

# Rotary Club of Worcester Sawyer Trust

Registered Charity Number 511276

## Who can the Trust help?

We are able to make a grant 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 I apply to the Trust?

We only accept applications on our official form supported by a REFEREE from an organisation such as Citizens Advice, Age UK, another charity, your housing association or a debt advice organisation.

## 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 arrears.
3. Help with debts for gas, electricity etc.
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.

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Decisions on the granting of assistance are taken by the Board of Trustees who are all unpaid volunteers.

Decisions can be made quite quickly **but only if the Application Form is fully and clearly completed using the guidance below** so that the trustees can understand the applicant's situation.

## HOW TO COMPLETE THE APPLICATION FORM

Your application must be supported by a referee who is allowed to help you to complete the form or to complete it for you.

Your referee must (i) understand your personal and financial situation and be (ii) willing to continue to support you in the future.

In order to consider an application, the Trustees need a full understanding of the financial circumstances of the applicant and the household they live in.

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**All applications must be accompanied by a Bank Statement** (or Post Office Account Statement) that shows your income and expenditure for at least 2 recent months.

**Applications for help with rent arrears** must be accompanied by a rent statement showing at least 4 recent months.

**Applications for help with utility bills** (gas, electricity or water) must be accompanied by your most recent utility bill.

**Applications for white goods must state exactly why you need each item at this time.** (For example:- "it has stopped working", "it is leaking", "there is not one of these in my new home".

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

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**Please read and complete the Application Form fully, showing that you and your referee have tried to follow these Guidance Notes with care**

**Our trustees are volunteers and will deal with your application quickly if they can.**

**BUT your application may have to be rejected if it has not been completed as fully and carefully as possible.**

<b>WORCESTER ROTARY CLUB</b> <b>SAWYER TRUST</b> Charity registration number 511276 <b>GRANT APPLICATION FORM</b>	<b>Official use only</b>	
	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	How old are you?	Marital status

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

### **Section 2.0 THE GRANT REQUESTED**

Amount of Grant applied for in £	What do you want the grant to pay for?

### **Section 3.0 THE REFERRING ORGANISATION**

Which organisation is your Referee from?

## Section 4.0 WHY DO YOU NEED THIS GRANT?

Please explain fully why you need a grant. (for example, “my washing machine has broken down and I cannot afford .....” or “I have got behind with my rent because...” or “I lost my job through Covid and ...”) Please tell us when each of these things happened so that we can understand your need. If you need more space, please continue on Page 6.

### Section 4.1

<b>Have you told us when each of these things happened or started to happen?</b>	
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### Section 4.2 Details of all other people living in the property

<b>Name</b>	
<b>Age</b>	
<b>Income</b>	
<b>Relationship to the applicant.</b>	
<b>Contribution to household funds</b>	
<b>Other important facts about them</b>	

## Section 5: FINANCIAL DETAILS:

You must provide a Bank or Post Office statement that shows all payments in and out for at least 2 recent months.

Have you included bank statements for at least 2 recent months	
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### Section 5.1 We require a full understanding of everything 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) etc

Type of income (Examples above)		Amount received (Say if this is /week, /month or /year?)

### Section 5.2 We need to have a clear understanding of your housing costs. A rent statement covering at least 4 recent months must be submitted if you are applying for a grant for rent arrears.

What is the weekly rent charge on your property in £?	
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?	
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**Section 5.3 Do you have other Assets – i.e., Savings or valuable property?  
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 or valuable property.		
Savings or investments		

**We also need to know if you have other Liabilities – i.e., debts or loans.**

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 <small>Please ensure that this is legible.</small>			
Declaration	<p><b>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.</b></p>		
Signature			

## Section 7.0 DECLARATION

Checklist	Answer Yes or No as appropriate
I have read the instructions in the shaded boxes and placed an answer in <b>every</b> white box	
I have provided a bank statement and the evidence requested at each section or I have explained why I cannot provide it. <b>(It may not be possible for us to make a grant without it.)</b>	
This is my first application to the Sawyer Trust	<b>YES</b> / No, I applied in ..... (date)
<b>SIGNATURE:</b> This should be the applicant or a person holding power of attorney for the applicant. <b>I confirm that I have read, understood and accept the Worcester Sawyer Trust Privacy Notice included with this Application Form.</b>	
	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,

## **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.**

1.) Your income declared in Section 5.1 should match the in payments to your bank account. **If there are other large occasional payments into your account that are not entered in Section 5.1, please explain them below.**

2.) If there are frequent or regular bank transfers into and out of your account, please help us to understand why these are happening.

3.) Please use the space below to continue Section 4.1 or to add anything else that will make it easy for trustees to make a grant.



# 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](mailto: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](http://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 **22<sup>nd</sup> May 2023**.

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.

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### **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 Act, 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](mailto: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.