



# Foresters Community Grants Programme Guidelines (United Kingdom)

The Foresters Community Grants Programme offers eligible members the opportunity to do more for themselves, their families and their local community. Regardless of the area of interest, the programme guidelines for each Grant type and other easy-to-access supporting resources are available to help members work through their plans before submitting their grant application:

- **Community Volunteer (CI) Grants** offer hands-on volunteer opportunities that are appealing and appropriate for Foresters members and families of all ages and abilities – and make a difference to the local community. Depending on your area of interest, members can choose to organize one of the following activity types: Care Package, Community Beautification, Create & Construct, Meal Help, and Volunteer Support
- **Fun Family (MI) Grants** offer complimentary admissions and / or unique opportunities to Foresters members, while also promoting the well-being of their families. Depending on what is available in your local community, members can choose to organise an event such as a day at the zoo or at a sporting event or a movie screening, for local Foresters members.

Foresters Financial reserves the rights to modify an activity plan, resources or budget as appropriate and subject to the defined Grant type guidelines.

	Community Volunteer (CI) Activity	Fun Family (MI) Activity
<b>Program Objective</b>	To increase local member engagement and volunteerism that aligns with our purpose to do more.	
<b>Submission of Application</b>	<ul style="list-style-type: none"> <li>Multiple applications cannot be submitted to fund the same activity on the same day and one application cannot be used to fund reoccurring activities. You may only submit one application per activity.</li> <li>Only members who are 18 years of age or older and in good standing are eligible to submit a grant application. Applications must be personally submitted by the member themselves. The Grants Team will only communicate with the member and email address named on the application.</li> <li>Upon submission of a grant application, all information included are assumed to be accurate. The Grants Team reserves the right to cancel an application if any changes (such as date, cost, budget items etc.) are required.</li> <li>Changes made to an application after submission may delay the approval process and funding may not be guaranteed. Insufficient funding may result in the grant application being cancelled.</li> <li>Upon submission of a grant application you will receive a reference number. Members are encouraged to periodically log-in to the portal to monitor the status of their grant, retrieve Post Activity Reports and obtain other helpful information.</li> <li>The grant application must be submitted eight (8) weeks (or more) prior to the activity date.</li> <li>You may submit a maximum of two (2) MI grant applications and three (3) CI grant applications per grant year, allowing up to a maximum of five (5) Grant submissions per year.</li> <li>You may submit a maximum of two (2) grant applications per quarter in the calendar year, regardless of when the activities take place. If an application is declined, you may reapply in the same quarter.</li> </ul>	
<b>Venue</b>	<ul style="list-style-type: none"> <li>The venue must be open and welcoming to everyone regardless of gender, race, age, ability, sexual orientation, ethnicity or religion.</li> <li>The activity must take place in a venue that is publicly accessible.</li> </ul> <p><b>Note:</b> A private venue, such as family home, place of business, residential building or residential complex is not an eligible venue.</p> <ul style="list-style-type: none"> <li>Venue locations must be within 96 km of the applicant's home.</li> </ul>	
<b>Activity Timing</b>	<ul style="list-style-type: none"> <li>Consider hosting activities during the evening and weekend to maximise member engagement.</li> </ul>	
	<ul style="list-style-type: none"> <li>The duration of an activity should be between 1-3 hours to ensure the community volunteer component is relevant, appealing to members and meaningful.</li> </ul>	
<b>Eligible Attendees</b>	<ul style="list-style-type: none"> <li>Your activity must be open and welcoming to everyone regardless of gender, race, age, ability, sexual orientation, ethnicity or religion.</li> <li>In compliance with Foresters Privacy Policy, personal information received by registered members cannot be distributed or used beyond their participation in your activity.</li> </ul>	
	<ul style="list-style-type: none"> <li>Only Foresters Financial members, who have registered for the activity are eligible to attend along with their registered guests.</li> </ul>	<ul style="list-style-type: none"> <li>Only Foresters Financial members, who have registered for the activity are eligible to attend along with their registered guests (max 4 tickets per household).</li> </ul>

