

## HarborOne Foundation Guidelines and Eligibility

(Updated 2/06/18)

For over a century, HarborOne has proudly served the financial needs of local individuals, families, business and institutions. As a leading community citizen, HarborOne's role has been to support, encourage and help champion the advancement of children and families throughout the region. In 2016, HarborOne became a public company and in keeping with its longstanding commitment of investing back in the community, established the HarborOne Foundation. The Foundation's aim is to work collaboratively to support and build partnerships that promote innovative solutions to meet the complex needs of our community.

### Mission:

The HarborOne Foundation mission is to strengthen and empower individuals and families by investing in highly effective non-profit organizations that are creating positive and lasting change in local communities where we live and work.

### Investment Focus Areas:

**Education that fuels future economic success:** *Our education grants help empower people to build personal assets and skills to take charge of their futures.*

- Youth development including early childhood education
- Financial education
- Employment skills/workforce development
- Women's empowerment

**Safe and affordable housing:** *Our affordable housing grants support access to safe, clean and affordable places to live.*

- Community development projects
- Maintenance and renovation projects
- Homebuyer programs
- Foreclosure and eviction prevention programs

**Basic Human Services:** *Our basic human services grants support organizations that meet the immediate needs of individuals and families while also supporting prevention and long term solutions for people living in difficult economic circumstances. (Food Pantries are encouraged to request support through HarborOne Bank Corporate Giving programs.)*

- Food and nutrition programs
- Fuel assistance
- Domestic violence programs
- Temporary housing, shelter
- Basic necessity assistance e.g., clothing

### Eligibility for Grants:

To apply for a grant from the HarborOne Foundation applicants must be:

- A registered 501(c) 3 organization that demonstrates significant local impact.
- An organization whose mission or services align with HarborOne's investment focus areas.
- An organization within HarborOne Communities\* primarily serving low to moderate income individuals and families.

While preference is given to organizations primarily serving the aforementioned cities and towns, the Board will also consider funding for programs which reach a broader, more regional area, as long as that area incorporates HarborOne Communities.

The Foundation does not provide financial support to political organizations or candidates, activities for religious purposes, individual endeavors or organizations which are discriminatory in their practices. Additionally, it will not fund organizations which utilize a fiscal agent.

#### Geographic Preference or HarborOne Communities\*:

**Massachusetts:** Abington, Attleboro, Avon, Berkley, Braintree, Bridgewater, Brockton, Canton, Carver, Cohasset, Dighton, Duxbury, East Bridgewater, Easton, Foxboro, Halifax, Hanover, Hanson, Hingham, Holbrook, Hull, Kingston, Lakeville, Mansfield, Marshfield, Middleborough, Milton, North Attleboro, Norton, Norwell, Plainville, Pembroke, Plymouth, Plympton, Quincy, Randolph, Raynham, Rehoboth, Rochester, Rockland, Seekonk, Scituate, Sharon, Stoughton, Taunton, Wareham, West Bridgewater, Weymouth and Whitman.

**New Hampshire:** Greater Manchester area

#### Grant Programs:

The Foundation will consider the following types of funding requests from organizations that fit our investment focus areas. Grant awards range from \$5,000-\$50,000.

- **Program Grants** to support the delivery and/or expansion of the direct services core to the mission of local organizations.
- **Capacity Building Grants** aimed at strengthening an agency's ability to make a greater impact, improve effectiveness and efficiency or adapt to address changing community needs. e.g., strategic planning, staff and board development, technology upgrades, and marketing. Priority for these grants are limited to organizations that have a prior Foundation funding history with HarborOne. Please contact Jennifer White [Foundation@HarborOne.Com](mailto:Foundation@HarborOne.Com) before applying.
- **Capital Grants and Campaigns** will not be supported by the Foundation but may be selectively considered by HarborOne Bank.

\*Capital projects are typically defined as major building purchases, new construction, expansion, renovation, and/or land acquisition. Those organizations whose primary focus is Affordable Housing should contact the Foundation to discuss Capital investment requests.

#### Frequency:

Organizations may receive funding from HarborOne Foundation only **once** per calendar year.

#### Deadlines and Review Process:

Grants will be reviewed on a bi-annual basis by the Foundation's Board of Directors in an impartial manner based upon an evaluations of each grant request. Some key elements examined in our grant evaluation process include an organizations' financial sustainability, leadership, impact and collaboration with in the community.

Application Available April 16, 2018

Due June 15, 2018

Notification August

Application Available September 15, 2018

Due November 15, 2018

Notification December

### Additional Eligibility Guidelines:

Although there are many worthy endeavors, the Foundation generally does not invest in the causes listed below. If you fall into one of these categories, we suggest you review HarborOne Bank Corporate Giving programs to possibly submit your request.

- Individuals including those seeking scholarships, fellowships, or sponsors for a particular cause
- Alumni organizations
- Animal related causes e.g., rescue societies
- Beauty pageants
- Major capital or endowment campaigns
- Fundraising dinners or events and tickets to fundraising events
- Individual sports teams including youth sports teams and leagues
- Advertising and promotional items or merchandise
- Organizations designed primarily for lobbying, Political Action Committees, candidates, and lobbying
- Single disease issues
- Travel, including conferences, seminars, tours and student trips
- The Foundation does not make grants to organizations for which program services are contingent on participation in religious services or events or adherence to religious doctrine.

### How to Apply:

For your convenience, HarborOne Bank is excited to offer an online request process, which will help determine if your organization is eligible for support and collect all the information that we need to make a timely and informed decision. If you have question in regards to the eligibility of your program please contact Jennifer White at (508) 895-1000 or send an email to arrange a time to discuss to [Foundation@HarborOne.Com](mailto:Foundation@HarborOne.Com) before you begin your application.

First time applicants will be required to create a user name and password. This will allow organizations to track applications, funding decisions, as well as receive any follow up reports that need to be submitted. Applicants will have the option to save and finish their work at any time throughout the application process. After your initial account creation all subsequent times you visit the site you can simply login using your user name and password. Our online application process has the following five steps:

1. **Eligibility Quiz:** Applicants are required to complete an eligibility quiz to determine if their request meets basic eligibility requirements for support from the Foundation.
2. **Organization Information:** Applicants are required to complete basic organizational information including the official organization name, address, website, tax id number and brief overview.
3. **Contact Information:** Applicants are required to submit contact information for the individual filling out the application as well as the President/CEO/Executive Director of the organization.
4. **Project/Program Information:** Applicants are required to submit information about the program that they are applying for including a program summary, goals, objective, metrics and budget narrative, and other supporting information.
5. **Attachments:** Applicants are required to submit the following attachments as part of any funding request: 501c3 IRS determination letter, Detailed Organization and Program Budget, Latest Audited Financial Statements, Form 990 and CV of President/CEO/Executive Director. **Please see [Foundation webpage for HarborOne Foundation Program and Organization Budget Template](#)**

**Questions:** Please contact: Jennifer White, President HarborOne Foundation at [Foundation@harborOne.com](mailto:Foundation@harborOne.com)