



## Benevolent Fund application form

Please note that the information you provide in this form will be used to process your application to the Benevolent Fund. This data will be supplied to the Trustees and the administrators of the Prospect Benevolent Fund who will process it in accordance with the Trust Deed, rules and policies of the Fund.

Your personal information will be collected, processed, stored and transferred to third parties to meet the legitimate interests of the Fund and in accordance with GDPR and the Data Protection Act 2018. Please see the Privacy Notice included with this form which outlines how your personal data will be used. For further information about Prospect's privacy policy please visit our website at [www.prospect.org.uk/privacy](http://www.prospect.org.uk/privacy)

**If you have any questions about the benevolent fund please call 0300 600 1878 or email [BenevolentFund@prospect.org.uk](mailto:BenevolentFund@prospect.org.uk)**

**Please submit your completed application form to [BenevolentFund@prospect.org.uk](mailto:BenevolentFund@prospect.org.uk)**

**Application Ref No 0 / ..... [Prospect use only]**

**See attached guide for assistance in completing form.**

### REFERRALS

If you are currently being supported by, or have been referred to this application by, a Prospect/Bectu employee or representative please can you provide their details below:

Name ..... Organisation .....  
Position ..... Contact number .....

Do you consent for us to speak to this individual about your benevolent fund application? Yes  No

### SECTION A – Applicant's personal details

A1. Full name (Mr/Mrs/Miss/Ms) .....

A2. Home address .....

Full postcode .....

A3. Telephone number ..... home  work

Mobile number ..... home  work

A4. Date of birth .....

A5. Email address ..... home  work

A6. Dependants - Please state the relationship (spouse/partner/daughter/son etc). Please indicate the age of any children but we do not need the names of children:

**SECTION B – Applicant’s eligibility details**

- B1. Name of Prospect/Bectu member/employee .....  
 (if different from applicant)
- B2. Prospect/Bectu membership or employee staff number .....
- B3. Relationship of applicant to member/employee: .....

**SECTION C – Details of application**

Please give a brief account of the circumstances which give rise to this application and indicate what assistance you are seeking (continue on a separate sheet if necessary and attach to the application).

**SECTION D – Applicant's financial details**

- D1. What is/was your *normal* monthly income? £.....
- D2. What is your *current* monthly income? £.....
- D3. If you receive benefit towards your housing costs please tick the appropriate box  
 Mortgage                   Rent                   Council Tax
- D4. What is your disposable income at the end of each month? £..... Detail below

| <b>Income</b>          | <b>Per month</b> | <b>Expenditure</b>           | <b>Per month</b> |
|------------------------|------------------|------------------------------|------------------|
| Salary                 | .....            | Rent (after benefit)         | .....            |
| Partner’s salary       | .....            | Mortgage (after benefit)     | .....            |
| Other income           | .....            | Endowment policies           | .....            |
| Maintenance            | .....            | Council Tax                  | .....            |
| Tax credits            | .....            | Ground rent                  | .....            |
| Child benefit          | .....            | Service charge/utilities     | .....            |
| Job Seekers Allowance  | .....            | Maintenance                  | .....            |
| Income support         | .....            | Contents/buildings insurance | .....            |
| Income from D3 (above) | .....            | Car/transport costs          | .....            |
| Other income           | .....            | Tel/mobile/TV/internet       | .....            |
|                        |                  | Other expenditure            | .....            |
| <b>TOTAL INCOME</b>    | .....            | <b>TOTAL EXPENDITURE</b>     | .....            |

**SECTION E – Details of applicant’s capital/savings**

E1. Bank(s): £..... Building Society: £..... Shares: £..... Other: £.....  
£..... £.....  
£..... £.....

**SECTION F - Details of applicant’s debts**

F1. Please list bank loans, hire purchases, credit cards or any other arrears with most urgent debts first

| Name of creditor | Purpose | Balance owed | Monthly £ | Next due |
|------------------|---------|--------------|-----------|----------|
| .....            | .....   | .....        | .....     | .....    |
| .....            | .....   | .....        | .....     | .....    |
| .....            | .....   | .....        | .....     | .....    |
| .....            | .....   | .....        | .....     | .....    |
| .....            | .....   | .....        | .....     | .....    |

**SECTION G – Supporting documentation**

Please ensure you have enclosed the following (tick as appropriate):

- All bank/building society statements from the last three months
- Copies of outstanding bills
- All payslip or pension advice from the last three months
- Other relevant supporting documents

**SECTION H – Details of other applications**

Please detail any previous applications made to this Fund or any other organisation.

|                           | Date applied | Outcome/amount |
|---------------------------|--------------|----------------|
| H1. Prospect/IPMS/EMA:    | .....        | .....          |
| H2. Other (please detail) | .....        | .....          |

**SECTION I – Financial counselling**

I1. Have you sought financial advice? YES  NO

If yes, please attach details of advice given and how you have applied this advice to reduce your outgoings.

I2 If not please give reasons: (Please note: Prospect can suggest free advisers if required)  
.....

**SECTION J – Applicant’s declaration**

J1. I confirm that all the information supplied is true and accurate to the best of my knowledge, and that no other relevant information has been withheld.

Applicant’s name or signature: ..... Date .....

