

## CRITERIA

# Donations to external charities

Investec's purpose is to create enduring worth this is for all of our stakeholders: our clients, our people and the communities in which we operate. We support this mission by taking positive action at the local level to address global economic, social, and environmental issues. We support education and entrepreneurship in our local communities, and we protect the environment through our behaviour, partnerships, and operations. Investec Group have made the commitment to spend 1% of our profit on charitable spend, our Donation Committee is a key part of this commitment to our communities.

For a successful application, the activities of the charity must fall within one of the three broad charitable areas mentioned below:

- Education (beyond awareness of the charitable cause);
- Entrepreneurship; or
- Environment.

The applicant charity must be registered in the UK, Ireland, or Channel Islands and should have been established for at least 12 months prior to the application. The charity must also be based in one of these geographical locations and should be making a positive impact on the community with their presence in the location. Additionally, the charity must not hold any religious or political affiliations, and London based schools will not be considered due to our partnership with Morpeth School.

Preference will be given to:

- project funding rather than requests for core funding;
- charities that are situated in and/or projects targeting communities close to one of Investec's offices; and
- projects presented by small to medium sized charities (<£3m annual turnover).

Please note that our typical donation is £8,000 or less and we are unlikely to support projects where fundraising consultancies are involved.

All funding proposals should be a maximum length of six sides of A4 and should:

- outline the project and the amount requested;
- explain how the project fits within our criteria;
- demonstrate the impact the project will have and how it will be measured; and
- include a detailed project budget breakdown.

Please include the 'Summary of proposal' form with your application. We will reject any proposal which does not include all the required information. The applications are considered by the committee in March and September every year. Proposals which have not been received at least three weeks in advance or in time for consideration may be considered later.

Please direct your completed funding proposal and questions to:

Investec: Sustainability

30 Gresham Street,

London, EC2V 7QN

[SustainabilityUK@investec.co.uk](mailto:SustainabilityUK@investec.co.uk)

+44207 597 4000

Given the high number of proposals received, we are only able to communicate to the successful applicants. If you have not heard from us within three months of your application, kindly consider it unsuccessful.

# Summary of proposal

Please keep the application summary to one A4 page. Any additional supporting documentation can be included separately.

Name of charity

Registered charity number and date of registration  Date of proposal 

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Address (including London Borough / Town or City)

Nature of charitable work

Amount that would make a difference

What would our donation be used for?  
*(Include the need which will be addressed and / or any particular beneficiary group to be supported, children, people with health problems, etc.)*

Duration of project / frequency of sessions (where applicable)

London Borough or Town or City targeted by project

The number of direct and indirect beneficiaries (if possible) and the cost of the project per head

What would the impact of our donation be?

Any affiliation with a for-profit company? If yes, please detail

Existing / previous relationship with Investec or our colleagues?  Date of any previous proposal 

Day	Month	Year
<input type="text"/>	<input type="text"/>	<input type="text"/>

Any other supporting information?

