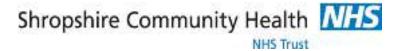
SHROPSHIRE COMMUNITY HEALTH NHS TRUST GENERAL CHARITABLE FUND Charity registration number: 1056698



Policies, Procedures, Guidelines and Protocols

Title Charitable Fund Guidelines for Managers Trust Ref No 2082 Local Ref (optional) Main points the document covers utilise charitable funds. Who is the document aimed at? Owner Head of Financial Accounting Approval process Who has been consulted in the development of this policy? Approval Date Initial Equality Impact Screening Full Equality Impact Assessment Lead Director Sarah Lloyd, Director of Finance Category Finance Subcategory Charity Guidelines Review date 18 July 2025 Who the policy will be distributed to Distributed to senior staff & available to all staff via the Trust website Keywords Charitable Funds Committee Charitable Funds Committee Charitable Funds Committee Charitable Funds Committee (Charitable Funds Committee Charitable Funds Committee (Charitable Funds Com	Document Details			
Docal Ref (optional) Main points the document covers Utilise charitable funds. Managers responsible for making decisions regarding the use of charitable fund monies. Managers responsible for making decisions regarding the use of charitable fund monies. Managers responsible for making decisions regarding the use of charitable fund monies. Managers responsible for making decisions regarding the use of charitable fund monies. Managers responsible for making decisions regarding the use of charitable fund monies. Managers responsible for making decisions regarding the use of charitable fund monies. Managers responsible for making decisions regarding the use of charitable funds. Managers responsible for making decisions regarding the use of charitable funds. Managers responsible for making decisions regarding the use of charitable funds. Managers responsible for making decisions regarding the use of charitable funds. Managers responsible for making decisions regarding the use of charitable funds. Managers responsible for making decisions regarding the use of charitable funds on the use of charitable fund monies. Managers responsible for making decisions regarding the use of charitable fund monies. Managers responsible for making decisions regarding the use of charitable funds on the use of charitable funds (Paragers of the Charitable Funds Managers responsible for making decisions regarding the use of charitable funds (Paragers of the Charitable funds Managers responsible for making decisions regarding the use of charitable funds (Paragers of the Charitable funds Managers responsible for making decisions regarding the use of charitable funds (Paragers responsible for making decisions regarding the use of charitable funds (Paragers responsible for making decisions regarding the use of charitable funds (Paragers responsible for making decisions regarding the use of charitable funds (Paragers responsible for making decisions regarding the use of the Charitable funds (Paragers resp	Title		Charitable Fund Guidelines for Managers	
Main points the document covers utilise charitable funds. Who is the document aimed at? Owner Head of Financial Accounting Approval process Who has been consulted in the development of this policy? Approval Date Initial Equality Impact Assessment Lead Director Sarah Lloyd, Director of Finance Category Finance Subcategory Charity Guidelines Review date 18 July 2025 Mon the policy will be distributed to Method Electronically to senior staff as defined by directors Method Date Amendments History Keywords Managers responsible for making decisions regarding the use of charitable fund some instance of charitable Funds. Managers responsible for making decisions regarding the use of charitable fund some instance of charitable Funds. Mapproval process Trustees of the Charitable Fund Charitable Funds Committee Charitable Funds Counting Approval process Trustees of the Charitable Funds Funds Counting Approval process Trustees of the Charitable Funds Funds Counting Approval process Trustees of the Charitable Funds Approval process Trustees of the Charitable Funds Funds Counting Approval process Trustees of the Charitable Funds Approval proces Funds Counting Approval process Trustees of the Charitable Fu	Trust Ref No		2082	
covers utilise charitable funds. Who is the document aimed at? Managers responsible for making decisions regarding the use of charitable fund monies. Owner Head of Financial Accounting Approval process Who has been consulted in the development of this policy? Approved by Charitable Funds Committee (Committee/Director) Approval Date Approval Date 18 July 2024 Initial Equality Impact Screening No Full Equality Impact Subcategory Sarah Lloyd, Director of Finance Category Finance Subcategory Charity Guidelines Review date 18 July 2025 Distribution Who the policy will be distributed to Distributed to senior staff as defined by directors Method Electronically to senior staff & available to all staff via the Trust website Keywords Document Links Required by CQC Other Amendment 1 December 2018 Minor wording changes 2 November 2020 No changes required 4	Local Ref (optional)			
