



The Macfarlane Trust

Grant Application Guidelines

Following feedback from beneficiaries, the Macfarlane Trust has introduced new guidelines for grants so that it is clear what support is and is not available. Some grants can now also be processed through the office without going to the Grants Committee (formerly National Support Services Committee/NSSC). This document sets out the areas that can be considered and how to apply for a grant.

Since the Archer Inquiry, the introduction of MFET regular payments, topped up by the Trust's own discretionary regular payments, has enabled primary beneficiaries and widows themselves to meet the costs of most of the items of expenditure which had been dealt with previously by the National Support Services Committee. In addition, in 2013, the Trust ran a special grants programme to fund health and mobility related repairs and improvements to beneficiaries' homes. Approximately £810,000 was allocated under this grants programme to beneficiaries whose applications met the criteria for help with costs which were far beyond reasonable affordability. That programme, too, was designed to alleviate the need for future grant requests in the short to medium term. Nevertheless, the Trust recognises that, exceptionally, some future needs will arise which are unexpected, unaffordable or require emergency, immediate assistance. A new Grants Committee, will continue to consider applications for assistance in the line with the criteria set out below.

Application Criteria

We can consider grants in the following areas:

Accommodation related grants, for example:

- house repairs and adaptations related to health and mobility issues
- costs associated with setting up home for the first time

Health related grants, for example:

- mobility equipment
- counselling
- respite breaks following treatment for hepatitis C

Education related grants, for example:

- the cost of a vocational training courses
- further education expenses

Bereavement related grants, for example:

- funeral costs and, in some cases, funeral plans
- costs of hospital travel for parents/dependants/carers/spouse to visit ill beneficiaries

Empowerment grants through the Honeycombe Legacy Fund (bereaved spouses/partners only)

- Grants from the Honeycombe Legacy Fund for bereaved spouses/partners for personal development and to develop economic independence, eg academic development, skills training, driving lessons

Making an application

- A Grant Application Form must be completed for a new grant request. If more than one grant is being requested at the same time they can be submitted on the same form.

- As a charity, the Trust is required to be able to demonstrate “charitable need” and as such consider whether someone applying for a grant has the ability to fund it from their own resources. This is why we ask for details of income and expenditure when grant requests are made.
- Supporting evidence, for example medical letters to support grant requests, are required for some grants and details are listed on the application form.
- In all cases where equipment is being purchased or work carried out we will require two quotes for the item to ensure a fair price has been quoted.

Advice on benefits and money management/debts

We are able to provide support on benefits and money management/debt by referring people to specialist benefits and money management advisers. If you would like a referral, please contact Keisha on 020 7808 1171 or keisha@macfarlane.org.uk

Processing the grants

Since May 2014 some grants can now be processed in the office and do not need to go to the Grants Committee if they meet certain criteria.

If your request falls outside of the criteria for office approval, is for retrospective items or a particularly large amount, it will be considered by the Grants Committee. You will be informed if your grant is being considered by the Committee.

The Grants Committee meets every 6 weeks. A completed application form and supporting documents need to be with the office 10 working days before the date of the Grants Committee.

What we cannot fund

Unfortunately, due to financial constraints, there are certain areas the Trust will not be able to consider support for:

- Private medical and dental treatment where this is available on the NHS
- Hospital travel costs, as these can be refunded by the NHS for those on low incomes
- Complementary therapy
- Gym membership
- General household items such as furniture and white goods (although these may be available as part of a setting up home grant)
- Mortgage or rent assistance or costs associated with the purchase of a property
- Legal Fees
- Clothing or school uniforms
- Holidays or travel insurance
- Assistance with wills
- Driving Lessons
- Pet-related expenses (the Trust can provide information about charities which provide support for pets where owners are on a low income)
- Other ongoing financial assistance outside of discretionary top up payments

In addition, the Trust is unlikely to consider grant applications for retrospective items, ie anything that has already been purchased, even if it would normally fall into an area that would be considered. You are therefore strongly advised to make an application in advance. All retrospective requests will be considered by the Grants Committee on a case by case basis, and applications will need to demonstrate why an application could not be made in advance.

Appeals

If you are not happy with the decision taken regarding any grant application you have submitted, you can appeal the decision. Appeals must be made in writing within one month of the decision date and you must provide new evidence in support of your appeal. The appeal will be considered at the next Grants Committee meeting. If the Grants Committee uphold their original decision, and you wish to appeal again, you may appeal again in writing within one month of the decision date. The second appeal will be heard by the full board at their next scheduled meeting.

Further Questions

If you have any further questions about your grant request or items we may be able to consider, please contact Keisha Hanchard, Support Services Officer, on 020 7808 1171 or keisha@macfarlane.org.uk

May 2017