



Everybody Benefits

Community Investments & Partnerships Funding Guidelines



Program overview

Excellus BlueCross BlueShield is committed to improving the health of our communities, making them better places to live, work, play, and raise a family. As a not-for-profit health plan, we strive to offer affordable access to health care. We aim to provide support for efforts focusing on health disparities, social determinants of health, and discrimination affecting our members and their communities. Our investment initiatives aim to help us reach this objective.

Eligibility criteria and geographical considerations:

Excellus BlueCross BlueShield receives hundreds of corporate giving requests every year. An internal committee reviews **every** request that benefits a charitable organization. Proposals must be received at least **six weeks** before the project or event start date. Please contact your Community Investments & Partnerships Regional Lead if your event date is less than six weeks from the submission date.

To streamline the process, organizations planning to submit multiple proposals are strongly encouraged to submit one proposal for all **sponsorship** requests.

Excellus BlueCross BlueShield's 31-county region includes: Broome, Cayuga, Chemung, Chenango, Clinton, Cortland, Delaware, Essex, Franklin, Fulton, Hamilton, Herkimer, Jefferson, Lewis, Livingston, Madison, Monroe, Montgomery, Oneida, Onondaga, Ontario, Otsego, Oswego, Schuyler, Seneca, Steuben, St. Lawrence, Tioga, Tompkins, Wayne, and Yates counties.

Investment opportunities

Sponsorships (application submissions are available January - September):

These awards support programs and events that share our mission of promoting access to high-quality, affordable health care, such as a fundraiser, health fair, health seminar, or other health-related event.

Health and wellness awards (application submissions available March - June):

These awards support programs and initiatives that improve health and health outcomes. Preference will be given to programs that address health conditions and factors linked to adverse health outcomes.

Health equity innovation awards (application submissions available September - October):

These awards, which provide one-time funding, are a testament to our shared commitment to reducing health disparities in racial, ethnic, LGBTQIA+ communities, people with disabilities, people living in rural or urban communities, or other groups of people who may be at a higher risk for poor health outcomes.

Member & Community Health Improvement (MACHI) Grants (applications available based on regional availability):

Through our Member and Community Health Improvement grant program, we aim to improve the health of our members and communities. We are committed to positively impacting all members of our communities, especially the marginalized or minoritized, by enhancing their health and quality of life. The Blue Cross Blue Shield Association's current goals are improving behavioral health, maternal health, and chronic condition management for members. Programs and initiatives focused on these areas are our current priority. We are interested in multi-year initiatives involving multiple community organizations with specific objectives and measurable outcomes.

Communication should occur with the Community Investments & Partnerships Regional Lead to discuss alignment and opportunity. When funding is available, organizations will be invited to complete a Letter of Intent, outlining their initiative or program to begin the review process.

Please note that we generally do not provide grants for ongoing operational support, maintenance, or construction of facilities, scholarships, or loans. Our focus is on health improvement initiatives, and we encourage you to align your proposals with this goal.

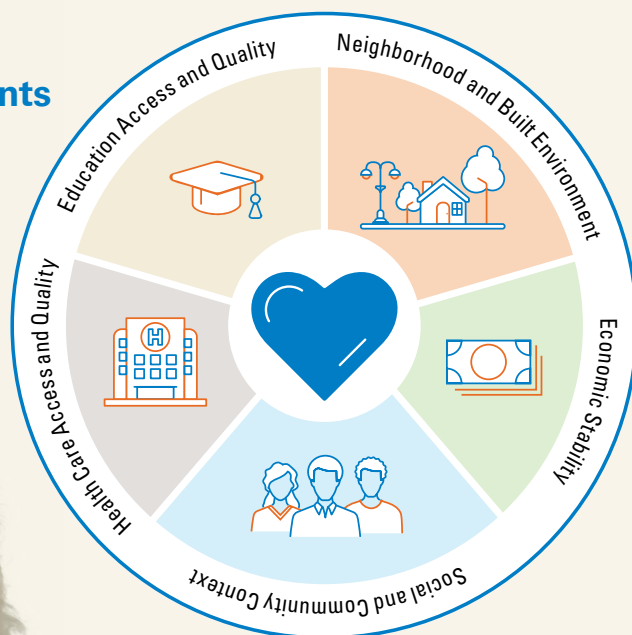


Types of projects supported:

Excellus BlueCross BlueShield supports health-related projects that aim to create positive community impact, build capacity, and promote diversity, including fundraising events, innovative programs, and expanding existing initiatives in areas:

- Related to improving health outcomes and
- Addressing the 5 Healthy People 2030 SDOH domains

Social determinants of health



Projects not supported:

Our corporate giving must follow all applicable laws, regulations, and corporate policies and refrain from contributing to political organizations, political candidates, and labor unions (unless the payees are registered 501(c)(3) charitable organizations).

In addition, we will not fund organizations that conflict with our corporate mission, goals, policies, or products, including organizations that discriminate against persons or groups based on age, political affiliation, race, nationality, ethnicity, gender, gender identity, disability, sexual orientation, HIV/ AIDS status, or religion.

