

# Donations policy

## What do we support

1. The Foundation will only consider donations to registered charities.
2. The charities must be within the United Kingdom and any donation must be used within the United Kingdom.
3. Particular consideration will be given to charities which operate in areas where the Society has a presence.
4. Particular consideration will be given to those charities whose objectives are to benefit children, through their education and/or welfare, and also the elderly and their welfare.
5. The Foundation will particularly seek to help those charities where clear and immediate benefit to the recipient(s) can be identified.
6. The Foundation needs to be made aware of what exactly the funds will be used for.
7. The Foundation will only consider applications where the charity provides its latest 2 years' audited Annual Accounts, along with sufficient information as to the work carried out by the charity.
8. The Foundation usually only considers donations of at least £500 and up to a maximum of £10,000.
9. The Foundation will normally meet quarterly to consider requests for donations.

## What we don't support

The Foundation is unable to consider requests for donations for any of the following:

1. Organisations which are not recognised charities.
2. Activities which are primarily the responsibility of central or local government, or some other responsible body.
3. Running costs, including rent or staff wages.
4. Restoration or construction work and any building running costs.
5. Vehicle purchase.
6. Capital projects.
7. Activities which collect funds for subsequent redistribution to other charities or individuals.
8. Animal welfare organisations.
9. Environmental causes, including restoration and upkeep of buildings or monuments.
10. Expeditions or overseas travel.

(continued...)



11. Fundraising events or activities.
12. Healthcare, including medical research.
13. Individuals including students.
14. Loans or business finance.
15. Overseas activities or charities.
16. Promotion of religion or the restoration or upkeep of places of worship.
17. Sponsorship or marketing appeals.

Principal Office, The Bailey,  
Skipton, North Yorkshire BD23 1DN  
Telephone: 08458 501700\*

[skiptoncharitablefoundation.co.uk](http://skiptoncharitablefoundation.co.uk)

\*To help maintain service and quality, some telephone calls may be recorded and monitored.  
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Skipton Building Society  
Charitable Foundation



## Donation guidelines and how to apply



# What is the Charitable Foundation?

**The Skipton Building Society Charitable Foundation was established in March 2000 by Skipton Building Society.**

It was introduced as part of a scheme, whereby all new investing members of the Society agreed to assign their right to any windfall arising within five years of opening their account, to the Foundation.

To ensure that the Foundation has funds with which to provide grants, the Society has undertaken to make an annual payment to the Foundation.

The Foundation is independent of the Society and its policies and decisions are determined by a Board of Trustees.

The Foundation exists to promote exclusively charitable purposes primarily by way of charitable donations.



# Your application

## Who can apply?

We encourage and welcome applications from all sections of the community and applications that fall within the Foundation's Donations Policy will be given equal consideration on grounds of merit.

## How do you apply?

Simply by filling in the form which is attached to this leaflet. Your completed form must include the latest 2 years' audited Annual Accounts, a covering letter setting out more detail together with any supporting literature you feel will strengthen your chances of receiving a grant. The form must be completed legibly and in full, and sent to:

**Secretary to the Charitable Foundation, Skipton Building Society,  
The Bailey, Skipton, North Yorkshire BD23 2DN**

Alternatively, to download an application form and for further information go to [www.skiptoncharitablefoundation.co.uk](http://www.skiptoncharitablefoundation.co.uk)

## How much to apply for

The Foundation will usually donate a minimum of £500 and up to a maximum of £10,000.

## How your application will be assessed

Your application will be checked against the criteria as specified in the Donations Policy (overleaf). If it meets these requirements, further checks will be made as to whether your organisation is financially sound and has a genuine need for a grant. Also, we will need to assess whether the amount you have applied for is appropriate for the size of your organisation. As the Foundation is independently run you don't have to be a member of Skipton Building Society to apply for a donation.

If your request does not satisfy this criteria, your application will be declined. If the request does meet with the specified criteria, the application will then be given further consideration at the next Board meeting. The Trustees meet on a quarterly basis. As the number of applications exceed the funds available, the Trustees exercise their discretion in making any awards even in circumstances where the criteria may be satisfied.

You will be informed by letter as to whether or not your application has been successful. If not, you should wait at least 1 year before you re-apply.

## Application Form (BLOCK CAPITALS PLEASE)

Name of Organisation: \_\_\_\_\_

Registered Charity Number: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Postcode: \_\_\_\_\_ Telephone: \_\_\_\_\_

Email address: \_\_\_\_\_

Purpose of Charity: \_\_\_\_\_

Amount applied for: \_\_\_\_\_

Your name and position in Organisation: \_\_\_\_\_

Please briefly specify exactly what the money would be used for and how many people would benefit from the donation:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If your application is successful, to whom should the cheque be made payable?  
\_\_\_\_\_

(Please delete as applicable<sup>†</sup>) I have enclosed the following:

<sup>†</sup>Letter <sup>†</sup>Latest 2 years Annual Accounts <sup>†</sup>Supporting literature/information

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

**We look forward to receiving your application.**