

Monmouthshire Building Society Charitable Foundation

Application Form



Application Number _____ (Office use ONLY)

Monmouthshire Building Society Charitable Foundation

As a regional Building Society we feel great affinity with the communities in which we operate and actively endeavour to support them wherever possible. In the year 2000 the Society extended its commitment by launching its own Charitable Foundation.

The Foundation is independent of the Society, and its policies and decisions are determined by a Board of Trustees. The Trustees give up their own time in running the Charitable Foundation and are not paid for the work they do. Since its launch, the Foundation has contributed tens of thousands of pounds to over 150 local organisations and charities in South East Wales.

What types of organisations are eligible to receive an award?

- The Foundation supports organisations based in South Wales. We will only accept applications from organisations who have a NP, CF or SA 1-13 postal code address.
- The Foundation will not normally consider requests from nationally based organisations or local groups affiliated to such organisations.
- The Foundation limits its support to organisations and groups (and will not consider applications to support an individual's activities.)
- The Foundation is happy to receive applications from all walks of life and examples of such areas may include:

Education	The environment
Youth groups	Support groups
The elderly	Carers
The hospice movement	Sports groups

How much money is available?

In order to distribute funds as widely as possible preference will be given to groups requesting part funding and smaller donations under £1,000 in value. However, one major cause will be chosen for support each year up to a maximum value of £5,000.

- The Foundation will not normally consider requests to fund the running costs of an organisation and has a preference to support the purchase of tangible items.
- Funding to improve the fabric of any building will only be considered if the building is wholly owned by the organisation applying for funding.
- The Foundation normally offers funding on the basis that the project/purchase will be completed within a three month period from the date the grant is awarded. Therefore, applications for projects which involve long-term funding are unlikely to be successful.

How do I apply?

You have a variety of options.

- Please complete this form in full, ensure the correct postage is applied and send it to:
The Secretary, MBS Charitable Foundation, Monmouthshire Building Society, John Frost Square, Newport, South Wales, NP20 1PX. Additional copies of this application form can be printed off from the **Community** section within our website: www.monbs.com.
- Complete an electronic version of this application form, and either print it off and post it to us, or email it to us. Full details can be found in the **Community** section within our website: www.monbs.com.

When is the closing date for applications?

There is no closing date. All applications received will be reviewed on a quarterly basis and the outcome of your application will be sent to you in writing, within one month of the meeting date.

1>

What is the name of your organisation?

2>

When was your organisation formed?

3>

Is your organisation a registered charity?

Yes / No (Please circle)

If 'Yes', please state registered charity number: _____

4>

What is the primary role/activity of your organisation and at what location are the activities carried out?

5>

Is your organisation affiliated to a national organisation or body?

Yes / No (Please circle)

If 'Yes', please state the nature of the relationship and the degree of local autonomy that your organisation has:

6>

What geographical area is covered by the work of your organisation?

7>

Please give details below of the project or items for which you are seeking funding. For each project/item please include the benefits it will deliver and a breakdown of the costs involved, including any VAT where applicable.

If additional space is needed, please attach a maximum of 1 sheet of A4 paper, labelled '7A'

8>

What is the total amount of funding you are applying for?

£ _____

9>

Does your organisation have the means to match-fund up to 50% of the total amount applied for?

Yes / No (Please circle)

10>

What time scales are associated with the completion of this project/purchase of the items required?

11>

Your Organisation:

- A) - How many people are on the management committee? _____
 - B) - How many full-time **paid** staff do you employ? _____
 - C) - How many part-time **paid** staff do you employ? _____
 - D) - How many volunteers do you have? (approx) _____
 - E) - Total income for the last financial year (Please attach Annual Financial Summary if applicable) £ _____
 - F) - Total expenditure in the last financial year (Please attach Annual Financial Summary if applicable) £ _____
 - G) - Current **unrestricted** reserve or savings £ _____
 - H) - Current **'earmarked'** reserve or savings £ _____
- Purpose of earmarked funds: _____

12>

If funding for your project was granted, what opportunities would there be to promote both your organisation and the work of the MBS Charitable Foundation?

13>

CONTACT DETAILS (USE BLOCK CAPITALS)

Name of contact

Position

Name of Organisation.....

Contact Address

.....Post Code

Daytime telephone number

Mobile number.....

E-mail address.....

14>

Declaration

I am authorised to make this application on behalf of the above organisation. I certify that the information contained in this application is correct to the best of my knowledge. If the information in the application changes in any way I will inform the Foundation immediately. If an award is granted, I give my permission for the Foundation to use my organisation's name to promote its work.

Name _____

Position _____

Signed _____

Date ____ / ____ / _____