Foundation's mission is to help address the economic and social challenges faced by the communities we serve by supporting programs targeted towards our core priority areas: affordable housing, healthcare, economic development, education, social services, cultural events and targeted programming for Youth and Senior services.

The Ponce De Leon Foundation is accepting proposals for community projects that seek to positively impact individuals, groups and services in the above noted core areas. Eligible organizations must be IRS-registered, tax exempt, 501 (c) (3) organizations or other non-profits which demonstrate an ability to cost effectively deliver services and benefits to successfully meet the needs of the communities we serve. Please complete the attached Grant Eligibility Quiz (Attachment #2) to determine eligibility before beginning the application process.

We invite eligible organizations to submit proposals by **August 15th**, **2025**. Selected proposals will receive grant funding to implement a "Ponce De Leon Foundation Strengthening Our Communities" project. General operating support requests will not be considered at this time. Grant funding will be for one year, beginning January 1, 2026.



Grant Restrictions

- Ponce De Leon Foundation only funds registered 501(c)(3) or non-profit organizations.
- We do not fund religious, political, fraternal, Quasi-Governmental entities, or individual activities.
- The minimum request is \$5,000.00 with the maximum being \$30,000.00.
- All entities applying need to submit the required documentation. **No exceptions**.
- A limit of \$30 million in consolidated assets (Includes Subsidiaries and Parent Companies) will apply to all grant requests.
- Entities cannot apply for a grant request of more than 10% of their operating budget.
- Only entities in the counties where Ponce Bank has branches can apply.

Important Dates

Best Practices Webinar Release Date Proposals Due Date by 5:00 pm Notice of Awards Grant Funds Released Before Grant Start Date July 11, 2025 July 14, 2025 August 15, 2025 December 01, 2025 December 30, 2025 January 1, 2026

Requirements of Grant Awardees

- After notification of award, if Grant is reduced, Grantee will be asked to submit a budget modification and include any revisions to the work plan as approved by Ponce De Leon Foundation.
- Grantee must attend Quarterly scheduled meetings.
- Submission of Reports:
 - o 6-month progress and expense report (June)
 - o 12-month final report and expenses (December)

Submitting a Proposal

- RFP Webinar Training is highly recommended.
- Only Electronic submissions (PDF) will be accepted.
- RFP file is fillable, kindly complete all required sections.
- All RFP responses must be submitted via our Ponce De Leon Foundation Portal via www.Poncedeleonfoundation.org website.
- All required documents should be submitted as a separate attachment (PDF) and labeled appropriately, matching title of the section. DO NOT COMBINE ATTACHMENTS.
- All required documentation must be submitted with the original grant request.
- No additional documentation will be permitted after submission due date.
- If any required documentation is missing your proposal will be disqualified. **No Exceptions**.
- Late proposals will not be accepted.



Grant Application Guidelines

Please follow all instructions. All attachments detailed below are required to be submitted for your proposal to be considered complete.

Your grant request should be clear and concise and have realistic goals. The narrative portion of the proposal should be no more than four (4) pages long, single spaced, in 12-point font (Arial or Times New Roman), with one-inch margins. Required attachments (listed below) are not included in the page count.

Your proposal package should include:

Use ONLY the templates provided, for any other documents, ONLY upload PDF files, named accordingly.

Attachment #1 A Grant Application Cover Form (attached)

Attachment #2 A completed Grant Eligibility Quiz (attached) used to determine your eligibility.

Attachment #3 A Program Narrative addressing the following key items (limit 4 pages)

- 1. Brief description of your organization, its mission, history, programs/services, accomplishments, and past program results.
- 2. Statement of Need what issue does the proposed project intend to address?
 - Description of target population and community to be served.
 - Gaps in existing services or programs which would be met by grant funds.
 - Rationale for proposed project how will the funds benefit the community?
- 3. Proposed Project Description
 - Program approach and outreach methodology How do you intend the address the issue and how do you ensure it will reach those it is intended to assist?
 - Staffing and oversight Who will provide the service and who will supervise the process?
 - Goals & Objectives State 3 Program Goals and Objectives
 - Project Evaluation What will result if you meet your goals and objectives?



- What changes do you expect to see in the community as a result of your project?
- How will success be measured?
- Sustainability How will the gains be maintained after grant has ended?

