



Leeds Building Society

Foundation

Our Grant Giving



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Our Foundation

The Leeds Building Society Foundation is changing - as of July 2022 we've shifted our focus to supporting those in need of a safe and secure home.

We want to provide UK registered charities with grants to support this new purpose, and we're looking to fund projects that fit within the following criteria themes:

- Sustainability
- Health
- Financial stress
- Accessibility
- Education and advice
- Security and refuge

Over the next four years, we're looking to award over £1 million to causes that support our purpose through our grant giving. **We have two grants available for charities to apply for: small grants (up to £1,000) and large, multi-year grants (up to £100,000).**

The following guide will help you to learn more about our grants, how you can apply and what to expect from our application process.



Leeds Building Society

Foundation



Our grants

Small grants

We'll fund:

- ✓ UK registered charities with a turnover of less than £1 million
- ✓ Applications for capital expenditure (purchase of items/equipment)
- ✓ Funding requests from organisations or projects based in the UK

Large grants

We'll fund:

- ✓ UK registered charities
- ✓ Applications for grants between £25,000 to £100,000 across one, two or three years
- ✓ Funding requests for organisations based in or delivering projects in Yorkshire or the North East of England
- ✓ Running costs (rent, utility bills, insurance etc.)
- ✓ Staff and volunteer costs (including full-time and part time staff and project delivery staff.)
All staff must be paid at least the Real Living Wage, set by the Living Wage Foundation
- ✓ Project costs
- ✓ Capital costs



Exclusions

All grants

We won't fund:

- × Religious, military or political projects
- × Charities or projects based outside of the UK
- × Individuals (including sponsorship)
- × Animal welfare projects
- × Local Scouts, Brownies or Girlguiding groups
- × Medical research
- × Retrospective costs (reimbursement for costs already incurred)
- × Charities and projects that don't align with our purpose of supporting people in need of a safe and secure home



Example projects

The list below indicates potential projects or organisations that may fit our purpose and funding themes. This list doesn't include every option but should give a good idea of what we can fund.

- **Sustainability** - projects that help with fuel poverty, energy efficiency or environmental impact. For example, helping vulnerable households to save money, stay warm and well through energy efficiency home improvements.
- **Health** - projects that help people with health needs with housing, adaptations or advice, such as handyperson services.
- **Financial stress** - projects that give people tools to reduce money worries, help with bills or debt stress. For example, debt advice services.
- **Accessibility** - projects that reduce loneliness, provide supported living services or adapt homes to make them safer for those with accessibility needs, such as accessible housing or befriending schemes.
- **Education and advice** - projects that support money management, provide advice services and signpost those in need to relevant support. For example, housing advice services.
- **Security and refuge** - projects that support emergency accommodation or make people feel safer where they live. For example, accommodation for people experiencing domestic abuse.



Our small grants provide funding to projects that **support those in need of a safe and secure home.**

Your project must meet our purpose through one or more of our funding themes:

- Sustainability
- Health
- Financial stress
- Education and advice
- Accessibility
- Security and refuge.

For small grants, we only accept requests to fund **capital expenditure**. This means that we fund the purchase of items used to directly help those in need, rather than contributing to a charity's running costs.

Applicants can apply for a minimum grant of £250 and a maximum grant of £1,000.



How we fund our small grants

Our small grants are funded through Leeds Building Society and our members.

Members can choose to opt in to our 'Your Interest in Theirs' scheme, donating up to 99p of their interest per account each year. The Foundation receives around £40,000 annually from this scheme which contributes towards funding our small grants.

We also receive an annual donation from the Leeds Building Society linked to members' votes at our AGM. On average, this donation is £3,000.

Every year we'll fund an average of £43,000 in small grants.

The amount available for small grants will fluctuate depending on how many members opt in to the Your Interest in Theirs scheme and vote at our AGM.



Small grants - scored out of 60

Score	0	5	10	15
How closely do the charity's main activities align with the Foundation's purpose, 'to support people in need of a safe and secure home'?	The charity doesn't meet the Foundation's criteria and/or the primary funding involves: a. Religious, military or political projects b. Animal welfare projects c. Medical research d. Schools e. Scouts/guides/cadets Stop assessing from here if they don't meet the criteria.	There's limited correlation between the charity's activities and the Foundation's purpose and/or the charity is affiliated to a franchise (E.g. a local branch of a national charity)	The charity's activities align to the Foundation's purpose to support those in need of a safe and secure home.	The charity's activities directly link to the Foundation's purpose to support those in need of a safe and secure home.
How directly will the project improve the lives of the charity's beneficiaries?	The project provides no direct benefit and may include: a. Laptops/tablets/equipment for administrative staff use b. Running costs c. Promotional materials for charity fundraising	The project would provide limited benefit or enable the charity's beneficiaries to access further support.	The project demonstrates a direct benefit and will make a material difference to the lives of beneficiaries.	The project demonstrates a direct benefit and is highly targeted towards the beneficiaries' needs.
Does the funding applied for cover at least 20% of the project's cost?	The funding would cover 20% or less of the project's cost.	The funding would cover at least 20% or more of the project's cost.		
Has the charity raised at least 50% of the total required?	The charity has raised no funds or less than 50%.	The charity has raised 50% or more of the project's total cost.		
Overall project cost as a % of turnover.	>50%	<50%		
Number of beneficiaries.	<5	5-20	20-50	>50

