

# 2024 Community Grant Guidelines—Small Grants (*Updated March 2024*)

Umpqua Bank, through the Umpqua Bank Charitable Foundation, believes in the power of partnership by leading with a Social Impact Strategy and Community Grants program that reflects a deep commitment to improving the quality of life and economic prosperity for under-resourced individuals, families, and small businesses. Through grantmaking, we invest in nonprofit organizations to support programming that builds healthy, prosperous, sustainable, and inclusive communities throughout our footprint.

## Program Details for Small Grants

Funds can be used for direct programming and/or general operating support. While the grant application requests information about how funds will be used, awards are unrestricted.

Grant range	\$5,000-\$10,000
Grants awarded	Around 175 annually
Applications received	Around 1,000 annually
Average grant size	\$5,555 in 2023

## Application Process

Applications must be submitted using the [Community Grant form](#) via the GrantsConnect platform to be eligible for potential funding. Paper or email applications are not accepted.

## Deadlines

Due to high demand and budgetary considerations, we are unable to extend grant deadlines. For this reason, we suggest you submit your grant application as early as possible. If you don’t hear from us by the end of the expected month for grant decision making, please email us at [Community@UmpquaBank.com](mailto:Community@UmpquaBank.com). Thank you for your patience and understanding.

Grant Cycle	Application opens by:	Application closes at 5:00 p.m. Pacific Time on:	Decisions communicated via email by the end of:
Summer	Monday, March 18	Wednesday, June 12	August
Fall	Monday, June 17	Wednesday, September 4	November

**Nonprofit organizations may submit only one application per calendar year.** An exception may be made where one organization serves as the fiscal sponsor for multiple programs or chapters. Please contact us if you believe your organization qualifies for this exception.

## **Review Process**

After the application deadline closes, we begin a multi-stage review process of all received applications. If we need additional information during the review period, we will request a revision through the application portal or contact the applicant directly. The entire process—from application deadline, through review, to formal decisioning—may take up to 12 weeks or longer.

## **Nondiscrimination policy**

Umpqua Bank and the Umpqua Bank Charitable Foundation respect and value diversity, equity, and inclusion. Nonprofit organizations seeking financial support from the bank or the foundation must offer their programs and services without discrimination on the basis of race, religion, gender, sexual orientation, gender identity, national origin, age, disability, medical condition, veteran status, marital status, or any other characteristic protected by federal, state, or local law, regulation, or ordinance. Your application submission validates your adherence to this policy.

## **Reporting**

Besides a payment receipt email, the Umpqua Bank Charitable Foundation does not require formal reporting for Community Grant recipients.

## **Contact**

If you have additional questions about our Community Grants program after reviewing this information, please contact us at [Community@UmpquaBank.com](mailto:Community@UmpquaBank.com) or visit [www.UmpquaBank.com/Community](http://www.UmpquaBank.com/Community).

## Priority Focus Areas

**Economically Vibrant Communities** – We drive prosperity in our communities through workforce development, education, economic development, and economic security.

Programming eligible in this focus area:

- Affordable housing
- Digital inclusion
- Economic development
- Financial literacy/ resiliency
- Home ownership/asset building
- Migrant/farm worker
- Small business (entrepreneurship support and technical assistance)
- Workforce mobility/mentorship

**Healthy Communities** – We build healthy communities by promoting physical and mental wellness.

Programming eligible in this focus area:

- Access to sports and recreation
- Arts and culture
- Education (early learning, K-12 education, post-secondary education)
- Fundamental needs (Community health, food, shelter)
- Mental and physical healthcare
- Pet welfare
- Public services support (nonprofits supporting libraries, parks, community centers, etc.)

**Inclusive Communities** – We foster a sense of belonging by supporting equity and inclusion for all.

Programming eligible in this focus area:

- Culturally specific programs and services
- Intergenerational programs (youth/senior connections)
- Reentry support for formerly incarcerated individuals/recidivism reduction
- Support for BIPOC Community
- Support for LGBTQIA+ Community
- Support for Military & Veterans
- Support for older adults
- Support for People with Disabilities
- Support for Women & Girls

**Sustainable Communities** – We strive to support the natural environment by limiting our operational impact and investing to help build a sustainable future.

Programming eligible in this focus area:

- Air quality management
- Biodiversity (pollinators, native plants, etc.)
- Climate resiliency
- Disaster preparedness (floods, droughts, wildfires, etc.)
- Energy management
- Environmental justice and equity
- Environmental sustainability and preservation
- Waste management
- Water management
- Wildlife conservation

## Eligibility

This program supports nonprofit organizations that align closely with our Priority Focus Areas.