Attachment #4 Timetable breakdown for the project outlining major activities, benchmarks and anticipated outcomes.

Attachment #5 Budget and Budget Justification (attached)

For Items 6, 7, 8 Fiscal Year ends MUST match

Attachment #6 Financial Statements of the organization as of 2024

- Audited Financial Statements (as of 2024)
- If audited financial statements of 2024 are not available, you must provide audited financial statements as of 2023 and provide internally generated 2024 financial statement. (BOTH ARE REQUIRED)
- Internally generated financial statements should include a balance sheet and revenue/income statement.
- If audited financial statements are not required by IRS, and you have less than \$50K in gross receipts, you must still provide internally generated statements as of 2024, including balance sheet and revenue/income statement.

Attachment #7 IRS 990 & IRS 990-N as of 2024

- An organization that normally has \$50K or more in gross receipts is required to provide an IRS 990 form.
- An organization that normally has less than \$50K in gross receipts is required to provide an IRS 990-N form, also known as the e-Postcard.
- Please note that one of the above is required for all entities.

Attachment #8 CHAR 500 (Samples attached) as of 2024

- For NYS a copy of your CHAR 500 with all attachments
- For NJS a copy of your CRI-300R with all attachments
- Under the new rule, an organization is subject to the new requirement to file its CHAR500 annual report with the Department of State if it:
 - Is registered with the Charities Bureau under Article 7-A of the New York Executive Law to solicit charitable contributions in New York State;

- Annually files Form CHAR500 with the Charities Bureau; and
- Has more than \$250,000 of total annual revenue and support.

Attachment #9 IRS 501(c)(3) determination letter

Attachment #10 Detailed list of all funding sources of your entity including amounts.

Attachment #11 Detailed list of Board of Directors with the following:

- Full names
- Affiliations/Employer
- Title

Attachment #12 Copy of W9 signed and dated as of August 2025

Attachment #13 New York or New Jersey – Good Standing Certificate as of – (see sample provided) Links to obtain certificates for both NY & NJ provided below: as of 2025

- https://dos.ny.gov/certificate-status
- <u>https://www.njportal.com/dor/businessrecords/EntityDocs/</u> <u>StandingCerts.aspx</u>
- Dated 2025
- If you do not have the 2025, we will only accept one dated 2024. NO EXCEPTIONS.

Attachment #14 Ponce Bank Relationship letter on your entity letterhead, describing all Ponce Bank activities. This may include:

A letter must be provided, with any of the descriptions listed below, otherwise this section will be considered incomplete and disqualify your application.

- Sponsorships received from Ponce Bank.
- Financial Mastery activities held
- Accounts
- If no relationship, please state so in 1-2 sentences.



Attachment #1 Application Cover Page

Ponce De Leon Foundation – Working to Strengthen our communities.

Organization App	lying	
Name:		
Address:		
City:	State:	Zip:
Project Title:		
Amount Requested	1: \$	
Contact Person fo	r Proposal and/or Program:	
Name:		
Address:		
Position:		
Name: Address: Position: Phone:		
Email:		
	Program Categ	ory: (Select one)
	☐ Youth Services	☐ Education
	☐ Senior Services	☐ Healthcare
	☐ Affordable Housing	☐ Economic Development
	☐ Social Services	☐ The Arts



Attachment #2 Grant Eligibility Quiz

The mission of the Foundation is to help address the economic and social challenges faced by the communities located in any county in which Ponce Bank has a branch office now and, in the future, in turn allowing them to share in our long-term growth. Accordingly, the Foundation will provide grants to support local nonprofit organizations and not-for-profit community groups and other similar types of organizations which demonstrate an ability to cost effectively deliver services and benefits which meet the needs of these communities. The core areas of the Foundation will include programs targeted towards: Affordable Housing, Healthcare, Economic Development, Education, Social Service needs, The Arts and targeted programming for Youth and Senior Services

Ponce De Leon Foundation – Working to Strengthen our communities.

Please answer the following questions and submit to the Ponce De Leon Foundation along with your application. The Foundation will utilize the required supporting documentation provided by you to confirm your eligibility for a grant. If you answered YES to number 7, DO NOT SUBMIT AN APPLICATION.

