

CONTROLLED DOCUMENT

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FINANCIAL SUPPORT FUND POLICY

CATEGORY:	Policy
CLASSIFICATION:	Finance
PURPOSE:	To set out the eligibility criteria and rule governing the award of hardship fund grants.
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ASSOCIATED DOCUMENTS:	Donations and Charitable Funds Policy
Essential Reading for:	Customer facing Brunelcare colleagues and managers
Information for:	Non-customer facing roles

Document Consultation and Review Process

Groups/Individuals who have overseen the development of this	Senior Leadership Team Away Day Managers
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Policy:	Brunelcare customers
Groups/Individuals Consulted:	

Document version control:

Date	Version	Amendments made	Amendments Approved by
22 March 2022	V001	Name changed from Hardship Fund Policy	Board
20 July 2022	V001	additional wording for eligibility criteria - <i>'have no more than £2,500 in savings'</i>	SLT
25 June 2025	V002	Full review of policy. Process clarified and procedure/definitions updated.	AR&F Committee – 23 April 2025 Board – 25 June 2025

For the Use of the Corporate Governance Team only:

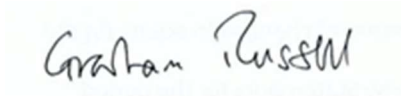
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1. POLICY STATEMENT

- 1.1 Brunelcare has created a financial support fund (the Fund) specifically to support the charity's customers in times of financial hardship.
- 1.2 With pressures on the cost-of-living growing, we want to ensure help is available to those we provide housing, care and support for, where no other funding is available to them.
- 1.3 While Government, both national and local, and other organisations and charities, already provide a wide range of support, we recognise that, for some, this support may not be easily, or immediately, in reach when it is needed most.
- 1.4 The Brunelcare financial support fund (the Fund) will provide those meeting the eligibility criteria with support to fund items such as furniture and white goods, adaptations to support independent living, and other essential items, equipment or services to support basic living needs.



Graham Russell
Chair of Trustees



Oona Goldsworthy
Chief Executive Officer

2. AIM OF THE POLICY AND RELATED LEGISLATION

- 2.1 The key aim of the policy is to ensure financial assistance is provided to those most in need and to ensure the appropriate controls are in place to provide a fair, transparent and consistent process.
- 2.2 This policy has been drafted to complement the Donations and Charitable Funds Policy, which details how funds that are utilised for hardship grants may be generated.

3. SCOPE OF THE POLICY

- 3.1 This policy applies to all Brunelcare customers who meet the eligibility criteria.
- 3.2 This policy applies to all Brunelcare employees and volunteers who may be responsible for promoting, supporting or administering hardship fund grants to eligible customers.

4. DEFINITIONS

- 4.1 *The Charity* is Brunelcare, registered with the charity commission, number 201555.
- 4.2 *Customers*, in this instance, is the collective term used to describe Brunelcare's various customer groups (tenants, residents, clients etc.).
- 4.3 *Hardship*, in this instance, refers to financial hardship, such as difficulty paying for everyday essentials with no alternative means of support.

5. KEY PRINCIPLES AND REQUIREMENTS

Eligibility Criteria

- 5.1 To be eligible for a grant from the Fund customers must:
- Be a current Brunelcare customer.
 - Be willing to complete a basic income and savings assessment.
 - Be able to demonstrate that they have reasonable steps in place to manage income and expenditure.
 - Have sought funding from all other available sources.
 - Have a payment plan in place if in arrears and not be in default (whether that be for rent or care fees).
 - Not have any outstanding cases of serious anti-social behaviour or have an open legal case against them.

What will the financial support fund (the Fund) cover?

- 5.2 The Fund will cover the following:
- Essential white goods, furniture and floor coverings.
 - Home adaptations to support independent living.
 - Other essential items, equipment or services to support basic living needs.

What will it not cover?

- 5.3 The Fund will not cover:
- Payment of debts.
 - Payment of rent or care fees.
 - Cash payments directly to customers.
 - Food vouchers where there is access to a food bank.

Food vouchers where there is access to a food bank.

