

Annex to Grant-Making Policy

How to Apply for a Grant

1) How do I apply?

Grant application forms are on the charity website www.stgeorghospitalcharity.org.uk or contact the Grants Team Charity.Grants@stgeorges.nhs.uk T.: 020 8725 1598. The charity office is on the second floor of Grosvenor Wing, Room 2.074.

Forms must be completed fully with required endorsements by Trust/University/ Community Project Sponsor as applicable before submission.

2) Who can apply?

People employed by either St George's University Hospitals NHS Foundation Trust (the **Trust**) and/or St George's, University of London (known as the **University** or **Medical School**) with authority to accept a grant on behalf of either organisation are eligible to apply. Co-applicants are welcome. Third parties who provide services within the hospital such as children entertainers for example need a Trust sponsor to apply on their behalf to the Charity. Such organisations need to be formally vetted by the Trust as a recognised supplier. It is best to make contact with the Charity to discuss.

In due course third party voluntary organisations who work to improve the health and wellbeing of the local community served by the Trust will be eligible to apply for funding. Eligibility criteria will be published at a later date.

3) Where does the Charity fund?

The Charity chiefly funds work which takes place within St George's University Hospitals NHS Foundation Trust (incorporating Queen Mary's Hospital, Roehampton) and St George's University of London, chiefly when the university is working in collaboration with the Trust.

This means work funded is chiefly taking place at St George's Hospital, Queen Mary's and St George's University which are based in Tooting, London as well as Queen Mary's Hospital based in Roehampton. However, the Charity intends to develop partnerships with organisations working to improve the health and wellbeing of the local community.

4) For what can I apply?

The Charity funds 5 areas of charitable activity:

- a) Capital Projects: Refurbishments, renovations, new builds, non-medical equipment
- b) Patient Welfare and Family Experience: entertainment, activities, environmental improvement and patient wellbeing (e.g. art), complementary alternative therapies, support groups, community projects
- c) Medical Equipment

d) Staff Development and Welfare; e.g. professional development training and wellbeing programmes

e) Medical Research

5) For how much can I apply?

No hard and fast rule. It is best to discuss needs with the Charity.

The Charity funds small and large projects. Large projects are generally counted as over £20,000 and up to a lot higher. Higher amounts need a special fundraising campaign to secure funds.

Individual research grants (when not funded through SPFs) tend to be up to £150,000 historically.

6) Which funds are available?

The Charity derives its income from many sources: general public donations, small and large appeals, companies, legacies, special fundraising events and trusts and foundations.

You can apply to the following funds providing they fit requirements:

a) Special Purpose Funds

The Charity has in the region of 220 special purpose funds. These are funds donated for a specific use with clearly defined restrictions for each fund; for a ward or particular type of research or activity. Each fund has up to three fund advisers who have delegated authority on behalf of Charity Trustees to endorse requests for funding which are submitted to the Charity for final approval.

To find out about funds, applicants should discuss with colleagues and/or call the Charity. If a fund is identified which matches the type and amount of funding sought then fund advisers must be consulted for their endorsement and signature before submissions to the Charity.

You can access SPF funds as follows:

1. Expense Claims up to £5,000	Use to request expenses to be reimbursed, with original receipts, up to £5,000. Use online expense claim module. For enquiries ask Charity Finance.
	Allow 15 working days for reimbursement, providing correctly completed and authorised. If fund advisers seeking reimbursement to self then second adviser must sign Submit to Charity Finance

2. Purchase Requisition form Up to £5,000	Use to order goods and services through the Trust procurement system which charity then reimburses to Trust. Two forms; one for medical equipment and the other for all else.
For non-medical Equipment	Applicant to raise purchase requisition and include purchase requisition number on form. Submit to Charity Finance.
For Medical Equipment	<i>For medical equipment</i> , submit Purchase Requisition Form first to Medical Physics directly (E: medicaldev.charity@stgeorges.nhs.uk) who will do checks and confer with Charity. Medical Physics will then submit form to Charity.

	Once Charity approved, Purchase Requisition form is sent by Charity to Medical Physics for requisitioning. If the medical equipment is for research, either hospital Divisional Chair or University Research Institute Director to sign as well as fund advisers. Medical Physics raises purchase requisition.
3. Payment Request Form Up to £5,000	Submit direct to Charity Finance to pay a supplier invoice. This is the exception rather than the rule. Normally the Charity reimburses the Trust after the Trust has paid a supplier directly.
	This route is not to be used for capital or medical equipment payments.

4.SPF Large Grant Application Over £5,000	No expenditure can take place without prior approval. Must abide by the objects of the SPF.
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SPF Expenditure Authorisation Summary for above

Expenditure < £1000	1 fund adviser signs
Expenditure £1000 - £5,000	2 fund advisers sign
Expenditure £5,000 to £20,000	2 Fund advisers to sign Approval from Charity Chief Executive/Finance Director, without further referral
Expenditure > £20,000	2 Fund advisers to sign Approval from Charity Chief Executive/Finance Director, then Grants Committee reviews and recommends or not to Board of Trustees

All other Funds:

b) Appeal Funds

The Charity at any one time has a variety of appeals underway. These are on the Charity website www.stgeorghospitalcharity.org.uk. Appeals fall into two categories: those that are for special projects e.g. new a building for the renal department and those which are broader such as for cancer or for children.

c) Research Funds

Research funding is available through two funding streams; either specific restricted research legacies or SPF research funds.

