

Office guidelines for grants – January 2005

General rules relating to all grant requests

These guidelines are confidential

As far as registrants are concerned, there are no office guidelines - there is no automatic entitlement to any type of grant.

Grants over the last twelve months and referral to trustees

When someone makes an application, first check how much they have received in grants over the last twelve months – if it is more than £2,000, the application is referred to the trustees. (This is literally the last twelve months. If they apply on October 1st, how much have they received since October 2nd last year?)

Other funding

To try and save the Trust's funds for things that no-one else will give grants for, registrants are asked to seek other support, where it is available from government-funded organisations. This is primarily support with home adaptations (via Social Services) and help with vehicles (from Motability). Registrants may prefer to seek funding from the Trust instead, but that will reduce the amount that is available for other one-off grants and regular payments.

They should ask first

Where possible, funding should be sought before expenditure takes place. Where expenditure has already taken place, if the application is for less than £500 or expenditure was clearly for an emergency involving essential goods, (eg central heating), process as per guidelines. If neither of these apply, refer the application to the trustees.

When seeking funding in advance, evidence of the likely cost is required. Where large grants are sought (eg for building work, central heating, double-glazing), two written estimates are required, on business letterheads.

Must send receipts – cash payments without receipts will never be funded

To comply with accounting regulations, copies of receipts must be provided to show that grants have been spent as shown in our records. If this is questioned, it is not about whether we trust the registrants or not, it is about protecting the charity from any accusations of fraud or mis-using funds. (If registrants are adamant that they want to pay cash for a 'discount', point out that without a receipt they have no guarantee).

Always stress that we want copies of receipts NOT originals, as they may get lost in the post. The deadline for receipts for simple purchases is a month after the grant is paid and for building work is three months.

If receipts are not forthcoming within the deadline, send a standard letter reminding the registrant that we need the receipts. If receipts are still not forthcoming within a further month, send the second standard letter pointing out that, if they are not received, the grant will be treated as a loan and recovered from regular payments.

If the applicant gives a sound reason why the expenditure has been delayed, the deadline can be extended.

Anything not in these guidelines

Remember – all requests for grants for things not covered by the Office Guidelines should be sent to the trustees for a decision. These guidelines are for staff use, only. If we are not allowed to say yes, we simply pass the requests on to the trustees. We do not say no – only the trustees can do that.

Accommodation related grants

Financial Advice (AM) – maximum £350 – no repeat grants under office guidelines

Grant towards an Independent Financial Advisor (IFA) giving assistance in obtaining a mortgage.

Either

- a. applicant asks office to arrange referral to IFA, who invoices MFT direct
- or**
- b. applicant arranges consultation with local IFA and sends:
 - a letter detailing the request
 - a copy of the invoice or receipt.

Setting up Home (LF) - maximum £2,500 every seven years

Grant towards the cost incurred by a registrant setting up home independently for the first time **or** setting up a new home following the break-up of a relationship.

Typically this grant will be a contribution towards the cost of furniture, furnishings, and 'whitegoods' (washing machines etc). It is NOT for things like TVs or DVDs.

Note: if applicant applies for a Moving Home grant as well as a Setting Up grant, the maximum for the two combined is £5,000. This maximum applies for three years – staggering the applications by a few weeks or months does not increase the amount that can be claimed.

Applicant sends:

- a. a letter detailing the request
- b. ***either*** (where funds are required before purchase) a written quotations on business letterhead or an advertisement, (to be followed by copy of receipts when payment has been made)
or (where funds are not required before purchase) a copy of the receipt(s).

Moving Home (AL) – maximum £3,500 every seven years

Grant toward solicitor's and surveyor's fees, removal costs, etc. We fund the lower of two quotations.

Note: a second grant can be awarded within seven years **if** the move is occurring due to medical grounds (as specified by the haemophilia centre or GUM) or harassment (confirmed by the police, social services or the haemophilia centre or GUM).

Applicant sends:

- a. a letter detailing the request
- b. ***either*** (where funds are required before purchase) two written quotations on business letterhead, (to be followed by a copy of the receipts when payment has been made)
or (where funds are not required before purchase) a copy of the two written quotations on business letterhead and a copy of the receipts.

Note: if applicant applies for a Setting Up grant as well as a Moving Home grant, the maximum for the two combined is £5,000. This maximum applies to the move into one property whenever the applications are made – staggering the applications by a few weeks or months does not increase the amount that can be claimed for one property.

