



**MBS Charitable
Foundation**

SUPPORTING OUR LOCAL COMMUNITY

Learn about the foundation,
funding eligibility and how
to donate.



**Melton
Building
Society**



About Melton Mowbray Building Society Charitable Foundation

Melton Mowbray Building Society Charitable Foundation was launched on 26 March 1998 to promote and support local charitable and community activity. The establishment of the Foundation was an initiative of Melton Building Society which, since its own inception in 1875, has been committed to maintaining the value of caring for its members' needs.

The Foundation is a registered charity (registration number 1067348). It is controlled by an advisory committee of trustees who meet quarterly in March, June, September, December and it holds a trust fund providing a capital base for donations made.

Melton Building Society is committed to making an annual contribution to the Foundation's trust fund. At the same time, it will meet in full any administration costs that arise, thus ensuring that the trust funds are used entirely for the benefit of our local community.

How can the Foundation help our local community?

The principal objective of the Foundation is to direct its resources towards less advantaged individuals or organisations

within a local catchment area of a 15 mile radius of the Building Society's branch offices in Melton Mowbray, Grantham, Oakham, Bourne and Stamford.

The Foundation divides its resources between two areas of activity:

1. Community Projects

The Foundation aspires to give at least 33% and up to 50% of the annual contribution made by Melton Building Society to either kickstart a community project within the catchment area or to establish an enduring activity or initiative for the benefit of the community. The extent of the contribution will be decided by the trustees based on the merits of individual projects.

Do you want to support the foundation? Speak to us about making a donation.



Suggestions for such a project are welcomed from the local community. It is appreciated that any project selected could take more than a year's commitment from the Foundation.

2. Community Activities

The Foundation utilises the remaining funds contributed by Melton Building Society in any one year to support a variety of local worthwhile needs.

The types of request considered by the Foundation will be from:

Young people, particularly those who are disadvantaged

Vulnerable groups such as the frail elderly, people with physical disability, people with learning difficulties or those who are mentally ill

Organisations where health and well-being programmes are being promoted and delivered

Small neighbourhood groups in areas experiencing the greatest disadvantage

Communities and voluntary organisations seeking assistance in the achievement of social and community development

Charitable organisations requiring support to cover ongoing operating expenses, including rent or staff wages.

Organisations supporting improvement in financial literacy across all ages.

The types of request not considered by the Foundation include:

Expeditions or overseas travel

Entities or individuals who have applied to the Foundation within the previous 12 months

The restoration or upgrading of buildings, including churches

Sponsorship of individuals

National Charities or fund requests which do not have direct relevance to our local community

How to apply to Melton Mowbray Building Society Charitable Foundation

Individuals or organisations within the Foundation catchment area are eligible to apply for charitable support from the Foundation.

The Foundation trustees have the sole power to accept or decline any applications received. In the interests of fairness, if you are successful in making an application to the Foundation, you will be unable to apply for further assistance within the following 12 months from the date of grant.

If you think you are eligible to apply, please write stating the following:

- 1. Reason for the request**
- 2. Who will benefit from the charitable donation**
- 3. When the funds are required**

In some circumstances it will be helpful to the trustees to state how the money will be spent. Trustees will normally only consider granting amounts between £50 and £500.

Please write to:

The Secretary to the Trustees
Melton Building Society Charitable Foundation
Mutual House , Leicester Road, Melton Mowbray
Leicestershire, LE13 0DB

or email c.ritchie@mmbs.co.uk
or visit www.themelton.co.uk for further information

Do you want to support the foundation? Speak to us about making a donation.

Thank you for your support in helping us

SUPPORT OUR LOCAL COMMUNITY



How you can help us

If you wish to help the Foundation to support the local community either by making a donation or by arranging fundraising or support for our chosen community project, the Foundation trustees will be extremely grateful.

To discuss any support for our chosen Community Project, please contact us on **01664 414141**.

Any donation you make will also be matched by Melton Building Society.*

*Subject to a maximum level at the discretion of the Society's Board of Directors.

Supporting our local community

Summary Privacy Policy

Melton Mowbray Building Society Charitable Foundation takes your privacy very seriously and always treats your personal details with the utmost care.

This Privacy Policy explains the types of personal data we collect, what we do with it, who we share it with, how long we keep it and your rights.

If you have any questions about the data that you share or we collect, don't hesitate to get in touch. We'll be more than happy to help.

