

## Simplyhealth Community Funds - Criteria for applications from charitable organisations or community investment initiatives

### **Purpose of Community fund investment**

Community fund investment is a demonstration of good 'corporate citizenship', contributing to the general health and social cohesion of the communities in which we operate. Supporting our people in their efforts to support causes they care about, contributes to their wellbeing, (health, happiness and engagement). Community fund investment is the local element of our overall Corporate Giving Strategy, which revolves around our purpose as an organisation – why we are in business. As such, where possible for local community investment, consideration is given to 'helping people make the most of life in every day health.

### **Community fund operational guidelines**

The town or city in which our offices are located should be considered a hub with the 'reach' of community investment extending to surrounding smaller towns and villages within a 15 mile radius. Support should not extend to other major towns or cities, e.g. Basingstoke, Salisbury or, Southampton, which benefit from the support of their local businesses. We may have employees who reside in these other large town or city locations, but funding should revolve around the office, not our people some of whom live a considerable distance from their daily workplace. We support our people and the causes they care about well via sponsoring and matched funding.

### **People or groups we are able to support**

The Community Funds helps groups and organisations that:

- Operate within and support the local area, defined as being within a 15 mile radius of an office (see guidelines above)
- Local branch of national organisation/charity targeting support for the local area and local people
- Help support or promote health and wellbeing, including the environment, sport, music and dance
- Support those less able to support themselves
- Fundraising events organised by local schools or PTAs etc.
- Customers who approach us for support in raising money for UK charities up to £250 max
- Professional partners, e.g. Dental and Veterinary practices raising money for either a local or national charity, up to £250 max
- Peripatetic sales team raising money for a charity local to their place of residence
- Whose wellbeing is dependent upon the support of animals, e.g. Guide dogs etc.

### **Charities or initiatives we are generally unable to help**

Applications generally will not be considered for:

- Support outside the local area, or groups where the funds help supply support on a national or international basis
- General appeals for non-targeted funding and disaster appeals e.g. DEC
- Research purposes or projects
- Promoting religious or political causes
- Organisations solely supporting animals e.g. rescue centres
- Heritage, building restoration projects or more general building works including maintenance
- Funding that will solely be used for marketing or promotional activity i.e. literature, leaflets, diaries, flyers, posters etc.
- Money to pay for an individual's salary on an ongoing basis

Exceptions to the above exclusions will be considered on their merits on a case by case basis.

**March 2018**

## How we like to help our employees

The Community Fund will supply help in the following ways:

- By **match-funding** our people organising or taking part in fundraising activities such as marathons and swim-a-thons etc. up to **£500** for a registered charity or proven charitable cause
- Teams of staff members organising fundraising events/activities to be offered total matched funding up to **£600**. **Please see Appendix below for clarity.**
- Fundraising activities relating to National events, for example, Children in Need, Red Nose Day etc as supported by employees up to 3 per year to a total matched funding of £1000 per event per location

## Application process

All applications should be sent to the local community fund mailbox or by post to the administrator using the relevant form on the website.

### **Note:**

- All applications will be reviewed and the final decision made by at least a quorum (minimum of 5 members), of the Community Fund Committee
- All applicants will be notified of decision
- Charities must be registered and local projects and initiatives must be proven
- For donations of £5,000 or above, recipients should be asked to provide evidence of 'impact'
- Approval for donations of £25,000 and over will be required from the charitable committee
- All community investment activity, (donations, sponsorships, matched giving, volunteering days), must be recorded using the London Benchmarking Group (LBG) online platform.