

COMPLAINTS STANDARD

THE VIRGIN MONEY FOUNDATION ("the Foundation/us/we")

1. WHO THIS STANDARD APPLIES TO

- 1.1 This standard applies to our external stakeholders – for example, our applicants for grants, grantees, and donors, and members of the public who have dealings with us (**you**).

2. OUR COMMITMENT TO GETTING THINGS RIGHT

- 2.1 We are committed to supporting individuals and institutions to bring change in their own local community through the financial awards that we make and from the skills, expertise, connections, passion and energy of our volunteers.
- 2.2 Whilst we work hard to ensure that we provide a fair and consistently high level of service so that you never have cause for complaint, we recognise that sometimes things can go wrong.
- 2.3 If you have a concern or complaint (referred to interchangeably in this standard as a "complaint") then we ask that you tell us first so that we can try to put things right, and can use the information that you provide to improve our standards going forward.
- 2.4 Whilst we hope that in the first instance your complaint can be dealt with informally between you and your contact at the Foundation, if that is not possible then you can raise a formal complaint by following the procedure set out below.
- 2.5 Please note that making a complaint will not affect the level of service that you receive from us. So, for example, if your complaint relates to our handling of your grant application, this will not affect your chances of getting a grant from us in the future should you apply again.

3. WHAT COMPLAINTS THIS STANDARD COVERS AND DOES NOT COVER

- 3.1 You should follow this standard if you have a complaint about, for example:

3.1.1 Our funding process

- (a) Please note that our Board's decision on grant awards is final. We can therefore only review your application again if you can clearly show that we significantly delayed, made material mistakes in, or failed to follow the procedures in our application process. Please note we are not obliged to give grant applicants reasons for refusing to make a grant.

3.1.2 Your contact with a member of our staff

- (a) For example, if you believe that you not been treated fairly or politely, or have been discriminated against, then you should follow this standard

- 3.2 This standard should not be used if you have a complaint about:

3.2.1 Fraud

(a) Please refer to our Anti-Fraud and Grant Mismanagement Standard which is available on request.

3.3 If you are unsure as to whether your complaint is covered by this standard, then we ask that you treat it as covered by this standard unless we inform you otherwise.

3.4 Please note that we will not investigate complaints which we believe to be vexatious or malicious.

4. HOW TO MAKE A COMPLAINT

4.1 Please note that we will only investigate complaints that are made verbally, by email, or by post, as per the procedure set out below. Complaints made via social media platforms will not be investigated and instead may be reported by us to the relevant platform(s).

Stage 1

4.2 If you have a concern or complaint which falls within the scope of this standard, we ask that you please raise this informally with your regular contact at the Foundation in the first instance. If you do not have a regular contact, it should be addressed to Richard Walton, in writing at: Virgin Money Foundation, Jubilee House, Gosforth, Newcastle upon Tyne, NE3 4PL, or by email on info@virginmoneyfoundation.org.uk. You should try to do this as soon as possible following the incident giving rise to your complaint.

4.3 If the complaint is about the individual named in 4.2 please address your complaint to Nancy Doyle-Hall, contactable at the same addresses.

Stage 2

4.4 If your complaint is not resolved informally to your satisfaction, then you should contact Nancy Doyle-Hall, Executive Director, Virgin Money Foundation in writing at Jubilee House, Gosforth, Newcastle Upon Tyne, NE3 4PL, or by email on nancy.doyle-hall@virginmoneyfoundation.org.uk as soon as possible.

4.5 If your complaint was handled at Stage 1 by Nancy Doyle-Hall or the complaint relates to her please address your complaint to Lorna Bennie, Trustee, Virgin Money Foundation at the same address or email him at lorna.bennie@virginmoney.com

4.6 To help us deal with your complaint as appropriately and quickly as possible, please make sure that you provide as much information as possible, including:

4.6.1 Details of what your complaint is about

4.6.2 The people involved

4.6.3 Relevant dates

4.6.4 Details of the steps that you have taken to try to resolve the complaint informally, including the response that you received at stage 1.

4.6.5 What you would like us to do to put things right.

4.7 We will acknowledge your complaint within **5 working days** of receipt.

- 4.8 Our aim is to respond in full within **28 working days** from the date of our acknowledgement. If we cannot give you a full response within this timeframe then we will let you know how long we expect it will take.

