



Procedure for Allocating Financial Gifts from the Benevolent Fund to Bart's Nurses and League Members

Background

Requests for financial help arise from a variety of sources and may be received by letter, telephone call or email:

- Individuals may request help for themselves
- A Bart's nurse or League member may request help for a Bart's nurse or League member who is a friend or member of the same set
- A request may be made by a League Countrywide Network visitor
- A request may be made by a friend or relative of a Bart's nurse or League member. The friend or relative may have no connection with Bart's or the League but is aware of the existence of the League Benevolent Fund

Stage 1 - Initial Action

If the request is not made by the individual concerned, permission for further discussion with the Benevolent Fund committee members is sought from the potential beneficiary. The Hon. Secretary or Hon. Treasurer of the Benevolent Fund will ring the individual for a sensitive discussion and to seek permission for further discussion of his/her circumstances at the next Benevolent Fund committee meeting. Assurance is given that all discussions take place in strict confidence.

Stage 2 - Next Steps

If there is a long time interval before the next meeting or if the need is very urgent, the situation may be discussed with the League President and the Hon. Secretary and Hon. Treasurer of the Benevolent Fund who can agree to award a gift which can be quickly dispatched. This gift is then discussed and officially approved at the next committee meeting. In practice this situation does not arise often.

All other financial requests are discussed at Benevolent Fund committee meetings which take place in February, April, June and October each year. Requests may fall into the following categories but the list is not exhaustive:

- Requests for the relief of ongoing hardship

- 'One-off' requests for those experiencing temporary hardship
- Requests for items of equipment such as special wheelchairs
- Requests for major household items, e.g. a new boiler or washing machine
- Requests for services such as travel to hospital, convalescence, respite care or attendance at therapy centres

No financial assessment of individual circumstances is made. This is in line with Charity Commission policy. Gifts given must fall within the objects of The Charities in Association with The League of St Bartholomew's Nurses (i.e. The Benevolent Fund and The Scholarship Funds).

Discussion of requests takes place with those committee members who are present at each meeting and the sum to be given is decided and agreed by all those present. The award is then formally proposed and seconded and recorded in the minutes of the meeting. Full names of beneficiaries are not recorded in the minutes. The Hon. Secretary and the Hon. Treasurer retain full details of all beneficiaries.

The Hon. Secretary or Hon. Treasurer will then communicate with the applicant to talk about the outcome. Where appropriate the recipient will be asked to send an invoice, receipt or other evidence of expenditure to the Hon. Treasurer. The Hon. Treasurer sends allocated funds by cheque and signed receipts are requested.

Some beneficiaries receive an annual financial gift and/or a financial gift on their birthdays and at Christmas, if this is the most practical way to give financial assistance. These gifts enable beneficiaries to take a short holiday or enjoy small luxuries which would otherwise be unaffordable.

Financial Assistance for League Members Undertaking Study

The Benevolent Fund is able to provide financial support for travel and accommodation costs for League members undertaking further study. These gifts are discussed and agreed at meetings of The Scholarship Funds committee. Sums agreed are then formally approved at the next meeting of The Benevolent Fund committee and recorded in the minutes. Full names of beneficiaries are not recorded in the minutes. The Hon. Secretary and the Hon. Treasurer of the Scholarship and Benevolent Fund Committees retain full details of all beneficiaries.

Exclusions

The Benevolent Fund does not support requests for financial assistance with long term care costs as these are extremely costly and would exhaust the Benevolent Fund's available resources.

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