We promise to keep your information safe and secure.

Personal information we collect from you

This will depend on the nature of any request you make to the trustees and the Community Foundation, but can include (but is not restricted to):

Identity details which includes your full name, title, date of birth, age, unique personal identifier and account number

Contact details which includes your home address, email address and phone number

Personal information about your family which includes your marital status, next of kin, dependents and emergency contact details

Profile data about you which includes your sex, occupation, employment status, citizenship status, residential status, property details, occupancy status and insurance information

Identification data which includes your driving licence, passport, National Insurance number and other national identifiers

How you interact with us which includes call recordings or any other form of communication.

Personal information we collect from others

Sometimes we work with carefully selected third parties and charities and we may receive your personal information from them.

Purposes of the processing

Data protection laws require us to explain what legal grounds justify our processing of your personal information (this includes sharing it with other organisations).

For some processing more than one legal ground may be relevant (except where we rely on a consent). Here are the legal grounds that are relevant to us:

Processing necessary to perform our charitable objectives, including providing financial support to claimants

Where we consider that, on balance it is appropriate for us to do so and the processing is necessary as a result of the legitimate interest which apply to us and in some cases other organisations

Processing necessary to comply with our legal obligations

Processing with your consent

Processing for a substantial public interest under laws that apply to us where this helps us to meet our broader social obligations.

Sharing your personal information

Where necessary, we may ask to share your personal information for marketing purposes – i.e. on our website, social media pages and/or on our internal intranet. This will be to promote the work of the Charitable Foundation, and we will always ask for your consent prior to any publication.

Do you want to support the foundation? Speak to us about making a donation.

Keeping your personal information

We keep personal information for as long as it is required by us:

To manage our relationship with you and provide charitable support

To communicate information about your request

To administer the Foundation's finances including any request for funding

For internal operational requirements, including meeting Regulatory obligations

For audit purposes

Your data subject rights and how to exercise them

You have rights relating to the personal information we hold about you, however, they may be subject to various exceptions and limitations. Below is a list of your rights:

Right to be informed

Right to request access to your personal information

Right to request correction of the personal information

Right to request erasure of your personal information

Right to request restriction of processing of your personal information

Right to data portability

Right to withdraw consent

Right to object

You can request to exercise your rights at any time by contacting us using the details in this privacy policy.

Data protection questions and complaints

If you have any questions or are unhappy about this document, how we use your information or any of your rights, contact our Data Protection Officer.

If you're not satisfied with the way we handle your complaint, you are entitled to raise a complaint directly with the UK Information Commissioner's Office. See www.ico.org.uk for details.

How to contact us

By email

We would always encourage you to contact us by email to reduce the environmental impact:

DPO@mmb.co.uk

By phone

You can call our Customer Service Centre on 01664 414141.

By post

Melton Mowbray Building Society
Mutual House
Leicester Road
Melton Mowbray
Leicestershire
LE13 0DB

In branch

Alternatively, you can visit us in one of our five branches in:

Bourne

Stamford

Oakham

Grantham

Melton Mowbray

This Privacy Policy is also applicable to charities, voluntary groups and third-party firms.



**MBS Charitable
Foundation**

Main Office

Mutual House, Leicester Road,
Melton Mowbray, Leics., LE13 0DB.

T. 01664 414141

F. 01664 414040

E. melton@mmbs.co.uk

Branch Offices

18 Nottingham Street,
Melton Mowbray, Leics.,
LE13 1NW.

T. 01664 480214

F. 01664 560321

E. meltonbranch@mmbs.co.uk

48 High Street, Grantham,
Lincs., NG31 6NE.

T. 01476 564528

F. 01476 575231

E. grantham@mmbs.co.uk

23 High Street, Oakham,
Rutland, LE15 6AH.

T. 01572 757911

F. 01572 757946

E. oakham@mmbs.co.uk

1 North Street, Bourne,
Lincs., PE10 9AE.

T. 01778 301556

E. bourne@mmbs.co.uk

49 High Street, Stamford,
Lincs., PE9 2BD.

T. 01780 431061

E. stamford@mmbs.co.uk

themelton.co.uk

Melton Mowbray Building Society, Mutual House,
Leicester Road, Melton Mowbray, Leicestershire, LE13 0DB
The Charitable Foundation is a registered charity, registration number 1067348.

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