

BARTS CHARITY FUNDING GUIDELINES – REQUESTS UNDER £5,000

(Effective from 22 November 2021)

We are delighted that you are thinking of asking us for funding. So that your request has the best chance of success please read this document before you proceed.

Please be aware of the following principles:

- As a charity, we have a legal obligation to ensure that the funds we hold are spent in accordance with donors' wishes and have an impact upon patient care.
- We hold many hundreds of funds which each have their own scope – whether we can agree your request will in part depend upon whether there is a fund whose purposes match your request.
- In order to ensure that use of the Charity's funds maximises benefit to patients, we are increasingly working with managers and senior clinicians in the Trust and Hospitals to help review and endorse requests.
- All funds are the property of the Charity and ultimately it is the Charity's decision whether or not to approve the spending request.
- This is the case whether or not there is a fundholder attached to the funds that may pay for your request.
- Just because a request has been approved in the past is no guarantee that it will be approved now.

When making your request please remember the following:

- You must evidence how the funding will benefit patients
- You should ensure your request provides value for money
- If you are requesting funding for one of the items below, your request must be within the given spending thresholds
- Supporting documentation is required for payment of all agreed requests
- No reimbursements under £20 will be considered
- Reimbursement for the purchase of gift vouchers is not permitted
- All applications and payments go through our online system and no paper applications will be considered
- Following advice from the Barts Health NHS Trust IT Department we cannot support applications from Trust staff or IT equipment including tablets

Failure to adhere to the guidelines may lead to your claim being delayed or rejected.

Please note that if your request falls into one of the categories below, you need to follow a different process.

Medical and other equipment/consumables > £5,000 – please go to our website page for [Healthcare Delivery Improvement Grants](#) to find out about the process and link to the Expression of Interest form

Research support – contact Barts Charity for a research request form

Building work – contact the Trust Estates Department, and then Barts Charity

IT Equipment – please contact the Trust IT department

If you have any questions about your request for funding please contact funding@bartscharity.org.uk

If you have questions once a submission has been made please contact financeteamgrants@bartscharity.org.uk

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Please note that if your request relates to one of these categories, it must be within these thresholds otherwise it will not be considered.

This list is NOT an exhaustive list of what the Charity will fund. If you are unsure whether your proposed spend will be funded by the Charity, please contact us before you make any spending commitments.

Courses/conferences

Attending a course/conference:

- evidence of attendance and fee should be provided
- accommodation allowance: Staff should make every effort to obtain value or discounted accommodation. Maximum £150 per night maximum unless part of a conference package

Meal allowances:

- Breakfast £5 per day; Lunch £8 per day; Evening meal £35 per day

Travel

Air:

- first class, business class or premium economy travel will not be supported **even on long haul flights**
- airport parking will only be paid where a journey is outside of normal working hours

Taxi:

- will not be supported within the UK without exceptional circumstances. Justification to be provided
- outside the UK – can be claimed where no other reasonable form of transport is available. Justification to be provided

Train:

- first class tickets will not be reimbursed

Mileage:

- 0.25p per mile for more than 10,000 business miles travelled per annum in one year
- 0.45p per mile for less than 10,000 business miles travelled per annum in one year
- confirmation of annual mileage to be submitted with each claim

Running a course

Costs associated with running a course may be claimed (note: fundholders may not pay themselves an honorarium)

Staff entertainment/benefit

Away days/team building:

- £40 per head maximum (inclusive of all costs)
- One event per year per fund

Staff events and parties:

- Only one event per year per fund, outside of Christmas
- Events must be open to all staff eligible to benefit from a fund
- £30 per head maximum (inclusive of all costs)

Staff Christmas parties/meals:

- £50 per head maximum

Leaving parties/gifts:

Staff must have completed five years continuous service with the Trust

- leaving party: £30 per head maximum (staff only)
- leaving gift: £50 maximum (the purchase of gift vouchers is not permitted)

Refreshments for staff and departmental meetings:

- Refreshments should be reasonable and value for money

Subscriptions:

- Eligible if the purpose of the fund allows
- Personal subscriptions not supported

Hospitality for Guests:

Entertaining:

- £50 per head maximum

Travel/accommodation:

- reimbursable at the cost incurred (note: first class claims will not be supported)

Medical and other equipment/consumables < £5,000

Purchase order number required:

- use Charity instructions for ordering on Oracle

Purchase order not required:

- obtain a pro forma invoice from the supplier
- invoice to be addressed to the relevant department and state 'c/o Barts Charity'