Replacement Windows (AW) – maximum £2,500 every ten years

Grant to cover the cost of replacement windows in the essential rooms **only** (ie one bedroom and up to two living rooms). We fund the lower of two quotations.

No applications for a replacement windows grant will be accepted within five years of receiving a moving home grant, as a property with suitable windows should have been purchased.

Applicant sends:

- a. a letter detailing the request
- b. **either** (where funds are required before purchase) two written quotations from reputable window companies, (to be followed by a copy of the receipts, when the work is completed)
or (where funds are not required before purchase) two written quotations from reputable window companies, and a copy of the receipts.

Central Heating Installation or Repair (AH) – maximum £2,500 every ten years

Grant to cover the cost of installing or repairing central heating and replacing boilers, which are beyond repair. We fund the lower of two quotations.

No applications for a central heating grant can be considered under office guidelines within five years of receiving a moving home grant, as a property with suitable heating should have been purchased.

Applicant sends:

- a. a letter detailing the request
- b. **either** (where funds are required before purchase) two written quotations from reputable plumbing companies, (to be followed by a copy of the receipt(s) when the work is completed)
or (where funds are not required before purchase) two written quotations from reputable plumbing companies and the copy of receipts.

Special Adaptations (AA) – maximum £2,500 – no repeat grants under office guidelines

Grant where adaptations to living accommodation are needed to allow proper home care for individuals with HIV. We fund the lower of two quotations.

It is expected that an application will first be made to the appropriate Local Authority (LA) and a copy of the response letter from LA is required.

Where the LA approves a grant of 75% and the balance is equal to or less than the current maximum, authorise a grant to allow work proceed.

Where the LA grant is less than 75% or the balance required is more than the current maximum, pass the application to the National Support Services Committee.

Applicant sends:

- a. a letter detailing the request
- b. copies of correspondence with local authority.

Domestic appliances

For all domestic applicants the applicant sends:

- a. a letter detailing the request
- b. *either* (where funds are required before purchase) a written quotation on business letterhead, to be, followed by a copy of the receipt(s)
or (where funds are not required before purchase) a written quotation on business letterhead and a copy of the receipt(s).

Laundry equipment (LA) – maximum £400 every five years (cannot be claimed within five years of receiving a Setting Up Home grant)

Grant towards laundry equipment.

Maximum per item

Washing machine – maximum £250

Dryer – maximum £150

or

Washer/dryer – maximum £400

Refrigeration equipment (LA) – maximum £300 every five years (cannot be claimed within five years of receiving a Setting Up Home grant)

Grant towards refrigeration equipment to safely store medication and provide ice packs.

Maximum per item

Fridge – maximum £150

Freezer – maximum £150

or

Fridge/freezer – maximum £300

Cooking equipment (LA) – maximum £300 every five years (cannot be claimed within five years of receiving Setting Up Home grant)

Grant towards cooking equipment to help with provision of nutritious food. Can be used towards gas or electric cookers, microwaves etc.

In the interests of safety, gas and electric cookers must be professionally fitted (cost of which should appear on the receipt).

Health-related grants

Convalescence or respite break (SH) - maximum £1,000 per year

Grant for a convalescent break following hospitalisation or serious illness requiring bed-rest. or for a respite break following circumstances leading to exceptional stress.

Can be taken as a single break or as two shorter ones, so long as maximum not exceeded. (Cost can include carer/companion/family members).

(Note: exceptional stress does not mean the stress of being a haemophiliac with HIV, as all registrants share this. Examples include break up of a relationship, death of a close family member, infection or acute phase of illness, depression brought on by 'bad news' relating to their health).

Applicant sends:

- a. ***Either (for convalescence break)*** – a recommendation from a doctor, giving dates of the admission to hospital or bedrest and the reason for this
or (for respite break) – a recommendation from a haemophilia centre or GUM doctor, clinical nurse specialist or social worker, confirming the circumstances leading to the exceptional stress.
- b. Receipts for travel, accommodation etc and, if necessary, a list of non-receipted expenditure up to the value of the grant (eg cost of snacks, refreshments, sundries).

Equipment for Disability & Special Chairs/Beds (HF) - maximum £1,500

Grant to purchase 'equipment for disability' (e.g. Wheelchairs, stair-lifts, bath-hoists) and specialist furniture, where this is recommended for medical/health reasons. We fund the lower of two quotations.

Note: if 50% of the cost is recoverable through a buy-back arrangement, (often provided by suppliers of stairlifts and special wheelchairs) the applicant can also receive a loan of £1,500, so payment can total up to £3,000, where they sign a written agreement that the equipment is the property of the Macfarlane Trust and that repayment will occur when the equipment is no longer needed.