Who is the document aimed at? Owner Head of Financial Accounting Approval process Who has been consulted in the development of this policy? Approval by (Committee/Director) Approval Date 18 July 2024 Initial Equality Impact Screening Full Equality Impact Assessment Lead Director Sarah Lloyd, Director of Finance Category Finance Subcategory Charity Guidelines Review date 18 July 2025 Method Distributed to Senior staff as defined by directors Method Electronically to senior staff & available to all staff via the Trust website Keywords Pocument Links Required by CQC Other Amendment Docember 2018 Minor wording changes March 2023 No changes reguired March 2023 No changes required March 2023 No changes required March 2023 No changes required	Main points the document		Provide guidance for determining when it is appropriate to	
aimed at? Owner Head of Financial Accounting Approval process	[· · · · · · · · · · · · · · · · · · ·		utilise charitable funds.	
Head of Financial Accounting	Who	is the document	Managers responsible for making decisions regarding the use	
Who has been consulted in the development of this policy? Approved by (Committee/Director) Approval Date 18 July 2024 Initial Equality Impact Screening Full Equality Impact Assessment Lead Director Sarah Lloyd, Director of Finance Category Finance Subcategory Finance Subcategory Charity Guidelines Review date 18 July 2025 Distribution Who the policy will be distributed to Distributed to senior staff as defined by directors Electronically to senior staff & available to all staff via the Trust website Keywords Document Links Required by CQC Other Amendment December 2018 Minor wording changes Amerb 2022 Mochanges required March 2023 No changes required March 2023 No changes required	aime	ed at?	of charitable fund monies.	
Who has been consulted in the development of this policy? Approved by (Committee/Director) Approval Date 18 July 2024 Initial Equality Impact Screening Full Equality Impact Screening Full Equality Impact Assessment Lead Director Sarah Lloyd, Director of Finance Category Finance Subcategory Charity Guidelines Review date 18 July 2025 Total Equality will be distributed to Distributed to Senior staff as defined by directors Method Electronically to senior staff & available to all staff via the Trust website Tocument Links Required by CQC Other Amendment History No Date Amendment December 2018 Minor wording changes March 2022 Mochanges required March 2023 No changes required March 2023 No changes required	Owner		Head of Financial Accounting	
in the development of this policy? Approved by (Committee/Director) Approval Date 18 July 2024 Initial Equality Impact Screening Full Equality Impact Assessment Lead Director Sarah Lloyd, Director of Finance Category Finance Subcategory Charity Guidelines Review date 18 July 2025 Distribution Who the policy will be distributed to Distributed to senior staff as defined by directors Method Electronically to senior staff & available to all staff via the Trust website Keywords Document Links Required by CQC Other Amendment December 2018 Minor wording changes No changes required March 2022 Minor wording changes, address and contact Telephone number Method March 2023 No changes required	Approval process			
Approval Date 18 July 2024 Initial Equality Impact Screening Yes	in the development of this		Trustees of the Charitable Fund	
Approval Date			Charitable Funds Committee	
Initial Equality Impact Screening Full Equality Impact Assessment Lead Director Category Finance Subcategory Review date 18 July 2025 Distribution Who the policy will be distributed to Biectronically to senior staff as defined by directors Method Electronically to senior staff & available to all staff via the Trust website Keywords Pocument Links Required by CQC Other Amendments 1 December 2018 Minor wording changes 1 Minor wording changes, address and contact Telephone number 4 March 2023 No changes required	,			
Screening Full Equality Impact Assessment Lead Director Category Finance Subcategory Review date B July 2025 Distribution Who the policy will be distributed to Distributed to Distributed to senior staff as defined by directors Method Electronically to senior staff & available to all staff via the Trust website Keywords Document Links Required by CQC Other	Approval Date		18 July 2024	
Assessment Lead Director Category Finance Subcategory Review date Tobstributed to senior staff as defined by directors Electronically to senior staff & available to all staff via the Trust website Trust website Tobstributed by CQC Other Amendments History No Date Amendment December 2018 Minor wording changes Amendmes, address and contact Telephone number All March 2023 No changes required Minor wording changes, address and contact Telephone number All March 2023 No changes required	Initial Equality Impact Screening		Yes	
