

Representatives' Guidelines



edridge fund

Updated February 2020

FOREWORD

Welcome to the guidelines for Edridge Representatives. This document aims to provide the basic information you need in order to carry out your role as an Edridge Representative.

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 difficulty. Edridge continues to support current and former staff across the probation and family courts service. Typically we provide grants to between 130-160 applicants a year, with grants averaging around £350

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 and our 50/50 club. Any ideas or suggestions you have for fundraising are very gratefully received.

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.

Feedback on how we deal with applications and any other support we can give is always welcome, and there are some contact details towards the end of the guidelines.

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 document of use in carrying out that work.

Alan Goode
Chair of Trustees

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.

ORGANISATION OF THE FUND

The Trustees

The Trustees are appointed by the National Executive Committee of Napo for a period of five years. Trustees are responsible for the appropriate making of grants, the support of those in need and the overall strategy of the Fund. They meet five or six times a year to consider strategic and management issues.

Trustees are regulated by the Charity Commission in the administration and use of the Fund.

The Trustees would be unable to fulfil these responsibilities effectively without the Edridge Representatives. It is your ability to present an accessible point of contact and assistance which enables the Fund to better meet the needs of applicants.

The Representatives

Each Napo branch should elect its own Edridge Representative. This Representative is often 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.

Most applications for help are made direct to the Fund, but Branch Representatives can be helpful in obtaining further details of the applicant's financial situation and assessing need. Often the support given by Representatives enables serving staff to cope with their problems and free them to offer better service to clients and the Courts. Care must be taken not to give advice about issues on which professional advice should be sought (e.g. loans or other financial products).

This supportive 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 sometimes 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 senior management. Knowledge of local and national charities can also be helpful. (See Appendix 3 for a selection of Charities)

An Edridge Reps meeting is held at the annual Napo Conference. 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.

The Trustees have in the past been able to ensure management support for the Fund and local representatives. Chief Executives and Deputy Directors can make a valuable contribution by demonstrating support for the Fund, allowing area communication systems to be used for publicising the Fund.

Any additional fundraising to enable the Charity to help those in need is vitally important and much appreciated by the Trustees.

Representatives can claim reasonable expenses from their Branch

A role outline for Edridge Reps is attached at Appendix 1.

WHO IS ELIGIBLE?

The Trustees hereby declare that monies which shall be subscribed, donated or raised for the following purpose of the Fund shall be held upon trust. These shall be applied in accordance with the provisions below, assisting the persons who meet the criteria:

- a) Whose work is, or has been wholly or mainly in Probation and Family Courts, and;
- b) Who are eligible to be full members, Professional Associate Members (PAMs) or retired members of Napo under its rules, and;
- c) Are in conditions of need or hardship, or;
- d) Are dependants of any of the above.

For the purpose of the above, in the event of the Trustees being in doubt as to the eligibility of any person to become a member of Napo, they shall submit the facts to the General Secretary of the Association. Any decision notified to the Trustees concerning that person's eligibility shall be binding upon the Trustees.

It is important to stress that eligibility is not contingent on the applicant being a Napo member. As a registered charity, our funds must be applied to all of those falling within the categories above. Members of other unions are encouraged to apply to the benevolent fund for their union in the first instance, but may still be considered for assistance if they meet Edridge's eligibility criteria.

GRANTS

Grants are usually made 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, the Edridge office or apply via the website. 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) Rep's 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.

APPLICATION PROCEDURE

Applications can be made by the applicant, if needs be with the assistance of a representative or colleague, with the applicant's permission. Most applicants apply directly to the Trustees by email or by post. It can be very helpful if Representatives assist in the application process, in order to obtain a full picture of the position and give assistance, if necessary, with completion of the Application Form (Appendix 4). Please note that the Application Form has clear instructions on completing the form and how to send it, whether by email or post.

Applications are circulated to trustees by secure email.

It is very important that Applications are made on the current form, which is always available on the Edridge website, and Representatives should assist applicants to ensure this is done.

ASSESSMENT OF NEED

The Trustees are under a legal obligation, in order to ensure that the charity's assets are used for a proper purpose, to assess need. This is a difficult and sometimes delicate task. However, Trustees must have details of the applicant's income, outgoings, savings and debts (and those of the applicant's partner) so that there can be some consistency and fairness in the distribution of the Fund's limited resources.

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

It is extremely important and helpful to the Trustees if all applications have as much detail as possible on the applicant's current circumstances. Where there is a specific identified need, it is helpful to have an indication of the amount needed, together with supporting evidence, if this is possible.

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.

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

Guidelines on the trustees' approach to particular types of application (e.g. for private healthcare, education & training, strike pay and for members of unions other than Napo) are set out at Appendix 3.

FUNDING

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 ways including:

- 1. Gift Aid** A good systematic method of support by regular giving either via salary deduction or your Bank. By completing a Gift Aid form the donation can be increased. (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.
- 4. One off donation** This could either be a one-off gift or by leaving a specific bequest in a Will.

COMPLAINTS PROCEDURE

Representatives should be aware of the Complaints Procedure, which is set out on our website, but is also attached at Appendix 8

CONTACT US

If you have any queries please contact us by email, or alternatively you can leave a message on 020 3397 7025 (this is a dedicated Voicemail number, and messages are passed to Edridge staff by email). A member of our team will contact you, as soon as possible

Our main email address is office@edridgefund.org However, for confidential matters, we prefer that you use a secure email account (such as gsi) and email us at edridge.applications@edridge.cjsm.net

If you have specific concerns, please contact either Alan Goode, Chair of Trustees alangoode27@gmail.com or the Secretary to Trustees edridge.secretary@gmail.com

A P P E N D I C E S

APPENDIX NO.

1	Edridge Rep Role Outline
2	Other Charitable Organisations
3	Grant-Making Guidelines
4	Application Form
5	50/50 Club
6	Gift Aid Form
7	Edridge Contact Details

Role Outline

Edridge Representative

Role

The Edridge Representative acts as a point of liaison for applicants and potential applicants to the Edridge Fund. The representative is a key intermediary between applicants and trustees, as ultimate decision-makers on grants. The role is voluntary (unpaid) yet rewarding in terms of the assistance which can be provided to colleagues in times of need and considerable distress.

Responsibilities

Processing applications: Provide details on how to apply to the Edridge Fund, assist where required in completing application forms: liaising with applicants when Trustees have particular concerns, occasionally chasing applications where necessary.

Welfare support: Acting as a concerned colleague to applicants in times of distress, signposting applicants to other potential sources of help, explaining the criteria for grants to applicants, following up with applicants after a grant decision is made, if necessary.

Raising awareness of Edridge: Ensuring Edridge is publicised in all work places, ensuring Edridge is discussed at branch meetings, following Edridge on social media, seek to raise awareness amongst non-Napo and retired members, representing Edridge at conferences and staff events.

Fundraising: A number of Edridge reps have run their own fundraising events (e.g sponsored race), others have conducted bucket collections at conferences. The simplest way to fund-raise for Edridge is by publicising our 50/50 lottery.

Expenses

If Representatives incur expenses in the course of their work for Edridge, a claim can be made to the local Napo Branch in the first instance.

Time to act

If you would like to become a Rep, please contact the Administrator, Sarah Byatt on office@edridgefund.org

Date 04/04/2020