



OneFamily Foundation Terms & Conditions

(Effective from 01 May 2019)

These terms and conditions apply to The Foundation and any persons engaging with The Foundation. Potential Applicants should read them carefully before making an Application for a Personal or Young Person's Education Grant or a Nomination for a Community Grant. Submission of an Application or Nomination indicates acceptance of these terms and conditions.

Interpretation

The following definitions have been used throughout this document:

Customer – means any person who holds a OneFamily policy or product in their own name or any person who is the named parent/guardian for a children's policy or product where the child is under 18

Applicant – means a person, satisfying the eligibility criteria for applicants as set out in the relevant sections below, who submits either a Nomination for a Community Grant or an Application for a Personal or Young Person's Education Grant (whether on their own behalf or on behalf of another individual or group)

Application – means an application for a Personal or Young Person's Education Grant made on behalf of either the Applicant or another eligible person

Beneficiary – means the community/organisation responsible for the Project for which a Community Grant is being sought

Nomination – means a nomination of a Project to receive a Community Grant

OneFamily – means the OneFamily group of companies (being Family Assurance Friendly Society Limited and its subsidiaries), whose website is located at onefamily.com

Project – means a specific activity or cause seeking funding by means of a Community Grant. Projects are typically self-contained and run or carried out by an organisation for the benefit of its members or users. For example, in the development of an outside play area for a nursery, the development of the play area would be the "Project" that the nursery would carry out with the funding provided by The Foundation.

The Foundation – means OneFamily Foundation Limited, registered in England and Wales under company number 09176069. Registered Office 16-17 West Street, Brighton, BN1 2RL

22981 013 05.2019

OneFamily Foundation Limited, registered number 09176069, is registered in England and Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. OneFamily Foundation Limited is not authorised or regulated by the Financial Conduct Authority or the Prudential Regulation Authority.

OneFamily is a trading name of Family Assurance Friendly Society Limited (registered and incorporated under the Friendly Societies Act 1992, registered number 939F). Registered in England & Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. Family Assurance Friendly Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority.

22759 002 07.2018



Decisions, determinations and exercises of discretion of, by or on behalf of The Foundation and its representatives are final and binding, and The Foundation will not be obliged to enter into correspondence in relation to them.

The Foundation reserves the right to modify or withdraw Community Grants, Personal Grants or Young Person's Education Grants, or change the timings of the Community Grants, Personal Grants or Young Person's Education Grants at any time without prior notice.

Entry to Community Grants, Personal Grants and Young Person's Education Grants is only available to people residing in the United Kingdom (England, Wales, Scotland or Northern Ireland).

More information can be requested by either emailing foundation@onefamily.com or writing to: The Foundation, OneFamily, 16-17 West Street, Brighton, BN1 2RL.

Responsibility

The Foundation endeavours to deal with all persons with whom it engages fairly and reasonably and with all due diligence and appropriate resource. However, The Foundation accepts no responsibility for any damage, loss, liability, injury or disappointment incurred or suffered whether as a result of applying for a Community Grant, Personal Grant or Young Person's Education Grant or otherwise. The Foundation further accepts no responsibility for any damage to any computer or other devices relating to or in connection with The Foundation's website or any other interaction with The Foundation.

The Foundation will not be liable for any failure to comply with its obligations where the failure is caused by something outside its reasonable control.

Nothing in these terms and conditions will exclude the liability of The Foundation for death, personal injury, fraud or fraudulent misrepresentation as a result of its negligence or breach of contract.

General information

The Application and Nomination processes for The Foundation are operated by OneFamily.

These terms and conditions set out the rules applicable to the Application and Nomination process. Applicants and recipients (including potential recipients) will be bound by these rules and are advised to read these terms before engaging with The Foundation. Any questions or requests for further information should be sent to foundation@onefamily.com.

The Foundation reserves the right to decline an Application if The Foundation believes the Applicant has opened a OneFamily product with the sole purpose of applying for a Grant.

The Foundation reserves the right to cancel, extend the period of participation or alter in any way whatsoever these terms and conditions. The Foundation cannot be held responsible if, for any reason, the application or nomination process is modified, shortened or cancelled.

The name and county of Community Grant winners may be available on The Foundation website or can be obtained by sending a stamped addressed envelope to: The Foundation, OneFamily, 16-17 West Street, Brighton, BN1 2RL.