Category Finance	Full Equality Impact		No	
Category Finance Subcategory Charity Guidelines Review date 18 July 2025 Distribution Who the policy will be distributed to Distributed to senior staff as defined by directors Method Electronically to senior staff & available to all staff via the Trust website Keywords Document Links Required by CQC Other Amendments History No Date Amendment 1 December 2018 Minor wording changes 2 November 2020 No changes required 3 March 2022 Minor wording changes, address and contact Telephone number 4 March 2023 No changes required				
Subcategory Review date 18 July 2025 Distribution Who the policy will be distributed to Distributed to senior staff as defined by directors Method Electronically to senior staff & available to all staff via the Trust website Keywords Document Links Required by CQC Other Amendments History No Date Amendment December 2018 Minor wording changes No vember 2020 No changes required March 2022 Minor wording changes, address and contact Telephone number March 2023 No changes required	Lead Director		Sarah Lloyd, Director of Finance	
Review date Distribution Who the policy will be distributed to Distributed to senior staff as defined by directors Method Electronically to senior staff & available to all staff via the Trust website Document Links Required by CQC Other Amendments History No Date Amendment December 2018 Minor wording changes November 2020 No changes required March 2022 Minor wording changes, address and contact Telephone number 4 March 2023 No changes required	Category		Finance	
Who the policy will be distributed to Distributed to senior staff as defined by directors Method Electronically to senior staff & available to all staff via the Trust website Keywords Document Links Required by CQC Other Amendments History No Date Amendment 1 December 2018 Minor wording changes 2 November 2020 No changes required 3 March 2022 Minor wording changes, address and contact Telephone number 4 March 2023 No changes required	Subcategory			
Who the policy will be distributed to Distributed to senior staff as defined by directors Electronically to senior staff & available to all staff via the Trust website Keywords Document Links Required by CQC Other Amendments History No Date Amendment December 2018 Minor wording changes November 2020 No changes required March 2022 Minor wording changes, address and contact Telephone number 4 March 2023 No changes required	Review date			
Method Distributed to senior staff as defined by directors Electronically to senior staff & available to all staff via the Trust website Comparison	Distribution			
Method Electronically to senior staff & available to all staff via the Trust website Document Links				
Keywords Document Links	distributed to		Distributed to senior staff as defined by directors	
Required by CQC Other Amendments History No Date Amendment 1 December 2018 Minor wording changes 2 November 2020 No changes required 3 March 2022 Minor wording changes, address and contact Telephone number 4 March 2023 No changes required	Method			
Required by CQC Other Amendments History No Date Amendment December 2018 Minor wording changes November 2020 No changes required March 2022 Minor wording changes, address and contact Telephone number March 2023 No changes required	Keywords			
Other Amendments History No Date Amendment December 2018 Minor wording changes November 2020 No changes required March 2022 Minor wording changes, address and contact Telephone number March 2023 No changes required	Document Links			
Other Amendments History No Date Amendment December 2018 Minor wording changes November 2020 No changes required March 2022 Minor wording changes, address and contact Telephone number March 2023 No changes required	Required by CQC			
NoDateAmendment1December 2018Minor wording changes2November 2020No changes required3March 2022Minor wording changes, address and contact Telephone number4March 2023No changes required				
1 December 2018 Minor wording changes 2 November 2020 No changes required 3 March 2022 Minor wording changes, address and contact Telephone number 4 March 2023 No changes required	Amendments History			
1 December 2018 Minor wording changes 2 November 2020 No changes required 3 March 2022 Minor wording changes, address and contact Telephone number 4 March 2023 No changes required	No	Date	,	
 November 2020 No changes required March 2022 Minor wording changes, address and contact Telephone number March 2023 No changes required 				
 March 2022 Minor wording changes, address and contact Telephone number March 2023 No changes required 	2			
		March 2022	Minor wording changes, address and contact Telephone	
	4	March 2023	No changes required	
	5	March 2024	Finance address changed	

