

Rotary Club of Worcester Sawyer Trust

Registered Charity Number 511276

Who can the Trust help?

We are able to help women aged 50 years and over who live in the United Kingdom and who are in need by virtue of financial hardship, sickness or poor health.

How can the Trust help?

We make a financial payment to cover an essential need approved by the Trustees. If you are awarded a grant you will NOT be able to apply for a further grant for a three year period.

How can I apply to the Trust?

WE ONLY ACCEPT APPLICATIONS THAT ARE SUPPORTED BY A REFERRING ORGANISATION, for example, Citizens Advice Bureau; Age UK; another charity; your housing association debt officer.

Your REFEREE, a member of the referring organisation, needs to have met with you to learn about your financial situation. An individual cannot be a referring organisation. Your referee must sign the application following a review of your affairs.

If you are not sure about who can be a referee, please contact us.

How is the payment made?

We do not pay cash directly to applicants. When we make a grant for goods or services, we pay directly to the suppliers.

What sort of things does the Trust pay for?

We will normally consider applications for financial assistance towards the following:-

1. Domestic appliances - {fridges, freezers, washing machines, cookers, etc.}
2. Rent or accommodation arrears.
3. Payment of debts incurred with utility bills.
4. Medical & health aids – (contribution towards wheelchairs, stair lifts, aids to general living).

What sort of things will the Trust not pay for?

We will not consider applications for financial assistance towards the following:-

- Cash payments to individuals; Luxury goods or services; Parties or outings;
- Carpets; Building repairs and maintenance; Legal expenses; Credit card debt;
- On-going or recurring costs.

What about things not listed above?

This guidance is not exhaustive. Please contact us for advice if the issue is not covered above.

GUIDANCE NOTES FOR COMPLETING THE APPLICATION FORM

Your application **MUST** be supported by an organisation that understands your personal and financial situation. Both you and a person from the organisation, your Referee, must sign the form and it is recommended that they help you to complete the form, or complete the form for you. **Your referee must be prepared to continue to support you because we will contact them if we need further information.**

In order to make a decision on the granting of assistance, the Trustees need a full understanding of the financial circumstances of the applicant and the household they live in. This means the Trustees must have a **FULLY COMPLETED** application form and **DOCUMENTARY EVIDENCE** of the financial amounts entered on the form.

Please send **COPIES** of the required documents; the Trustees do not need originals.

All applications must be accompanied by a Bank Statement (or Post Office Account Statement) to show your regular income and expenditure for at least 2 recent months **and a Rent Statement** showing at least 4 recent months. If you cannot provide a bank or rent statement, please explain why and send other evidence of income and expenditure. Please do not leave any sections of the Application Form blank - {write "N/A" or "none" where a section does not apply so that the Trustees know that you have completed the section.)

Decisions on the granting of assistance are taken at regular meetings of the Board of Trustees. Awarding of grants depends a) on the assessment of the application and b) the funds available for grants at the time of application.

Decisions can be made quite quickly but your referee may be asked to provide additional information if the required documentation is incomplete or unclear and this will delay your application. If this happens, **you and your referee will have 6 WEEKS** to provide the additional information requested by the Trustees.

We have tried to keep the form as simple as possible. **This does mean that you might have relevant information for which there is no specific section. Please give us details of this on Page 6 of the Application Form.**

Applications can only be made by post to the following address:-

SAWYER TRUST, PO BOX 797, WORCESTER, WR4 4BU

Please use the correct postage - large letters up to 100 grams need a large letter stamp - there are additional charges above 100 grams.

We will process your application as soon as we can. **Your referee** will normally be sent an acknowledgement that we have received your application but if it is received close to a meeting, we may delay sending the notification pending a decision. Only contact us about an application if you have not heard from us within four weeks of its submission.

We cannot be contacted by telephone.

WORCESTER ROTARY CLUB SAWYER TRUST Charity registration number 511276 GRANT APPLICATION FORM	Official use only	
	Application Ref	
	Date received	
	Approved	

By submitting this completed form to the Sawyer Trust, you are providing the Trust with personal information and you give the Trust permission to use this in accordance with the Worcester Rotary Sawyer Trust Privacy Notice provided at the end of this form.

Section 1.0 APPLICANT INFORMATION

Title (Miss/Mrs/Ms etc)	Surname	Forenames

Date of Birth	Age at application	Marital status; single/married/divorced/widow/separated/with partner

Applicant's Address	Postcode
	Telephone number(s)
	Email address

Section 2.0 THE GRANT REQUESTED

Amount of Grant applied for	What would you use a grant for?

Section 3.0 THE REFERRING ORGANISATION

Name of referring organisation

Section 4.0 MORE ABOUT YOU. Please explain the problems that have caused you to need a grant (these might be health issues, benefit changes, life changes etc.) In each case say how long ago they happened,

Section 4.1

Have you told us when each of these things happened?

YES/NO

Section 4.2 **Details of all other people living in the property**

Name

Age

Income

Relationship to the applicant.

Contribution to household funds

Other important facts about them

Section 5: FINANCIAL DETAILS:- You must provide a Bank or Post Office statement that shows all payments received and payments out or withdrawals for at least 2 recent months.

Please confirm that you have included the Bank Statements required	Yes / No
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Section 5.1 We require a full understanding of all you have to live on. In each case, tell us the amount of income, the type of income such as Earnings, Pension, Universal Credit (UC) , Employment Support Allowance (ESA), Job Seekers Allowance (JSA), Tax Credits, Disability Living Allowance (DLA), Personal Independence Payment (PIP)

Evidence of income for at least 2 recent months must be provided on the bank or post office statement you are sending.

