

Guidelines for Matched Funding Scheme for UK Employees

FirstGroup is proud of the fundraising achievements of our employees across our UK operations. Our Matched Funding Scheme recognises and rewards this dedication with up to £200 per person each financial year. These Guidelines are designed to help employees learn more about the Scheme and how to apply.

1. Key information

FirstGroup employees can apply for up to £200 in Matched Funding for eligible registered charities during each financial year (April – March). You can apply at any point in the year and for as many different activities as you like, provided the application is within three months of your fundraising and the total amount claimed over the course of the year does not exceed £200. The minimum amount for matched funding is £50 – applications for less than this amount will not be accepted. Matched Funding will be rounded down to the nearest whole pound – so if you raise £101.56, FirstGroup will match £101.

Matched funding is specifically for funds raised at events by employees and does not apply to charity donations made by employees where no actual fundraising has taken place (e.g. a one-off donation made directly to a charity appeal or an in-memoriam donation).

Team applications are restricted to a maximum of four FirstGroup employees per fundraising event (i.e. FirstGroup will match fund up to £800 per team event).

Applications for matched funding should be made once the fundraising event has taken place, and the application must include evidence that monies have been received by the charity.

Matched Funding will be awarded on a first come, first served basis. We have an annual budget for Matched Funding each year and once this has been fully utilised, Matched Funding may become unavailable until the next financial year.

2. Employee Details

The Matched Funding Scheme is open to all employees of FirstGroup based in the UK. It cannot be used for the friends or family of an employee – only activities the employee has been actively involved in. If the fundraising is taking place during working hours, you must get permission from your manager to take part.

The Matched Funding Scheme excludes contractors.

3. How to apply

Once your fundraising is complete, to apply for the Matched Funding Scheme you will need to complete and submit the [online form](#).

Whether you have fundraised on your own or as part of a team, please complete this form. Only one form needs to be submitted per team.

The form needs to be completed in one sitting – it cannot be saved and returned to. You will need to attach evidence of your fundraising to the form. This can be a screenshot of an online fundraising page or a scan of a paying in slip. If your fundraising has been carried out offline, you must also provide acknowledgement from your chosen charity that they have received the funds. The evidence must clearly show that you participated in the fundraising, the charity you raised funds for and the total you raised.

You will need to confirm you have read these guidelines before you can submit your request.

4. Charity details

Bank details of the charity (account number, bank name and sort code) are required for the online form for transfer of funds. In addition, you will be required to enter the registered number of the charity (usually found in the footer of the charity website, the [Charity Commission for England and Wales](#) or the [Office of the Scottish Charity Regulator](#)).

If you are fundraising for more than one charity, you will need to complete the form once per charity, as we require the bank details for each organisation to make a payment.

Please check below that your charity is eligible for matching **before starting your application**.

5. Charitable Giving - Excluded organisations

What we support

Our charitable programmes focus on those areas with a demonstrable link to our business, vision and values, where we believe we can achieve the greatest impact:

- Through the promotion of **employability and skills**, our aim is to empower people to reach their full potential and change individual lives to help the communities we serve.
- By providing support to **environmental projects** and encouraging **sustainable mobility**, our aim is to reduce the impact of congestion on our customers and communities, cutting emissions and improving air quality.
- Through **economic regeneration** and **social inclusion** programmes, we aim to improve quality of life, connecting people and creating thriving and sustainable communities.

Charitable donations¹ from FirstGroup plc may only be made to one of the following:

- Charities registered with the [Charity Commission for England and Wales](#)
- Charities registered with the [Office of the Scottish Charity Regulator \(OSCR\)](#)
- Community Interest Companies (CIC) registered in the UK with the [Office of the Regulator of Community Interest Companies](#)
- Charities which hold a 501(c)(3) exemption in the USA
- Charities registered with the [Canada Revenue Agency](#)

What we do not support

Almost any registered charity (or CIC) is eligible, but unfortunately, the following exclusions apply.

