



## Charitable Foundation

### 2023 Grant Guidelines

The following information is meant to prepare non-profit organizations with the information required to apply for a grant from Rockland Trust Charitable Foundation.

If there are questions remaining after reviewing this guide, please send an email to: [Charitable.Giving@RocklandTrust.com](mailto:Charitable.Giving@RocklandTrust.com)

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## **Mission Statement**

*Rockland Trust's philanthropic mission is to strengthen the communities served by the Bank.*

*We enable individuals and their families to access opportunity and improve the quality of their lives.*

## **Rockland Trust's Giving Focus**

Rockland Trust and its affiliated foundation support local communities in three ways: event sponsorships, Community Donation Fund contributions, and Rockland Trust Charitable Foundation grants.

***Please note: Due to the large number of requests we receive, Rockland Trust does not typically fund multiple applications (grant, sponsorship OR donation) from the same organization in a single calendar year.***

For further information on all of our charitable giving programs, please visit [www.RocklandTrust.com/CharitableGiving](http://www.RocklandTrust.com/CharitableGiving).

## **Geographic Focus**

Rockland Trust and the Rockland Trust Charitable Foundation are strong advocates for the Massachusetts and Rhode Island community organizations that help support the individuals, families, and businesses that comprise the communities we serve. Funding priority is given to communities served by a Rockland Trust Bank branch.

The Rockland Trust Charitable Foundation requires that 501(c)(3) Public Charity non-profit organizations be located in, and serve individuals of, one of the following geographic areas:

Barnstable County, MA  
Bristol County, MA  
Dukes County, MA  
Essex County, MA

Middlesex County, MA  
Nantucket County, MA  
Norfolk County, MA  
Plymouth County, MA

Suffolk County, MA  
Worcester County, MA  
Rhode Island

## Funding Priorities

The Rockland Trust Charitable Foundation prioritizes its grants to organizations and programs that serve a majority low-to-moderate income population in the following areas:

- **Affordable Housing** – priority is given to programs that create and provide safe, affordable housing, or provide programs and services to provide shelter and/or foster homeownership or ensure that individuals and families stay in their current homes, thereby preventing homelessness. Typical programs funded are:
  - Development of low-to-moderate income housing
  - Emergency home repairs
  - Rental assistance programs
  - Homebuyer education programs
  - Foreclosure prevention and homeowner counseling programs
  - Domestic violence and homeless shelters
- **Children & Youth** – priority is given to programs that are preventive in nature and that focus on providing children and youth equal access and opportunity to programs and services that foster health, wellness, education, and leadership skills to achieve their full potential. Typical programs funded are:
  - Parenting education and training
  - Early childhood education
  - Social-emotional and mental health
  - After-school enrichment/tutoring programs in sports, arts, leadership with an educational component
  - Mentoring and literacy programs
  - Access to summer camps for underserved youth
  - Career/College exploration, preparation and support

**Requests for programs that support local youth sports, PTO events, Scout troops, local education foundations and basic needs drives (holiday gifts, backpacks, clothing, etc.) should be submitted through Rockland Trust’s Donation application. Please do not submit a grant application for these types of requests.**

- **Financial Inclusion & Workforce Development** – priority is given to programs that provide consumers and individuals with financial education and build employment skills they will need to achieve their potential and become contributing members of society. Typical programs funded are:
  - Financial literacy education, including money management, budgeting, banking, credit building and debt reduction

- Adult education, e.g., English as a Second Language
- Job preparation, training, and placement
  
- **Small Business Support** – priority is given to programs that provide small business assistance programs that strengthen our communities. Typical programs funded are:
  - Small business assistance
  - Entrepreneurial support programs

### **Grant Size and Duration**

Rockland Trust’s average grant amount is \$5,000, but can range from \$2,500 - \$10,000+. Multi-year requests are accepted.

The Foundation reserves the right to make grants in multi-year installments. Multi-year commitments are usually 2-3 years, and require an annual narrative and financial report.

Grants of more than \$10,000, including multi-year commitments, will be supported by a grant agreement signed by the grantee.

### **Grant Review and Timing**

In 2023 grants applications will be accepted until Friday, October 13 at 5:00 EST, when our grant application portal will close for the calendar year.

Organizations should expect to receive a response to an application with a determination or additional questions between six to twelve weeks after the submittal date.

Grant support of an organization in one year does not guarantee support in subsequent years. Rockland Trust and the Rockland Trust Charitable Foundation does not typically fund multiple applications (grant, sponsorship OR donation) from the same organization in a single calendar year.

### **Eligibility for Grants**

A requesting organization and its application must satisfy each of the following conditions to be eligible for consideration:

- **Status:** Grants will only be made to 501(c)(3) public charity organizations who are in corporate and good tax standing with the Internal Revenue Service and other governmental authorities. If you are an organization with a fiscal sponsorship relationship, please email [Charitable.Giving@RocklandTrust.com](mailto:Charitable.Giving@RocklandTrust.com) to discuss with our staff prior to submission.

- **Non-Discrimination:** Organization cannot discriminate on the basis of Age, Race, Sex, Religion, National Origin, Disability, Family Status, Receipt of Public Assistance, Sexual Orientation, or Gender Identity.
- **Geography:** Applications must originate from organizations based in, or that serve the residents of Rockland Trust’s geographic focus area as described on Page 1.

Rockland Trust Charitable Foundation does not make grants to the following:

- Religious organizations (activities for religious purposes)
- Political activities, lobbying, or candidates for political office
- Government Agencies, including Town or City departments or schools
- Police or Fire organizations
- Labor or Fraternal organizations
- Individuals or families
- Annual Fund drives or campaigns
- Trips, tours, or conferences
- Scout Troops
- Parent Teacher Organizations
- Scholarship programs
- Capital campaigns or capital requests (including the purchase of equipment, technology or vehicles)
- Other grant-making foundations/organizations, such as United Ways, community foundations, private foundations, etc.
- Organizations where the request will benefit a very limited number of individuals or a single family (such as Habitat for Humanity, Make-a-Wish, etc.)
- Single-disease research and/or support organizations
- Projects where Rockland Trust Charitable Foundation is the sole funder

### **Applying for a Grant**

Grant applications are accepted **only** via our online portal. The click-through to the application is located at: [www.RocklandTrust.com/CharitableGiving](http://www.RocklandTrust.com/CharitableGiving).

Applications may be saved at any time in the process to resume later. We recommend that you create a WORD file of your responses to copy and paste as needed.

Add [mail@grantapplication.com](mailto:mail@grantapplication.com) to your safe senders list to ensure you receive all system communications.

The following attachments are **REQUIRED** for review and consideration of your grant application:

- A copy of the IRS Letter of Determination documenting the 501(c)(3) public charity status
- A copy of the organization's signed W-9
- List of Organization's Board and/or Advisory Members with professional affiliations
- Organization's Current Fiscal Year Budget, with Year-To-Date Actuals

The following attachments **may be** required for review:

- Proposed Project Budget, *if applying for project support*
- Organization's Most Recent Audit, *if required to file one with the IRS*
- Additional information about the request

### **Questions?**

Please send an email to [Charitable.Giving@RocklandTrust.com](mailto:Charitable.Giving@RocklandTrust.com) to ensure the quickest response.