

Taunton Heritage Trust

Huish Homes Magdalene Street Taunton Somerset TA1 1SG

Tel: 01823 335348 (9am – 12 noon)

E: info@tauntonheritagetrust.org.uk

W: www.tauntonheritagetrust.org.uk



GRANTS TO PROVIDE “RELIEF IN NEED” - GUIDANCE FOR REFERRAL AGENCIES

October 2021

In order to ensure our grant scheme continues to reach those most in need and due to the financial impact of the Coronavirus pandemic we have had to make some changes. Please read these guidance notes carefully before completing the application form. Any queries please pick up the phone.

1. Who can apply?

Recognised referral agencies only may apply on behalf of applicants, who must be living in the historic Borough of Taunton Deane. **Applicants must not complete the forms.**

2. Who can benefit?

Persons living in the historic Borough of Taunton Deane who are in conditions of need, hardship or distress and who have not had an application submitted on their behalf in the previous 12 months (unless the grant is for school uniform, when the Trust will consider a second grant request if it is for different children in the family).

Grant applications will not be considered for current or ex-Residents of Taunton Heritage Trust who are in arrears to the Trust or who owe money to the Trust.

3. The Trust will not give grants:

- To take the place of public/statutory funds. The Grants Panel may consider supplementing individuals in receipt of benefits provided need is proven.
- For school trips, school bags, stationery or other non-essential school items (see paragraph on specific items below).
- For retrospective applications.
- For further/higher education course fees or books/materials.
- For deposits for accommodation.
- For funeral expenses.
- For bankruptcy costs.

4. How to apply:

4.1 Referrer (and not applicant) to complete the application form which can be downloaded from our website www.tauntonheritagetrust.org.uk

Providing Sheltered Accommodation and helping those in need in Taunton Deane
Registered Charitable Incorporated Organisation (CIO) 1177162

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- 4.2 The individual/family circumstances should be described in detail. The need and how the grant would benefit the applicant should also be fully explained. The Grants Panel must be satisfied that the request is for an **essential need**.
- 4.3 Referral agencies must cost all items, with the exception of white goods and furniture, which the Trust will cost.
- 4.4 If the request is for a contribution towards an item please explain fully how the balance would be met.
- 4.5 The form must be signed by the referral agency officer responsible for submitting the form and for monitoring the use of any grant awarded.
- 4.6 The referrer **must** get the applicant to read the Data Protection Statement at section 9 on the form and sign to give their consent. Without this consent we are unable to consider the grant request. The Data Protection Statement is also given at the bottom of this document.

We appreciate that sometimes it may be difficult to get an applicant to sign the form. However, we have a legal duty to gain consent from the applicant to use their data, so we must have this signature rather than just a typed name. We will accept a signature from the applicant on a piece of paper with the wording of section 9 on the application form (either typed or handwritten) accompanying it. This can then be emailed to us as a photo of the piece of paper. It is important that if you are having problems getting a signature that you contact us before submitting the form (email info@tauntonheritagetrust.org.uk) rather than leaving it blank or typing in a signature, as this will be rejected. We can then give suggestions for obtaining a signature that meets our requirements.

- 4.7 **Signed and scanned application forms should be submitted to us by email to info@tauntonheritagetrust.org.uk. When submitting applications via this route, please ensure that you comply with your organisation's GDPR regulations for sending personal information.**

5. **Specific items must be itemised and costed and the following noted:**

- 5.1 **Furniture** – will be costed by us via the Home Furniture Services Trust Store, also known as Furnitrust, (HFST). If successful, a letter of introduction will be sent to the applicant via the referrer and the HFST will invoice us direct. There is a three month limit for obtaining the goods.

5.2 **Free standing white goods (fridges, freezers, cookers and washing machines etc)**

We may only be able to grant for one electrical appliance per applicant. Please therefore list requested items in order of priority.

Electrical appliances will be supplied and installed by the Trust through Hatchers of Taunton – we will cost these items. If a cooker is required please state if it is electric or gas.

If a request includes an electrical appliance and flooring we may only be able to grant for one of these. Please therefore list items in priority order.

A microwave combination oven would normally be considered as an alternative to a cooker if the applicant is a **single person with no dependents**. We would also consider a mini counter top oven with hot plates but referrers would have to source and price this themselves and give their organisation's bank details on the application form so that payment could be made to the referral agency via bank transfer. Please make it clear on the application form which cooking appliance is requested for a single person.

*A washing machine would only be considered if there were no communal laundry facilities or access to a laundrette.

A tumble dryer will only be considered if proven exceptional need is clearly explained on the application form

The following sizes of appliance **only** will be considered unless there are exceptional circumstances that must be fully explained on the application form, and in **white only**:

	Width
Washing machine	60cm (see* above)
Tumble dryer	60cm (see* above)
Under counter larder fridge	55cm
Under counter freezer	55cm
Fridge freezer	55cm
Gas cooker	50cm
Electric cooker	50cm

5.3 Any type of flooring

We will consider requests for flooring for up to two priority areas only but may only be able to grant for one. Please supply two written quotes on carpet shop headed paper specifying cost for supply, giving the areas in order of priority. Both quotations should be for carpeting from the Big Hit Stain Safe Range only or similar approved. All carpet stores should be able to supply this range.

