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# **Barts Charity funding guidelines**

## **– requests under £5,000**

(Effective from 6<sup>th</sup> November 2023)

We are delighted that you are thinking of asking us for funding for a restricted or specific purpose.

### **The aim of Special Purpose Funds**

We manage funds donated for a restricted or specific purpose which we may be able to use to help fund your idea or need.

Before you incur the expense, it is vital that you read these guidelines (see section 5) to ensure that your request can be accommodated within this scheme and to ensure that you are not left financially disadvantaged.

Please note that failure to adhere to the guidelines may lead to your claim being delayed or rejected.

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### **1 Principles for Charity Funding:**

- 1.1 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 in the area intended by the donor.
- 1.2 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.
- 1.3 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.
- 1.4 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 prior approval has been obtained from the named fundholder/signatory in the Trust.
- 1.5 Just because a request has been approved in the past it is no guarantee that it will be approved now.
- 1.6 The Charity reserves the right to update these funding guidelines at any time. The up-to-date guidelines can be found on our website.

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## 2. **When making your request please remember the following:**

- 2.1 All claims must be made in GBP £, including evidence of conversion where applicable.
- 2.2 You must evidence how the funding will have an impact in the area intended by the donor.
- 2.3 You should ensure your request provides value for money.
- 2.4 If you are requesting funding for one of the items detailed in section 5, your request must be within the given spending allowances. Where the expenditure is greater than the allowance, Barts Charity will reimburse to the allowance value only.
- 2.5 Supporting documentation is required for payment of all agreed requests.
- 2.6 No reimbursements under £20 will be considered.
- 2.7 All applications and payments go through our online system and no paper applications will be considered.
- 2.8 Following advice from the Barts Health NHS Trust IT Department we cannot support applications from Trust staff for IT equipment including tablets and software.

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## 3. **If your request falls into one of the categories below, please follow the process outlined below.**

- 3.1 Medical and other equipment/consumables > £5,000 – we may be able to provide funding for such items through our [Everyday Impact](#) and [Advancing Healthcare Grant](#) schemes. Please visit this webpage to find out more about the application process for this scheme and a link to the Expression of Interest form.
- 3.2 Research support – contact Barts Charity's Funding & Impact team ([funding@bartscharity.org.uk](mailto:funding@bartscharity.org.uk)) for advice.
- 3.3 Building work – contact the Trust Estates Department, and then Barts Charity.
- 3.4 IT Equipment – please contact the Trust IT department (see point 2.9 above).

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## 4. **Contact us**

- 4.1 If you have any questions about these guidelines or a submission you have made, contact [financeteamgrants@bartscharity.org.uk](mailto:financeteamgrants@bartscharity.org.uk)
- 4.2 If you have any questions about a request for funding not covered by these guidelines, contact [funding@bartscharity.org.uk](mailto:funding@bartscharity.org.uk)

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## 5. Detailed guidelines

If your request relates to one of these categories, costs must be within these allowances. Where the requested amount exceeds these allowances, Barts Charity reserves the right to reimburse up to the allowance value only.

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 on [financeteamgrants@bartscharity.org.uk](mailto:financeteamgrants@bartscharity.org.uk) before you make any spending commitments.

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### 5.1 Courses/conferences

#### 5.1.1 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 unless part of a conference package.

#### 5.1.2 Meal allowances:

- Breakfast £5 per day; lunch £8 per day; evening meal £35 per day.
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### 5.2 Travel

#### 5.2.1 Air:

- First class, business class or premium economy travel will not be supported even on long haul flights.
- reasonable airport parking costs will be paid (excluding valet parking or premium services).

#### 5.2.2 Taxi:

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

#### 5.2.3 Train:

- First class tickets will not be reimbursed.

#### 5.2.4 Mileage:

- 0.45p per mile for less than 10,000 business miles travelled per annum in one year.
  - 0.25p per mile for more than 10,000 miles business miles travelled per annum in one year.
  - Confirmation of annual mileage to be submitted with each claim.
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### 5.3 Running a course

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

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## 5.4 Staff entertainment/benefit:

### 5.4.1 Away days/team building:

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

### 5.4.2 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).

### 5.4.3 Staff Christmas parties/meals:

- £50 per head maximum.

### 5.4.4 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.

### 5.4.5 Refreshments for staff and departmental meetings

- Refreshments should be reasonable and value for money.

### 5.4.6 Subscriptions:

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

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## 5.5 Hospitality for Guests:

### 5.5.1 Entertaining:

- £50 per head maximum.

### 5.5.2 Travel/accommodation:

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

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## 5.6 Medical and other equipment/consumables < £5,000

### 5.6.1 If a purchase order is required:

- Use Charity instructions for ordering on Oracle.

### 5.6.2 Purchase order not required:

- Obtain a pro forma invoice from the supplier.
- The invoice needs to be addressed to the relevant department and must state c/o Barts Charity'.

## Summary of allowable expenses < £5,000

(All expenses must be supported by a receipt or invoice)

Item	Allowed	Amount	Additional Information
Air Travel: Within UK	Yes	Standard/Economy class only	
Air Travel: Long-haul (over 3 hours)	Yes	Standard/Economy class only	
Air Travel: Priority/Speedy Boarding cost	No		
Airport Parking	Yes		Reasonable costs only (excluding valet parking or premium services)
Business Mileage (Car) for the first 10,000 per annum	Yes	45p/mile	Confirmation of annual mileage to be submitted with each claim
Business Mileage (Car) over 10,000 per annum	Yes	0.25p/mile	Confirmation of annual mileage to be submitted with each claim
Course/Conference: Attending a course	Yes		Evidence of attendance & fee must be provided
Course: Running a course	Yes		Fundholders may not pay themselves an honorarium
Gift Vouchers	Yes		
Hospitality for Guests (Entertaining)	Yes	Maximum £50/head	List names of attendees
Hospitality for Guests (Travel & Accommodation)	Yes	Standard/Economy class & rooms only	
Hotel (courses & conferences)	Yes	Maximum £150/night	Unless part of a conference package
Meal: Breakfast		£5/day	
Meal: Lunch		£8/day	
Meal: Dinner, including soft or alcoholic drinks	Yes	£35/day	
Medical Equipment (with Purchase Order)	Yes	Up to £5,000	Use Charity instructions for ordering on Oracle
Medical Equipment (without Purchase Order)	Yes	Up to £5,000	· obtain Pro-forma invoice · invoice addressed to relevant Dept & state "c/o Barts Charity"
Staff Away Day/Team Building	Yes	£40/head (inclusive of all costs)	One event per head per year
Staff events and parties	Yes	£30/head (inclusive of all costs)	Only one event per year, per fund excluding Christmas be open to all staff eligible to benefit from a fund

Continued on the following page ►

## Summary of allowable expenses < £5,000 (continued)

(All expenses must be supported by a receipt or invoice)

Item	Allowed	Amount	Additional Information
Staff Christmas parties/meals	Yes	£50/head (inclusive of all costs)	
Staff Leaving parties/gifts	Yes	Leaving party £30/head (staff only) Leaving gift £50/head maximum	Staff must have completed five years continuous service with the Trust
Staff - Refreshments for staff and departmental meetings	Yes		Reasonable and value for money
Subscriptions	Yes		Eligible if the purpose of the fund allows
Subscriptions (Personal)	No		
Taxi (Within UK)	No		
Taxi (Outside UK)	Pre-approval required by Fundholder		Justification to be provided
Train	Yes	Standard/Economy class only	