

## Foundation Giving Guidelines

The charitable foundations affiliated with Rockland Trust (the “Foundations”) apply the following guidelines when deciding whether to make a grant or sponsorship. These guidelines are advisory and the Board of Directors of the Foundations may, in their discretion, make exceptions to them.

### Funding Types

Rockland Trust and its affiliated foundations currently accept two types of requests for funding:

A **Sponsorship Request** is support for an event on a specific date, and is a marketing partnership with a non-profit organization that aligns with our geographic and program focus areas.

A **Program Grant** is support for a project or services provided by a non-profit organization that aligns with our geographic and program focus areas. Program grants funds can be requested for operating support or capital projects. Multi-year requests are accepted, but the organization should have received prior support.

### Eligibility Guidelines

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

**Status:** Foundations will typically only make a grant or sponsorship to organizations with Internal Revenue Code 501(c)(3) Public Charity status

**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.

**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:** Requests must originate from organizations based in, or that serve the residents of, the following geographic areas:

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

**Focus Area:** Requests for funding must support one of more of the broad categories which the Foundations have targeted for support: Affordable Housing, Community Development, Education, Financial Literacy, Health and Human Services, and Youth Programs.

### **Funding Information**

The average grant or sponsorship amount will range from \$1,000 - \$5,000. The Foundations do not award grants or sponsorships smaller than \$1,000. If the Foundations choose to make a larger grant, the Foundation may elect to pay it in installments over multiple years.

Grants and sponsorships less than \$10,000 will be accompanied by a letter outlining conditions. Grants of more than \$10,000, including multi-year commitments, will be supported by a grant agreement signed by foundation and recipient.

Foundations will **not** typically make both a grant and sponsorship to the same organization in the same a calendar year. Support of an organization in one year does not guarantee support at the same level in subsequent years.

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

Program grant or sponsorship requests are accepted on a rolling basis. The Boards of Directors meet quarterly to review requests.

Sponsorship requests **MUST BE** submitted a minimum of six weeks prior to event publicity date. Requests of any type must be received with sufficient notice for proper evaluation and response.

**Please note:** *Requests for the current calendar year must be submitted by October 15th.*

### **Funding Considerations**

Rockland Trust and its affiliated foundations prioritize funding requests 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
- Have a realistic project budget where 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

### **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 requests from United Way member agencies.

### **Notifications**

Rockland Trust and its affiliated foundations will notify funding applicants by either email or phone. Every grant or sponsorship check will be accompanied by a letter; we strive to deliver checks in person. Foundations will typically respond in writing to every grant or sponsorship request received, even if it is to decline them.