YES	NO	
		1. Is your organization an IRS-registered, tax-exempt, 501(c)(3) or non-profit organizations?
		2. Is your organization located in and does it serve the residents of the Counties of the Bronx, Manhattan, Brooklyn, Queens, Hudson County NJ, or Bergen County, NJ?
		3. Does your project or program fall under one or more of the program areas supported by the Ponce De Leon Foundation: affordable housing, healthcare, economic development, education, social service needs, The Arts, and targeted programming for Youth and Senior services?
		4. Does the project or program display a history of sustainability and success?
		5. Do you have a detailed budget for the project or program?
		6. Do you have the most recent financial statements including tax returns for the organization that? (As of the required year)
		7. Do the Financial Statements reflect consolidated assets (Includes Subsidiaries of Parent Companies) of more than \$30 million?

Attachment #5 Budget & Justification

Organization:	
Project Name:	

	Description/ Justification	Amount Requested
PERSONNEL		
	Subtotal	\$
FRINGE		
	Subtotal	\$
TRAVEL (only local)		
	Subtotal	\$
PRINTING & SUPPLIES		
	Subtotal	\$
COMMUNICATIONS		
	Subtotal	\$
OTHER (please specify)		
	Subtotal	\$
INDIRECT (not to exceed 10%)		
	Subtotal	\$

Total Requested \$

Attachment #8 CHAR 500

SAMPLE-NYS

From CHAR500 The five need for the first	Annual Filing for Charitable Organizati New York State Department of Law (Office of the Attorney Charities Bureau - Registration Section 120 Broadway New York, NY 10271 http://www.charitiesnys.com / 2 0 1 1 and ending (mmidslyyyy) c. Name of organization			2 0 11 Open to Public Inspection
Name change Initial filing Final filing Amended filing NY registration pending	Number and street (or P.O. box if mail not delivered to street address) City or town, state or country and zip + 4	Room/suite	f. Telephone numb	
correct and complete in accorda	rjury that we reviewed this report, including all attachments, and to noe with the laws of the State of New York applicable to this repo		our knowledge and	i belief, they are true,
a. President or Authorized Of b. Chief Financial Officer or T	Signature Printed Name		Title Title	Date Date
Check C if total contr \$25,000 am contribution NOTE: An organization United Way or incorpor substantially all of its co b. EPTL annual report exempt Check C if gross rece For EPTL or Article-7A registrants of exemptions under both law	Information emption (Article 7-A registrants and dual registrants) biutions from NY State (including residents, foundations, corporat If the organization did not engage a professional fund raiser (PFR is during this fiscal year. In any claim this exemption if no PFR or FRC was used and either: ted community appeal and contributions from other sources did r intributions from one government agency to which it submitted an ion (EPTL registrants and dual registrants) eipts did not exceed \$25,000 and assets (market value) did not ex siming the annual report exemption under the one law under which they are s, simply complete part 1 (General Information), part 2 (Certification) and pa gt aubmit a fee, de not complete the following schedules and de not submit	or fund rais it receives to exceed \$3 annual report ceed \$25,00 registered and rt 3 (Annual Re	ting counsel (FRC). d an allocation from 25,000 or 2) it rece rt similar to that req 00 at any time durin if for dual registrants cl eport Exemption Infor	to solicit n a federated fund, eived all or uired by Article 7-A. g this fiscal year. aiming the annual report
a. Did the organization use a pro if "Yes", complete Schedu b. Did the organization receive g if "Yes", complete Schedu	overnment contributions (grants)?	for fund raisi	-	
Indicate the filing fee(s) you are a. Article 7-A filing fee b. EPTL filing fee c. Total fee	e for summary of fee requirements. submitting along with this form: \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$ \$	total fee	, payable to "NYS	money order for the Department of Law"

1 CHAR500 - 2011

Attachment #8 CRI-300R

SAMPLE-NJS



New Jersey Office of the Attorney General

Division of Consumer Affairs Office of Consumer Protection Charities Registration Section 124 Halsey Street, 7th Floor, P.O. Box 45021 Newark, NJ 07101 (973) 504-6215