Type of income (examples above)	Amount received	Is this per week, per month or per year?

Section 5.2 We need to have a clear understanding of your housing costs. A rent statement covering at least 4 months must be submitted.

What is the weekly rent charge on your property??	
How much Housing Benefit goes into your rent account each week?	

If you receive Universal Credit, how much do you receive for housing each period of 4 weeks?	
Is your UC housing paid(i) into your bank account or (ii) directly to your landlord?	

Have you supplied a rent statement showing 4 months?	YES / NO
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Section 5.3 We need to know if you have other Assets or Liabilities not described above. Please cross out any that do not apply and give evidence for those that do apply.

Asset	Value of asset	What evidence are you supplying? (Copies only)
Estimated Value of your home (if owned or part owned)		
Savings or investments		

Liability	Amount owing	What evidence are you supplying? (Copies only)
Mortgage owing on property		
Credit card debts		
Outstanding loan amounts or other debts		

Section 6.0 Details of Referring Organisation listed in Section 3.0

Name of Organisation			
Address			
Postcode		Telephone No	
Name of referee			
Position			
Email address			
Declaration	I confirm that I have reviewed this application and that, as far as I am aware, it is an accurate representation of the applicant's affairs. I am willing to support the applicant further if necessary.		
Signature			

Section 7.0 DECLARATION

Checklist	Cross out as appropriate
I have read the instructions in the shaded boxes and placed an answer in each white box	YES / NO
I have provided a bank statement and the evidence requested at each section or I have explained why I have not provided it.	YES / NO
This is my first application to the Sawyer Trust	YES / No, I applied in (date)
SIGNATURE : This should be the applicant or a person holding power of attorney for the applicant. I confirm that I have read, understood and accept the Worcester Sawyer Trust Privacy Notice included with this Application Form.	
	Date

Please return this form with its supporting documents to:-

**Sawyer Trust
PO Box 797, Worcester, WR4 4BU**

Please use correct postage – large letters up to 100 grams require a large letter stamp, with additional charges above 100 grams.

All the information you have provided will be treated as confidential

If you have provided enough information for the trustees to understand your situation, your application will be considered at their next meeting.

Your application will be delayed If the trustees have to ask for further information,

Any further personal information which may help the trustees in considering the application may be provided – please use Page 6 overleaf or add as many pages as you need . (This may included details of weekly expenditure / medical treatment / time for recovery from injury or illness etc.)

Page 6:- Any additional information you need to include so that we do not have to delay your application while we ask for more information.

Worcester Rotary Sawyer Trust

PRIVACY NOTICE

Sawyer Trust respects your privacy and is committed to protecting your personal data and being transparent about how we collect and use your data. We will comply with any data protection legislation currently in force. This Privacy Notice explains how we use any personal information that you provide or which is provided to us by third parties

1. Important Information about who we are

We are the Worcester Rotary Sawyer Trust, a registered charity (registered in England No.511276). The charity is managed by Trustees who are appointed by The Rotary Club of Worcester.

Our correspondence address is:

Sawyer Trust
PO Box 797
Worcester
WR4 4BU

We can be contacted by email at: info@sawyertrust.org

You have the right to make a complaint at any time to the Information Commissioner's Office (ICO), the UK's supervisory authority for data protection issues (www.ico.org.uk). We would, however, appreciate the chance to deal with any concerns you may have before you approach the ICO, so please feel free to contact us first.

Changes to the Privacy Notice and your duty to inform us of changes

This Privacy Notice was last updated on **25th May 2018**.

It's important that the personal data that we hold about you is accurate and up-to-date. Please keep us informed if your personal data changes during the duration of your relationship with us.

We may update this Privacy Notice from time to time. If we make significant changes we will contact you to confirm that changes have been made.

2. The personal data we collect from you, as an applicant for a grant from this charity, how we collect it and how we use it

This section explains what information Sawyer Trust collects, keeps and stores about you and/or other people living with you, if you apply for a grant from us, and your rights in relation to that information. You may also be given information by a person or organisation assisting you with your application, about the information they keep about you and what happens to it.

What information do we collect?

Sawyer Trust holds personal information about you which may include your name, date of birth, address, phone number, gender, financial status and whether you have a disability or poor health, so that we can make sure our services meet your needs.

Why do we collect your information?

Under the General Data Protection Regulation (GDPR), and the UK's Data Protection Bill, we must have a legal reason to keep your data and process it. When Sawyer Trust provides you with a service, we will process your data under legitimate interest or public task. We do this because we cannot provide a service to you without using your personal information.

Who do we share your information with?

We share your data within Sawyer Trust with people who need to see it in order to provide you with a service. We may also share it with external agencies that inspect our work. We may provide your name, home address and phone number to external contractors to enable them to deliver goods and/or services provided to you by us. We may be required to share your data with other agencies for legal reasons, a court order for example, or with other organisations if we believe that you are at risk of harm or may harm someone else.

Who is responsible for your data?

The Trustee Body of Sawyer Trust is responsible for your data. The Data Controller of Sawyer Trust is Paul Denham, who can be contacted by email to DC@sawyertrust.org. Information shared with external organisations will also be the responsibility of those organisations. You can ask those organisations how to contact their Data Controllers.

How long do we keep your data?

Sawyer Trust will keep your data for a specified period of time once we have finished working with you. Depending on our legal obligations this will be a minimum of 6 years.

How can you access your data? (Subject Access Requests)

You may request a copy of the information that Sawyer Trust holds about you and we will provide this to you within a reasonable time.