Hospital Fares (MF) – maximum £100 per month and maximum £200 for family per period of hospitalisation

Grant towards the travel costs for attending hospital and, if hospitalised, travel costs of close family members visiting hospital. Transport costs can be claimed for an escort, where this is confirmed as being medically necessary, by a medical professional.

Expenses will be paid at the current NHS rates and conditions, which at January 2005 are:

- 13p per mile for travel by car
- public transport standard fares

Applicant sends:

- a. copy of letter or appointment card
- b. details of any car journeys and number of miles claimed
- c. copy of any public transport receipts
- d. where appropriate, confirmation of medical need for an escort.

Emergency Nursing/Home Care (HN) - Maximum £1,000 per year

Grant towards emergency, short-term nursing or social services personal care or private residential nursing costs, awarded only whilst awaiting a decision on an application for this type of support made to the National Support Services Committee.

Applicants sends:

- a. a letter detailing the request
- b. **either** (where funds are required before help is engaged) a written quotation on business letterhead, (to be followed by a copy of the receipt(s))
or (where has already been engaged) a copy of the receipt(s).

Ancillary costs of assisted conception (??) – for maximum see below

Grant towards costs related to (but not including) treatment for assisted conception. Can include travel, overnight accommodation, storage of treated sperm or fertilised eggs.

For each course of treatment:

Accommodation – maximum grant £100

Expenses will be paid at the current NHS rates and conditions, which at January 2005 are:

- 13p per mile for travel by car
- public transport standard fares

Applicant sends:

- a. copy of letter or appointment card
- b. details of any car journeys and number of miles claimed
- c. copy of any public transport receipts
- d. copy of any accommodation receipts.

Education related grants

Advanced education for registrants (ER) or their children up to age 21 (?ER or ED?) – maximum £2,000 a year for up to five years

Grants towards advanced education course fees, books, equipment and/or travel. (Advanced education refers to Bachelor's degree (BA, BSc), teaching course, HND, HNC, A-level or higher).

No funding is offered for gap years.

Travel expenses can be claimed at 13p per mile for travel by car or public transport standard fares.

Applicant sends, as appropriate:

- a. confirmation of acceptance on course
- b. evidence of successful completion of the previous stage/year
- c. receipt(s) for fees
- d. receipts for books or equipment
- e. detail of travel costs (details of car journey and number of miles claimed or copy of public transport receipts).

School change costs (ES) – maximum £200 per child

Grant towards the cost of school uniform, books, sports kit and other equipment when the child starts a new school.

Applicant sends:

- a. a letter detailing the request
- b. *either* (where funds are required before purchase) a list of items required and estimate of their cost, (to be followed after purchase by a copy of the receipts)
or (where funds are not required before purchase) a copy of the receipts.

School clothes costs (?ES?) – maximum £100 a year per child (but not allowed within a year of receiving a school change grant)

Grant to help with the cost of clothes and shoes for schools, available to age 16.

Applicant sends:

- a. a letter detailing the request
- b. *either* (where funds are required before purchase) a list of items required and estimate of their cost, (to be followed after purchase by a copy of the receipts)
or (where funds are not required before purchase) a copy of the receipts.

Additional school costs (ED) – maximum £100 a year per child

Offered up to age 16, for specialist equipment or materials or school trips.

Applicant sends:

- a. a letter detailing the request
- b. *either* (where funds are required before purchase) details of the cost (to be followed after purchase by a copy of the receipts)
or (where funds are not required before purchase) a copy of the receipts.

Other

Clothing following weight gain or loss (LC) – maximum of £250 every two years

Grant for registrants who have lost or put on more than a stone in weight due to their current health state.

Applicant sends:

- a. a supporting letter from a medical practitioner, confirming the extent of the weight gain/loss
- b. *either* (where funds are required before purchase) a list of items required and estimate of their cost, (to be followed after purchase by a copy of the receipts)
or (where funds are not required before purchase) a copy of the receipts.

Specialist clothing (LC) – maximum of £150 every two years

Grants for specialist clothes to meet specific medical needs.

Applicant sends:

- a. a recommendation from a haemophilia centre or GUM doctor, clinical nurse specialist or social worker, confirming the medical need for the clothing
- b. *either* (where funds are required before purchase) a list of items required and estimate of their cost, (to be followed after purchase by a copy of the receipts)
or (where funds are not required before purchase) a copy of the receipts.