How to apply for small grants

You can apply for a small grant through the application form on our website: leedsbuildingsociety.co.uk/your-society/about-us/foundation/.

Our Trustees meet every quarter, and your application will be considered at the next scheduled meeting. You'll find the meeting dates on our website.

If your application is successful, donations are made by cheque to the official name of your charity up to eight weeks after the last meeting date.

You'll be required to complete a short impact form online once your project has finished.

If you receive a grant from us, you must wait two years to submit another application. You can apply for funding again if your application is unsuccessful, but not for the same items of expenditure.

Unfortunately, we're unable to give feedback on unsuccessful applications.



Large grants

Our large grants provide funding to projects that **support those in need of a safe and secure home.**

Your project must meet our purpose through one or more of our funding themes, Sustainability, Health, Financial stress, Education and advice, Accessibility, Security and refuge.

Applicants for large grants can apply for a minimum of £25,000 to a maximum of £100,000. This grant can be a one year grant or split across two or three years.

You can apply for core, project and/or capital costs. You can apply for new work or existing work, as long as you're not requesting retrospective funding. We advise you to apply for what you need the most, in order to support those in need of a safe and secure home.

For our large grants, we're only accepting grants from organisations based in or delivering in Yorkshire and/or the North East of England (see page 13 for more detail).

We'll only accept large grant applications from UK registered charities. There are no restrictions on turnover for our large grants.



How we fund our large grants

Our large grants are funded by an annual donation from Leeds Building Society. **Their donation allows us to distribute £300,000 every year in large grants.**

We're welcoming applicants for grants between £25,000-£100,000. **The number of grants we can award every year will be dependent on the number and quality of applications we receive.**

The Trustees would like to support a wide variety of organisations, and therefore to increase your chance of success we recommend you ask for between £25,000 to £50,000. If you're applying for more than £50,000, you'll need to score highly against our scoring matrix (see page 19).

When we receive applications, we'll be looking for a clear and concise budget that clearly indicates how the money will be spent and why the funds are needed.



What we are looking for

Organisations based in or delivering projects in Yorkshire and/or the North East of England

For our large grants, we're taking a location-based approach to support communities close to our head office (Leeds) and contact centre (Newcastle).

We're open to applications that support the following areas: Darlington, Durham, Gateshead, Hartlepool, Middlesbrough, Newcastle-upon-Tyne, Northumberland, North Tyneside, Redcar and Cleveland, South Tyneside, Stockton-on-Tees, Sunderland, Barnsley, Bradford, Calderdale, Doncaster, East Riding of Yorkshire, Hull, Kirklees, Leeds, North Yorkshire, Rotherham, Sheffield, Wakefield and York.

We'll accept your application if your head office is based elsewhere in the UK as long as the service or project you're seeking funding for is delivered in Yorkshire or the North East of England.

Potential for colleague volunteering

We welcome applications that provide opportunities for Leeds Building Society's colleagues to volunteer. Every colleague at Leeds Building Society has 14 volunteering hours to use every year. The majority of our colleagues are based in Yorkshire and the North East and we'd welcome any volunteering opportunities your organisation may have.



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Capital costs

We'll fund capital costs, such as building works and refurbishment costs, especially when they're essential to the successful delivery of your project.

We're also willing to fund major capital projects, such as property, if it aligns to our purpose.

In your application, please indicate how the project will impact the ongoing costs of your organisation, i.e. if it will lead to cost savings. If it will increase ongoing costs, please indicate in your application how you'll fund these.

If you apply for capital costs, we may ask for certain documentation when shortlisting (if relevant to your application). We may ask to see:

- Planning permission
- Confirmation of ownership
- Lease agreement (we expect a minimum of 15 years)
- Up-to-date financial quotes for the proposed works (from the last six months)
- Any other documents deemed relevant



Matched funding

We're happy to be the first funder of a project, if you can demonstrate that our grant will be a catalyst to secure further funding. To be sure your project is sustainable, we'll ask for an income/fundraising plan. This should outline how you plan to secure the rest of the funding and the time frames in which you aim to receive this funding.

