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Cardiff and Vale University Health Board Fundraising Policy

Policy Statement

To ensure the Health Board delivers its aims, objectives, responsibilities and legal requirements transparently and consistently, we acknowledge ethical, sensitive fundraising as a legitimate means to enable the purchase of goods and equipment or services which are not available within capital or revenue budgets, but will help ensure the UHB remains a premier health care provider. The public see donating cash or equipment, or actively raising funds, as a positive way of supporting a health service which is short of funding.

Cardiff and Vale Health Charity (“the Health Charity”) is the official charity and working/trading name of the Cardiff and Vale University Health Board General Purposes Charitable Fund, Charity Registration Number 1056544.

The Health Charity’s corporate trustee is Cardiff and Vale University Health Board. Further accountability is provided by the Charity Commission and the Welsh Government’s Cabinet Secretary for Health and Social Services. Responsibility for the management and distribution of funds and the receipt of new charitable monies is with the corporate trustee. This falls on the members of the Board, though the corporate trustee remains the UHB. Responsibility for the management of charitable funds is delegated to the Charitable Funds Committee. The day to day work related to the Health Charity is performed by the Charitable Funds Officer and the Charity Office. The function of the Charity Office is to maintain a register of fundraising activities, support fundraising activities, and ensure that fundraising activities are undertaken in accordance with principles of best practice and pose no risk to the reputation of the UHB and the brand of the Health Charity.

Fundraising staff in the Charity Office are members of the Institute of Fundraising and attend continuous professional development; other staff members in the UHB are not appropriately qualified to give fundraising advice to staff or supporters.

Policy Commitment

The UHB is committed to ensuring that related fundraising activities are undertaken in accordance with principles of best practice and pose no risk to the reputation of the UHB, our staff and patients, and the brand of Cardiff & Vale Health Charity. The following procedures have been developed in light of this:

1. The Charity Office **must** be made aware in advance of all activities where patients, visitors, staff or members of the public on the UHB estate will be able to donate money, cash or goods, for any charitable cause. The Charity Office **must** approve such fundraising activities prior to them being undertaken.
2. a. Approval for collecting funds connected to local and national health related awareness campaigns such as Jeans for Genes, and national charity event days such as Red Nose Day is dependent on the fundraising activity being registered in

advance with the Charity Office.

b. All charities must contact the Charity Office **before** putting up any advertising (including leaflets, flyers, display boards etc.) or longer term structures (including signage, sculptures, and display boards) across the UHB sites in general and in office and ward locations.

c. Only Cardiff & Vale Health Charity collecting boxes are permitted on the UHB estate unless permission has been granted by the Charity Office.

d. The Charity Office **must** be made aware in advance of all fundraising activities naming the UHB or Health Charity as the beneficiary. The Charity Office **must** be able to review and approve marketing materials and financial arrangements in advance. The corporate trustee retains the right to refuse donations that have been raised in a way that may be detrimental to the objectives of the Health Charity and the wellbeing of communities served by the UHB. The Health Charity will not benefit from fundraising activities perceived as sexist, transphobic, racist, or otherwise offensive

3. The following situations **must** be referred to the Charity Office:

a. An external individual or organisation wishes to support the hospital, or specific wards or departments, with a cash donation, volunteer time, or gift in kind. Gift in kind could be a donation of concert or match tickets; signed memorabilia; donated artwork; children's toys; furniture; training.

b. Staff want to hold a fundraising raffle, for which they will sell tickets more than 24 hours in advance of the draw. The Charity Office will act as the promoter and supply numbered tickets in accordance with the Lotteries and Amusements Act 1976.

c. Staff want to approach an individual or organisation for sponsorship, financial support, gifts in kind etc.

d. An individual or organisation wants to sell items on behalf of the Health Charity.

e. Notification of a legacy that names Cardiff and Vale University Health Board, Cardiff & Vale Health Charity or any area of any UHB service as a beneficiary.

f. An individual or organisation wants to donate a potential asset (medical equipment, furnishings). This **must** be brought to the attention of the Charity Office at the earliest possible time for inclusion on the asset donation register. Departments receiving donated assets will be asked to confirm the assets conform to relevant standards and revenue consequences are managed.

4. Fundraising restrictions are in place to protect patients, staff, and members of the public:

a. Fundraising **must not** take place in wards at the bedside.

b. Fundraising staff or volunteers **must not** directly approach patients or visitors to suggest or request involvement or contributions. If patients or visitors approach a member of staff regarding the fundraising activity staff may accept offers of participation and support.

c. Staff participation in fundraising activities is voluntary and **must not** be imposed on any individuals.

d. An individual member of staff fundraising for a charitable cause on site is acceptable as long as the fundraising does not interfere in scheduled work hours. Care should be taken to ensure that participating in or organising fundraising activities does not impair compliance with statutory regulations and recommended practice.

e. Legally, fundraising **must not** be undertaken by individuals under the age of 18.

f. Children up to the age of 18 can be involved with fundraising with a guardian's permission. However, children cannot collect static collection boxes, sell tickets for licensed lotteries, or count collected money.

5. All charitable income received into any ward or department by any member of staff, either from donations or fundraising activities, **must** be paid into the relevant Health Charity endowment fund, via the Cashiers' Office, within 7 days.
- Cash from a ward or department-based fundraising activity, such as a raffle, **must** be counted and signed as a donation by two members of staff on the donation form and taken in a sealed collection tin or envelope to the Cashiers' Office.
 - If under exceptional circumstances staff are not able to take a donation to the Cashiers' Office, staff should contact the Charity Office on extension 41802 for assistance.
 - Under **no** circumstances should a donation cheque be made payable to an individual UHB staff member. If you receive a cheque made payable to a member of staff, please forward it to the Charity Office for action.
6. The Charity Office will support departments or partner organisations seeking to raise a substantial sum for a large capital project or long-term work in a particular area.
- In the first instance, this should be discussed with the department's Clinical Board and the Charity Office.
 - Where agreed, the Charity Office will support the formation of an Appeal committee. This should involve departmental staff, a patient representative, and a member of the Charity Office.
 - The Charity Office retains the right to start, manage and transition appeals according to the Health Charity's priorities and the Charity Office's capacity.

Other supporting documents are:

- Naming Policy
- Standards of Behaviour Policy

Scope

- The scope of this policy includes fundraising activity in the following situations:
- fundraising undertaken on or off the UHB estate to benefit our patients through Cardiff & Vale Health Charity
 - fundraising undertaken on the UHB site by partner charities

All sections of this policy apply to:

- Anyone involved in any fundraising event undertaken on UHB sites to benefit any charity;
- Anyone fundraising with the UHB and/or the Health Charity as a named recipient of funds.

Equality and Health Impact Assessment

An Equality and Health Impact Assessment (EHIA) has been completed and this found there to be no impact. Key actions have been identified and these can be found incorporated within this policy/supporting procedure.