



Grant Application and Funding Guidelines Short Form Application for Grants under \$5,000

The **United Bank Foundation Massachusetts** was created in 2005 by United Bank and is dedicated to supporting community activities and the promotion of charitable causes in the Massachusetts communities served by United Bank.

The **United Bank Foundation Connecticut** was created in 1998 by Rockville Bank. The Foundation changed its name in 2014 to the United Bank Foundation Connecticut following strategic merger of Rockville Bank and United Bank. The Foundation is dedicated to supporting community activities and the promotion of charitable causes in the Connecticut communities served by United Bank.

Both Foundations are committed to improving the quality of life for individuals and families in the communities served by United Bank. Special consideration is given to organizations and programs which promote and support community development and benefit disadvantaged or low to moderate income individuals and families in the areas of:

Affordable Housing: Programs that provide access to housing for families and individuals by providing credit counseling/credit repair, financial literacy education.

Community Service: Investments in health care, education, job training, work-force development, childcare, credit services or financial services.

Economic Development: Programs that support or benefit small businesses and job creation efforts.

Neighborhood Revitalization or stabilization: Programs which attract or retain business or individuals in low to moderate income geographies distressed or underserved areas (as designated by the federal, state, local or tribal governments) or disaster areas.

Additional areas of interest that are important to us:

Education--Initiatives at the primary, secondary and post-secondary levels that raise the aspirations of students in the Community, support early literacy as well as initiatives that support the education process.

Health and Human Services--Programs that are essential to the underlying medical care of the Community. Initiatives that focus on physical and mental wellness and provide access to the services needed for economic self-sufficiency.

Youth Programs-- Programs that assist in improving the quality of life for children in the Community or programs that foster education, learning and leadership as well as build early literacy skills.

Cultural Programs-- Programs that assist in enriching the quality of life for residents of the Community by cultivating an appreciation of the art, music, museums, libraries, and other cultural resources.

ATTACHMENTS AND SUPPORTING DOCUMENTATION:

Specific attachments and supporting documentation are required as part of this application. The application will be considered incomplete and will not be reviewed without all required attachments.

- Copy of IRS determination letter confirming tax-exempt status as a 501(c)(3) organization and/or a 509(a)
- Mission Statement on your organization's letterhead
- 1-2 page summary of your organization and the program in need of funding
- Documentation to support the number of low to moderate income populations served by your organization or by the program in need of funding.

GRANT-MAKING CRITERIA:

The Foundation will consider supporting projects and initiatives that meet one or more of the following criteria:

- are directly related to the Foundation's priorities and areas of interest stated above
- include a strategy for leveraging other resources and support from the region
- produce cost-effective results that can be measured and evaluated
- provide incentive and stimulation for the private and public sectors to work together in community problem solving
- encourage coordination and collaboration with other efforts
- advance innovative and long term strategies that will address recognized needs
- demonstrate an ability to be sustainable or to obtain future funding if needed

ELIGIBILITY FOR GRANTS:

- Applicants must be recognized by the IRS as a tax-exempt 501(c)(3) non-profit or have "public charity" status or its equivalent.
- Applicants must be located in or provide service in a community served by United Bank.
- In some cases, site visits will be scheduled before funding decisions are made.
- The Foundation will generally consider requests for support from organizations every other year (for example if you receive funds in 2014 we will not review a proposal from your organization in 2015).
- The Foundation will not consider multiple requests to support the same program from the same organization in consecutive years.
- Organizations should not make application to both the MA and CT Foundation.
- Organizations receiving funds from the United Bank sponsorship program are not eligible to apply for a grant from United Bank Foundation MA or United Bank Foundation CT in the same calendar year.

INELIGIBLE ORGANIZATIONS AND REQUESTS:

The Foundations do not support the following types of organizations and requests even if an applicant meets all other eligibility and grant-making criteria above:

- Fraternal, labor and political organizations
- Lobbying groups
- Individuals
- Staff costs/salaries/benefits or internship stipends

- National health organizations (MA only)
- Religious organizations (MA only)
- Requests made by city/state departments or quasi-government (city or state) agencies for capital projects (MA only)

DEADLINES:

Grant requests under \$5,000 will be reviewed monthly. If your grant request is time sensitive please submit 60 days prior to the date funds are needed to ensure we have adequate time to review and respond to your request.

PROPOSAL SUBMISSION AND CONTACT INFORMATION:

Please contact the Foundation Office at (413) 787-1202 with any questions. Proposals and required attachments should be emailed to donations@bankatunited.com. Proposals are required to be submitted online. We will not respond to written inquires for funding support under \$5,000.

COMMON GRANT APPLICATION FORM
(Please Type)

Select one:

I am applying to the United Bank Foundation Massachusetts
(Organization or program must take place in MA)

I am applying to the United Bank Foundation Connecticut
(Organization or program must take place in CT)

1. _____
Today's Date
2. _____
Legal Name of Organization
3. _____
Address
4. _____
City, State, Zip Code
- 5 (T) _____ (Website) _____
Telephone Number and Website Address
6. _____
Executive Director/Chief Executive Officer
7. _____
Contact Person for this application if different from above
8. (T) _____ (Email) _____
Telephone Number and Email Address of contact person
9. _____
Principal Purpose of your Organization
10. _____
Geographic Area Served (service area)
11. _____
Approximate number of persons served annually
12. Number of Employees: Full Time _____ Part Time _____ Volunteers _____
13. Percent of disadvantaged or low/moderate income individuals served (approximately) _____%
Note: Please provide documentation which states the percentage of disadvantaged or low to moderate income individuals served by your organization or the program in need of funding.
14. _____
Specific purpose for which funds are requested

15. _____
Amount Requested

16. _____
Period of time in which funds will be spent (anticipated start and end dates)

17. \$ _____ \$ _____
Organization's Total Budget Project Budget, if available

18. _____
Does your organization receive support from the United Way or other federal funds? If so, which ones?

19. _____

List top three measurable results you expect to accomplish if the grant is awarded.

20. _____

List plans for communicating the program and its accomplishments to the community and the general public. Include how the Foundation will be acknowledged for providing support.

21. Include a brief description of the program or project in need of funding:

Signature of CEO or Executive Director indicating approval of this application

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