Form CRI-300R

Long-Form Renewal Registration/Verification Statement

Pursuant to the New Jersey Charitable Registration and Investigation Act (also known as "the C.R.I. Act" (N.J.S.A. 45:17A-18 et seq.), and prior to operating or commencing solicitation activity in the State, a charitable organization unless exempted from registration requirements (or qualified to file a Short-Form Registration Statement, CRI-200) shall file a Long-Form Initial Registration Statement, CRI-150-I. Charities submitting their annual long-form renewal registration must use Form CRI-300R. Please see the checklist at the end of this form for a discussion of fees, financial statements, documents to be attached, and other requirements for registration.

other requirements for registration. 1. This statement is an Initial or Renewal Registration: Renewal 1b. This statement contains the facts and financial information for the fiscal year ending: 2. Federal ID Number: 2a. N.J. Charities Registration Number: 3. Full legal name of the registering organization: In care of: 4. Mailing Address: 5. Physical Address: Same as Mailing Address: 6. If the street address listed above is not where the organization's official records are kept, or if the organization does not maintain an office in New Jersey, indicate the name, full address, phone and fax number of the person having custody of the organization's records, and to whom correspondence should be addressed. Address: 7. Organization's contact information: Email: Website:

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13. Have there been alternated in the organization's name, address, internal Revenue Service (I.R.S.) status, etc. since the date of your last reporting.

14. What is the charkable purpose or purposes for which the organization was formed.

14. What is the charkable purpose or purposes for which the organization was formed.

14. Does the organization solicit or intend so solicit contributions from the general public in the State of New Jersey (including through the sale of merchandise)?

16. Loes the organization selicit funds under any other name(s)?

17. "Yes," explain up purpose for which solicited funds are being raised:

15. Does the organization selicit funds under any other names used.

15. Does the organization was a commercial co-venture?

16. Hease describe the purpose for which the funds are being raised.

16. Please enter the names of all PFR's and Commercial co-ventures.

PFR OR Conventure:

Business Name

17. Does the organization register or solicit in other states?

States:

State Name

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19.	Does the independent	t paid fund-raiser or fund-raising	counsel have custody	, control or access to	the organization's fund
19a.	Please Describe the S	Situation			
		ever had its authority to conduct on ever entered into any voluntar			
(including, but not lin	voluntarily entered into an assur aited to, a settlement of an admir jurisdiction, state or federal agen	istrative investigatio		
1	been convicted of any or any criminal or civ registrant's fitness to	or any of its present officers, din eriminal offense committed in c il offense involving untruthfulno perform activities regulated by t criminal activity shall be deeme	onnection with the pe ess or dishonesty or a his act? A plea of gui	rformance of activitie ny criminal offense re	s regulated under this lating adversely to the
	engaged in unlawfu	or any of its present officers, din I practices in the solicitation of o butions, or are such proceedings	ontributions or admi	nistration of charitable	e assets or been enjoin
24.	liable in any admini- question a judgment	or any of its officers, directors, to strative or civil action involving of liability in an administrative adividual engaged in an unlawfu aritable assets.	theft, fraud, or decep or civil action shall in	tive business practices sclude, but is not limit	? For purposes of this sed to, any finding or
Е	inter the name, title, s	street address, telephone number	and salary of each of	Ticer, director and tru	stee.
	Name	Business Address	Telephone Number	Title	Salary
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	Name	Title	Street Address	Telephone	Salary
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		ition's officers, directors age or adoption to:	, trustees or the five most-h	ighly compensated emp	oloyees
4.	a) Fach other	? 🕳			
			of any fund-raising counsel	or independent paid fu	nd-raiser
	under cont	ract to the organization?	•		
	c) Any chief	executive, employee, an	y other employee of the org	anization with a direct	financial
	interest in	the transaction, or any p	artner, proprietor, director, of th more than two (2) percent	officer, trustee, or to an	У
	providing	goods or services to the	organization?	interest in any suppire	r or vendor
			•		
			s, trustees or the five most-h sed in by a fund-raising cour		
			y supplier or vendor providi		
organi	ization?				
					•
	CF	RI-300R Long-For	m Registration Re	newal Financia	I
			Statement		
	Revenue	entributions & Donations	: Includes but is not limited	to individual and corn	orste contributions
A. F		gacies, bequests and gre			
A. F					
A. F	donations, le				
A. F	donations, le A1a. Gross	Direct Public Support			-
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	Ala. Gross Alb. Gross Alc. Gross	Direct Public Support Indirect Public Support Fund Raising and Gami	(including donations from o	other, charities	
	Ala. Gross Alb. Gross Alc. Gross	Direct Public Support Indirect Public Support Fund Raising and Gami	(including donations from o	other, charities	
	Ala. Gross Alb. Gross Alc. Gross Ald. Gross	Direct Public Support Indirect Public Support Fund Raising and Gami Contributions (add lines	(including donations from o	other charities (30 0)