**By signing this form, you agree that we can process your personal information for assessment of your application and payment purposes. Further information can be found at [www.prospect.org.uk/privacy](http://www.prospect.org.uk/privacy). Your personal information will be held by Prospect and will be treated as confidential with the appropriate security.**

**Please note that terms and conditions are subject to Parliamentary approval and may be subject to change.**





# Guide for completing the Prospect Benevolent Fund application form

## General eligibility

Members and staff of Prospect and their dependants are eligible to apply for financial assistance from the Prospect Benevolent Fund. Any decision on assistance will take into account an assessment of your financial position. You are also strongly advised in the cases of claims of financial hardship or difficulty to have sought debt and financial counselling before submitting a claim.

**The more comprehensive the information provided, the faster the claim can be actioned.**

## Data Protection Act

### Referral details

It is the preference of the Trustees that claims come through a union representative or branch. This will also aid the speed in which the claim will be actioned.

## SECTION A – Applicant’s personal details

A1 to A5: This information will enable the Benevolent Fund administrators to make contact to confirm or clarify some points or to seek additional information. It is important that these details are clear and concise to enable any follow-up action.

A6: This information will ensure that the Trustees of the Fund are able to understand the level of financial dependency that rests upon the applicant. It is in the applicant’s best interests that all dependent family members are listed.

## SECTION B – Applicant’s eligibility details

B: This information will allow the Benevolent Fund to confirm that the application relates to an eligible member, employee or relative thereof.

## SECTION C – Details of application

The Trustees will be looking to the applicant to clearly demonstrate the financial hardship case for awarding funding from the Benevolent Fund. That funding can take the shape of a grant or a loan up to a maximum of £2,000 for any one individual. It has to be pointed out that this is not £2,000 per claim but normally £2,000 in total from the fund per applicant no matter how many separate claims are made.

The applicant should explain the circumstances that have led to the need for this application as clearly and concisely as possible to allow the Trustees to assess the merit of the application and to gauge whether the assistance being sought is appropriate and can be granted within the rules of the fund. Please avoid the use of abbreviations and use a separate sheet if required.

## SECTION D – Applicant’s financial details

D1 to D2: This information will enable the Trustees to understand any changes in work related income. This must include any investment income under ‘Other’ in D4.

D3: This information will enable the Trustees to understand what impact any change in circumstance has had on the applicant’s housing costs and if any external assistance exists.

D4: The Trustees have to take the available spending power an individual has at their disposal into consideration when assessing an application. For a proper assessment as much detail as possible should be provided to explain what, if any, disposable income the applicant may have at the end of each month.

## **SECTION E – Details of applicant's capital/savings**

E1: This information will provide the Trustees with an understanding of what financial flexibility the applicant may have. Details of all accounts held must be provided or the application may be refused.

## **SECTION F – Details of applicant's debts**

F1: In most cases when awarding a grant Trustees would prefer to target the most serious areas of debt directly with a cheque made out to the actual creditor. It is important, therefore, that any debts are listed in order of priority that would allow the appropriate targeting to take place should a grant be authorised. Debt counselling advice can give good guidance here.

## **SECTION G – Supporting documentation**

The Trustees need to see supporting documentation before they are able to come to a final decision on any application. To limit the amount of follow up action that may be needed it is important that documentary evidence is provided along with the application.

## **SECTION H – Details of other applications**

H1: The Trustees have an obligation to keep within the rules of the Fund and ensure that the normal maximum grant allowed is not exceeded. As this maximum applies to each eligible individual applicant, previous applications to the Prospect or its predecessor IPMS or EMA Funds should be listed.

H2: The Trustees will wish to take account of any assistance applied for or received from other organisations. The applicant is to list all other applications made and detail any grants authorised or expected decision dates.

## **SECTION I – Debt counselling**

I1: You are also strongly advised in the cases of claims of financial hardship or difficulty to have sought debt and financial counselling before submitting a claim.

I2: Usually an individual applying for assistance from the Fund would be receiving some personal support. In the case of a Prospect member it may be a lay representative or a paid official of the union. A welfare officer, debt counsellor, Citizens' Advice Bureau counsellor, etc can also provide support depending on the circumstances.

## **SECTION J – Applicant's declaration**

J1: The applicant is to sign that the information provided in support of the claim is the truth and covers the full picture.

### **Important notices:**

- a) All information supplied on the application form will be handled in the strictest confidence. Prospect Benevolent Fund takes your privacy very seriously and will never disclose or share your data to a third party, unless required to do so by law. We only retain your data for as long as is necessary.
- b) Please note that the Benevolent Fund admin staff carry out work on behalf of the Trustees and only implement decisions. Any applicant deemed to be abusing admin staff in any way are likely to have their application terminated.
- c) For further information about Prospect's privacy policy please visit our website at [www.prospect.org.uk/privacy](http://www.prospect.org.uk/privacy).

Prospect's Data Protection Compliance Officer can be contacted on 0300 600 1878 or by email at [datacompliance@prospect.org.uk](mailto:datacompliance@prospect.org.uk)

### **Change of history record**

| Issue     | Description of change | Approval | Date of issue |
|-----------|-----------------------|----------|---------------|
| Version 1 | Initial issue         | T Hunt   | 6 August 2018 |