

# Protective Life Foundation contribution guidelines and application criteria

## Contribution guidelines

**An organization should meet the following criteria in order to submit an application to the Protective Life Foundation:**

- Be an IRS-certified, 501(c)(3), tax-exempt nonprofit organization
- Be within the Foundation's targeted funding area, which is primarily the metro Birmingham area
- Have strong financials and a current operating budget
- Have strong leadership with an organized local board of directors or advisory board
- Be in concert with Protective Life Corporation's culture, mission and values

**Generally, applications from the following organizations will not be considered:**

- Organizations not within the Foundation's targeted funding area
- Public or private schools with grades K-12, including athletic, music, band or any other fundraising activities or initiatives
- Houses of worship (churches, synagogues, mosques, etc.), public facilities primarily funded by tax revenues (public libraries, etc.), state organizations or state-supported organizations
- Animal-related causes
- Sporting events, to include walks, runs, golf tournaments, etc.
- Other corporate or private foundations
- Nonprofits that conduct grant making to other organizations/groups/individuals

Please note that the Protective Life Foundation will sponsor only one fundraising event (dinner/luncheon/activity), if approved, per nonprofit per calendar year.

## Criteria for submitted applications

### 1. Contact information

- Name, email\* and additional contacts' information

### 2. General information and overview of application

- Project name, mission statement
- Executive Director's experience/brief bio
- Staffing
- Governance/Board/Advisory Committee
- DEI story

### 3. Financials

- Other funders and/or sources of income
- Prior year operating results
- Current year budget
- Balance sheet and endowments
- IRS 501(c)(3) designation letter
- Current IRS form W-9

### 4. Application information

- Population served
- Amount of request
- Intended use of funds

\*The Protective Life Foundation notifies all applicants of the review committee's decision by email.

## Submitting the application

- Go to Protective Foundation Grant Application Opens and login or setup your account and password.
- Review the information about your organization and make updates.
- Review the contact information and make sure we have the current information for your executive director as well as the person submitting this grant request.
- Note - Please enter the mailing address on the organization record and use the physical address on the individual contact records.
- Fill out the questions on the application as thoroughly as possible.
- You can save the application and return to complete it later, but — BE AWARE — our review process will not begin until you have submitted the application. At that time, no more changes can be made to the form.
- If you have questions, submit them to [grantrequest@protective.com](mailto:grantrequest@protective.com) and we will reach out to you within 3 business days.
- If you need to talk with us before completing your application, please email [grantrequest@protective.com](mailto:grantrequest@protective.com).

### Once your application is complete

- We will review it and let you know if there are follow-up items.
- When any follow-up items are resolved, the request will be added to the next grant review cycle.

[Submit grant application here](#)

## Submission deadlines

**Submissions are due by Jan. 21, April 21, July 21 and Oct. 21 for consideration in quarterly grant-making.**

Depending on the nature and amount of the request, some proposals will be reviewed by the Foundation's Executive Review Committee monthly, and others will be considered on a quarterly basis.\*\*



See [protective.com/about-us/community-involvement](https://protective.com/about-us/community-involvement) for more details

\*\*Subject to change based on the Executive Review Committee's schedule.

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