Therapy (HT) – maximum £200 per person – no repeat grants

Grant to allow the registrant or their partner/carer to sample complementary therapies. Whilst applicants may choose to take a 'course' of therapy, the grant is intended to allow them to sample a number of types of therapy to discover which, if any, is most beneficial.

Therapy grants are also available for smoking cessation therapy, and trial membership of gyms or health clubs.

Note: this grant should not be expected to lead to continued funding for therapy – if they decide it is beneficial to their health to undergo a particular type of therapy, registrants are expected to fund this from their regular pay.

Applicant sends:

- a. a letter detailing the request
- b. *either* (where funds are required before purchase) details of cost, (to be followed after purchase by a copy of the receipts)
or (where funds are not required before purchase) a copy of the receipts.

Wills (AM) – maximum £100

Grant towards legal cost of having a will prepared.

Applicants send:

- a. a letter detailing the request
- b. *either* (where funds are required before purchase) details of cost, (to be followed after purchase by a copy of the receipts)
or (where funds are not required before purchase) a copy of the receipts.

Mattresses and bedding (LB) – maximum £300 every two years

Grant towards mattress and/or bedding where these have been damaged due to medical condition eg night sweats or bleeds

Mattress maximum £200

Bedding maximum £100,

Applicant sends:

- a. a letter detailing the request
- b. *either* (where funds are required before purchase) a written quotation on business letterhead or a copy of an advertisement, (to be followed by a copy of the receipt(s))
or
(where funds are not required before purchase) a copy of the receipt(s).

Bereavement (FB)

Automatic grant - £2,000

Grants paid automatically to the next of kin of the deceased registrant, to contribute towards the associated costs'

Further bereavement support – maximum £500

Grants towards the cost of travel to hospital during the terminal stage of the registrant's illness and/or any other items that may need replacing following death, eg bedding. Travel expenses can be claimed at 13p per mile for travel by car or public transport standard fares

Applicants send:

- a. a letter detailing the request
- b. *either* (where funds are required before expenditure) details of cost, (to be followed after purchase by a copy of the receipts)
or (where funds are not required before expenditure) a copy of the receipts.

Computer equipment (EC) – maximum £750 every four years

Grant towards computer equipment (eg PC, printer, broadband connection cost, software, hardware upgrades).

Applicants send:

- a letter detailing the request
- b. *either* (where funds are required before purchase) details of cost, (to be followed after purchase by a copy of the receipts)
or (where funds are not required before purchase) a copy of the receipts.

Mobility

Driving Lessons (ML) – maximum £350 – no repeat grants under office guidelines

Grant to enable registrant to learn to drive. If the registrant is not able to drive for health reasons, a spouse, parent or carer can be nominated for this grant.

If applicant will be leasing a Motability vehicle when they have passed their test, they should apply to the Motability Trust for funding for driving lessons. If this is refused or only part funded, a grant may be awarded.

Applicant sends:

- a. a letter detailing the request
- b. a copy of the letter from Motability, refusing a full grant
- c. *either* (where funds are required before purchase) estimate of the cost, (to be followed after purchase by a copy of the receipts)
or (where funds are not required before purchase) a copy of the receipts.

Motability deposits (MM) – maximum £1,000 every three years

Grant to any registrant purchasing a Motability vehicle, where there is no suitable nil-deposit car, electric scooter or wheelchair available.

Applicants should apply to the Motability Trust for funding for the deposit. If this is refused or only part funded, a grant may be awarded.

Applicants will not be awarded grants to cover the cost of optional audio systems, paint finishes and other accessories not related to health needs, or where they are requesting a high-specification car and the only difference between it and other models in the range is engine power.

Applicants send:

- a. a letter detailing the request
- b. a copy of the letter from Motability, refusing a full grant
- c. *either* (where funds are required before purchase) details of the cost and car specification, (to be followed after purchase by a copy of the receipts)
or (where funds are not required before purchase) a copy of the receipts.

Non-Motability car, electric scooter and wheelchair purchase and maintenance (MC) –

maximum for purchase £1,000 every five years

maximum for maintenance £500 per year except in year of purchase

Grants for applicants who are not in receipt of the higher rate of DLA, (therefore cannot lease a Motability car), where a medical practitioner confirms mobility difficulties create a need for transport.

Applicants send:

- a. a letter detailing the request
- b. *either* (where funds are required before purchase) details of cost (usually the order form), (to be followed after purchase by a copy of the receipts)
or (where funds are not required before purchase) a copy of the receipts.