

## Matched Giving Scheme Guidelines

Please note these guidance notes replace all previous guidance notes

### How the Matched Giving Scheme works

The Matched Giving Scheme encourages Lloyds Banking Group members of staff in Scotland to get involved in the voluntary sector and to help fundraise through personal participation in events or give their time freely to support the work of charities throughout Scotland.

Every member of staff employed by Lloyds Banking Group and any Group subsidiary in Scotland is entitled to claim up to **£1000** in each calendar year from the Matched Giving Scheme for a charity for which they have either raised money for or given time to. We will **match every pound you raise** or donate **£8** per hour of voluntary time given, to a maximum of **£500 for fundraising events and/or £500 for voluntary time given**, provided that your claim falls within the rules of the scheme and the charity is eligible for funding.

The funding year runs from January to December.

Before applying to the Matched Giving Scheme please make sure that you have read the rules and guidance notes below carefully.

### The rules

Here are the basic rules for applying to the Matched Giving Scheme:

- You must be an employee of Lloyds Banking Group, or any other Group subsidiary in Scotland or a Trustee of the Bank of Scotland Foundation.
- We cannot support claims for activities or voluntary time completed by family members, friends etc. The whole ethos of the scheme is to get you to personally participate in the voluntary sector!
- Each staff member is eligible to claim up to £1000 in the calendar year to a maximum of £500 for fundraising events and/or £500 for voluntary time given.
- You can apply at any point in the year and for as many different activities as you like, so long as your entitlement is not exceeded. Please note that one-off or single claims **under £100** are not eligible but can be used to contribute to a total.
- For fundraising activity claims:
  - You must have personally participated in an event or activity. That is, you must have done something to raise the funds. For example, if you are raising funds by doing bag packing at the local supermarket we would expect that you were one of the bag packers, not the organiser/supervisor of the event.
  - Claims for fundraising activities must be submitted within six months of the date completed.
  - You must have completed the fundraising activity before being able to claim. We cannot support claims for fundraising where funds are gathered in advance of the activity being undertaken.
- For claims for voluntary time:
  - These can be submitted at any time for hours given to charity during the last twelve months.
  - We do not support claims for voluntary time spent organising fundraising events or for time given during work time.
- Each staff member who has personally participated in a fundraising activity or given voluntary time must complete their own claim form. We cannot accept group applications.
- Your Line Manager must authorise your claim by signing to confirm that they have examined your application and any supporting evidence (e.g. sponsorship form).
- We can only support charities which fit within our guidelines (see the **types of charities we fund** and **what we don't fund**).

We strongly advise you not to make any promises of funding to the charity you are fundraising for, in case there are reasons why your claim may not be met. If you have any doubts at all, then please contact the Bank of Scotland Foundation and we will be only too happy to provide you with clarification.

## The types of charities we fund

We support a wide range of charities which help people in Scotland to achieve a better quality of life, create equality of opportunity and help those who are disadvantaged or marginalised in society.

We can only support charities based and working within Scotland

## What we don't fund

Unfortunately, we are unable to fund the following types of charitable work:

- Organisations which are not registered charities
- Individuals - including students
- Animal welfare
- Environmental projects e.g. geographic and scenic, conservation and protection of flora and fauna
- Activities and statutory requirements of hospitals and medical centres (inc NHS Trusts), schools (including PTAs and school associations), universities and colleges
- Sponsorship or marketing appeals
- Establishment/preservation of endowment/welfare funds
- Organisations that redistribute funding for subsequent grant-making to other organisations and/or individuals
- Expeditions or overseas travel
- Building projects for places of worship, other than where such buildings provide accommodation for community groups
- Promotion of religion
- Building projects for heritage centres, visitor centres, museums and theatres
- Historic restoration/historic publications
- Charitable work outside of the UK (i.e. benefiting people outside the UK)

## What happens next?

Once we have received your claim form, we will check for eligibility against the rules and the types of charities we fund.

If your claim is successful, we will write to you to let you know that the money has been sent to the charity you fundraised for or have given voluntary time to.

We will send the Matched Giving Claim payment directly to the charity, along with a letter explaining that you raised these funds and how you did it.