



Monmouthshire Building Society
Charitable Foundation

Funding Request Application Form

Monmouthshire Building Society Charitable Foundation was founded in 2000 to support local schemes and good causes across south Wales and the south west of England and provide modest donations to help them thrive.

Things to know before you apply:

We can support organisations based within our heartland of south Wales, Powys and border counties.

The Charitable Foundation does not support sponsorship applications
However, your local Monmouthshire Building Society Branch might be able to help

Please read the full criteria (inside) before you complete the application form

Organisation Name:

Organisation Postcode:

Application Number



Application Criteria

Monmouthshire Building Society Charitable Foundation was founded in 2000 to support local schemes and good causes across south Wales and the south west of England.

The primary purpose of the foundation is to provide modest donations that will have a positive impact on the lives of disadvantaged or vulnerable people in our communities.

What do you need to know before you fill in this form?

We can only help:

- Organisations based within our heartland of south Wales, Powys and border counties.
- Voluntary and community organisations, Constitution clubs or groups

We'd love to hear from you if you are working towards:

- The prevention or relief of poverty
- The advancement of community development
- The advancement of the arts, culture, heritage or science
- The advancement of environmental protection or improvement
- The relief of those in need by reason of youth, age or disability
- The advancement of animal welfare

Unfortunately, we can't help you if are looking for (or are):

- Sponsorship (for sponsorship opportunities, please visit your local Monmouthshire Building Society branch)
- Administrative costs, including salaries, travel costs, rent or promotional material
- General fundraising appeals
- Charities that have not submitted their annual returns to the Charity Commission
- Organisations that have not submitted their annual returns to Companies House, where required to do so.
- We can only support charities and organisations with at least one year of published accounts covering a 12 month period, where required as above.

You do not need to be a member of the Society to apply for funding

Who can apply?

Voluntary organisations, charities and community groups who meet our application criteria. If you read everything and meet our criteria, please let us know how we can help.

How much can I apply for?

We provide modest donations that will have a positive impact on the lives of the disadvantaged or vulnerable in our communities. By providing smaller amounts we can help more good causes.

Please provide as much detail as possible in your application about what you do and what you would like to spend the funding on, any extra information we need will be asked for in this form.

How long do I have to wait for a decision?

Foundation meetings are held quarterly in March, June, September and December. Current deadline dates for applications can be found on our website www.monbs.com. We'll let you know the outcome of your application within one month of the meeting. (Please note this can take up to 28 days.)

● Section 1 - Organisation Details

Organisation Name				
Address				
	Postcode			
Are you a Charity?	Yes	No		
If yes, please provide Registered Charity No				
Name of Contact				
E-mail Address				
Does your organisation own the building at which the activities are carried out?	Yes	No		
Is your organisation affiliated to a national organisation or body?	Yes	No	Why are we asking? We are asking because we are unable to help you if you are.	
If applicable, please provide the date you last applied to the Foundation and if your application was successful or unsuccessful	/	/	Successful	Unsuccessful
When was your organisation formed?	/	/		
How did you hear about the Monmouthshire Building Society Charitable Foundation?				

● Section 2 - Organisation Overview

Please tell us about the work your organisation does

Want to know what we're looking for? Easy, just tell us about the fantastic work you do and how you are making a difference, that's really it!

[illegible]

● Section 3 - How will the funds be used?

If we at the Monmouthshire Building Society Charitable Foundation can help, how will the donation be used and how it will benefit those you support?

So you've told us about the fantastic work you do and how you are making a difference, now let us know how a donation from us can help.

[illegible]

● Section 4 - Full Cost Breakdown

Please let us know how the donation will be spent (including VAT) along with a copy of quotations for any items that you will use the donation to pay for

Item Description	Cost (£) inclusive of VAT
Total – (full amount applying for , including VAT)	

● Section 5 - Organisation Financial Details

Please tell us your organisation's latest annual income		
If the donation you are looking for is part of a larger target, please let us know where you are in relation to that target (Max 100 words)		
Have you given us a copy of your latest Annual Accounts?	Yes No	If No, please let us know why

● Section 6 - Other

If your application was successful, what opportunities would there be to promote both your organisation and the work of the MBS Charitable Foundation?	

● Section 7 - Declaration

I confirm I have read the criteria to ensure my application meets the criteria and have completed an accurate application on behalf of the organisation	
I give permission to Monmouthshire Building Society Charitable Foundation to use the information provided within the application for promotional activity on the website, social media and in the press.	
Signature	
Date	

Where to post or email your completed application:

Post:

The Secretary,
MBS Charitable Foundation, Monmouthshire Building Society,
John Frost Square, Newport, South Wales, NP20 1PX

Email:

mbscf@monbs.com



Head Office: Monmouthshire House, John Frost Square,
Newport, South Wales, NP20 1PX.

T : 01633 844 360

Registered Charity Number: 1081311. Company Registration Number: 4025081
Monmouthshire Building Society is authorised by the Prudential Regulation Authority and
regulated by the Financial Conduct Authority and the Prudential Regulation Authority.
Financial Services Register Number: 206052.

CFAPP(01/23-1)