The Umpqua Bank Charitable Foundation will:

- Accept applications only from qualified, tax-exempt, 501(c)(3) nonprofit organizations—eligible applicants must be registered on the national IRS database at time of application
- Accept applications from nonprofits serving communities where Umpqua Bank maintains a physical location and associates, including branches, commercial banking centers, lending offices, and administrative offices—the list of eligible states is provided within the grant application; there is space to tell us more about the geographical community(ies) your nonprofit serves in relation to the Umpqua Bank location(s) and associates nearest you
- Prioritize organizations and/or programs that
  - serve a majority low-to-moderate (LMI) population,
  - serve under-resourced communities, and/or
  - engage current associates in a volunteer capacity
- Consider other funding commitments and grants awarded through the Umpqua Bank Charitable Foundation and Umpqua Bank when making grant decisions

We will not support Community Grant applications for:

- Individual schools, or related programs sponsored by an individual school
- Government entities, including municipalities, school districts, and universities/colleges
- Political advocacy/campaigns/lobbying
- Religious activities or organizations that include religion in programs
- Multi-year commitments
- Capital requests, including new or upgraded buildings
- Capital/fundraising campaigns

- Event sponsorships
- Higher education scholarships
- Association membership fees
- Endowment funds or re-granting programs
- Debt retirement or deficit funding
- Activities providing the Umpqua Bank Charitable Foundation, Umpqua Bank, or its associates with any tangible benefits in exchange for the grant

## Application Fields

This section will help you understand what we're looking for in an application and is for informational purposes only; your formal application must be submitted online. Required fields are denoted by an asterisk.

### Organization Information

We are looking to fund nonprofit organizations that are closely aligned with Umpqua's Priority Focus Areas, are addressing an identified need in your community, and have a track record of success. We will ask you for the following information on your application:

- Mission Statement \* (word limit: 100)
  - While you may also have a vision, values, and other directional guidance, please provide only the organization's core mission statement.
  - Avoid formatting like bullets and line breaks.
- Website \*
  - Please copy and paste your organization's primary web address.
- Does the organization's leadership have BIPOC (Black, Indigenous, and People of Color) representation? \* (Yes/No)
  - If yes, please select all that apply (pick from list).
- Does this organization primarily serve BIPOC (Black, Indigenous, and People of Color) community(ies)? \* (Yes/No)
  - If yes, please select all that apply (pick from list).
- Is the composition of the nonprofit's board of directors a majority Black, Indigenous, and People of Color (BIPOC)? \* (Yes/No)
- Organization leadership and board demographics \*
  - Given the demographic information you provided above, how are the communities served by your program represented in leadership positions at your organization?
- Mailing Address \*
- Mailing City \*
- Mailing State \*
- Mailing Zip \*
- Is your mailing address the same as your physical address or meeting place? \* (Yes/No)
  - If "no," please enter your physical address or meeting place. This cannot be a P.O. Box.
- W-9\* (file upload, PDF)
  - Use the most current version of the [IRS form](#) (dated 2018). If applying through a fiscal sponsor, provide the sponsor's W-9.

### Organization Leader Contact

The system automatically captures the name and email address of the person completing the application when you log in. In this part of the form, we are looking for the contact information for the organization's leader:

- Title \*

- First and last name \*
- Email address \*
- Work number \*

## Request

We are looking for programs strongly aligned with Umpqua’s Priority Focus Areas, have a demonstrated record of impact in their community, are thoughtful about what need they are fulfilling, and have a plan for sustainability for future success.

- Program Title \*
  - Your application should focus on a specific program that is already up and running at your organization.
- Please describe your program and how you plan to use the grant funds. \* (word limit: 250)
  - This is the most important part of the application. Please provide a high-level overview of how grant funding will be used, who it will serve, and the desired impact.
- Program Timeframe \* (word limit: 100)
  - Please enter dates, season or other timing information.
    - Example: “Our financial education courses for students coincide with the traditional academic year, beginning in September and ending in June.”
- Priority Focus Area\* (pick from list)
- Secondary Focus Area\* (pick from list)
- Does your organization do any of the following? Please select all that apply. \* (pick from list)
- Will this grant be used to address environmental, climate, and/or sustainability challenges? \* (Yes/No)
- Request Amount \*
  - Requests may range from \$5,000 to \$10,000. The average grant in 2023 was \$5,555.
- Project Budget \*
  - Please provide a dollar amount in USD for the overall project or program budget.
- Other Funding Sources \*
  - List other sources of funding for this program that have been secured or are pending. Please include the date funds were received or are expected.
- Prior Support from Umpqua Bank or the Umpqua Bank Charitable Foundation. \*
  - If you have received funding from Umpqua Bank and/or the Umpqua Bank Charitable Foundation in the past, please list the amount and date received.
- Project Budget \*
  - Please upload a detailed project budget.
- Does your program take place outside of the address listed above? \* (Yes/No)
  - If yes, please provide at least one and up to four physical addresses served by this program.
    - For example, if your main office is in Portland, OR, but the program benefits families in Beaverton, Gresham, and Milwaukie equally, provide a physical address in each city or area, and list the Percentage of Program at 34%, 33%, and 33%, respectively.

- If your organization does not maintain a physical location in each city it serves, use a location from which you recruit clients or post flyers, like a school, partner organization, or city hall.