22981 013 05.2019

OneFamily Foundation Limited, registered number 09176069, is registered in England and Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. OneFamily Foundation Limited is not authorised or regulated by the Financial Conduct Authority or the Prudential Regulation Authority.

OneFamily is a trading name of Family Assurance Friendly Society Limited (registered and incorporated under the Friendly Societies Act 1992, registered number 939F). Registered in England & Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. Family Assurance Friendly Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority.

22759 002 07.2018



In case of any dispute, the laws of England and Wales will apply and all parties submit to the non-exclusive jurisdiction of the English Courts.

Use of Personal Data

Personal details will be held and used by The Foundation and OneFamily in accordance with the OneFamily Privacy Notice available at www.onefamily.com/privacy. A copy is also available by writing to OneFamily, 16-17 West Street, Brighton, BN1 2RL; by calling Customer Services on 0344 8 920 920 or, by email to customerservices@onefamily.com.

When an Applicant nominates a Project for a Community Grant, The Foundation will assume that the organisation leading the Project provides its consent to being contacted regarding the Nomination. If the Applicant is unsure whether the organisation is prepared to be contacted by The Foundation or OneFamily they should seek consent from the relevant individual(s) at the organisation before submitting the Nomination.

Website terms and conditions

When using OneFamily websites the website terms of use available at www.onefamily.com/privacy will apply. Please do contact us if you have any questions or concerns about these terms.

Types of Funding

The Foundation provides three types of funding:

- Personal Grants
- Young Person's Education Grants
- Community Grants

Personal Grants

Customers may apply for a Personal Grant of up to £500.

Applications can be completed online or via a paper application form.

Applications will be reviewed to ensure they fit with the eligibility criteria and if approved, the Application will go into a monthly randomised computer draw.

Only Personal Grant winners will be notified of the outcome of the draw.

Eligibility

To apply for a Personal Grant an Applicant must

22981 013 05.2019

OneFamily Foundation Limited, registered number 09176069, is registered in England and Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. OneFamily Foundation Limited is not authorised or regulated by the Financial Conduct Authority or the Prudential Regulation Authority.

OneFamily is a trading name of Family Assurance Friendly Society Limited (registered and incorporated under the Friendly Societies Act 1992, registered number 939F). Registered in England & Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. Family Assurance Friendly Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority.

22759 002 07.2018



- be a Customer whose OneFamily policy or product remains active throughout the life of the Application
- not hold only a pension policy*
- not be a OneFamily employee.
- not be an immediate family member (spouse, partner, child, parent or sibling, regardless of where they live) of a OneFamily employee working within The Foundation team

A OneFamily Customer can submit an Application for either themselves or someone else for a Personal Grant. If someone else is nominated, the applicant should know them well, they need to live in the United Kingdom and they can't be a OneFamily employee. Only one Application can be made at any given time for either yourself or someone you know. If the Foundation receives more than one Application for the same recipient we will only consider one Application.

An Application for a Personal Grant must

- be genuine and be submitted by the Applicant named in the Application
- be used to improve the life of the proposed recipient
- provide relief to the recipient in times of poverty or financial hardship due to unforeseen temporary or long term circumstances, or support them to learn a trade or skills that would help them in the future, for example to get back into work
- be a request for something for which funding is not otherwise reasonably readily available (e.g. from other sources without a possibly lengthy process involving the council, social services or charities etc)
- the Applicant must confirm to the best of his or her knowledge and belief that the recipient has less than £2,000 in accessible savings.

For examples of the types of needs which may or may not be eligible for a Personal Grant see onefamily.com/your-foundation/personal-grants/frequently-asked-questions-personal-grants/

Successful Applicants and/or recipients of Personal Grant funding won't be able to apply for another Personal Grant or Young Person's Education Grant for one year from the date of their winning Application. The Foundation has absolute discretion as to the amount to be awarded to recipients of a Personal Grant. This means the Foundation may award more or less than the amount applied for.

*We are sorry but OneFamily members holding pension products only are not eligible for this member benefit due to the potential adverse tax consequences for both the member and the product. Members who have a pension product will still be eligible if they hold other OneFamily products.

How to apply

If you would like to apply for a Personal Grant, use the online form found on The Foundation website: onefamily.com/your-foundation/personal-grants/ If you don't have internet access, contact the Customer Services team on 0800 373010* to request a hard copy of the form.