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	A3b. Other Support			
	A30. Other Support			-
	Line A4. Total Gross Revenue (ad	d lines A1c, A2 and A3)	العب	
В	. Expenses			
	Line B1, Program Expenses		.	
	Line B2.Management Expenses			Time .
	Line B3. Fund-raising Expenses			WW9
	Line B4. Affiliate Expenses			
	Line B5. Total Expenses (add lines	s B1, B2, B3 and B4)		
C	. Net Assets	×1		_
	Line C1. Net Assets			-
Did vo	u use a Professional Fund Raiser?			
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Has IR	S filing status changed since last reg?			
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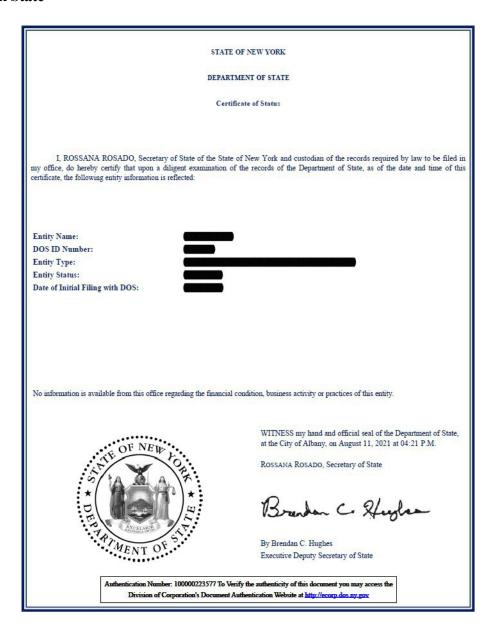
	Certification
	Form CRI-150I, CRI-300R, CRI-200
	egistration Form ${f must}$ be authorized by two (2) officers of the organization, one being the Financial Officer or Treasurer.
First Autho	rization:
Consumer , this organi	I that this registration is being issued at the discretion of the New Jersey Division of fiftirs and agree that employees of the Division may inspect the records in the possession of action to norder to accretain compliance with the statute and all pertinent regulations. I also that I may be required to provide additional information if requested.
	tify that the information contained in this registration and the attached financial schedule(s) nt(s) are true. I am aware that if any of the above statements are willfully false, I am subject nt.
Signature_	Name
Second Au I understar Consumer this organi	
Second Au I understan Consumer this organi understana	horization: If that this registration is being issued at the discretion of the New Jersey Division of lifeirs and agree that employees of the Division may inspect the records in the possession of authon to arise in osceration compliance with the stantes and all pertinent regulations. I also that I may be required to provide additional information if requested. If that the information contained in this registration and the attacked financial schedule(s) that the interior are run. I am aware that if any of the above statements are willfully false, I am subject

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Attachment #13 Certificate of Good Standing Sample

New York State





Attachment #13 Certificate of Good Standing Sample

New Jersey State

STATE OF NEW JERSEY
DEPARTMENT OF THE TREASURY
DIVISION OF REVENUE AND ENTERPRISE SERVICES
SHORT FORM STANDING



I, the Treasurer of the State of New Jersey, do hereby certify that the above-named New Jersey Domestic Non-Profit Corporation was registered by this office on November 06, 2012.

As of the date of this certificate, said business continues as an active business in good standing in the State of New Jersey, and its Annual Reports are current.

I further certify that the registered agent and office are:

KRISTINE ALLEN 400 38TH STREET SUITE 405 UNION CITY, NJ 07087



IN TESTIMONY WHEREOF, I have hereunto set my hand and affixed my Official Seal at Trenton, this 23rd day of August, 2022

Elizabeth Maher Muoio State Treasurer

Shape Men

Certificate Number: 2656815230

Verify this certificate online a

https://www.l.state.nj.us/TYTR_StandingCert/JSP/Verify_Cert.jap