

## NARRATIVE AND ATTACHMENTS

Please provide the following information in this order using these headings and subheadings.

### I. NARRATIVE (maximum of 3 pages)

#### Describe your organization

- Problem statement: What problem, needs or issues does your organization address? Explain the principal purposes and services of your organization.
- Briefly describe your organization's history and major accomplishments.
- Describe the current programs and activities of your organization, including geographic area served.

#### Describe your request

- Amount requested and period of time in which funds will be spent.
- Organization's total budget and total budget of project for which grant is requested (if applicable).
- Is your organization funded by the United Way? Amount of annual United Way financial support?
- How does your organization work with other providing similar services; and how is it unique?
- Who is your constituency? (be specific about demographics such as race, socio-economic class, gender, language, ethnicity, age, sexual orientation, people with disabilities, and/or other descriptions, as appropriate.) How are they actively involved in your work and how do they benefit from this program and/or your organization?
- If other than general operational support, describe the program or project for which you seek funding, why you decided to pursue this project, whether it is a new or ongoing part of your organization and whether a similar program or project is presently provided in the community by other sources.
- Describe specific purpose for which funds are requested.
- What are the issues, goals, objectives, and activities/strategies involved in this request? What is your timeline?
- What population will be served by your request? Anticipated outcome and results?

### II. ATTACHMENTS

#### Evaluation

- Describe your plan for evaluating the success of your project or for your organization's work. Who will be involved in evaluating this work— staff, board, constituents, community, consultants? How will the evaluation results be used?

#### Organizational Structure/Administration

- Briefly describe how your organization works: What are the responsibilities of the board, staff, volunteers, and if a membership organization, the members?

- How representative are these groups (board, staff, etc.) of the communities with which you work? Please outline demographics of the organization.
- Who will be involved in carrying out the plans outlined in this request? Include a brief paragraph summarizing the qualifications of key individuals involved.
- Provide a list of your board of directors with related community and employment affiliations.
- Organizational chart showing decision-making structure.
- If this is a collaborative proposal, how will you work with other organization(s)?
- Other funding sources (foundations, corporations, others) solicited for this project and status of your proposal with each one.
- What are your long-term strategies for funding this project beyond this grant period?

#### Finances

- Organization's annual operating budget and actual income-and-expenses for most recently completed fiscal year.
- Organization's annual operating budget and actual year-to-date income-and-expenses for current year.
- Most recent annual financial statement (audited, if available).
- Current budget for grant project, if other than general support.
- List individually other funding sources for this request. Include amounts and whether received, committed, or projected/pending.
- Most recent completed year's organizational financial statement (expenses, revenue, and balance sheet) audited, if available.
- A copy of your IRS 501 (c)(3) letter. If you do not have 501(c)(3) status, check with the South Shore Savings Charitable Foundation, Inc., which may require additional information in order to consider your request.

#### Other Supporting Material

- Letters of support/commitment (up to three).
- Recent newsletters, articles, newspaper clippings, evaluations, or reviews (up to three).
- Recent annual report.
- Letters of agreement, if this is a collaborative proposal.
- Other, as appropriate.

Mail complete grant application package, including IRS tax determination letter indicating 501(c)(3) status, to:

**South Shore Bank Charitable Foundation,  
Inc. James M. Dunphy, President  
c/o South Shore Bank  
1530 Main St., S. Weymouth, MA 02190**

**South Shore Bank  
Charitable Foundation,  
Inc.**



**SOUTH SHORE  
BANK**

## Description

The South Shore Bank Charitable Foundation was created by South Shore Bank in 1997 for the support and benefit of community, charitable, educational, and other benevolent purposes.

## Mission

The mission of the Foundation is to reinforce, encourage, and support the Bank's ongoing commitment to the well-being of the communities it serves. The Foundation will allocate its resources specifically for the advantage of the community at large, including education and social human services endeavors.

## Geographic Focus

The South Shore Bank Charitable Foundation's financial grants and monetary gifts support non-profit organizations whose work benefits the population of those communities in which the Bank has a major presence.

## Grant Making

Directors of the South Shore Bank Charitable Foundation evaluate grant requests, review proposals, and make funding decisions.

## Financial Grants

The amount of grants to qualified nonprofit organizations is determined by demonstrated needs and existing resources.

## Types of Support

Grants will be made for existing program support, general support, special projects, and/or start-up endeavors covering a variety of issues impacting the community.

## How to Apply for a Financial Grant

Requests for funding should meet the guidelines described above. Proposals should include the following elements:

- **Cover Letter**

Introduce your organization and your proposal.

- **Grant Application**

Use official application format as described herein.

- **Program Overview**

Describe goals, constituents, community needs to be met, and projected outcomes.

- **IRS Tax Determination Letter Indicating 501(c)(3)**

- **Financial Information**

- ✓ Income and expense budget for the specific program
- ✓ Most recent year-end financial statements or audit
- ✓ Sources and amounts of funding required, solicited, and received to date

## Grant Determination

The funding decision may take up to four weeks to complete. Applicants will be notified of their proposal outcome by mail.

### South Shore Bank Charitable Foundation, Inc.

#### Officers

James M. Dunphy, President

Pamela J. O'Leary, Vice President

Daniel W. Brennan, Treasurer and Clerk

#### Directors

Joseph C. Sullivan, Chairman

James M. Dunphy

Marisa A. O'Dwyer

Pamela J. O'Leary

Margaret K. Spagone

Paul M. Pecci

Arthur H. Sharp

## South Shore Bank Charitable Foundation Grant Application

Date of application:

Legal name of organization:

Address:

Telephone number:

Fax number:

CEO or Executive Director:

Contact person and title:

Grant request: \$

Period grant will cover:

Project title (if project funding is requested):

Type of request:

- General support
- Endowment
- Start-up costs
- Capital expenditure
- Project support
- Technical Assistance
- Other (Describe)

Total project budget (if request is for other than general support): \$

Total organizational budget (current year): \$

Starting date of fiscal year:

Summarize the organization's mission (2-3 sentences):

Summary of project or grant request (2-3 sentences):