



The Edridge Trust Guidelines

FOREWORD

by Chair of Trustees

Welcome to the guidelines and information for Edridge Representatives. As Trustees, we are very grateful to you for the work you do in assisting applicants, assessing their needs and supporting them during times of trouble. I am sure you are aware that the Edridge Fund is needed now as much as ever.

We are very grateful to Napo for their ongoing financial support. However, we are always in need of additional funds raised from sponsored events, donations in lieu of gifts, or regular donations.

Whichever way money is given to Edridge, we would encourage everyone to ensure a Gift Aid form is completed - we can then claim back the tax already paid but this costs the donor nothing extra.

We hope your local Napo branch will have a regular Edridge item on the agenda at all branch meetings. This can be an opportunity to remind people about Edridge - how assistance can be obtained and how they can help the Fund.

On behalf of the Trustees, may I express our thanks to all of you for the valuable work you do for the Fund. We hope you find this booklet of use in carrying out that work.

THE HISTORY OF EDRIDGE

The National Association of Probation Officers was inaugurated in 1912 with its first Chair being Sydney Edridge (Clerk to the Justices at Croydon). Probation Officers received regular salaries for the first time in 1926, though these were very low.

The Edridge Benevolent Trust was set up in 1934 in response to real need, its aim being 'to alleviate cases of distress amongst serving and retired Officers'. Since its inception, the Trust has been an independent Registered Charity and Napo has been responsible for appointing the Trustees. In 1990, in order to increase the categories of people eligible to benefit, a new trust fund, The Edridge Fund, was set up replacing the old trust fund.

ORGANISATION OF THE FUND

The Trustees

The Trustees are appointed by the National Executive Committee of Napo for a period of five years and are legally responsible to the Charity Commissioners for the administration and use of the Fund. They are responsible to the Service and the applicants for the appropriate making of grants, the support of those in need and the good standing of the Fund. They meet five or six times a year to consider new referrals and review current cases. Every application is dealt with in the strictest confidence. At their meetings, the trustees also receive and report on the Fund's financial situation.

1. The Trustees would be unable to fulfil these responsibilities effectively without the Branch Representatives. It is your ability to present an approachable Edridge image and to accept the quite difficult role of being a 'help' to colleagues, which will enable the Fund to meet all the needs existing in the Service.
2. The Trustees have been able to develop a liaison with NPD and CAF/CASS, following reorganisation, to ensure management support for the Fund and local representatives. Chief Officers can make a valuable contribution by demonstrating support for the Fund, allowing area communication systems to be used for publicising the Fund.
3. The work of the Trustees has increased over the years and the management of the Fund has become more complex as the demands made on it have increased. This means that administration costs have risen accordingly and, therefore, any additional fundraising to enable the Charity to help those in need is vitally important and much appreciated by the Trustees.

The Representatives

Each Branch elects its own Edridge Representative. This Representative is usually the first point of contact for anyone wishing to use the Fund.

The Representative is also encouraged to offer personal support should this be welcomed by any applicant. This role is, therefore, of vital importance to the Branch and to the operation of the Fund. The Edridge Representative and Trustees treat every application in the strictest confidence. These are considered at regular meetings throughout the year or, in response to crises, between meetings.

Most referrals for help are channelled through representatives and they are responsible for obtaining details of the applicant's financial situation and assessing need. Often their role develops into that of a counsellor. Their support enables many serving staff to cope with their problems and free them to offer a better service to clients and the Courts. Care must be taken not to give advice about issues on which professional advice should be sought.

This caring role is also important when the applicants are retired members of the service or when a serving or retired member of the service dies.

Edridge representatives also have the difficult task of stimulating colleagues' interest in the Fund. If colleagues do not give adequate financial support, the Fund cannot continue to make grants to those in need. Many representatives appoint deputies to assist them. It is important to gain the support of the branch and the top management. Knowledge of local and national charities can also be helpful. (See Appendix 3 for a selection of Charities)

National representative conferences are usually held bi-annually and the mutual support gained at these meetings is most important. Regional meetings can be organised by the appropriate Trustee should this be felt to be useful.

WHO IS ELIGIBLE?

1. All employees of the Service who are eligible to be members of Napo can benefit.
2. Retired Staff.
3. Bereaved Partners, Spouses and Dependents of 1 and 2.

Edridge operates only on the basis of demonstrated need. Applications are assessed individually and grants are designed to help towards the applicant's specific requirements.

