

GUIDANCE NOTES

GUIDELINES:

The Yorkshire Building Society Charitable Foundation aims to help alleviate poverty, improve health and save lives. Donations are made to registered charities which support children, those seriously ill, as well as elderly, homeless and disabled people.

The Charitable Foundation accepts nominations from Yorkshire Building Society members and colleagues. Donations range from £250 to £2,000 to registered charities based in and who support beneficiaries of the UK, to fund a specific project and/or items that will have a positive impact on the charity's beneficiaries.

Basic eligibility criteria for charities:

- Registered with the Charity Commission, the Charity Commission for Northern Ireland or the Scottish Charity Regulator
- Nominated by a Yorkshire Building Society member or colleague
- Beneficiaries in the UK
- Have not received a YBS Charitable Foundation donation in the last 2 years (*However local branches of a larger charity that operate under one registered charity number may be considered*)
- Annual returns submitted to the Charity Commission, the Charity Commission for Northern Ireland or the Scottish Charity Regulator

The following will not be considered:

- Charities serving only a specific sector of the community selected on the basis of political or religious grounds/advancement
- Animal welfare charities
- Activities for beneficiaries outside the UK
- Charities that have not submitted their annual returns to the Charity Commission, the Charity Commission for Northern Ireland or the Scottish Charity Regulator
- Charities or Local Branches that have received a YBS Charitable Foundation donation in the last 2 years
- Community Interest Companies, community or voluntary organisations that are not registered charities

Donations to fund specific items

Charities can apply for donations of up to £2,000 to fund specific items that will be used by or directly benefit their beneficiaries.

Some examples of previous donations are:

- Sensory toys for children with special needs.
- Medical equipment for a hospice or charitable sector of the NHS e.g. syringe driver.
- Kitchen equipment for a foodbank e.g. industrial freezer.

Priority will be given to applications where the donation covers the total cost of the item. In some cases the Trustees will also consider applications where the donation covers a significant portion of the total cost, and the remainder has been fundraised by the charity. This does not apply to large capital fundraising appeals.

The following will not be considered:

- Donations to benefit individuals, e.g. medical equipment for someone's home.
- Donations to large capital fundraising appeals e.g. fundraising for a minibus.
- Donations for any administration equipment for a charity's own use, e.g. telephones, security systems, computers or other IT equipment.
- Donations for any fundraising or marketing equipment for a charity's own use, e.g. collection buckets or gazebos for fundraising events.

Donations to fund specific projects

A project is a specific and distinct piece of work that you would like us to fund. Although the Foundation is unable to consider donations to support core costs, the Trustees are keen to support full cost recovery for projects. This means that charities are able to apply for some of their overheads as well as the direct costs of a project, including things like:

- A proportion of salaries for core staff or project workers
- A proportion of rent or utilities
- A dedicated laptop for the project
- Staff or volunteer training

More guidance on how to apply full cost recovery can be found on the National Lottery Community Fund website: <https://www.tnlcommunityfund.org.uk/funding/funding-guidance/full-cost-recovery>

In addition to supporting full cost recovery, the Foundation will consider part-funding projects that demonstrate significant impact in our priority areas: improving health/ saving lives, and alleviating poverty. This means that you can still apply for a donation that doesn't cover all of your project costs, providing that funding is secured for the remaining costs.

The following will not be considered:

- Donations for general ongoing funding, running costs, research, sponsorship, fundraising events, marketing appeals.
- Overseas travel, expeditions or educational expenses, including cases that would otherwise qualify for support but require funds for activities outside the UK.

Due to the limited funds of the Foundation, donations are awarded on a priority basis.

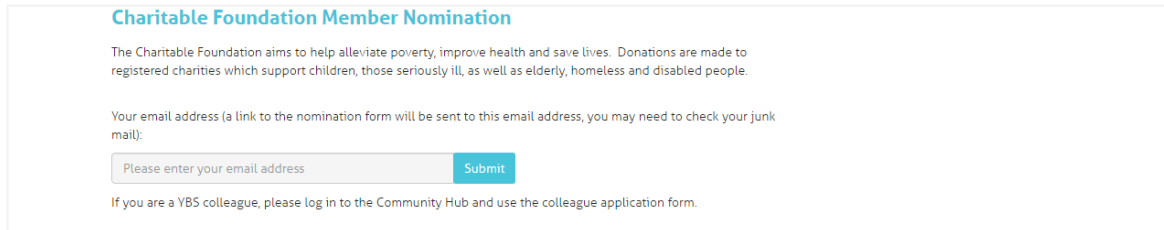
Priority will be given to the following:

- Applications that can demonstrate significant impact for beneficiaries.
- Donations in areas that have high levels of deprivation.
- Projects that have sustained engagement with beneficiaries or target hard to reach groups, e.g. those that are not in education, employment or training, or elderly people who are socially isolated.
- Applications that can demonstrate working in partnership with other charities and community organisations.