The Foundation will review all Applications received five working days or more before the Personal Grant monthly draw. If an Application reaches us after this we'll carry it over to the next month's draw.

If you or the person you nominate no longer need the funds applied for, or are no longer eligible, you must withdraw your Application.

22981 013 05.2019

OneFamily Foundation Limited, registered number 09176069, is registered in England and Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. OneFamily Foundation Limited is not authorised or regulated by the Financial Conduct Authority or the Prudential Regulation Authority.

OneFamily is a trading name of Family Assurance Friendly Society Limited (registered and incorporated under the Friendly Societies Act 1992, registered number 939F). Registered in England & Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. Family Assurance Friendly Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority.

22759 002 07.2018



Applications can be withdrawn at any time. Simply log into your profile on The Foundation website or contact us.

A member of The Foundation team will review all Applications to check eligibility before they are entered into a draw. Applicants will be notified either way if an Application is eligible or ineligible for the draw.

The Foundation's decision on which Applications are eligible to go into the draw is final, and The Foundation will not be obliged to enter into correspondence about our decision.

*Open 9am-7pm Monday-Friday and 9am-1pm on Saturdays. Calls from UK landlines and mobile phones cost no more than calls to geographic numbers (01 or 02). For more information, please contact your provider. Telephone calls may be monitored or recorded for training purposes.

The monthly draw

Successful Applications are selected randomly from eligible Applications using a computerised process near the start of each month.

If an Application is unsuccessful, it will be entered into three further monthly draws before being removed. Applicants will be notified of this and invited to submit a new Application.

If there are fewer Applications than the number of Personal Grants available in any given month, all eligible Applications in that month will be awarded a Personal Grant and any remaining unallocated funds will roll over into the following month. The Foundation also reserves the right to donate any unallocated funds to any charity of its choice.

We will notify successful Applicants in writing or by telephone within two weeks of the draw.

If, for any reason, a Personal Grant is no longer needed or is not claimed within three months of the draw, The Foundation reserves the right to re-allocate the funds.

Payment

Successful recipients will be paid their awarded Personal Grant by cheque, or by bank transfer to their own bank account or, exceptionally, by payment to a third party on the recipient's behalf.

A written quote for any items or services to be purchased is needed before payment is made. Proof of purchase in the form of receipts, photographs etc. should be provided to The Foundation team upon request and within six months of payment to prove the Personal Grant has been used responsibly.

If proof which satisfies The Foundation isn't provided, The Foundation reserves the right to require that the Personal Grant is repaid in full.

The Foundation is not responsible for

- the purchase of any goods or services relating to the Application
- any goods or services purchased with Personal Grants, any loss/harm/injury/death as a result of misuse of products/services or faulty products/services bought using a Personal Grant.

22981 013 05.2019

OneFamily Foundation Limited, registered number 09176069, is registered in England and Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. OneFamily Foundation Limited is not authorised or regulated by the Financial Conduct Authority or the Prudential Regulation Authority.

OneFamily is a trading name of Family Assurance Friendly Society Limited (registered and incorporated under the Friendly Societies Act 1992, registered number 939F). Registered in England & Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. Family Assurance Friendly Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority.

22759 002 07.2018



By submitting an Application the Applicant agrees that under no circumstances will any funding from The Foundation be used for illegal activities or activities that could bring OneFamily or The Foundation into disrepute.

If successful it will be the responsibility of the Applicant to ensure the Personal Grant is spent in line with the information set out in the successful Application.

Personal Grants are non-transferable and are personal to the proposed recipient.

The Foundation may wish to use Personal Grant winners' stories and personal details for promotional purposes. Applicants should tick the appropriate box on the Application if they wish to give their agreement to this.

Young Person's Education Grants

Customers may apply for a Young Person's Education Grant of up to £500.

Applications can be completed online or via a paper application form.

Applications will be reviewed to ensure they fit with the eligibility criteria and if approved, the Application will go into a monthly randomised computer draw.

Only Young Person's Education Grant winners will be notified of the outcome of the draw.