If you've already received a percentage of funding for the project you're applying for, we'll need to know:

- How much you've raised so far
- The sources of funding
- How you plan to fund the remaining shortfall

We may wish to discuss the above with you at the shortlisting stage.

We're also happy to be the sole funder, providing a grant for 100% of the project.

How to apply for large grants

You can apply for a large grant on our website: leedsbuildingsociety.co.uk/your-society/about-us/foundation/.

Alongside key information about your charity, you'll need to tell us what you're seeking funding for, how it aligns with our purpose and themes, who will benefit from the funding and what difference your project will make.

You'll need to provide a breakdown of how you'll spend the grant, as well as essential financial information including your organisation's bank details.

You'll also need to attach the following supporting documentation:

- A copy of your most recent annual accounts
- A recent bank statement, in your organisation's name (from the last three months)
- A copy of your governing documents



What makes a good application

- ✓ A simple and straightforward application - avoid using jargon and acronyms and make sure your application makes sense to someone who doesn't know your organisation.
- ✓ Alignment to our purpose - make sure that your funding request aligns clearly to our purpose 'to support people in need of a safe and secure home'.
- ✓ Meeting our funding themes - your funding request must match one or more of our funding themes. The more funding themes your project fits in to, the more compelling your application will be.
- ✓ Clear evidence of need/demand.
- ✓ Sustainability – we'd like to know the longer-term impact of your grant and how you'll continue to run your project or service after the grant period ends.
- ✓ Clearly costed expenditure - make sure that your grant breakdown is correct and adds up to your requested amount.
- ✓ Clear objectives and outcomes.



Large grant scoring

Before your application is scored, we'll check your application against the following questions. If your application doesn't answer 'yes' to every question, we won't proceed with scoring your application.

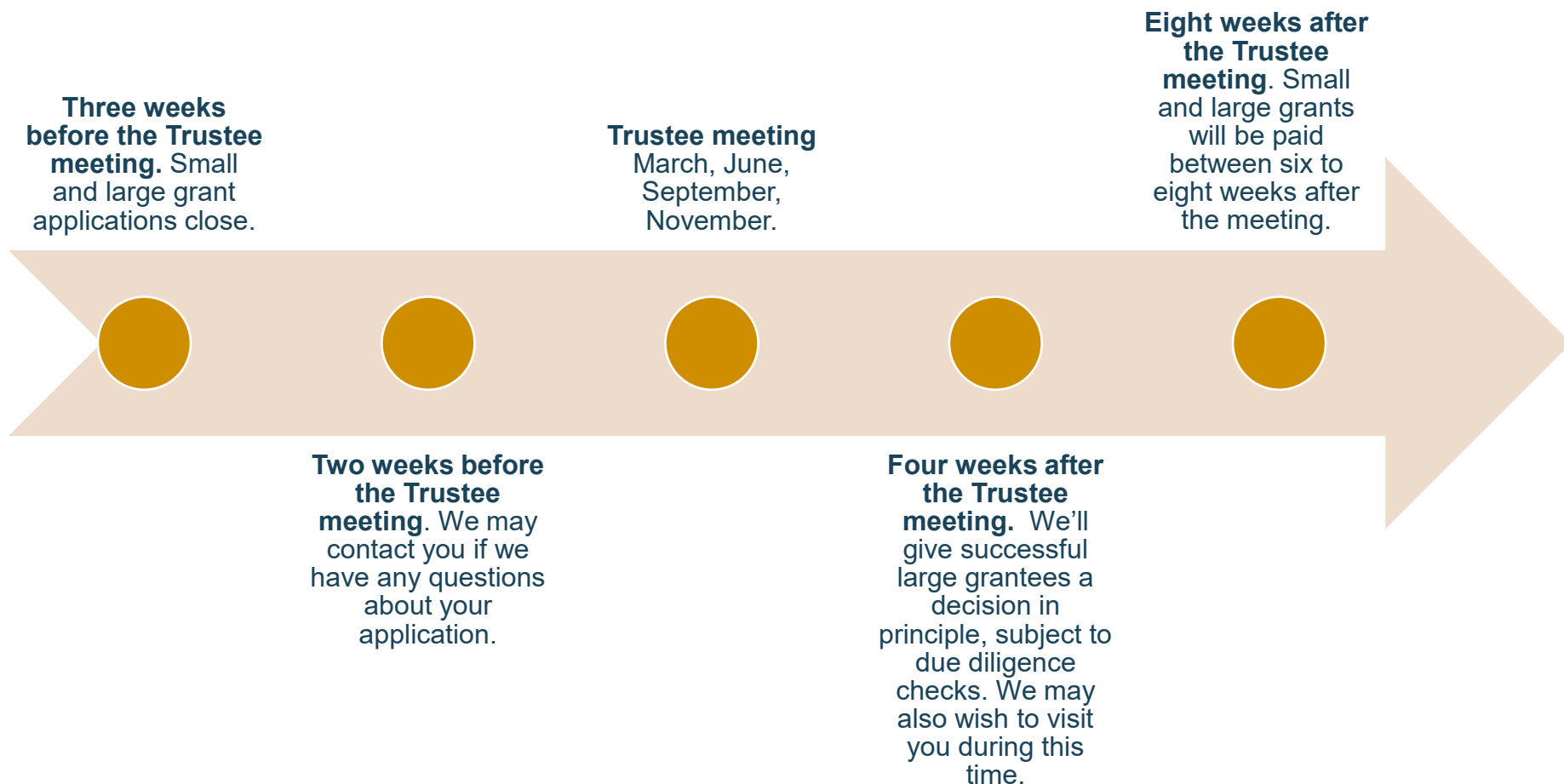
- Are they a registered charity?
- Are they applying for funding to be delivered in Yorkshire and/or the North East?
- Is the funding request between £25,000 and £100,000?
- Will the funding period be between one and three years?
- Have they provided a clear and concise budget?
- Have they provided the required supporting documents (most recent annual accounts, a recent bank statement and governing documents)?



