**Charity Grants**

The Bureau can make applications on behalf of clients to a variety of charities, both national and local. A list of the charities we can contact for assistance for clients is on the Staff & Volunteer homepage.

We are a trusted partner with charities and therefore have a responsibility to apply for and spend grant money responsibly and once a series of checks have been carried out.

All charities have limited funds so we can only make applications for funding for one essential item per client. This is particularly important in respect of local charities whose funds are particularly limited.

Essential items are generally limited to:

A basic model of washing machine

A basic model of fridge

A basic model of cooker

A basic bed

Exceptions to the above will be considered by the ASM on a case by case basis, taking into account any particular and acceptable reasons why a client should require a more expensive model i.e. an orthopaedic bed because of a severe back condition, or an item not listed above.

Applications should not be made by advisors until the checklist at Annex A has been worked through and approval given by an ASS.

In exceptional circumstances other items can be requested at the ASM’s discretion.

**Annex A**

**Charity Grants Checklist/Process**

|  |  |  |
| --- | --- | --- |
| 1 | Client to be registered on casebook and new case opened – “Charity Grant Application Item” |  |
| 2 | Specific item identified and confirmed with client – will usually be from Argos, item number and price (including costs where relevant of delivery, fitting/installation costs and removal/recycling of old item) to be recorded on casebook |  |
| 3 | Clients cannot add extra money to purchase a more expensive version of the item they need, except in exceptional circumstances and at the discretion of the ASM. |  |
| 4 | Income and expenditure record for client to be prepared and recorded in case record – can either be MART or briefer version. |  |
| 5 | Brief explanation in case record of what is required and why client cannot afford this themselves. Any deviation from single, basic item to be approved by ASM and reasons for this recorded |  |
| 6 | Identify appropriate charity to apply to in consultation with ASS |  |
| 7 | Referral consent form to be completed by client and attached to case record – if SCD to be communicated in application, permission MUST be given on the form for this before application sent. |  |
| 8 | Prepare application – standard letters for Lawton Trust and Watford Health Trust attached at Annexes B and C. Attach all to casebook and add expected outcome. |  |
| 9 | If grant refused – discuss possibility of applying to alternative charity with ASS; update client as appropriate. |  |
| 10 | If grant awarded, update client, confirm outcome on casebook. Details of grant and item to be passed to Bureau Manager to place order see procedures below. Send thank you letter/email – suggested wording attached at Annex D. |  |

Processing of monies received:

1. OM pays cheque into bank

2. OM completes spreadsheet on cash book

3. Adviser advised by OM that cheque has cleared

4. Adviser confirms items with client and agrees delivery date

5. Chief Officer(CO) purchases goods by debit card for client

6. CO passes invoice of purchase to OM

7. OM adds information of purchase to spreadsheet on cash book

8. Client receives goods

9. Adviser sends letter of thanks and OM returns any unspent monies