

**PILGRIM BANK FOUNDATION**  
**40 South Main Street**  
**Cohasset, MA 02025**

**The mission of the Pilgrim Bank Foundation (the “Foundation”) is to provide financial support to charitable and community service organizations in the communities in which Pilgrim Bank (the “Bank”) operates. The Foundation is dedicated completely to community activities and the promotion of charitable causes.**

The Foundation has identified five areas that it will emphasize in supporting:

- **Education and Youth Programs** - Initiatives at the primary, secondary and post secondary school age levels that raise the aspirations of students in the Community, enhance initiatives that support the education process, and support programs that assist in improving the quality of life for children in the community that foster education, learning and leadership in and out of a formal school setting, such as afterschool programs and daycare.
- **Health and Social Services** - Programs that are essential to the health and wellbeing of the Community, as well as initiatives that focus on physical and mental wellness.
- **General Community** - Organizations that support and promote the social or economic wellbeing of the local community. This would include efforts to support organizations dedicated to homelessness, disabilities, abuse, training and food pantries.
- **Veterans Programs** - Programs that assist in improving the quality of life for veterans of military service.
- **Elder Services Programs** - Programs that assist in improving the quality of life for older Americans.

**REQUIREMENTS FOR APPLICATION**

- Grants from the Foundation are generally awarded quarterly. Applications are accepted year round.
- Awards are generally limited to use in the communities served by the Bank.
- Grant recipients must demonstrate Section 501(c)(3) or 501(c)(1) status and relevance to the Foundation’s area of giving.
- The Foundation does not provide financial support for political organizations or candidates, activities for religious purposes, contributions to individual endeavors or scholarships.
- Letter stating nature of the request and a completed Application Form.

When requesting a grant from the Foundation, the following information must be included:

- Organizational Summary (Mission, Goals, Objectives)
- Specific purpose of funds requested
- Need for the project / service in the community
- Amount requested
- Information on the organization’s Executive Director and Board of Directors
- Copy of the IRS federal tax- exempt letter
- Depending on the amount of the request, additional information may be required

**The minimum grant awarded will be \$2,500. Smaller grant requests will not be considered. The Foundation has determined that its targeted range for its awards will be \$2,500 to \$10,000 per organization, per year.**

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### **PLEASE INCLUDE THE FOLLOWING INFORMATION WITH YOUR GRANT APPLICATION:**

1. A copy of the IRS Tax Exempt Status under 501(c)(3) or 501(c)(1) of the Internal Revenue Code.
2. The most recent year-end financial statements for the organization and current fiscal budget.
3. A written request on the organization's letterhead including the following information:

#### **GENERAL**

- Date the organization's Board approved the project and / or amount of money requested.
- Describe the organization, its purpose and governing structure (explain if other organizations are involved with this project).

#### **PROPOSED PROGRAM OR PROJECT**

- Describe the program or project that requires funding by answering the following:
  - Why is the funding needed?
  - Who will be served and how will they benefit?
  - How will the community benefit?
- Describe the steps to implement this project including person responsible for the project and projected timeframe for implementation.
- Describe how the success of the project will be measured and evaluated.
- If Grant Funds are for general, unrestricted use, please state.

#### **BUDGET INFORMATION**

If applicable to the Grant Application:

- Itemize the expenses to be funded by this request.
- Indicate the entire budget including amount requested.
- Source of cost estimates / funding need – bids solicited or comparison prices (if applicable).
- Other sources of funding for this project.
- Financing method to sustain this program / project (if applicable).

Please send the completed Grant Application and other required information to the address above.

**\* Grant Funds are not to be used for political purposes or lobbying efforts.**

**\* Grant Funds may not be paid to an individual endeavor.**

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**GRANT APPLICATION**

Date of Application: \_\_\_\_\_

Grant Applicant's Organization Name: \_\_\_\_\_

Address: \_\_\_\_\_

**ORGANIZATION REPRESENTATIVES:**

Executive Director: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Contact Person: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

**TYPE AND AMOUNT OF REQUEST:**

Amount Requested: \_\_\_\_\_

Total Project Budget: \_\_\_\_\_

Area of Support: (Circle Category)

- Education and Youth Programs
- Health and Social Services
- General Community
- Veterans Programs
- Elder Services Programs

Description or purpose that Grant would fulfill: \_\_\_\_\_

\_\_\_\_\_

Market area and income segment served by the Grant: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_