** Beneficiaries Money Handling Policy**

Occasionally, we are approached to purchase items on behalf of beneficiaries who are unable to do so themselves. To safeguard both beneficiary and staff/volunteers the following procedure must be strictly followed and this form returned to the office ASAP.

Task Number:………………………

1. Please confirm giving money to volunteer/staff:

Beneficiary (PRINT NAME and sign):………………………………………………………

Staff Member/Volunteer (PRINT NAME and sign):………………………………………

Amount Received: £……………………

Reason for the money being handed over to staff/volunteer (e.g. shopping, donation to FGNS): ………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………

Date:………………………………………………………

2. Please confirm that all goods, receipts and accurate change was handed back by the volunteer/staff:

Beneficiary (PRINT NAME and sign):…………………………………

Staff Member/Volunteer (PRINT NAME and sign):…………………..

Amount Received: £……………………

Date:………………………………………………………

Any comments:………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………….

3. Volunteer/Staff should return this form to the office in person/by post or by email at [info@fulhamgoodneighbours.org](mailto:info@fulhamgoodneighbours.org) (e.g. in pdf or jpg) at the earliest opportunity.

Other circumstances concerning money handling.

We would always encourage family members/paid carers to handle all financial transactions. Beneficiaries may also want to consider contacting The Money Carer Foundation (Tel. 01928 2387270) for all issues relating to managing their money on a daily basis. Nevertheless:

1. CHEQUES: In the absence of family/paid care agency, staff/volunteer may be asked to write a cheque on behalf of a beneficiary. Staff/volunteers should resist a task of this nature. Instead we can e.g. accompany the person to their nearest bank branch or contact their bank to arrange a home visit.
2. BANK, DEBIT AND CREDIT CARDS including ONLINE SHOPPING: Volunteers/staff are not allowed to handle beneficiary’s cards and his/her PIN number under any circumstances. If a beneficiary is unable to deal with online transactions independently, the volunteer should not be e.g. typing in their card numbers or passwords for them. Instead, they should contact the office for further guidance.
3. ONLINE BANKING: Volunteers/staff are not allowed to be involved in beneficiary’s online banking in any way under any circumstances.
4. REIMBURSING FGNS: Occasionally, staff will obtain decorating materials on behalf of beneficiaries. The type of materials and costs is agreed before any purchase is made. Staff will use FGNS Debit Card or their personal money for this transaction. Staff will handover the receipt and goods to the beneficiary when they are reimbursed.
5. REIMBURSING VOLUNTEERS: On rare occasions volunteers might be asked to obtain few items of small value e.g. milk and then be reimbursed by the client. This should happen only with volunteer’s explicit permission, and he/she is under no obligation to agree, and the total amount of money the volunteer puts forward should be no more than £20.
6. DONATIONS. Beneficiaries are encouraged to give any donations online via <http://uk.virginmoneygiving.com/charity-web/charity/finalCharityHomepage.action?charityId=1002563>. The second preferred option is for a cheque in the name of FULHAM GOOD NEIGHBOUR SERVICE to be written out and send to the office. Finally, cash donations can be given in exceptional circumstances to a member of staff/volunteer and should be returned to the office at the earliest opportunity where they are recorded. Each donation is acknowledged with a receipt specifying the donation amount and a thank you letter.