TYPES OF GRANT

1. Special Grants

These are the main type of grants made, often at times of financial crisis, to help those who face financial difficulties such as: accident/illness/debt/relationship breakdown.

Normally applicants contact either their local rep or the Edridge office. In each case an application form must be completed and is based on financial need (see application procedure).

Summary

- a) Confidentiality must be ensured
- b) The applicant must demonstrate financial need
- c) Reps suggestions relating to grant level are welcome
- d) It is important to note that Trustees can, in times of emergency, make an immediate grant, often within 24 hours. This is called an 'emergency special'.

2. Christmas Grants

The Trustees now feel that Christmas grants are perhaps outdated and that, should an applicant need a grant, it should not necessarily be related to Christmas. In the past the Christmas grant has been seen as something of a gift, which, unless there is financial need, should be discouraged. For this reason we have insisted that reps contact each person in their region receiving a Christmas Grant to carry out a personal means test (although not necessarily filling in an application form). We have also been happy to send a Christmas Card from the fund, rather than financial gifts and this has been quite successful.

Summary

- a) Each year we will continue to insist that every person who has been recommended for Christmas grant be contacted and a financial means test be undertaken.
- b) We do not encourage any further applications for Christmas (gift) grants as such.
- c) If reps should wish to send Christmas cards, the fund will be happy to arrange to send these cards without necessarily the thought of a financial gift.

3. Bereavement Grants

Bereavement grants can be made to the dependent of a serving or retired member of the service.

These grants were originally intended for cash at a time when probate had occurred and finances were often frozen. The original grants were intended to defray the cost of a funeral and, at one stage, would have been quite a large part of funeral expenses. Nowadays funerals are usually very expensive and fortunately most people have made provision during their lifetime. Thus the bereavement grant is intended now to provide a small amount of cash in case of immediate need. The question of longer term need can then be assessed by the rep and further grants made if necessary.

Summary

- a) On each occasion, when we are notified of bereavement, we ask the rep to enquire sensitively as to the financial circumstances of the bereaved. It can then be gauged whether a grant is necessary.
- b) Should a grant be necessary, then £100 will normally be sent.
- c) Reps should follow up, at a suitable time after the death, to assess any further need complete an application form, which can be considered by the Trustees in the normal way.

APPLICATION PROCEDURE

Referrals can be made by the applicant or by a representative/colleague with the applicant's permission. Some applicants write directly to the Trustees. Ideally, the local representative should deal with all referrals, initially, in order to obtain a full picture of the position and give assistance, if necessary, with completion of the Application Form (Appendix 4).

Applications should then be forwarded to the Secretary of the Edridge Fund:

Richard Martin
Edridge Fund, The Limes, Lynn Road, Gayton, King's Lynn, PE32 1QJ

ASSESSMENT OF NEED

The Trustees are under a legal obligation, under Charity Commission Guidelines, to assess need. This is a very difficult and delicate task but Trustees must have details of the applicant's income, outgoings, interest from savings and debts so that there can be some consistency and fairness in the distribution of the Fund's limited resources.

Representatives are encouraged to make a recommendation on the amount of grant.

Occasionally the Trustees are unable to make a grant as sometimes the applicant is not eligible and at others it is felt that there is not sufficient financial need.

As people's circumstances can change the Trustees request that, if applicants are on a regular/termly grant, an annual review is made (see Types of Grant).

Confidentiality is essential. Applicants often need reassuring that the details of their predicament are forwarded only to the Trustees. Once this is made clear applicants are often able to share their anxieties more readily.

FINANCE

The Edridge Fund receives a regular quarterly donation from Napo. Although this helps the fund considerably, it still only represents a portion of the income required to meet the current level of grants, which increase year by year. Special events are organised locally or nationally for fund raising for Edridge.

In order for the fund to continue giving grants that really help to meet need, it is vital that individual colleagues continue to support it. This can be done in various way including:

1. Gift Aid A good systematic method of support by regular giving either via your County Treasurer or your Bank. By completing a Gift Aid form the donation can be increased by 28p for each £1 given. (See Appendix 6)
2. 50/50 Club A monthly draw for an annual stake (See Appendix 5)
3. Fundraising Supporting special fund raising events organised locally or nationally.