SPF research funds are accessed as per SPF application process. Non-SPF research funding bids are submitted to the Charity's Medical Advisory Group (MAG) which is composed of senior medical academics for their review and recommendations to the Board of Trustees.

Invitation to apply for non SPF research funding is announced on the Trust's intranet and via the University. There is a separate application form for research which is provided at the time of announcement. Applications are checked by JRES ((Joint Research and Enterprise Service) prior to submission to MAG.

Research grants are administered via JRES in conjunction with the Charity grants manager. JRES is the support function for research grant applications for both the Trust and the University.

d) General Funds

General funds are used for applications where funds cannot be identified from SPFs, Appeals or Research. Applications for this fund are very competitive. There will be two grant windows per year for which applications for funding from general funds will be announced. These will be listed on the Charity's grant website page.

Summary of Approval Authorisations for SPFs, Appeals, Medical Advisory Group and General Grant Funds Applications

Approved by	SPF	Appeals	Medical Advisory Group for non SPF Research	General Grant Funds
CEO/Finance Director	£5K-£20K	Under £20K	CEO non-voting member of MAG	Under £5K
Grants Committee (GComm)	£20K to £75K GComm can approve	£20K to £75K GComm can approve	N/A	Over £5K GComm recommends to Board
Grants Committee	Over £75K GComm recommends to Board	Over £75K GComm recommends to Board	N/A	
Medical Advisory Group (MAG)	N/A	N/A	Recommends to Trustee Board	N/A
Trustee Board	Final say over £75K	Final say over £75K	Final say	Final say over £5K

7) Which signatures do I need to obtain when I apply?

Approval signatures by the Trust (and/or University) are required *before submission*. These are as follows *depending on the nature of the request*:

- Fund Adviser/s for SPF applications only
- Divisional Finance Manager (not applicable for research costs)
- Medical Physics (only for medical equipment)

For research: Trust Divisional Chair for Trust applications or University
Research Institute Director for University applications
Deputy Director of Estates and Facilities and/or Assistant Director of Capital and Estates (as applicable - aspects to consider listed in application)
Chief Information Officer (for IT related including APP development)
General Manager or Deputy General Manager for under £5,000
Divisional Director of Operations for over £5,000
Trust Chief Strategy Officer.

8) When can I apply and timing of decisions?

You can apply whenever you like but the timing of the decision depends on where the money is coming from and how much is sought.

Dates of meetings for the Grants Committee and the Board of Trustees are on the Charity's grants website page.

1. Special Purpose Funds	Timing of Decisions
Under £5,000	Submissions accepted on a rolling basis and processed within two weeks if forms and supporting documents are in order.
£5,000 to £20,000	Submissions accepted on a rolling basis. CEO will give outright decision within two weeks of application if all the necessary information has been provided in the application.
£20,000 to £75,000	Submit to Grants Committee for decision. Please see Charity website for meeting dates. Decisions will be dependent on the annual timetable of the Grants Committee. Decisions will be provided within two weeks of meetings as to next stage or final decision.
Over £75,000	Submit to Grants Committee for consideration which then may recommend to Board of Trustees for final decision. Decisions will be dependent on the annual timetable of the Grants Committee and the Board of Trustees. Please see Charity website for meeting dates. Decisions will be provided within two weeks of meetings as to next stage or final decision.
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Research Funds	
Derived from SPFs	Follow SPF process

All non-SPF Research funding	Submit to Medical Advisory Group which makes recommendations to Charity Board of Trustees. Call for applications are made on the Trust intranet and via the University. The timetable will be made available on the Charity website as and when dates are set. From time to time dedicated committees may be established for specific research legacies. Announcements will likewise be made.
General Funds	
Under £5,000	Submissions accepted on a rolling basis. Decision within two weeks of receipt if all in order.
Over £5,000	There will be two grant windows announced per year. Submissions go to the Grants Committee for their recommendation (or not) at the next Board of Trustees meeting. Dates announced on Charity grants website page. Decision within two weeks of receipt if all in order.

9) What happens when I have a grant approved or rejected?

For approvals a grant award letter and grant agreement are issued by the grants manager. The grant agreement must be signed by the grant applicant on behalf of the applicant organisation and returned to the grants manager in order to activate the grant along with confirmation of the actual grant start and end dates.

In the case of a rejection the grants manager will contact applicant by email within two weeks of the decision.

For non-medical equipment grants, the grant applicant/holder is responsible for finding a Trust person to raise the purchase requisition, using the Charity cost centre so the Trust reclaims the cost from the charity. The Trust, when reclaiming, supplies Charity finance with the supplier invoice/s and its own Trust invoice giving the purchase requisition number and grant reference. The grant reference is on the grant award letter and grant agreement. SPF funding under £5,000 does not have a grant reference.

For medical equipment, on receipt of the signed grant agreement, the grants manager advises Medical Physics which raises the purchase requisition and proceeds with the order.

Interim and final grant feedback reports are requested on the results of the grant funding explaining the detailed benefits and the manner in which these were measured.

10) For how long are grants awarded and when are monitoring reports expected?

Medical Equipment	6 month grant. Interim report at one month and final report no later than 3 months after the end of the grant
Grants (not research or medical equipment)	Generally 12 month grants. Interim report at 6 months and final report after 13 months
Research	Up to 36 months. Interim reports every 6 months and final report one month after the end of the grant.

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