How to apply:

Members can apply using the [link](#) on our website. Colleagues can apply directly on the [Community Hub](#).

1. If you are a **member**, click the link above and enter your email address to receive a link to the nomination form.



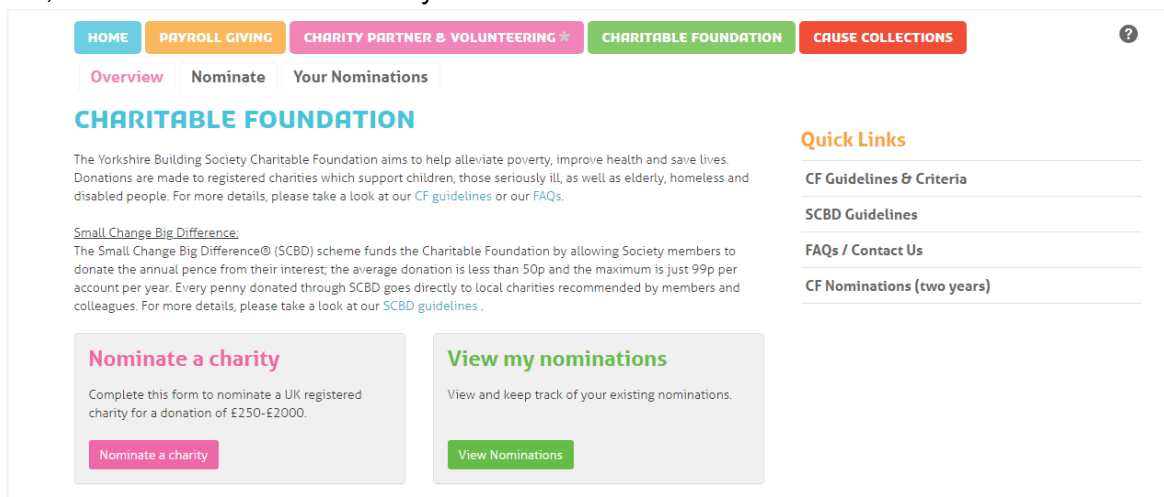
Charitable Foundation Member Nomination

The Charitable Foundation aims to help alleviate poverty, improve health and save lives. Donations are made to registered charities which support children, those seriously ill, as well as elderly, homeless and disabled people.

Your email address (a link to the nomination form will be sent to this email address, you may need to check your junk mail):

If you are a YBS colleague, please log in to the Community Hub and use the colleague application form.

2. Once you've received the link to the nomination form via email, you'll be able to complete the nomination.
3. If you are a **colleague**, please apply on the Community Hub. Click the Charitable Foundation tab, and then 'Nominate a charity'.



HOME | PAYROLL GIVING | CHARITY PARTNER & VOLUNTEERING * | **CHARITABLE FOUNDATION** | CAUSE COLLECTIONS

Overview | **Nominate** | Your Nominations

CHARITABLE FOUNDATION

The Yorkshire Building Society Charitable Foundation aims to help alleviate poverty, improve health and save lives. Donations are made to registered charities which support children, those seriously ill, as well as elderly, homeless and disabled people. For more details, please take a look at our [CF guidelines](#) or our [FAQs](#).

Small Change Big Difference:
The Small Change Big Difference® (SCBD) scheme funds the Charitable Foundation by allowing Society members to donate the annual pence from their interest; the average donation is less than 50p and the maximum is just 99p per account per year. Every penny donated through SCBD goes directly to local charities recommended by members and colleagues. For more details, please take a look at our [SCBD guidelines](#).

