

# Newsletter for the Trust Funds managed by Charis Grants

## Good News!

Charis Grants has a new Trust on board - **The Three Valleys Water Trust** (launched 1 April 2009), offering financial assistance to clear water debt of customers of Three Valleys Water and Further Assistance Payments to anyone living in the region supplied by Three Valley Water. Three Valleys Water's commitment to the Trust is £2.5m over 5 years. Contact details are over the page.

[www.3valleyswatertrust.org.uk](http://www.3valleyswatertrust.org.uk)

## anglianwater assistance fund

Fund Manager  
Claire Watt

### UPDATE

On 1 April 2009 the Anglian Water Trust Fund ceased awarding new grants to individuals for relief of either water debt or other types of hardship. Instead, Anglian Water has set up a new Assistance Fund to provide this sort of help. This Assistance Fund will have a narrower remit than the Anglian Water Trust Fund, focussing exclusively on water debt. In consequence this Assistance Fund will not seek to operate through a charitable trust.

### WHO IS ELIGIBLE TO APPLY?

To be eligible to apply applicants must be a current customer of Anglian Water or Hartlepool Water. Grants are awarded on a six month provisional basis, where applicants must demonstrate they are taking steps to achieve financial stability and to meet current and future water bills. At the end of the six month period, the application will be reviewed and if the award has been confirmed, the grant to cover water and/or sewerage debt will be paid on behalf of successful applicants direct to Anglian Water or Hartlepool Water. Charis Grant continue to administer this programme.

[www.anglianwater.co.uk/awaf](http://www.anglianwater.co.uk/awaf)

## The British Gas energy trust

## The Scottish Gas energy trust

Trust Manager  
Kirstie Berridge

### GRANT MAKING 2008/2009

In 2008 the Trust received 10,469 applications from individuals and made awards with a total value of £2.9m. With a lower budget of £2.86m available in 2009 and in the current economic climate, the pressure on the Trust's budget is clear and only applications of the strongest quality, showing exceptional need, will be awarded a grant.

### ORGANISATIONAL

Trustees approved grants in December 2009 to eight short listed projects with a total commitment of £484,562. Six projects will run for a 2 year period, the remaining 2 projects, Roxburgh CAB and Toxteth, will run for 3 years. Grant recipients are;

- Burghley Lodge Centre, Leeds
- Castle Advice Service, Sheffield
- North Liverpool CAB
- Ollerton & District CAB, Nottingham
- Toxteth CAB, Liverpool
- Rhondda Taff CAB, Wales
- Roxburgh CAB, Scotland
- Thorpe Edge Community Centre, Bradford

[www.britishgasenergytrust.org.uk](http://www.britishgasenergytrust.org.uk)



Trust Manager  
Claire Watt

### WHO IS ELIGIBLE TO APPLY?

Customers of the following water companies:

- Bournemouth & West Hampshire Water
- Folkestone & Dover Water
- Portsmouth Water
- South East Water
- Tendring Hundred Water

From 1 April 2009 the Eos Foundation will also accept applications from **Cambridge Water** customers.

### NEW TRUSTEE

The EOS Foundation is delighted to welcome Nigel Foster, formerly Business Planning Manager at Bournemouth & West Hampshire Water as a new Trustee from December 20 2008.

### CHAIRMAN

John Sansby, who has been Chairman of the Foundation since it's inception, stepped down at the end of March 2009. Trustees and Charis Grants would like to thank John for his invaluable contribution to the Foundation over the last 5 years. Tony Jackson, current Trustee, has taken over as Chairman.

[www.eosfoundation.org.uk](http://www.eosfoundation.org.uk)

## EDF ENERGY TRUST

Trust Manager  
Kirstie Berridge

### GRANT MAKING

In 2008 application numbers rose by 8% on the previous year, with a total of 5,356 applications received compared to 4,925 in 2007. In 2008 total award value was just over £1.9m. With £2.7m available to help vulnerable customers in 2009, the Trust has an objective of increasing application numbers by a further 15% and welcomes applications from your clients.