Excellus BlueCross BlueShield does not support political activities, endowments, lobbying efforts, individuals, subscriptions, or beauty or talent contests. Government-funded services do not qualify for supplemental funding.

Reporting requirements:

If your organization receives funding, you will receive notifications requesting reports via the online application portal. These reports will assist in assessing future investment efforts.



Funding timeline:

Project budgets typically cover a one-year timeframe except for MACHI Grants (which are generally multi-year).

Reminder: Approval for funding doesn’t guarantee automatic future support.

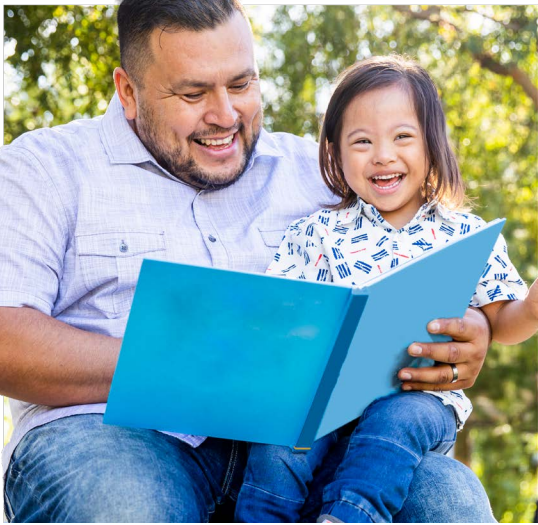
There are different funding cycles for various sponsorships and awards:

- Sponsorships are applications are open from January – September
- Health & Wellness Awards applications are open from March – June
- Health Equity Innovation Awards applications are open from September – October
- MACHI Grants: Solicitation and Letter of Intent Process

Prospective applicants are encouraged to discuss their request with the community investment lead in their region.

We recommend meeting with a community investments and partnerships team member to discuss your request, before applying through the online application portal.

2025 Funding Cycle Investment Availability		
Sponsorships Cycle January - September These opportunities are for applicants seeking funding for events that support activities that align with our mission to help people lead healthier and more secure lives through access to high-quality, affordable health care. Event sponsorship examples include: fundraisers, health fairs, health seminars, galas, and summits.	Health & Wellness Awards Cycle March - June These opportunities support programs that conduct ongoing work or initiatives to improve health and health outcomes. Most disparities are due to many causes: programs that address specific health conditions and factors linked to health disparities will receive precedence.	Health Equity Innovation Awards Cycle September - October These awards focus on innovative initiatives that address disparities in health care and improve health outcomes. The target population for these awards is historically marginalized and minoritized communities. Project initiatives require clear metrics for demonstrating improved outcomes and reporting.
Member & Community Health Improvement (MACHI) Grants: Multi-Year Funding Opportunities Based on Regional Availability		



Ready to apply?

Application guidelines, recommendations, and considerations:

To apply for funding, please visit the Excellus BlueCross BlueShield Community Investments & Partnerships page on the Excellus BlueCross BlueShield website to access the online application portal.

Application attachment considerations:

- Most recent fiscal year-end financial statements
- Current year operating budget
- Promotional materials
- Testimonials
- Letter of support when appropriate

Notice of decision:

A committee will review each proposal to determine the best alignment with our investment strategy and mission. Applicants will be notified of approval or declination following the committee review (typically within 4-6 weeks of receipt of the proposal*). An unsuccessful application does not reflect a judgment about the worthiness of a particular project.

We routinely receive more requests than we can fund.

Fiscal sponsorship:

We support registered 501(c)(3) nonprofit organizations (including churches) or public entities such as towns, public schools, or state agencies. All others will need to use a fiscal sponsor.

What is fiscal sponsorship?

Fiscal sponsorship describes an arrangement where a tax-exempt organization, usually a charity, accepts contributions for a project spearheaded by someone outside the charity that furthers the sponsor's charitable purposes.

The National Council of Nonprofits defines a fiscal sponsor as "a nonprofit organization that provides fiduciary oversight, financial management, and other administrative services to help build the capacity of charitable projects." The sponsor cannot simply act as a passive conduit (i.e., pass-through entity), funneling donations from outside contributors to the project. Fiscal sponsorship works for tax purposes because the sponsoring charity is in the driver's seat, responsible for, and legally in control of the funds raised for the tax-exempt purposes pursued by the project. The sponsor maintains records that substantiate the use of funds for appropriate charitable purposes.

Fiscal sponsorship allows an organization without tax-exempt status under Internal Revenue Code Section 501(c)(3) to seek grants and solicit tax-deductible donations under the sponsor's exempt status. Funding includes grants, loans, and charitable contributions to the fiscal sponsor, who controls the project, and the selection of the secondary organization, project participants, or collaboration.

When done well, a fiscal sponsorship acts as a proving ground for a new idea or nonprofit while utilizing the sponsor's administrative resources. Newly formed nonprofit entities may apply through fiscal sponsors while awaiting their 501(c)(3) designation from the IRS.



To learn more about investment opportunities, availability and how to apply, visit: ExcellusBCBS.com/Community