



THE MACFARLANE TRUST

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Mr

JC/0701/1888

07 January 2005

Dear

I know you heard the discussions about gym membership and receipts/grants/loans at the Partnership Group, but thought I ought to respond formally to your letter of the 7th December. Sorry it has taken so long.

Unless I am specific, about meaning something different, whenever I refer to a year I literally mean twelve months – if a grant is awarded on 1st February 2005 then the year will be up on January 31st 2006.

When trustees ask me to point out that a grant is for this year only, I think they are trying to make sure that you don't assume you will get another grant next year, just because you got one this year.

That would be a perfectly reasonable assumption – if we think that gym membership is a good thing for you now then why wouldn't we make another grant? The reality is that we receive far more in the way of application than we have funds, and trustees often have to make very difficult decisions about which of these very important and often compelling applications should receive funding.

It is, though, worthwhile applying again next year, particularly as, if I remember correctly, you had a very good supporting letter from your doctor stressing your health improvements since you started regularly attending.

I am sorry if it sounds a bit like a lottery, whether you get funding for something or not, but in some ways it is, because trustees cannot predict what applications will be received and registrants' health can vary so much. As an example we may suddenly receive a few applications from registrants whose health has seriously declined and they all need adaptations to their homes each costing thousands of pounds, which depletes the amount left to deal with the other applicants. Add to this that the number of applications we receive is increasing, (I suspect not least because we are getting better at telling registrants that they can apply for help).

I think the trustees accept your point about different gyms providing very different facilities, and as an example there was a discussion on the fact that some local authority gyms are excellent, whilst others are not very pleasant places to visit.

Yes thank you, the receipts showing your direct debit will do nicely.

I hope that the discussions at the meeting have dealt with the issue of mentioning the conversion to a loan if receipts are not received. We now have a three stage process, and the following are the extracts from the first two letters (thankfully we have not yet had to go as far as converting to a loan). Would you mind checking these and suggesting any improvements you think we can make?

Grant offer letter:

"I am pleased to inform you that a grant of £? has been awarded towards ?.

This sum will be credited directly to your bank account, and should be cleared within seven working days.

The Trust is required by its auditors to provide proof of grant expenditure, so I would be very grateful if you could send a copy of the relevant receipt(s) to me, in the enclosed FREEPOST envelope. (Please do not send the original as it may form part of your guarantee and Royal Mail admits to losing over 2 million letters a year.)

It is important that we receive the receipt(s) within the next month. If you have any problems providing the receipts, please let me know, so we can identify an alternative acceptable to our auditors."

Follow-up letter

"Further to my letter of ? finance I have noticed that we have not yet received the receipts for grant.

As I mentioned in my original letter, the Trust is required by its auditors to provide proof of grant expenditure. This is not a question of whether we trust you to spend the money properly, it is more to prove to the auditors that there has been no fraud or misuse of our funds by staff or trustees.

If you have not yet spent the money or have any problems providing the receipts, please let me know, so we can extend the deadline on our computer system for receiving the receipts or try and identify an alternative acceptable to our auditors.

I have enclosed a FREEPOST envelope for you to send copies of your receipts when they are available. (Please do not send the original as it may form part of your guarantee and Royal Mail admits to losing over 2 million letters a year.)"

Sorry about the length of my reply, I seem to have gone on a bit.

Many thanks for your help with the letters.

Yours sincerely,

Jude Cohen

Head of Support Services

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