Funding limits

5.4 Funding will be limited to:

- One application from an individual or household per financial year up to a maximum of £250.
- Reasonable costs based on the goods or service applied for. Costs will be benchmarked to ensure that they are reasonable and demonstrate value for money.

5.5 The Fund will remain open to applications while sufficient funding is available.

5.6 Grants will only be made from the Fund when all other sources of funding have been explored.

How do you apply?

5.7 All applications for Fund grants must be made through a Brunelcare colleague, such as a housing manager, registered manager or deputy.

5.8 The application will include an eligibility check and income assessment. If the eligibility criteria are met, the application will be submitted for consideration by the Brunelcare colleague.

How will applications be decided?

5.9 Applications will be reviewed by the Corporate Governance Team as soon as possible after they have been received.

5.10 If an application cannot be supported, a clear explanation of the reasons why will be provided in writing by the Director of Corporate Resources and Brunelcare colleagues will provide support to explore other options.

How will funds be made available

5.11 When a decision has been made to award a grant the Director of Corporate Resources will write to set out the details of the funding and how it will be provided, this may mean that Brunelcare purchases the required item directly.

Measuring impact and reporting

5.12 We will aim to measure the impact the grant has made on each individual customer. This may include contacting the customer to complete a simple questionnaire and producing case studies to highlight the difference the grant has made. This information will be reviewed against Brunelcare's outcomes framework.

5.13 Regular reports, no less than annually, will be produced for both the Audit, Risk and Finance Committee (financial) and Performance, Quality and Experience Committee (outcomes), to include:

- Number of applications received.
- Applications granted.
- Values - total and individual.
- Themes/trends in applications.
- Impact measurement.

6. ROLES AND RESPONSIBILITIES

The Corporate Governance Team

- 6.1 The Corporate Governance Team will be responsible for reviewing and deciding on grant applications. This may be done either in a formally scheduled meeting or on an as-required basis when applications are received.

Director of Corporate Resources

- 6.2 The Director of Corporate Resources will be responsible for identifying new sources of funding to support the sustainability of the Fund. They will also support the reporting and monitoring of grants and awareness raising.

Operational Directors

- 6.3 Operational Directors will be responsible for ensuring operational colleagues support customers in making applications, and the delivery of grants on approval by the allocations panel.

Director of Finance & Digital Services

- 6.4 The Director of Finance & Digital Services will ensure appropriate controls are in place to manage the administration and accounting of the Fund. Including financial reporting and releasing money to fund grants.

Colleagues

- 6.5 Colleagues are responsible for familiarising themselves with this policy and for supporting Brunelcare customers to make applications to the Fund.

7. EQUALITY AND DATA PROTECTION

Equality and Diversity

- 7.1 Brunelcare seeks to embed an environment where all clients, visitors, employees, agency employees, contractors, consultants, trustees, volunteers and any other workers are treated as individuals, fairly and in a consistent way. We work within the spirit and the practice of the Equality Act 2010 by promoting a culture of respect and dignity and actively challenging discrimination, should it ever arise. This Policy will be applied in a way that is

consistent with these principles. We will monitor take up and allocation of the Fund to ensure fairness.

Data Protection

- 7.2 Brunelcare is committed to ensuring protection of all personal information that we hold, and to provide and protect all such data.
- 7.3 Brunelcare is dedicated to safeguarding the personal information under our control and in maintaining a system that meets our obligations under the General Data Protection Regulation (GDPR). Our practice is set out in our Privacy and Confidentiality Policy.
- 7.4 It is recognised that dealing Fund applications and allocation will involve the collection and sharing of sensitive personal information. Data protection obligations will therefore be always followed with information only shared with those that it is necessary to share this information with and in a secure manner.

8. IMPLEMENTATION AND TRAINING

- 8.1 The Director of Corporate Resources, supported by the Corporate Governance Team, will be responsible for the implementation of this policy. This includes raising awareness of the policy internally, developing the application form and process, and providing appropriate training, guidance and support. They will also support the monitoring of grants and reporting to the Board and its respective Committees.

9. MONITORING AND REVIEW

- 9.1 This policy will be reviewed every three years, or sooner should the author or legal requirements deem it to be required. Customers and key stakeholders will be consulted as part of the review process for this policy.