EQUAL OPPORTUNITIES STATEMENT

Adopted by the Trustees on 7th June 1991

Within the limits proposed by the Trust Deed regarding:

1. The categories of people eligible to benefit
2. The criterion of need

In particular the Trustees adopt the Napo Equal Opportunities Statement which says that there will be no discrimination on the grounds of race, colour, ethnic or national origin, religion, creed, sex, sexual orientation or marital status. The Trustees will endeavour to ensure the local representatives are aware of and abide by the Equal Opportunities Statement and that potential beneficiaries are aware of the statement.

EDRIDGE NATIONAL OFFICE

Richard Martin, the Secretary of the Fund and the Administrative Secretary are happy to help with any queries you may have. Please contact us at the above address and number. If we are not in please leave a message on the answerphone. Personalised Edridge stationery is available on request as are any of the forms contained within this booklet.

RETIRED STAFF

(Including Widows or Widowers of the Service)

There is a wide variety of support given by different probation areas to retired staff in general. There is no national organised arrangement for supporting retired staff. This policy paper draws together a selection of some of the current activities that are available and is not exhaustive.

1. Database of retired staff

Each probation headquarters should have a list of retired staff in their area. However, if this is not the case then the County Treasurer will certainly have a list of those to whom pensions are being paid. The problem that arises may be that on retirement people move about the country and, therefore, unless it happens by chance, there may be retired probation staff in your area about whom nothing is known.

2. Methods of keeping in touch

Many CPOs have their own tea/lunch parties when all retired staff are invited. This can be once a year or more often. Usually Edridge reps get themselves invited to this type of function where news can be shared.

3. Newsletters

Some reps send newsletters, either of their own volition or together with other newsletters that are sent out by the County or other local bodies. Sometimes one or more active retired member helps with the production of such a newsletter and keeping in touch with others. There are areas where groups of retired staff meet together for social occasions in friendship and through those keep in touch with the local rep as to the health of each other.

4. Christmas contact

Some Reps send Christmas cards to retired members and we, from the national office, send cards when requested by reps to various members. The Trustees give grants at Christmas to a number of people, mostly because of historical reasons. We now wish to phase out 'gift' type grants at Christmas, as they are against Charity Commission policy and only give when need is clear.

5. Fundraising

It is known that retired members can help very much with fund raising and this can be an extremely good way of involving them in the Fund's activities.

APPENDICES

1. Trustees and Reps Contact List - see website under About Us
2. Application Form - download from website (see Apply on the web site)
3. Gift Aid Form - download from website (see Gift Aid)
4. 50/50 Club form - download from website (see The 50/50 Club)
5. All about Edridge leaflet - download from website (see About Us)
6. Other Charitable Organisations are listed below:

Independent Age
6 Avonmore Road
London W14 8RL
Tel: 020 7605 4200
www.independentage.org.uk

Helping older people on low incomes to stay in their own homes for as long as possible.

The Family Fund
Unit 4, Alpha Court
Monks Cross Drive
York YO32 9WN
Tel: 01904 621115
www.familyfund.org.uk

For families with severely disabled or seriously ill children.

British Dyslexia Association
Unit 8, Bracknell Beeches
Old Bracknell Lane
Bracknell, RG12 7BW
National Helpline: 0845 251 9002
www.bdadyslexia.org.uk

Dyslexia friendly society enabling all dyslexic people to reach their potential.

Stroke Association
Stroke House, 240 City Road
London EC1V 2PR
Tel: 020 7566 0300
www.stroke.org.uk

Professional Classes Aid Council
10 St Christopher's Place
London, W1U 1HZ
Tel: 020 7935 0641
www.pcac.org.uk

Provides help and assistance to professional people and their families overtaken by adverse circumstances.

The Frank Buttle Trust
Audley House
13 Palace Street
London SW1E 5HX
Tel: 020 7828 7311
www.buttletrust.org

To ensure that children and young people in desperate need are given a brighter future.

Association of Wheelchair Children
6 Woodman Parade
North Woolwich
London E16 2LL
Tel: 0870 121 0050
www.wheelchairchildren.org.uk

Helping children with wheelchairs become independently mobile.

Invalids at Home
Mrs Mary Rose
Bamford Cottage
South Hill Avenue
Harrow
HA1 3PA
Tel: 0208 864 3818

Small one-off grants for people severely disabled or long-term sick and living at home.

Elizabeth Finn Trust
(formerly Distressed Gentlefolk Assoc)
1 Derry Street
London W8 5YH
Tel: 020 7396 6700
www.elizabethfinntrust.org.uk