



# Corporate Giving Guidelines

*You're worth more.*

## **Corporate Giving at Monroe Bank**

We are proud of our record of involvement with the people and communities of Indiana. We recognize our civic responsibility and take pride in our efforts to support the communities that help us grow. Our corporate giving is directed towards local agencies and non-profit organizations that provide needed services to those communities. Monroe Bank's (hereafter referred to as "the Bank") priority is to support programs and provide resources for: economic development, affordable housing and community development organizations, education, health and human services, and culture and the arts. We also support and encourage the service of our employees, who give their time and talent to these worthy causes.

The Bank supports local organizations through both **charitable contributions** and **sponsorships**.

## **Charitable Contributions**

Charitable Contributions are donations from the Bank to nonprofit organizations with IRS 501(c)(3) status. These contributions can be used for any purpose within the stated mission of the organization.

## **Sponsorships**

Sponsorships are financial support from the Bank for a specific event, function or program. Generally, sponsorships are funds paid to any for-profit or non-profit organization for which the Bank will receive promotional, entertainment and community relations value. The Bank hopes to maximize its visibility through participation as a sponsor of an event. Sponsorship opportunities that present networking opportunities, strengthen business relationships or increase the public's awareness of the Monroe Bank name will be given priority consideration.

## **Corporate Giving Priorities**

The Bank focuses its corporate giving through organizations which support:

- Economic Development
- Affordable Housing and Community Development Organizations
- Education
- Health and Human Services
- Culture and the Arts

## **Corporate Giving Eligibility**

Only organizations that the IRS has granted 501(c)(3) tax-exempt status are eligible for Charitable Contributions funding. Both Charitable Contributions and Sponsorships will be selected on the basis of those opportunities which best serve the Bank's corporate giving mission and promote the Bank's products, services and image. The Bank generally does not make contributions to the following applicants or for the purposes or benefit of those listed below:

- Individuals, including Monroe Bank employees, friends or relatives
- Fraternal, political, veterans or labor organizations
- Trips, tours and conferences
- Endowments
- Local chapters of national health organizations
- religious activities or programs that serve, or appear to serve, specific religious groups or denominations. However, if a proposal submitted by a church-based or similar organization falls clearly within program guidelines and is intended to serve as broad a segment of the population as the program of a comparable non-religious organization, we will consider the proposal on the same basis as others.
- Adult recreational or athletic teams, or youth travel teams
- Requests by United Way agencies outside the annual United Way campaign
- Organizations outside of the Bank's market area

The Bank will not fund any organization that discriminates for any reason, including race, religion, creed, age, sex, sexual orientation and national origin.

### **Application Procedures**

All requests must be made in writing on official organization stationery. Proposals for funding must be concise and contain the following:

- Organization name, address and name of executive director
- Contact person, title, telephone number and email address
- Amount requested
- Brief description of organization's mission
- Current list of board of directors
- Geographic area & target population served by organization
- Brief description of the purpose for funds requested
- Project budget identifying the organization's source and use of funds
- Percentage of the people served who are below 80% of area median income
- Age, ethnicity and income demographics of the population served by the organization
- IRS letter confirming tax-exempt status 501(c)(3)

Please allow six to eight weeks for processing contribution requests. All proposals will be mailed a written response after the Sponsorships and Donations Committee has reached a decision.

### **Allocation Guidelines**

Annually, the Bank's senior management team will determine the general area of need on which to focus its support and will establish an annual budget for Sponsorships and Charitable Contributions. A Sponsorships and Charitable Contributions Committee, comprised of Monroe Bank employees, administers the giving program.

The Sponsorships and Charitable Contributions Committee will review requests for either Charitable Contributions or Sponsorships with consideration to specific criteria, including:

- An evaluation of the requesting organization’s mission, past history, success and a determination of whether the request is appropriate for the Bank’s participation and support;
- A review of the current volunteers involvement and support being provided to the requesting organization by the Bank’s employees, customers and board of directors. Preference will be given to those organizations where the Bank’s constituent involvement is strongest.
- A determination of the degree to it provides an effective communication conduit to potential new customers for the Bank.
- Relationship of the organization with the Bank.

The Bank will review only one proposal per organization per 12-month period.

**Renewing a Contribution**

When an organization seeks to renew a contribution, Monroe Bank’s Sponsorships and Charitable Contributions committee reserves the right to request information on how the company’s previous donations were used and the value they provided, before proceeding with consideration of the request to renew.

**In-Kind Donations**

In-kind donations of equipment, facilities, technical resources and volunteers are made when possible. All requests for in-kind contributions must be made on the requesting organization’s official stationery and accompanied by a copy of the organization's IRS determination letter of tax-exempt charitable status under Section 501(c)(3).

**Corporate Giving Contact**

For South Central Indiana

(Jackson, Lawrence, Monroe counties and all other requests)

Monroe Bank Sponsorships and Charitable Contributions Committee  
P.O. Box 2329  
210 E. Kirkwood Avenue  
Bloomington, IN 47402-2329

For Central Indiana

(Hendricks, Johnson counties and areas surrounding Metropolitan Indianapolis)

Monroe Bank Sponsorships and Charitable Contributions Committee  
7517 Beechwood Centre Road, Suite 300  
Avon, IN 46123