Large grants – scored out of 90

Score	0	5	10	15
Alignment to purpose 'to support people in need of a safe and secure home'.	The charity doesn't meet the Foundation's purpose.	There is limited correlation between the charity's activities and the Foundation's purpose.	The charity's activities align to the Foundation's purpose.	The charity's activities directly link to the Foundation's purpose.
Criteria themes	The application doesn't fit within any of the Foundation's themes.	The application fits within one of the Foundation's themes.	The application fits within two of the Foundation's themes.	The application fits with three or more of the Foundation's themes.
Evidence of need/demand	The application doesn't provide evidence of need/demand.	The application provides limited evidence of need/demand.	The application provides clear evidence of need/demand.	The application provides clear evidence of need/demand in consultation with beneficiaries.
Outcomes	The application hasn't considered outcomes.	The application has considered some outcomes but hasn't addressed how it plans to achieve these.	The application has clear outcomes and has addressed how it plans to achieve these.	The application has coherent outcomes and clearly addressed how it will deliver them, following consultation with beneficiaries.
Impact	The funding will have no benefit to the community beyond the end of the funding period.	There will be some residual benefit to the community in the medium term.	There will be considerable benefit to the community in the long term.	The project/scheme will maintain the same level of benefit to the community in the long term as it has during the funding period.
Sustainability	There's no plan to fundraise the rest of the money needed to complete the project.	There's a basic plan to fundraise the rest of the money, but it lacks detail.	There is a sufficient plan to fundraise the rest of the money needed.	There is a detailed plan to fundraise the rest of the money needed, and the organisation has a proven track record in this respect.

Timeline for large grants



After you've applied

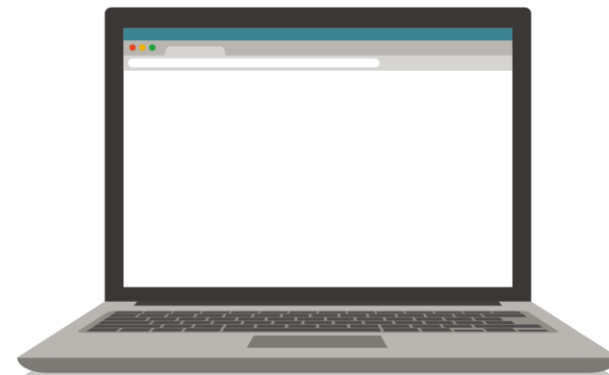
Our Trustees meet every quarter, and your application will be considered at the next scheduled meeting. You can find the meeting dates on our website.

If you're successful, your grant will be paid via BACS. If you've requested a multi-year grant, we'll agree a schedule for making payments.

If you're successful, you'll have to wait two years after your funding period ends to re-apply.

If you're unsuccessful, you can apply again 12 months after submitting your last application.

Unfortunately, we can't give feedback on unsuccessful applications.



Monitoring information

Large grant holders will be asked to complete an impact report at the end of the first year of funding. If you're a multi-year grant holder, you'll need to complete the form every year to update us on your progress.

The impact report will include:

- A summary of the activity funded by this grant (or an update on progress)
- A summary of the outcomes of your service/project
- How you have spent your grant so far (we may request evidence such as receipts or invoices)
- The impact the grant has had on beneficiaries
- A short case study
- Any photos you wish to share with us

Throughout your grant period, our Trustees may also wish to visit your project. We'll discuss this with you as part of the funding agreement.