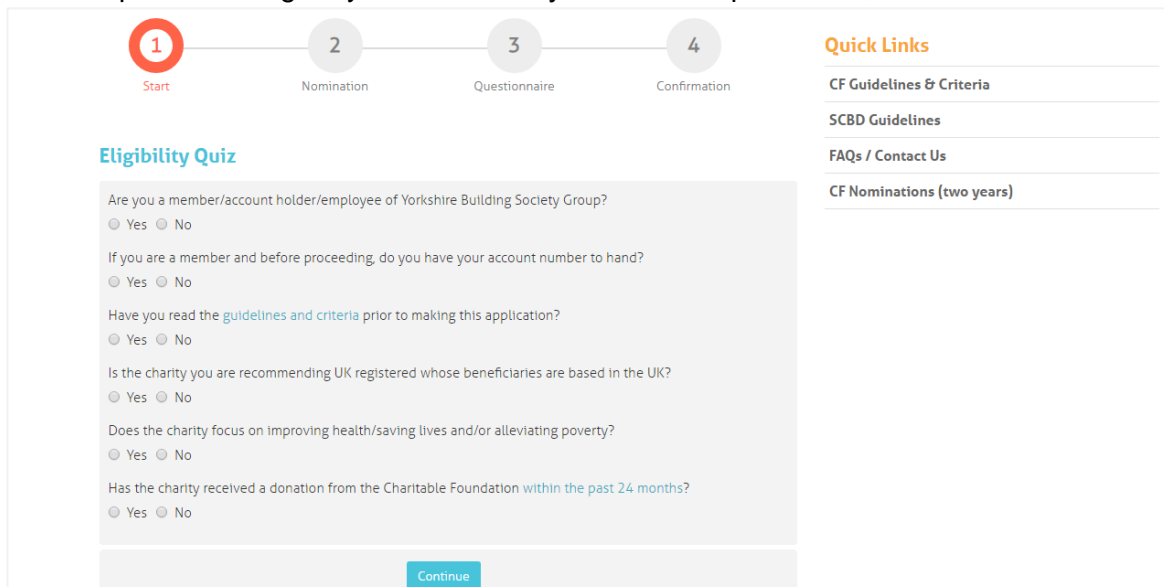
Nominate a charity
Complete this form to nominate a UK registered charity for a donation of £250-£2000.

View my nominations
View and keep track of your existing nominations.

Quick Links

- [CF Guidelines & Criteria](#)
- [SCBD Guidelines](#)
- [FAQs / Contact Us](#)
- [CF Nominations \(two years\)](#)

4. The first part is an Eligibility Check. Once you have completed this, click 'Continue'.



1 Start — 2 Nomination — 3 Questionnaire — 4 Confirmation

Eligibility Quiz

Are you a member/account holder/employee of Yorkshire Building Society Group?
 Yes No

If you are a member and before proceeding, do you have your account number to hand?
 Yes No

Have you read the [guidelines and criteria](#) prior to making this application?
 Yes No

Is the charity you are recommending UK registered whose beneficiaries are based in the UK?
 Yes No

Does the charity focus on improving health/saving lives and/or alleviating poverty?
 Yes No

Has the charity received a donation from the Charitable Foundation [within the past 24 months](#)?
 Yes No

Quick Links

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5. Enter your charity details. The charity contact will be contacted if we need further information regarding your application, and also to verify payment details if the application is successful.

6. If your charity isn't in the search results, click 'Can't find the organisation'. You'll be able to search for the charity, or if it's still not on our system, you can enter the details manually by clicking 'I can't find my organisation on the right'.

The screenshot shows a 'Suggest an organisation' modal window. It contains a 'Country' dropdown menu with 'United Kingdom' selected and an 'Organisation name' text input field with the placeholder 'Start typing the name and select from the list'. Below the input fields is a light blue box with the heading 'Searching for your organisation' and the text: 'Please start typing the name of your organisation. We will provide a list of organisations from our database of thousands of organisations which have been carefully checked to make sure they tick all the right boxes.' At the bottom of the modal are 'Back' and 'Continue' buttons. The background shows a 'Nomination' form with fields for 'The charity you want to nominate', 'Can't find the organisation?', 'Charity contact name', 'Charity contact email', and 'Charity contact telephone'.

7. Once you've entered your charity details, click 'Continue' and you'll be taken to the nomination questionnaire. Please complete your application.
8. Please ensure that your budget section is clear and itemised. Use separate lines for each item you are applying for.
9. Once you have completed your application, click 'Continue'.
10. You'll have the chance to review the application before you submit.
11. Once you have submitted your application, you will receive an email confirming that the application has been received.

Applications for this fund will be reviewed on a quarterly basis by the Trustees of the Charitable Foundation. You can expect to hear back within three months of submitting an application.

Payments will be made via Charities Trust. You may be contacted by an employee of Charities Trust to verify your charity bank details.

If you have any questions about your application, please get in touch with community@ybs.co.uk