Eligibility

To apply for a Young Person's Education Grant an Applicant must

- be a Customer whose OneFamily policy or product remains active throughout the life of the Application
- not hold only a pension policy*
- not be a OneFamily employee.
- not be an immediate family member (spouse, partner, child, parent or sibling, regardless of where they live) of a OneFamily employee working within The Foundation team

A OneFamily Customer can nominate an individual aged 15-19 for a Young Person's Education Grant. The Applicant should know the intended recipient well, they need to live in the United Kingdom and they can't be a OneFamily employee. Only one Application can be made by the Customer at any given time. If the Foundation receives more than one Application for the same recipient we will only consider one Application.

An Application for a Young Person's Education Grant must

- be genuine and be submitted by the Applicant named in the Application
- be for a recipient aged 15-19 years at the time of the Application
- be for a recipient who is based in the UK
- be used towards costs relating to further education, training or work experience undertaken by the proposed recipient

22981 013 05.2019

OneFamily Foundation Limited, registered number 09176069, is registered in England and Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. OneFamily Foundation Limited is not authorised or regulated by the Financial Conduct Authority or the Prudential Regulation Authority.

OneFamily is a trading name of Family Assurance Friendly Society Limited (registered and incorporated under the Friendly Societies Act 1992, registered number 939F). Registered in England & Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. Family Assurance Friendly Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority.

22759 002 07.2018



- be a request for something for which funding is not otherwise reasonably readily available (e.g. from other sources without a possibly lengthy process involving the council, social services or charities etc)
- the Applicant must confirm to the best of his or her knowledge and belief that the recipient has less than £2,000 in accessible savings.

For examples of the types of needs which may or may not be eligible for a Young Person's Education Grant see <https://www.onefamily.com/your-foundation/young-persons-education-grant/faqs/>

Successful Applicants and/or recipients of Young Person's Education Grant funding won't be able to apply for another Young Person's Education Grant or Personal Grant for one year from the date of their winning Application.

The Foundation has absolute discretion as to the amount to be awarded to recipients of a Young Person's Education Grant. This means the Foundation may award more or less than the amount applied for.

*We are sorry but OneFamily members holding pension products only are not eligible for this member benefit due to the potential adverse tax consequences for both the member and the product. Members who have a pension product will still be eligible if they hold other OneFamily products.

How to apply

If you would like to apply for a Young Person's Education Grant, use the online form found on The Foundation website: <https://www.onefamily.com/your-foundation/young-persons-education-grant>

If you don't have internet access, contact the Customer Services team on 0800 373010* to request a hard copy of the form.

The Foundation will review all Applications received five working days or more before the Young Person's Education Grant monthly draw. If an Application reaches us after this we'll carry it over to the next month's draw.

If the person you nominate no longer needs the funds applied for, or is no longer eligible, you must withdraw your Application.

Applications can be withdrawn at any time. Simply log into your profile on The Foundation website or contact us.

A member of The Foundation team will review all Applications to check eligibility before they are entered into a draw. Applicants will be notified either way if an Application is eligible or ineligible for the draw.

The Foundation's decision on which Applications are eligible to go into the draw is final, and The Foundation will not be obliged to enter into correspondence about our decision.

*Open 9am-7pm Monday-Friday and 9am-1pm on Saturdays. Calls from UK landlines and mobile phones cost no more than calls to geographic numbers (01 or 02). For more information, please contact your provider. Telephone calls may be monitored or recorded for training purposes.

The monthly draw

22981 013 05.2019

OneFamily Foundation Limited, registered number 09176069, is registered in England and Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. OneFamily Foundation Limited is not authorised or regulated by the Financial Conduct Authority or the Prudential Regulation Authority.

OneFamily is a trading name of Family Assurance Friendly Society Limited (registered and incorporated under the Friendly Societies Act 1992, registered number 939F). Registered in England & Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. Family Assurance Friendly Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority.

22759 002 07.2018



Successful Applications are selected randomly from eligible Applications using a computerised process near the start of each month.

If an Application is unsuccessful, it will be entered into three further monthly draws before being removed. Applicants will be notified of this and invited to submit a new Application.

If there are fewer Applications than the number of Young Person's Education Grants available in any given month, all eligible Applications in that month will be awarded a Young Person's Education Grant and any remaining unallocated funds will roll over into the following month. The Foundation also reserves the right to donate any unallocated funds to any charity of its choice.

We will notify successful Applicants in writing or by telephone within two weeks of the draw.

