



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
- 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
- Charities with beneficiaries not in 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 that have received a YBS Charitable Foundation 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.

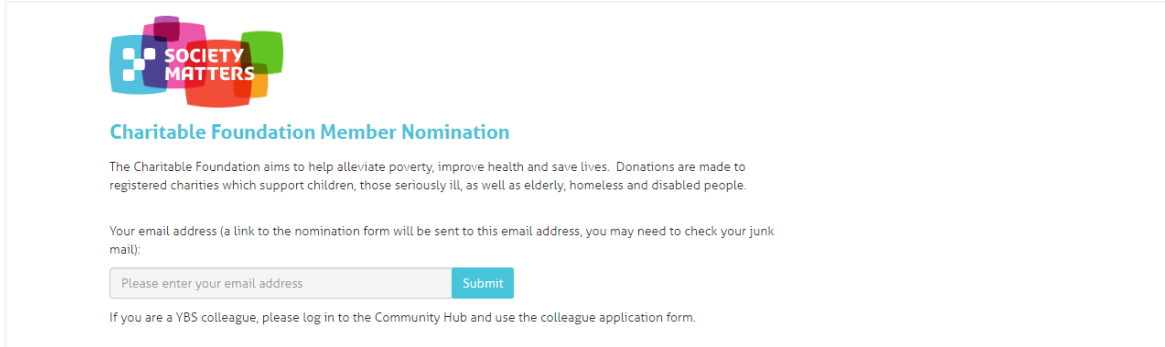
Priority will be given to the following:

- 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:

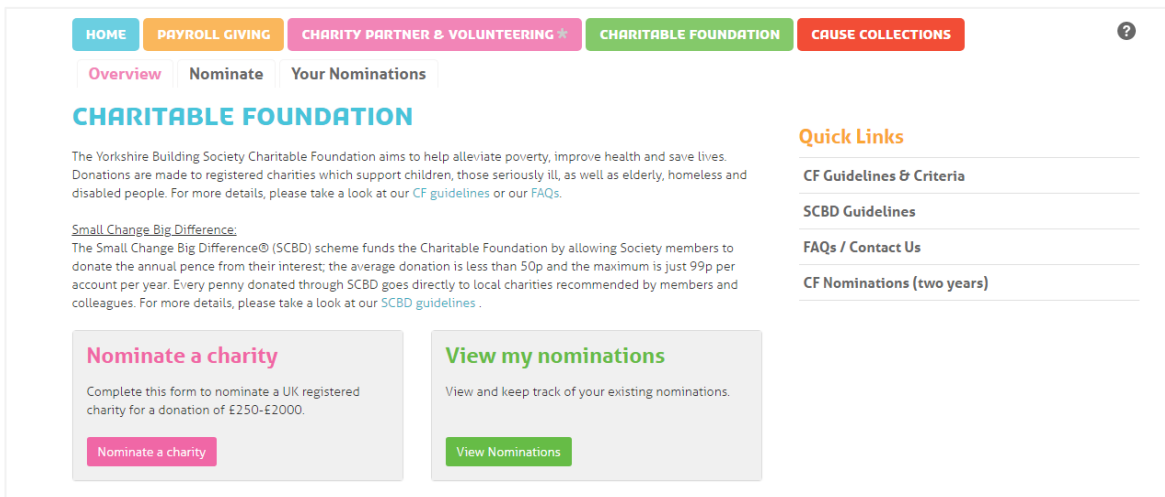
Members can apply using the [link](#) on our website. Colleagues can apply directly on the [Community Hub](#).