### NEW TRUSTEES

Julia Kaufmann and Balbir Chattrick stepped down as Trustees in September 2008. Denice Fennell and Steve Meakin were therefore approached to join the Board as it was recognised that their skills and experience would support the work of the Board. We are pleased to announce they both accepted the role of Trustee. Denice has spent over 40 years working for a major energy company and Steve is the Money Advice Coordinator for Devon and Cornwall and Chair of the Institute of Money Advisers (IMA).

[www.edfenergytrust.org.uk](http://www.edfenergytrust.org.uk)

## FINANCIAL INFORMATION

An applicant's financial situation should be explained fully in section 7 of the application form. Alternatively the information can be submitted on a Common Financial Statement (CFS), prepared for the applicant (all pages).

## DEBT RELIEF ORDERS / BANKRUPTCY APPLICATIONS

With the introduction of Debt Relief Orders in April 2009, all Trusts administered by Charis Grants have tightened their assessment criteria for awarding bankruptcies. Please see Trust websites for more details. All Trusts will consider applications for Debt Relief Orders.

## QUOTES REQUIRED

If the applicant is asking for a household item the grants assessor would normally chose the item from the Argos catalogue (we usually award Argos vouchers for named items because increasingly we are finding stores are not accepting cheques.) If there are requirements from your client for a specific item, please provide the Argos reference or an alternative quote within the price limits (see websites) set for that item and reasons given why there is an exceptional need for this item. For other items such as carpets, a quote would need to be provided with the application. Also for more major costs, such as a new heating system, a minimum of two quotes would need to be submitted with the application.

### 'Exceptional Need'

In all cases an 'exceptional need' for the item must be demonstrated.

### 'Priority Item'

Usually only 1 FAP is granted so please ensure the priority item is highlighted.

### 'Eligibility Criteria'

Customers don't have to have a debt to their utility supplier to apply for a Further Assistance Payment (FAP). For example an elderly person who has managed to keep on top of their bills all winter may now have an **exceptional** need for a washing machine.

## GAS COOKERS



Due to recent changes in government law, Trusts are unable to supply gas cookers, except in exceptional circumstances which will need to be verified in writing by a professional worker.



## THINK - CAN THE TRUST REALLY HELP?

The Trusts are receiving an increased number of applications from people who they simply cannot help. Please ensure:

1. a client meets the eligibility criteria of the Trust for which they are applying. This is stated on the front of the application form.
2. if applying for help with their utilities, that the client has an actual debt—the trust cannot help with current charges.
3. if a client is reapplying, they have waited the appropriate time. If an applicant has previously been unsuccessful they cannot reapply to the Trust for 6 months from the date on their decision letter. If an applicant has been timed out they must also wait 6 months. If a successful applicant is unfortunate enough to need help from the Trust again, they must wait for a 2 year period before reapplying.
4. a client does not apply for any excluded items - listed on front sheet of application form.

## NEW TRUSTEES

Charis Grants are always keen to hear from potential new trustees. To express an interest or for further information email [laurarouse@charisgrants.com](mailto:laurarouse@charisgrants.com)

## FORMS SHOULD BE POSTED TO THE SPECIFIC TRUST ADDRESS - SEE BELOW

FREEPOST RRZJ-XBSY-GYRG  
British Gas/Scottish Gas Energy Trust  
PO Box 42, Peterborough  
PE3 8XH - **NO STAMP REQUIRED**

FREEPOST RLXG-RBYJ-USXE  
EDF Energy Trust  
PO Box 42, Peterborough  
PE3 8XH - **NO STAMP REQUIRED**

Anglian Water Assistance Fund  
PO Box 42, Peterborough  
PE3 8XH - **stamp required**

Eos Foundation  
PO Box 42, Peterborough  
PE3 8XH - **stamp required**

FREEPOST RSBB-LESH-AGEL  
Three Valley Water Fund  
PO Box 42, Peterborough  
PE3 8XH - **NO STAMP REQUIRED**

Application form request line: 01733 421060

E-mail : [admin@charisgrants.com](mailto:admin@charisgrants.com)

Please ensure we have your e-mail address for future newsletter mailings.  
Organisation details should be e-mailed to [laurarouse@charisgrants.com](mailto:laurarouse@charisgrants.com)