If, for any reason, a Young Person's Education Grant is no longer needed or is not claimed within three months of the draw, The Foundation reserves the right to re-allocate the funds.

Payment

Successful recipients will be paid their awarded Young Person's Education Grant by cheque, or by bank transfer to their own bank account or, exceptionally, by payment to a third party on the recipient's behalf.

A written quote for any items or services to be purchased is needed before payment is made. Proof of purchase in the form of receipts, photographs etc. should be provided to The Foundation team upon request and within six months of payment to prove the Grant has been used responsibly.

If proof which satisfies The Foundation isn't provided, The Foundation reserves the right to require that the Grant is repaid in full.

The Foundation is not responsible for

- the purchase of any goods or services relating to the Application
- any goods or services purchased with Young Person's Education Grants, any loss/harm/injury/death as a result of misuse of products/services or faulty products/services bought using a Young Person's Education Grant.

By submitting an Application the Applicant agrees that under no circumstances will any funding from The Foundation be used for illegal activities or activities that could bring OneFamily or The Foundation into disrepute.

If successful it will be the responsibility of the Applicant to ensure the Young Person's Education Grant is spent in line with the information set out in the successful Application.

Young Person's Education Grants are non-transferable and are personal to the proposed recipient. The Foundation may wish to use Young Person's Education Grant winners' stories and personal details for promotional purposes. Applicants should tick the appropriate box on the Application if they wish to give their agreement to this.

22981 013 05.2019

OneFamily Foundation Limited, registered number 09176069, is registered in England and Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. OneFamily Foundation Limited is not authorised or regulated by the Financial Conduct Authority or the Prudential Regulation Authority.

OneFamily is a trading name of Family Assurance Friendly Society Limited (registered and incorporated under the Friendly Societies Act 1992, registered number 939F). Registered in England & Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. Family Assurance Friendly Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority.

22759 002 07.2018



Community Grants

OneFamily Customers may nominate a Project for a Community Grant.

You can nominate a Project to receive funding of up to £5,000. Funding rounds are available at various times during the year. The dates for each round are published on the website: onefamily.com/your-foundation/community-grants/

The Nomination of a Project must be done with the knowledge and consent of the proposed Community Group or Charity benefitting from the Community Grant (being the person or persons appropriately authorised for this purpose).

Nominations can be completed online or via a paper form.

How to apply

If you would like to nominate a Project for a Community Grant, use the online form found on The Foundation website: onefamily.com/your-foundation/community-grants/. If you don't have internet access, contact the Customer Services Team on 0800 373010* to request a hard copy of the form.

The Foundation will review all Nominations received during the Nomination period.

If you or the group you nominate no longer need the funds applied for, or are no longer eligible, you must withdraw your Nomination.

Nominations can be withdrawn at any time at the Applicant's request.

The Foundation team will review all Nominations to check eligibility before they are entered into the draw. The Applicant will be notified either way if a Nomination is eligible or ineligible for the draw.

The Foundation's decision on which Nominations are eligible to go into the draw is final, and The Foundation will not be obliged to enter into correspondence about their decision.

Successful Nominations are selected randomly from eligible Nominations using a computerised process.

If a Nomination is unsuccessful, we reserve the right to resubmit the Nomination into the next available draw. Submitting unsuccessful Nominations into further draws, if a further draw is available, is at The Foundation's discretion.

If there are fewer Nominations than the number of Community Grants available in any given draw, all eligible Nominations in that draw will be awarded a Community Grant and any remaining unallocated funds may roll over into the next draw. The Foundation also reserves the right to donate any unallocated funds to any charity of its choice.

We will notify successful Applicants in writing or by telephone within two weeks of the draw.

22981 013 05.2019

OneFamily Foundation Limited, registered number 09176069, is registered in England and Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. OneFamily Foundation Limited is not authorised or regulated by the Financial Conduct Authority or the Prudential Regulation Authority.

OneFamily is a trading name of Family Assurance Friendly Society Limited (registered and incorporated under the Friendly Societies Act 1992, registered number 939F). Registered in England & Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. Family Assurance Friendly Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority.

22759 002 07.2018



If, for any reason, a Community Grant is no longer needed or is not claimed within 6 months of the draw, The Foundation reserves the right to re-allocate the funds.

Nominations are reviewed to ensure they fit with the eligibility criteria (below) and if approved, be entered into the next available draw.