### **Demographic Information**

- Program Participants \*
  - How many people are served by this program annually?
    - Please include units like families, homes, students, businesses, etc.
- Primary Under-Resourced Population \* (pick from list)
  - If the clients served by your program also fall into an under-resourced population, either intentionally because of the organization’s mission or unintentionally, select the appropriate category. While we understand several populations may intersect, please choose the one your program serves intentionally or the most dominant population.
- Other Under-Resourced Population (multi-select list)
  - Optionally, you may select any additional under-resourced population(s) served by your program.
- Percentage of Low-to-Moderate Income (LMI) participants served by your program(s) \* (pick from list)
  - Select the range that corresponds to the percentage of your clients that are low-to-moderate income.
- Low-to-Moderate Income (LMI) Qualifier \* (pick from list)
  - Choose which type of information you use to determine the status of the clients served by this program.
- Other LMI Details \* (word limit: 250)
  - Please provide additional information about the Low-to-Moderate Income (LMI) communities served by this request. Please note if your organization does not track LMI communities served.

### **Volunteer Engagement**

At Umpqua Bank, we love to see associate participation in the programs we fund and have made that a priority in our review process. We encourage organizations to post volunteer opportunities in the [NPOconnect Nonprofit Platform](#) and reach out to local Umpqua locations to build volunteer relationships prior to submitting their first application.

- Do you have any Umpqua Bank, Columbia Banking System, and/or Financial Pacific Leasing associates volunteering with your organization? \* (Yes/No)
  - Only current Umpqua Bank, Columbia Banking System, and/or Financial Pacific Leasing associate volunteers \*
    - It is the responsibility of the applying nonprofit to verify that any listed associate volunteers are currently employed, at the time of grant application, with Umpqua Bank, Columbia Banking System, and/or Financial Pacific Leasing.
    - Please do NOT include any details about your banking relationship with Umpqua Bank (or Columbia Bank in the past) or individual donors who are Umpqua associates.

- If yes, please provide additional details.
- In what way(s) are Umpqua Bank volunteers currently supporting your organization? (Select all that apply)
- Are you interested in future volunteer support from Umpqua Bank? \* (Yes/No)
- If yes, what kind of volunteer support would be helpful? (Select all that apply)

### **Final Information**

- Attestation \*

By checking the box below, I certify that the information contained in this application is accurate, and that I have the authority to submit this application on behalf of this organization. I agree to the following if a contribution is awarded:

- The contribution will be used for the purposes outlined in the award email and may not be expended for any other purpose without prior written approval from the Umpqua Bank Charitable Foundation.
- Neither Umpqua Bank nor the Umpqua Bank Charitable Foundation have received or will receive anything of material value in exchange for a grant contribution.
- The organization and/or project does not discriminate on the basis of race, religion, gender or sexual orientation, gender identity, national origin, age, disability, medical condition, veteran status, marital status, or any other characteristic protected by federal, state or local law, regulation or ordinance.
- The organization agrees to be contacted by Umpqua Bank for community development reasons, including questions about your application, community need surveys, and notifications from Umpqua Bank's Social Impact team.

## Frequently Asked Questions

Q: My nonprofit organization's last application was declined. When am I eligible to submit another grant application?

A: Generally, the next calendar year. However, please be sure to update and strengthen the request before submitting a new application.

Q: What can I do to submit a more competitive application?

A: The Community Grants program is highly competitive; typically, about 20% of applications are approved every year. Please ensure that your organization's mission is strongly aligned with one of our Priority Focus Areas. We also prioritize programs that have an Umpqua associate involved, especially in a leadership capacity. Before you submit another application, we expect that you have made progress on at least one of the following:

- Recruited Umpqua Bank associates to volunteer, at least episodically. If you have not been successful, please explain your efforts to engage Umpqua associates.
- If it made sense, sought Umpqua Bank associates to fill open community leadership positions (board or committee) at your organization.
- Posted volunteer opportunities through the [YourCause Nonprofit Platform](#).
- Having active conversations with us to explore ways to engage volunteer associates.

Q: Does Umpqua offer sponsorships?

A: Community Grants are the primary open, broad-based funding opportunities through the Umpqua Bank Charitable Foundation. Event sponsorship requests are facilitated by Umpqua Bank each fall to support the following calendar year. Regional leadership teams review requests from associates (employees) and determine which sponsorships will be approved; decisions are typically shared early in the calendar year. Other requests may be initiated by specific business lines throughout Umpqua Bank, but there is no public channel to request sponsorships.

Q: We had a grant writer who is no longer with the organization. How can we access the grant application history without their account?

A: We can add or replace applicants on both drafted and submitted applications. Please reach out to us at [Community@UmpquaBank.com](mailto:Community@UmpquaBank.com) for help.

Q: I'm having issues with the Grants Connect platform. How do I get help?

A: At the lower right corner of the Grants Connect screen you will see an icon that says, "Need Assistance?" There, you will get technical assistance from the Grants Connect vendor, Your Cause.

Q: I already have a Grants Connect account that I use for another funder. Can I use the same login to complete this application?

A: Yes, a single account can be used for all grantmaking foundations or companies using Grants Connect.

Q: I missed the application deadline. Can my application to be reviewed during the current cycle?

A: With the automation of our system, late applications cannot be accepted. However, your application progress is not lost. Please reach out to us at [Community@UmpquaBank.com](mailto:Community@UmpquaBank.com) for help routing a draft application to the next available cycle.

