

## Rockland Trust Charitable Giving Guidelines

These guidelines summarize the significant factors which Rockland Trust and the affiliated charitable foundations evaluate in their charitable decision-making.

**Rockland Trust and the charitable foundations affiliated with Rockland Trust focus on support of:**

- **Affordable Housing** – Programs that provide or support affordable or low-income housing.
- **Community Development** – Programs that enhance the well-being of underserved populations and communities.
- **Education** – Initiatives that raise the aspirations of students, enhance their knowledge, and support education.
- **Financial Literacy** - Programs that educate the public in matters of money management, fraud, and credit building.
- **Health and Human Services** – Programs that promote essential medical care and initiatives that focus on physical and mental wellness.
- **Youth Programs** – Innovative programs that create a better future for children and young adults through fostering potential and encouraging self-reliance.

These guidelines are advisory, and Rockland Trust may, in their discretion, make exceptions to them.

### Funding Types

Rockland Trust and its affiliated foundations currently accept three types of applications for funding:

A **Gala Sponsorship application** requests support for a breakfast, luncheon or dinner event on a specific date with speakers/presenters (may be virtual in 2022) on a particular date, and is a marketing partnership with a non-profit organization that aligns with our geographic and program focus areas.

An **Event Sponsorship application** requests support for a community event on a specific date, such as a 5K walk/run, parade, community fair, golf tournament, etc. It is a marketing partnership that aligns with our geographic and program focus areas.

A **Grant application** provides support to a 501c3 public charity in support of an organization's mission or project/program that aligns with our geographic and program focus areas. Funds can be requested for programs, operating support, or capital projects and multi-year requests will also be considered. If the Foundations choose to make a larger grant, the Foundation may elect to pay it in installments over multiple years.

If you have any questions on which type of application to complete, please email [Charitable.Giving@RocklandTrust.com](mailto:Charitable.Giving@RocklandTrust.com).

**Grant Funding Considerations**

Rockland Trust and its affiliated foundations prioritize funding organizations and programs that:

- Serve low-to-moderate-income individuals in our geographic area
- Address a significant community need
- Produce cost-effective results which can be measure and evaluated
- Coordinate and collaborate with other community improvement efforts and organizations
- Demonstrate an ability to be sustainable or obtain future funding
- Projected outcomes are proportionate to the amount requested
- Originate from organizations that enjoy widespread community support based upon feedback from local stakeholders and Rockland Trust colleagues
- Are eligible for Community Reinvestment Act (CRA) credit

**Eligibility Guidelines**

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 organizations with Internal Revenue Code 501(c)(3) Public Charity status. Organizations do not need to be a 501(c)(3) Public Charity to apply for sponsorships.

**Existence, Good Standing, Leadership, etc.:** Organization must have been formed and be and remain in corporate and tax good standing with the Internal Revenue Service and other governmental authorities. Organizations with strong leadership, sound financial management, and a good track record are preferred.

**Fiscal Sponsorship:** Grants are not typically awarded to organizations that utilize another organization’s 501(c)(3) tax ID to apply when they themselves are not designated a 501(c)(3) charity by the IRS.

**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, the following geographic areas:

- |                         |                        |
|-------------------------|------------------------|
| ○ Barnstable County, MA | ○ Norfolk County, MA   |
| ○ Bristol County, MA    | ○ Plymouth County, MA  |
| ○ Dukes County, MA      | ○ Suffolk County, MA   |
| ○ Essex County, MA      | ○ Worcester County, MA |
| ○ Middlesex County, MA  | ○ Rhode Island         |
| ○ Nantucket County, MA  |                        |

Rockland Trust and its affiliated Foundations do not typically support applications from the following:

- Religious organizations (activities for religious purposes)
- Political activities or candidates for political office
- Government agencies
- Police and Fire organizations
- Labor or fraternal organizations
- Community/school sports teams
- Individuals or families
- Annual Appeal letters
- Organizations that act as Fiscal Sponsors for non-501(c)(3) non-profits

### **Funding Information**

The average grant award ranges from \$1,000 - \$5,000. Grants of **more than \$10,000**, including multi-year commitments, will be supported by a grant agreement signed by the Foundation and grantee.

The average gala sponsorship award varies based on the size of the event and marketing benefits. Event sponsorship awards are often less than \$1,000.

Rockland Trust will **not** typically award both a grant and sponsorship for the same organization in the same calendar year. Support of an organization in one year does not guarantee support at the same level in subsequent years.

### **Timing/Proper Advance Notice**

Gala and event sponsorship applications are considered on a rolling basis and **MUST BE** submitted a minimum of **six weeks prior to event publicity date.** Gala and event sponsorship applications are accepted year-round.

Grant applications will be accepted **until October 14, 2022 at 5:00pm EST**, when our online grant request portal will close for the calendar year. **Please note that capital requests typically require a more involved review process, including but not limited to a site visit.**

### **United Way**

Rockland Trust makes a substantial, unrestricted donation to the United Way each year, which becomes part of the general pool of funds available to all United Way member agencies. The amount of United Way support already being received will be considered when reviewing United Way member agencies' requests.