Applicants will be required to demonstrate the Project's need for funding, details of who will benefit from it, and provide full costings for all elements of the Project.

Eligibility and entry

To nominate a Project an Applicant must:

- be a Customer whose OneFamily policy or product remains active throughout the life of the Nomination
- not be a OneFamily employee
- not be an immediate family member (spouse, partner, child, parent or sibling, regardless of where they live) of a OneFamily employee working within the Foundation team
- submit the Nomination in the English language.

Projects nominated for Community Grants must:

- be genuine
- benefit the community
- be achievable and realistic
- have necessary permissions required in order to commence the Project (e.g. planning permissions if a building project) to make use of the funding.
- be able to provide a detailed breakdown of how the Community Grant funding will be put to use
- create a specific change that positively impacts the local community, through for example specific purchases, activities or the running costs of a programme
- take place wholly within the UK
- if submitted on behalf of, or in association with a religious organisation, have an outcome that must be accessible to anyone of any faith, or no faith.

A Project can only be nominated once and can only benefit from one award in a funding round.

A Project must be led by an organisation that:

- has been in existence for at least 6 months
- is a not-for-profit organisation or group for community good
- does not require users to pay high membership fees which The Foundation considers to be prohibitive
- is based in the UK can meet The Foundation's due diligence requirements, which may include providing The Foundation with details/evidence of the organisation's:
 - governance arrangements (including the fitness and propriety of key individuals)
 - governance structure

22981 013 05.2019

OneFamily Foundation Limited, registered number 09176069, is registered in England and Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. OneFamily Foundation Limited is not authorised or regulated by the Financial Conduct Authority or the Prudential Regulation Authority.

OneFamily is a trading name of Family Assurance Friendly Society Limited (registered and incorporated under the Friendly Societies Act 1992, registered number 939F). Registered in England & Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. Family Assurance Friendly Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority.

22759 002 07.2018

- incorporation and / or trading /operating status
- geographical and trading location(s)
- charitable status (if applicable)
- bank account details and authorised signatories; and
- anything else reasonably required to confirm the validity of the organisation or Project.

Projects that include any of the following will NOT be considered for support:

- one off events
- groups where membership or other participation costs are considered by The Foundation to be prohibitive (e.g. a golf or tennis club with high membership costs that would prohibit certain members of the community from joining)
- support for commercial or profit making ventures
- financial contribution directly towards salaries unless staff salaries are essential for the Project objectives (we may consider staffing costs on an hourly basis, but only if this is necessary to achieve the Project objectives e.g. a music teacher to lead a music therapy group, or a builder to construct a sensory room)
- funding for paid for advertising unless necessary for the Project objectives
- the promotion of political parties/groups/factions
- the advancement of religion/faith, including Projects that promote religious advocacy, attempt to convert people to another religion, or attempt to expand membership
- Projects that involve any form of mandatory religious study or discriminate against any faith or group (although groups may be eligible for secular and inclusive community based activities e.g. a food bank run by a local church)
- overseas travel or activities outside the UK
- improvements to land or buildings that are generally not open or accessible for use by members of the community
- contingency amounts within the Project budget
- deficit or retrospective funding (e.g. grants for activities or purchases that have already taken place)
- organisations that are for the sole relief or benefit of animals and plants
- Projects that are connected to for-profit business ventures or that financially compensate an idea creator beyond fair wage
- use of the award amount as or part of a raffle, chance or lottery prize.

How to nominate

To nominate a Project for a Community Grant use the online form on The Foundation website: onefamily.com/your-foundation/community-grants/. If you don't have internet access, contact the Customer Services team on 0800 373010* to request a hard copy of the form.

When an Applicant submits a Nomination for a Community Grant, they are confirming that they have the consent of the Project owner (being the person or persons appropriately authorised for this purpose) for this. They are also agreeing that under no circumstances will any funding from The Foundation be used for illegal activities or activities that could bring The Foundation or OneFamily into disrepute.

22981 013 05.2019

OneFamily Foundation Limited, registered number 09176069, is registered in England and Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. OneFamily Foundation Limited is not authorised or regulated by the Financial Conduct Authority or the Prudential Regulation Authority.

OneFamily is a trading name of Family Assurance Friendly Society Limited (registered and incorporated under the Friendly Societies Act 1992, registered number 939F). Registered in England & Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. Family Assurance Friendly Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority.

