

Requests For Grants From Charitable Funds

The form of authority below can be completed on-line but will need to be printed out as it requires your signature as fund advisor and also management approval.

Management Approval

The form of authority must be signed off by the appropriate level of management,

ie, Assistant Divisional Manager [£1,000 to £10,000]
 Head of Division/Divisional Manager [over £10,000]

Please note that, where a request for funding relates to the General Purpose Funds, the signature of Deborah Lee, Director of Strategic Development [for UHBristol Board] is also required. Where considered appropriate, Deborah Lee's support may also be sought by the Trustees in respect of expenditure from Special Purpose Funds.

Information required

We require sufficient information to satisfy the Trustees that the expenditure is of benefit to patients and/or staff, is additional to the day to day expenditure of UHBristol and meets the purpose of the fund as set out in the Code of Practice issued by the Trustees. A request for funding needs to be supported by explanatory information. The form asks for the following:

What requires funding and the total grant applied for

This is the basic description of what is to be funded and the total cost. This should be broken down in the boxes below so that there is a full understanding of how the application is made up.

Function of Equipment/Service/Research

This should provide sufficient information to give an understanding of what the equipment etc. to be paid for actually does. Where the funding is to support research you should ensure that you have complied with the Joint Policy Statement issued by the Charity and UHBristol and supply the Charity with the information required.

Benefits to patients/staff/UHBristol

This is the rationale for the expenditure and should provide sufficient information to enable us to ensure that it meets the Charity's criteria of ultimate benefit for patients, whether it be for patients, staff or for research. For major projects you may wish to cover both this and the function in an attachment.

Equipment cost

You should show the cost with and without VAT. Medical equipment and some IT equipment bought from charitable funds is exempt from VAT. If there is any doubt you should contact the Charity. You should also show the annual running costs as the Charity will not pay for these and they will need to be paid for from the appropriate UHBristol budget. The costs should be supported by quotations from the supplier or IM&T for computer equipment.

Salary costs

The full salary cost including on-costs (employer's pension & NI) should be checked with UHBristol or University finance departments. The form should also show the employee grade, the period of appointment, hours to be funded and whether this is the extension of an existing contract. If the name of the employee is known this should be stated in "what requires funding".

Other costs

This covers any other costs such as training, refurbishment and research consumables. It should detail the items, the costs and supplier if known.

Attendance at training courses, seminars and meetings

A breakdown of the costs between attendance, travel and accommodation should be provided.

Research consumables

The basis for the cost and quotation.

Refurbishment

You should provide:

Details of the quotation received and the date it was made.

Assurance that the scope of the work will not change.

The amount of VAT included in the cost.

The work should not proceed until confirmation has been received from the Charity. Please be aware that any cost overruns will need to be applied for but these will not be covered if there is insufficient money in the fund.

Plan Ahead

All fully completed documentation must be submitted to arrive not later than one week before a Trustees' meeting [cut-off dates are circulated to all Fund Advisors annually and can also be provided on request]. Any paperwork received later than this will only be considered, by Trustees, in extreme circumstances.

When Trustees approve funding it is for a specific commitment. Any change to the original request must be notified and a new application submitted.

Thank you.

Requests For Grants From Charitable Funds

Please fill out this form and, once completed and ready to return, print it off and send it to Above & Beyond, The Abbot's House, Blackfriars, Bristol, BS1 2NZ or email it to info@aboveandbeyond.org.uk

Fund Title

Fund Number

Total grant applied for £

What requires funding

Function of Equipment/Service/Research

Benefits to staff/patients/UHBristol

Please explain how this will be of ultimate benefit to patients and why it should be funded through charitable funds rather than out of an NHS budget.

(if necessary continue on an additional sheet of paper and attach with supporting information).

Equipment Cost

These costs to be met by UHBristol and should be confirmed by MEMO for medical equipment or Estates for other equipment - exclude VAT for medical equipment

Equipment Cost (attach quotation) £	VAT £
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Total Equipment Cost £	Annual running maintenance costs £
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Salary Costs

Salary costs to be confirmed by UHBristol or University finance departments and must include on costs.

Salary costs (for duration of appointment) £
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Employee grade	Period of appointment
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No. of Hours	Extension of existing contract	YES/NO
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Other Costs

e.g. training, refurbishment, research consumables.

Funding Requested By

This will usually, but not always, be the Fund Advisor.

Name (in capitals)

Signed	Date
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University Hospitals Bristol Support

I approve the above detailed expenditure and agree to accept the associated revenue costs for UHBristol.

Assistant Divisional Manager [£1,000 - £10,000] / Head of Division or Divisional Manager {over £10,000}

Name

Signed	Date
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For applications from General Purpose Funds the support of the Director of Strategic Development is required.

Name

Signed	Date
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For charity use only

Fund Balance £	Authorised by
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Title	Date
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