Stage 3

- 4.9 If you are not satisfied with the response received at Stage 2 then you may write to Amanda Jordan, Chair, Virgin Money Foundation, at Jubilee House, Gosforth, Newcastle upon Tyne, NE3 4PL. If the complaint involves the Chair of the Board of Trustees then you may instead write to Joanne Curry, Vice Chair, Virgin Money Foundation, at Jubilee House, Gosforth, and Newcastle upon Tyne, NE3 4PL.
- 4.10 Please can you tell us in your correspondence:
- 4.10.1 Why you are not satisfied with our response provided at Stage 2.
- 4.10.2 What you would like us to do to put things right.
- 4.11 You must submit your complaint at Stage 3 within **4 weeks** of the date of the response that you received from us at Stage 2.
- 4.12 The Chair/Vice Chair will acknowledge receipt of your complaint within 5 working days of receipt where possible.
- 4.13 The Chair/Vice Chair will aim to produce a decision and send that to you within 28 working days from the date of their acknowledgement to you. That decision will be final.
- 4.14 Please note that in certain circumstances, it may not be possible to deal with your complaint in the timeframes set out in this standard. However, we will keep you informed if that is the case.

5. OTHER AVENUES OF COMPLAINT AVAILABLE

- 5.1 If you are unhappy about how we have dealt with your complaint, then, depending on the nature of your complaint, you may choose to contact a relevant regulator. Please note, however, that the regulator(s) may decline to investigate your complaint further if they are not satisfied that you have exhausted this complaints procedure first.
- 5.2 Please see below guidance on which regulator you may wish to contact for further investigation.
- 5.2.1 Advertising complaints
- (a) Please contact the [Advertising Standards Authority](#) to complain about, for example:
- (i) An advertising campaign you think is offensive, deceptive or inaccurate.
- (ii) The amount of emails or mail you get from us.
- 5.2.2 Marketing complaints
- (a) You can change how often you get emails, phone calls, texts or post from us using the [Fundraising Preference Service](#).
- 5.2.3 Other serious complaints

- (a) You can [report serious concerns](#) to the Charity Commission if you believe that we are, for example:
- (i) Not doing what we claim to do.
 - (ii) Losing lots of money.
 - (iii) Harming people.
 - (iv) Being used for personal profit or gain.
 - (v) Involved in illegal activity.

6. ADDITIONAL INFORMATION

6.1 Equal opportunities

6.2 We are committed to promoting equal opportunities. When we deal with your complaint you will therefore receive equal treatment regardless of age, disability, gender reassignment, marital or civil partner status, pregnancy or maternity, race, colour, nationality, ethnic or national origin, religion or belief, sex or sexual orientation.

6.3 If you have any particular communication needs, or need information in another format, for example, please contact the Foundation at info@virginmoneyfoundation.org.uk

6.4 Your personal details

6.5 By using our complaints procedure you are:

- 6.5.1 Consenting to us using the personal information that you have provided to us for the purpose of dealing with your complaint and to help us improve our services.
- 6.5.2 Consenting to us sharing the personal information that you have provided with other persons and organisations (e.g. our legal advisers, consultants, regulators, the police) to assist us in dealing with your complaint and improving our services.
- 6.5.3 Consenting to us sharing the personal information that you have provided, as required by law.
- 6.5.4 Please note that we will retain details of your complaint on our files for a period of 12 months after the final resolution of the complaint.

6.6 Confidentiality

- 6.6.1 We will keep all complaints confidential.
- 6.6.2 If you make a complaint we will treat you with respect, and we expect you to treat our staff in the same way, and to also keep the complaint confidential.
- 6.6.3 Whilst completely anonymous complaints are often difficult to investigate and appropriately resolve (and we may not be able to resolve them without further information), if you do want to raise a complaint confidentially we will make every effort to investigate and appropriately resolve it.

6.7 **Ongoing improvements**

6.7.1 All complaints received, whether formal or informal, will be recorded and monitored by us and used to improve our services and policies going forward.

7. REVIEW OF THIS STANDARD

7.1 This standard will be reviewed biennially to ensure that its provisions continue to meet our legal obligations and reflect best practice.