

# Exclusions

- Applications which have received a grant or donation in the last two years (unless under exceptional circumstances)
- Activities which are mainly statutory funded by local or central government
- Private companies
- Hospitals, medical centres, medical treatment, medical research
- Fundraising for distribution to other charities or organisations
- General fund raising events, activities or appeals (with the exception of a raffle prize for an event linked to our key priorities)
- Political or pressure groups
- Animal welfare organisations
- Individual/s fundraising for later distribution to a third party
- Promotion of religion
- Appeals for places of worship
- Sponsorships of marketing appeals e.g. advertising in charity brochures or souvenir programmes
- Bursaries to support individuals further education
- Trips and holidays
- Mini Buses or other vehicles
- Sport, music, drama, arts which do not have a learning objective linked to our key priorities
- Whiteboards, desk top pc's
- Contribution to buildings, maintenance or refurbishment costs
- Conferences or seminars unless these have a direct link with our key priorities
- Contribution to large appeals or general appeals by a national charity
- Museums, galleries, musical festivals
- International aid agencies
- Running costs including salaries (excluded from the community fund)
- Individuals tuition/course fees

## Further community information

### Diversity policy

All Britannia Community Policies give equal treatment to all applicants irrespective of race, colour, sexual orientation, nationality, ethnic origins, disability, age, gender or marital status.

### Child protection and health and safety policies

Britannia will only grant funds on the condition that an organisation/charity adopts best practice and has the necessary child protection and health and safety policies in place. Advice on this is available from your local social services department.

### Publicity

With each organisation's agreement Britannia will actively seek positive publicity opportunities such as cheque presentations, opening ceremonies, photographs and press releases whenever practical. This will help to increase the benefits for the causes we support and show that we are making a difference in our local communities.

Please contact

#### Britannia Community Fund

Community Fund Co-ordinator,  
Britannia,  
Britannia House,  
Cheadle Road,  
Leek, Staffordshire,  
ST13 5RG

Tel: 01538 391806  
Fax: 01538 393337

#### Britannia Foundation

Secretary to  
Britannia Foundation  
Britannia,  
Britannia House,  
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ST13 5RG

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## Grants and Donations Policy

Building  
a  
**fairer**  
society  
in your community

# Britannia's community fund

Britannia, as part of the Co-operative financial services does not just offer mortgages, insurance, loans and savings accounts, we also believe that we have an important role to play in the wider community.

## Aim

Our approach to community involvement is derived from our values and heritage and provides us with a significant way of putting our values into practice and of contributing to the communities in which we live and work.

## Local communities

Our focus is simply to support local communities.

## Our key priorities

Our priority will be in areas where we believe we can make the biggest difference and that is by supporting education and wherever possible promoting an improvement in numeracy and/or financial literacy.

## Our support for local communities

Britannia runs various community initiatives, two of which are detailed in this document; namely the Britannia Community Fund and the Britannia Foundation.

## Britannia Community Fund

This fund offers one-off donations of up to £1,000 to non-profit organisations, voluntary groups and schools. The fund also offers donations of up to £100 to individuals who have been loyal to Britannia for over 2 years. Details on how to apply under this scheme can be found on page 2.

## Britannia Foundation

This is Britannia's own registered charity and offers grants and donations between £1,000 and £25,000 to registered charities and schools. Details on how to apply under this scheme can be found on page 3.

## What does the Britannia Community Fund do?

The Britannia Community fund offers a quick and simple application process to voluntary groups, charities and schools, working within education, specifically numeracy and/or - financial literacy, who require donations of up to £1,000. We also support individuals with a donation of up to £100.

## We welcome applications from:

**Individuals** We will support individual loyal customers who have held accounts with us for the last two years, wishing to achieve personal development that supports our key priorities.

**Groups** We will support any voluntary organisation, school or charity working within our key priorities, that operate within a local community. Whilst the Britannia Community Fund focuses on buying specific items or equipment, e.g. educational toys, books, it will also support small projects in support of our key priorities.

## How can you apply?

There is a simple application form which is available on our website: [britannia.co.uk/community](http://britannia.co.uk/community) it is also available at your local branch.

## What happens to my application?

All applications are evaluated against our key priorities and all applications will be notified of our decision in due course. As the Britannia Community Fund receives far more applications for support than we can meet from available funds, it is with regret that we are unable to provide reasons, or enter into any correspondence in relation to the decline of any application. Please note that any funds obtained via the Britannia Community Fund will be publicised.

## Exclusions

For a list of exclusions please see page 4.

Application forms available online or in branch

# Britannia foundation

Registered charity

## What does the Britannia Foundation do?

The Foundation offers grants and donations between £1,000 and £25,000 to registered charities and schools working within education, particularly numeracy and/or financial literacy. The Britannia Foundation is an independent registered charity, number 1069081 and has its own Board of trustees who - evaluate applications.

## We welcome applications from:

**Registered Charities and Schools** Any registered charity or school working within our key priorities.

**National Charities** Any national charity working within our key priorities that can ring fence their activities to a local community. Note: The Foundation prefers buying specific items of equipment but in some circumstances will consider capital expenditure and salary costs.

## How can you apply?

There is a simple application form which is available on request by e-mailing [charitable.foundation@britannia.co.uk](mailto:charitable.foundation@britannia.co.uk) or telephoning on **01538 391734**. You will also need to supply us with the most recent copy of your report and accounts independently audited where possible.

## What happens to my application?

All applications will be acknowledged on receipt. There are two regional trustee committees who evaluate applications, each meet twice a year so there may be a delay before a decision is made and communicated. As the Foundation receives far more applications for support than we can meet from available funds, it is with regret that we are unable to provide reasons, or enter into any correspondence in relation to the decline of any application.

## Monitoring

After the donation has been made the Trustees want to ensure the funds are used as expected and the intended benefits are achieved. The way in which we check this will depend on the circumstances of each case.

## Exclusions

For a list of exclusions please see page 4.