FirstGroup is not able to fund:	
Political parties or organisations who promote a specific political party	<i>FirstGroup is politically neutral/ non-affiliated, and as such does not support charities in this area.</i>
Organisations that promote a specific religion or requires beneficiaries to be of a specific faith, convert to that faith or accept information or teaching about that faith as a condition of taking part in or benefitting from programmes and or services	<i>FirstGroup aspires to be a diverse and inclusive organisation because we believe that diversity brings benefits for our customers, communities and our people, and as such does not support charities where any of the restrictions outlined may apply.</i>
Any organisation that could be deemed to have a controversial or negative impact on the reputation of FirstGroup plc	<i>FirstGroup reserves the right to reject applicants that could be deemed to have a controversial or negative impact on the reputation of the organisation.</i>
Requests for sponsorship or in-kind support (e.g. tickets) for fundraising activities, or financial support for things such as medical costs, including our own employees	<i>Due to the large number of FirstGroup employees and extent of our network, we receive a very high volume of individual requests, and would not be able to meet all of them.</i>
Crowd-funded appeals	<i>FirstGroup only support registered charities and institutions, therefore requests to support appeals of</i>

¹ Please note that this Exclusion list applies to charitable giving – not to commercial sponsorships, which are managed through the usual commercial channels.

	<i>this nature will be viewed on a case by case basis and only if monies go to a registered charity. This protects all parties from potential fraud or corruption issues.</i>
Core costs for a charity, including for buildings, salaries, general running, management or travel costs	<i>Our support will always be directed at the core objective of a charity rather than ancillary costs.</i>
Running costs for: <ul style="list-style-type: none"> charitable events, including marketing materials, room hire etc. charitable expeditions or overseas travel for individuals or groups UK travel/ transport 	<i>Our support will always be directed at the core objective of a charity rather than ancillary costs.</i>
Universities, colleges or schools, pre-schools and nurseries including Parent Teacher Associations (PTAs), even where these are a registered charity	<i>Due to the large number of FirstGroup employees and extent of our network, we receive a very high volume of requests from individual entities, and would not be able to meet all of them.</i>
Scouts, Girl Guides, Cadets or similar organisations	<i>Due to the large number of FirstGroup employees and extent of our network, we receive a very high volume of requests from individual branches, and would not be able to meet all of them.</i>
The Arts (e.g. theatre, choirs, cultural projects)	<i>FirstGroup aims to support charities and institutions that most closely align with our business, vision and values. Our focus is around education, employability and skills, accessible mobility and regeneration. For this reason, arts programmes are currently excluded unless they are deemed to promote employability / social inclusion or economic regeneration.</i>
Sports charities and clubs (unless there is a strong focus on education, employability and skills or sustainable and accessible mobility)	<i>Due to the large number of FirstGroup employees and extent of our network, we receive a very high volume of requests from sports clubs and charities, and would not be able to meet all of them.</i>
Animal Welfare charities (though this does not include conservation charities)	<i>Due to the large number of employees and extent of our network, we receive a very high volume of requests. We therefore focus available funds supporting those charities and institutions that most closely align with our business, vision and values in terms of education, employability and skills, environmental or local regeneration and accessible mobility. For this reason, we currently exclude animal welfare charities.</i>

The FirstGroup plc Community First team reserves the right to make final decisions on eligibility.

The above exceptions may not apply where the primary objective of a request is:

- to promote employability/ social inclusion
- to promote environmental or economic regeneration
- aligned with the objectives of FirstGroup's official charity of choice partner (see website for details)
- in the form of an in-kind donation (e.g. tickets) to support a strategic local community engagement programme (e.g. in support of a partnership with a school, or local educational programme)

6. Once you have applied

Matched Funding applies to the totals you detail on your online form. If there are any additional donations after this point, they cannot be included in the request.

Should we have any questions regarding your application, you will be contacted using the details you provide on the form. If you have any questions regarding your application, please email CommunityFirst@firstgroup.com.

It can take up to eight weeks for the money to be transferred to your chosen charity, however you will be notified by email once the transfer has taken place.

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Matched Funding each year and once this has been fully utilised, Matched Funding may become unavailable until the next financial year.