22759 002 07.2018



All applicable dates and deadlines will be published on The Foundation website. Any Nominations received after the published closing date will not be considered for the draw.

We take no responsibility for Nominations that are lost, delayed, misdirected, incomplete or cannot be delivered or entered for any technical or other reason and proof of transmission or posting of the Nomination will not be taken as proof of receipt. The Foundation will not be liable for any expenditure incurred by an Applicant or Project whilst making a Nomination or promoting their cause.

*Open 9am-7pm Monday-Friday and 9am-1pm on Saturdays. Calls from UK landlines and mobile phones cost no more than calls to geographic numbers (01 or 02). For more information, please contact your provider. Telephone calls may be monitored or recorded for training purposes.

Assessing nominations

Once we receive a Nomination it will be reviewed by members of The OneFamily Foundation team to check it meets the eligibility criteria.

We'll let the Applicant know either way whether their Nomination has been assessed as eligible or ineligible. We reserve the right to reject Nominations that we consider are incomplete, illegible, false or fraudulent for any reason, and to remove them from the process at any point.

If there are fewer entries than expected, we may carry forward any balance of money to the next round if available, or donate it to a charity of our choice as we see fit.

The decision of The Foundation regarding any aspect of the Nominations process is final, and we won't be obliged to enter into correspondence relating to our decision.

Once a Nomination has been reviewed and accepted, if changes are needed these should be discussed with The Foundation. The Nomination will then go through the Community Grant review process again.

Successful Community Grant Projects

Successful Applicants and the Project Key Contacts will be notified within two weeks of winning a Community Grant.

Nominations that are unsuccessful are eligible to re-apply for future rounds, if available.

Successful Projects will work with The Foundation to provide a Project plan that ensures the Community Grant delivers the full benefits anticipated in the original Nomination.

Successful Applicants and the Project Key Contact authorise The Foundation to publish their name when announcing details of the Community Grant without prior permission or financial compensation or the attribution of rights other than the sum awarded. Successful Applicants may be required to participate in on-going Public Relations (PR), social media and other activity as reasonably requested by The Foundation.

22981 013 05.2019

OneFamily Foundation Limited, registered number 09176069, is registered in England and Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. OneFamily Foundation Limited is not authorised or regulated by the Financial Conduct Authority or the Prudential Regulation Authority.

OneFamily is a trading name of Family Assurance Friendly Society Limited (registered and incorporated under the Friendly Societies Act 1992, registered number 939F). Registered in England & Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. Family Assurance Friendly Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority.

22759 002 07.2018



The Foundation may use successful Applicants' names, home town, photographs or opinions in future publicity or promotional material and by participating in the process, Applicants agree to such usage.

Payment

Community Grant winners will be required to provide confirmation of any money spent for their Project and evidence that the Community Grants is being spent as set out in the Nomination. This evidence may take the form of invoices, quotes or receipts.

The Community Grant funding will not be provided as a payment in advance of the Project but will instead be distributed on a needs-basis.

Community Grants are non-exchangeable, non-transferable, and are not redeemable for cash or other remuneration.

If the winning Project fails The Foundation's due diligence requirements, does not meet these terms and conditions, or is not implemented within such reasonable timeframe as The Foundation may require, they will not be provided with funding. A new winner may be chosen (who will also need to satisfy due diligence requirements).

The Foundation reserves the right to a full return of the Community Grant if it receives evidence that the money is not being used in line with the Nomination.

Should a winning Project require any further funding beyond the award amount, The Foundation will not be responsible for any such additional funding.

Beneficiaries of a Community Grant or Award funding cannot be nominated for another Community Award or Grant within 24 months of receiving funding for a winning Project.

22981 013 05.2019

OneFamily Foundation Limited, registered number 09176069, is registered in England and Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. OneFamily Foundation Limited is not authorised or regulated by the Financial Conduct Authority or the Prudential Regulation Authority.

OneFamily is a trading name of Family Assurance Friendly Society Limited (registered and incorporated under the Friendly Societies Act 1992, registered number 939F). Registered in England & Wales at 16-17 West Street, Brighton, BN1 2RL, United Kingdom. Family Assurance Friendly Society Limited is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and Prudential Regulation Authority.

22759 002 07.2018