Laminate or vinyl flooring will only be considered in EXCEPTIONAL CIRCUMSTANCES, provided a detail explanation of need is fully explained on the application form.

If a request includes flooring and an electrical appliance we may only be able to grant for one of these. Please therefore list items in priority order.

If successful, payment for flooring will be made via bank transfer to the referrer's organisation, using the details supplied by the referrer on the application form. We will not issue a cheque and will not make the payment to either the applicant or the carpet store.

Applications for flooring will only be considered if the Agreement at the end of the application form is signed by both the applicant and the referrer.

5.4 Disability aids, home adaptations for disability, mobility scooters – please give details of applications made to other agencies such as Somerset West and Taunton Council, or other charities etc. Applicant's savings and amount they are to contribute must be shown. The Trust will only give a contribution to mobility scooters dependent on the applicant's circumstances. If successful payment will be released via bank transfer to the referrer's organisation, using the details supplied by the referrer on the application form, once we have **written confirmation** from the referrer that the balance has been obtained.

5.5 School uniform – basic clothing essentials only, (including school shoes, PE kit and PE shoes) will be considered.

- please cost all items from the Taunton Uniform shop in East Reach, Taunton. Referrer to obtain a price list from the shop, and tick items requested and attach to form. Please total all amounts, ensuring totals are correct. Successful applicants will receive an introductory letter,

with the supplied price list, to be taken to the shop to obtain the goods (with a one month deadline). The shop will invoice us direct.

- if uniform is to be obtained from another source, as it is not supplied by the Taunton Uniform shop, please make this clear on the application form. Attach a list from the supplier with the items requested clearly marked, costed and the amount requested totalled. Payment made via bank transfer to the referrer's organisation, using the details supplied by the referrer on the application form. We will not make a payment to the applicants or other third parties.
- a maximum of 2 of each item requested, per child, will be considered unless there are exceptional circumstances, which must be fully explained on the application form.
- The Taunton Uniform shop will supply football/hockey boots and PE shoes but does not supply school shoes. If school shoes are requested please cost from another reliable source and give your organisation's bank details on the form so that we can make payment to your organisation via bank transfer. We do not make payment to applicants or other third parties.
- The Trust would not normally grant both a blazer and school coat for one child.
- Swimwear would only be considered if a compulsory part of the school curriculum.
- The Trust **will not consider** the following school items:

Stationery
Lunch boxes and water bottles
Book bags
Name labels
Optional school wear items
School socks (PE socks will be considered)
Shin pads/guards/gum shields
Any other non-clothing school items

5.6 Home Computers – will only be considered if proven exceptional need, e.g. disability/impairment is clearly explained on the application form.

5.7 Respite breaks - request for contributions towards breaks for respite will be considered on their merit. If a request is for a couple the Trust would only pay for one of them.

5.8 Nursery fees – will only be considered if proven exceptional circumstances are clearly explained on the application form.

5.9 Any other items – a request for any other items not listed above must be costed from a reliable source (such as Argos or other large store and the referral organisation's bank details (not the applicant's or other third party) given on the form so that payment can be made via bank transfer.

6. How to submit the application form:

Please see point 4.7 under 'How to Apply' above, which explains how you can email the application form to us (our preferred method). If you wish to post it please do so to the address at the top of the application form, in good time to meet the deadline given below. **We do not need multiple copies.**

7. Application forms will be rejected if:

- Handwritten
- Not signed by the referrer and/or applicant
- Completed by the applicant
- Incomplete (e.g. no carpet quotes, details of income, etc)
- Insufficient supporting information / essential need not demonstrated

- Unclear

8. Equality & Diversity

The Taunton Heritage Trust is committed to equal opportunities. Our aim is to ensure that anyone applying for a grant does not receive less favourable treatment on the grounds of age, disability, gender reassignment, marriage or civil partnership, pregnancy and maternity, race, religion or belief, sex and sexual orientation (defined as Protected Characteristics), and must not be disadvantaged in any way.

9. Data Protection

Taunton Heritage Trust will treat all personal and sensitive information on this form as confidential and will make appropriate measures to ensure this information is held securely. We will never give your information to anyone else for marketing purposes but may need to share your information with the following organisations to facilitate the administration of the grant:

Hatchers – a supplier of electrical goods

Taunton Uniforms – a supplier of school uniform

Any other supplier that the Trust may use in the future

Grant application forms will be held for a maximum of 2 years in secure storage and then will be shredded.

10. When will applications be considered?

The Grants Panel normally meets on the first Wednesday of every month. The deadline for receipt of applications is 12 noon on the previous Friday.

11. How will I be notified of the outcome of my grant request?

The outcome of your grant application request will be emailed to the referrer who has completed the application form, after the Grants Panel meeting, via the secure email system Egress Switch, in order to protect personal data. You will need to have an account with Egress to open the email. It is free and very easy to set up an account. Please visit <https://switch.egress.com/ui/registration/AccountCreate.aspx>

Grants are made at the Panel's discretion. There is no appeals process.

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