SHROPSHIRE COMMUNITY HEALTH NHS TRUST GENERAL CHARITABLE FUND Charity registration number: 1056698



Charitable Fund Guidelines for SCHT Managers

In order to provide support to SCHT managers to aid their decision making regarding when it is appropriate to utilise Charitable Funds, the guidance here should help them determine what is appropriate and meets the purposes of the Charity.

The purpose of the Charitable Fund is to provide benefit to the patients of the Trust, by providing supplementary support to those services that the NHS traditionally funds from "exchequer monies"*1.

The Boundary between Charitable Funds and Trust exchequer monies

There can be issues in identifying when it is appropriate for charitable funds to be spent on services that are usually funded by the NHS. The Charity is permitted to contribute to the delivery of patient services provided that:

- a clear charitable purpose is served that falls within the Charity's purposes and objectives.
- that there is open process by the Trustees to support the decision to apply charitable funds in this way.
- an assessment of how far the NHS provision extends.

Subsidising or Replacing NHS Services

The Charity is not there to subsidise or replace NHS services, although Trustees can make a decision to spend on services that have previously been paid by the Trust, if:

- the Charity has received a considerable donation or legacy.
- the Trust Board have supported the use of Charitable Funds as an effective way of funding, rather than using other alternatives.
- discussions and agreements have been reached with the individual, group or League of Friends.

Is the expenditure for an item that should normally be funded from Trust exchequer monies?

- if the Charitable fund were not funding the item, would the service in question continue, or cease?
- if the service would cease, then the money granted from the charity must be paying for that service (i.e., subsidising NHS) and therefore it is not appropriate.
- if the service would otherwise continue, then the money granted from the charity could be argued to be enhancing the service, which is an allowed charitable purpose.

¹ Exchequer monies: is the main source of revenue and capital funding that the Trust receives to pay for NHS services.

SHROPSHIRE COMMUNITY HEALTH NHS TRUST GENERAL CHARITABLE FUND Charity registration number: 1056698

League of Friends & Fundraising

The Charity does not itself actively engage in fundraising activities, although it is prepared to encourage individuals and groups, provided that such activities are appropriate with the objectives and purpose of the Charity.

In line with our values, the Charity will support the League of Friends and others with their fundraising as appropriate on behalf of our patients, through communication and engagement.

Managers should maintain a dialogue with the League of Friends or other groups and the Charity Trustees to ensure an understanding of their general fundraising activities and enable an opportunity to assess any new or one-off fundraising against the Values of the Charity. In certain situations, proposals should be submitted for consideration by the Charitable Funds Committee.

Before a decision is taken by managers to support fundraising activities, they must ensure that potential projects:

- are in line with the purposes of the Charity.
- have justifiable and clearly defined patient benefit.
- there is a deliverable plan to spend the donations.
- there is no on-going commitment arising from the project (unless formally approved).
- Managers have sought the support of the Charity Trustees.
- that fundraisers are self-sufficient, can organise and independently collect monies (including Gift Aid) from events themselves, and that Trust staff are not required to be involved in these activities.
- other alternative funding routes have been considered.
- that fundraising will not cause conflict or arouse adverse public or media interest.

Associated Documents

The charitable funds finance procedure and expenditure request form can be found in the 'Staff Zone' area of the Trust website, by following the link below:

http://www.shropscommunityhealth.nhs.uk/content/doclib/10275.pdf

For further advice and support please contact the finance team:

Head of Financial Accounting Mount McKinley Tel. 01743 730536