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



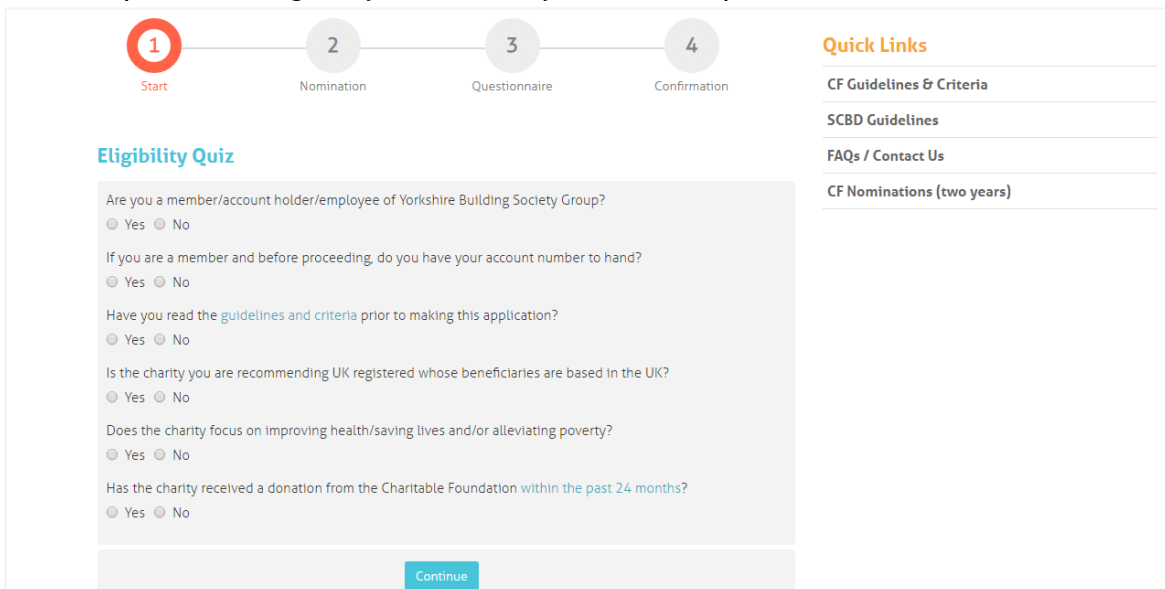
The screenshot shows the 'Charitable Foundation Member Nomination' page. At the top is the 'SOCIETY MATTERS' logo. Below it is the title 'Charitable Foundation Member Nomination'. A paragraph explains the foundation's aim: 'The Charitable Foundation aims to help alleviate poverty, improve health and save lives. Donations are made to registered charities which support children, those seriously ill, as well as elderly, homeless and disabled people.' Below this is a text input field with the placeholder 'Please enter your email address' and a 'Submit' button. A note at the bottom states: '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'.



The screenshot shows the 'CHARITABLE FOUNDATION' page on the Community Hub. The navigation bar includes 'HOME', 'PAYROLL GIVING', 'CHARITY PARTNER & VOLUNTEERING *', 'CHARITABLE FOUNDATION', and 'CAUSE COLLECTIONS'. Below the navigation bar are tabs for 'Overview', 'Nominate', and 'Your Nominations'. The main heading is 'CHARITABLE FOUNDATION'. A paragraph describes the foundation's aim: '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](#).' Below this is a section titled 'Small Change Big Difference' which explains the SCBD scheme. On the right side, there is a 'Quick Links' section with links to 'CF Guidelines & Criteria', 'SCBD Guidelines', 'FAQs / Contact Us', and 'CF Nominations (two years)'. At the bottom, there are two main action buttons: 'Nominate a charity' and 'View my nominations'.

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



The screenshot shows the 'Eligibility Quiz' page. At the top, there is a progress indicator with four steps: 1 (Start), 2 (Nomination), 3 (Questionnaire), and 4 (Confirmation). The first step, 'Start', is highlighted. Below the progress indicator is the title 'Eligibility Quiz'. The quiz consists of six questions, each with radio button options for 'Yes' and 'No':
1. Are you a member/account holder/employee of Yorkshire Building Society Group?
2. If you are a member and before proceeding, do you have your account number to hand?
3. Have you read the [guidelines and criteria](#) prior to making this application?
4. Is the charity you are recommending UK registered whose beneficiaries are based in the UK?
5. Does the charity focus on improving health/saving lives and/or alleviating poverty?
6. Has the charity received a donation from the Charitable Foundation [within the past 24 months](#)?
At the bottom of the quiz is a 'Continue' button.

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'.

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