

Charitable Foundation Application Form



Monmouthshire Building Society
Charitable Foundation

Application Number _____ (Office use ONLY)

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 over £200,000 to more than 300 local organisations and charities across South East Wales.

Important - Please read all the following notes, prior to completion.

What types of organisations are eligible to receive an award?

- The Foundation will only accept applications from organisations who are located in the following postcodes **NP, CF, SA 1-13, HR1 1, HR1 2, HR2, HR4 0, HR4 9, HR9, LD3, GL14-16 and BS 20-21.**
- 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 (including registered charities) and will not consider applications to support an individual's activities or a private commercial enterprise.
- The Foundation is happy to receive applications from all walks of life and examples of such areas may include:
 - Education
 - Youth Groups
 - The Elderly
 - The Hospice Movement
 - The Environment
 - Support Groups
 - Carers
 - 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 may be chosen for support each year up to a maximum value of £5,000.

- The Foundation will rarely consider requests to fund the running costs of an organisation and prefers to support the purchase of tangible, non-consumable items. (Running costs would include travel costs, salaries, training, hire and accommodation costs. Consumable items would include food, fuel, printing, stationery and ink cartridges.)
- Funding to improve the fabric of any building will only be considered if the building is wholly owned by the organisation applying for funding.

- Funds cannot be provided for goods already purchased prior to any award being granted.
- 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. Successful applicants are advised that they are unable to apply for further funding for a period of 3 years.

How do I apply?

You have a variety of options.

- a) 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**.

- b) 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?

All applications will be reviewed on a quarterly basis and must be received by the following dates:

- 13th June for the June meeting
- 5th September for the September meeting
- 5th December for the December meeting

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. a. What is the primary role/ activity of your organisation and at what location are the activities carried out?	
b. Does your organisation own the building at which the activities are carried out?	Yes/No (Please circle)
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 **FULL 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) *Match-Funding - this means that we will pay 50% of the value of the item(s) purchased. As an example, if the award granted was up to £500 and the goods purchased amount to £980, we would pay you £490.
10. What time scales are associated with the completion of this project/ purchase of the items required?	

11. Your Organisation -	All questions MUST be answered:
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:	£ (These are unallocated funds, available for the organisation to spend at its discretion)
h. Current 'earmarked' reserve or savings:	
i. 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)	Contact Name
	Position.....
	Name of Organisation.....
	Contact Address.....

Post Code
	Daytime Telephone Number..... Mobile Number.....
	Email 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.



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Please return this completed application to:
**The Secretary, MBS Charitable Foundation, Monmouthshire Building Society,
John Frost Square, Newport, South Wales, NP20 1PX.**

Email: mbscf@monbs.com Telephone: 01633 844 335

Website: www.monbs.com - please visit the 'Community' section

Registered Charity Number: 1081311. Company Registration Number: 4025081

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