	Community Volunteer (CI) Activity	Fun Family (MI) Activity
	<ul style="list-style-type: none"> <li>A minimum of ten (10) volunteers are required, however consider the capacity of the venue and the scale of your Foresters project to determine how many volunteers you can accommodate to organise a successful and impactful experience.</li> </ul>	<ul style="list-style-type: none"> <li>A minimum of fifty (50) guests are required, however the capacity that the venue allows for your activity will likely dictate the maximum number of tickets that you are able to offer at your activity.</li> </ul>
<b>Age Restrictions</b>	<ul style="list-style-type: none"> <li>We encourage Foresters members to plan family-friendly activities, as well as accommodations for various age groups and the abilities of your guests.</li> </ul>	
<b>Cost and Budget Items</b>	<ul style="list-style-type: none"> <li>Out of budget expenses and cash withdrawals are prohibited and may be subject to audit.</li> <li>Budgeted items must be directly related to and support the activities purpose. See the Non-Qualifying Budget Items policy for further assistance in planning your budget.</li> </ul>	
	<ul style="list-style-type: none"> <li>The total amount of your requested Grant cannot exceed £2,000, inclusive of all activity costs outlined in the activities budget.</li> <li>For care package activities, the total value of each care package cannot exceed £40.</li> <li>A maximum of £8 per attendee may be used for volunteer snacks &amp; refreshments.</li> <li>Awareness-raising speakers and other add-ons can complement the volunteerism of a CI activity.</li> </ul>	<ul style="list-style-type: none"> <li>The total amount of the budget submitted in your Grant application cannot exceed £35 per attendee, this includes taxes, fees and a maximum of £8 for concession vouchers</li> <li>All available tickets must be of equal value/cost and provide the same experience for all members.</li> <li>For concerts and/or live performances, cost averaging is not permitted. All tickets should be the same face value</li> <li>All food items and beverages must be prepared and provided by the venue in the form of vouchers at a maximum value of £8 per person.</li> </ul>
<b>Admission Charges</b>	<ul style="list-style-type: none"> <li>Admission charges for activities to members are not permitted, however members are responsible for costs incurred by their attendance, such as parking or babysitting, as applicable.</li> </ul>	
<b>In-Kind Donations</b>	<ul style="list-style-type: none"> <li>In-kind donations collected on-site are the responsibility of the organiser and must be delivered to the benefitting organisation promptly or within a reasonable amount of time following the activity.</li> <li>Costs associated with the collection/distribution of donations are not an allowable expense.</li> </ul> <p><b>Note:</b> The charity may be willing and able to arrange a pickup of the in-kind donation, if requested</p>	
<b>Personal Benefit</b>	<ul style="list-style-type: none"> <li>No member, nor their immediate family, may personally benefit financially or otherwise from receiving a Grant and/or hosting an activity.</li> </ul>	

	Community Volunteer (CI) Activity	Fun Family (MI) Activity
<b>Non-Qualifying Activities</b>		<ul style="list-style-type: none"> <li>• Participant activities that are focused around fitness or sports (e.g. Yoga classes, karate, etc.)</li> <li>• Activities focused on takeaway items (e.g. pottery and bear building parties, etc.)</li> <li>• Alcohol-focused activities (e.g. wine, liquor or beer tasting)</li> <li>• Meal-centered activities (e.g. dinners, brunches, picnics, etc.)</li> <li>• Betting/wagering-focused activities (e.g. horse racing, casino, bingo, etc.)</li> <li>• Overnight getaways</li> <li>• Camping or caravanning</li> </ul>
<b>Payment Administration</b>	<ul style="list-style-type: none"> <li>• Granted CI funding is payable by paycard that are issued to the applicant and can only be used by vendors who accept this type of payment</li> <li>• Foresters Financial cannot guarantee merchants (in-store or online) will accept paycard as a method of payment.</li> <li>• If the paycard does not work (in-store or online) please contact the paycard provider directly for assistance.</li> <li>• Your paycard is programmed to automatically deactivate within 7 business days after the activity date, allowing for any store refunds to occur within that period of time</li> <li>• Personal expenditures will not be reimbursed and may be subject to audit</li> </ul>	<ul style="list-style-type: none"> <li>• Granted MI funding is payable directly to the venue.</li> <li>• It is the responsibility of the member applicant to facilitate the refund of unused funds by the venue, to Foresters Financial. The Grant reference number must be listed on your repayment.</li> </ul> <p><b>Note:</b> Refund options include; check, money order and wire transfers.</p>