



Multiple Sclerosis Society

# A guide to **support grants**

Advice and guidance for awarding grants through your branch





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# Introduction

**These guidelines have been developed to assist branch volunteers in dealing with requests for help from people affected by MS. This guide provides you and your committee with the knowledge, skills and support needed to help your local MS community.**

This guide will look in detail at the Society's Application for Financial Assistance form, which all branches should be working with. After reading this guidance we hope you will have a better understanding of why we ask what we ask from our applicants.

We discuss the role of the MS Support Officer and support volunteer in your branch and have included guidance on forming a Grants Sub-Committee, to enable you to make more speedy decisions, and establish your own guidelines and policy regarding grantmaking. We address concerns over confidentiality when considering an application, common queries around committee members applying for grants and the Society's policy on grants for respite care.

You will also find updated Frequently Asked Questions, based on real questions posed to the Grants Team by branches and applicants. With information on providing loans and an extensive chapter on the National Grant Fund, we hope you find these revised guidelines useful and supportive.

## **Developing grantmaking procedures in your branch**

For many people with MS there will come a time when they need a piece of equipment or to pay for adaptations to their home as a result of their disability, but will not have the necessary funds to do so. Some needs can be met by statutory provision, but the reality is that equipment or funds will not always be available.

The MS Society and our branches have always aimed to help people with MS, with items they need because of their disability, but for which they cannot get fully funded statutory help. Some of the items funded include home adaptations, powered wheelchairs, riser/recliner chairs, car adaptations and respite care.

Branch MS Support Officers and support volunteers, along with the Grants Team at the MS National Centre, play a key role in providing information on the help that we can give as well as ensuring that any applications which are received are dealt with appropriately, effectively and consistently.

All branches should adhere to four minimum standards when considering grants for financial assistance.

These are:

- All requests above £200 should be submitted on an Application Form for Financial Assistance
- All branches should form a Grants Sub-Committee to consider requests
- All applications should be considered within four weeks
- All grantmaking activity is reported back to the National Centre annually.

Pages 3 to 9 of this guide give advice and guidance on dealing with requests at a branch level. Pages 10 to 14 explain the role of the Grant Team at MS National Centre and the purpose of the National Grants Fund.

### **Grants for non-members**

Your branch and all the Society's staff are required by our constitution to assist anyone with MS. It therefore follows that our funds should be available to non-members as well as members. There are many reasons why someone may wish to become a member of the Society; to support us financially, to join a social/support group or to meet other people affected by MS. However, there are also many reasons why a person may choose not to become a member. It may be that they are still coming to terms with their MS, that they are keeping their diagnosis secret from friends and family for now, or simply that they are not the type of person that becomes a member of a formal organisation.

We understand that on rare occasions branches feel frustrated that, having raised money locally themselves, they are then expected to pass that money on to non-members in the form of a grant. Remember though, that those who kindly donated to you were donating to help all people affected by MS in your area, not just your members.

Please remember that membership should not be taken into consideration when you receive a request for help. We should not give the impression that membership brings financial privileges unavailable to others and you may in fact find that the applicant becomes a member of your branch after receiving a grant.

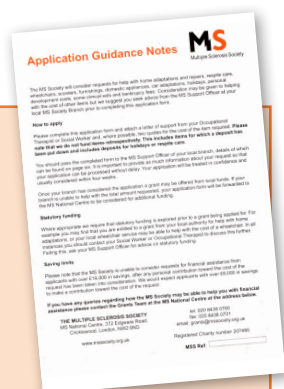
### **Further advice and support**

Although we hope that this guidance will provide comprehensive support to branch committees, and MS Support Officers in particular, it is not possible

to address every scenario that you may encounter in your work in the branch. In Appendix B you will find commonly asked questions with answers that you may find useful, but please remember that the Grants Team at the MS National Centre are always available to offer individual, confidential advice. You will find contact details in Appendix C. The Society's website is also a useful resource for information on the application process and downloadable versions of the information booklets that the Grants Team have put together. Go to [www.mssociety.org.uk](http://www.mssociety.org.uk) and look at the Support and Services pages or the BranchZone to find these.

The skills and experience that branch volunteers already possess, combined with the guidance and support of the Grants Team at the National Centre, can assist branches to administer an equitable and consistent grants process across the UK.

# The application form



All branches should have a supply of the Application for Financial Assistance form. Please use this form when considering requests for financial help. Any requests forwarded on to the National Centre for consideration must be on one of these forms. Copies are available from the Grants Team at the National Centre or downloadable from the BranchZone.

We are sometimes asked why we request so much information on our application form. As well as seeking specific information to assist the branch in considering the application, the form also contains sections which may help you to find other sources of funding, enabling the Society's resources to go further.

**For these reasons the following pages will look at each section of the form in more detail.**

## Part 1: About the applicant

This provides you with the basic information regarding the applicant and where they live. It also confirms diagnosis of MS.

## Part 2: Your income

Branches must ensure that the Society's funds are directed to those most in need, both in terms of their need for the item being applied for, and their ability to pay for it.

If the applicant is in receipt of Income Support (IS) or Income-based Employment and Support Allowance (ESA), we do not ask them to provide their income and expenditure details. People on IS or ESA rarely have any surplus cash and should be

regarded as being in receipt of the lowest level of income, as defined by the government. To support this we ask that either the branch MS Support Officer or the applicant's Social Worker signs the form to confirm receipt of IS or ESA. For those not receiving IS or ESA we ask for details of their income and expenditure.

An applicant's income needs to be compared to their outgoings. If they have a partner who lives with them, their joint income should be taken into account as well as any contributions from other members of the household. The difference between an applicant's income and expenditure will have a bearing on the size of the grant that might be available from the branch. For instance, someone who has a significant amount of money left over after outgoings may be offered a smaller grant than someone who has no excess money.

To ensure that informed decisions can be made, Part 2 of the application form should be completed as fully as possible. It is helpful to calculate how much excess weekly income an applicant has. If they have provided monthly totals, simply divide by four to get a weekly total.

If an applicant appears to have a large level of excess income you should discuss their own level of contribution with them.

It is MS Society policy to disregard both the Care and Mobility components of Disability Living Allowance (DLA) when calculating income. This policy brings us into line with the Benefits Agency, and other charities, which disregard DLA when assessing for IS or ESA. Attendance Allowance, for those over 65, should also be disregarded. It should be remembered that disabled people have as much right to decide how they spend the money that they are entitled to as others who are not disabled.

When looking at expenditure, it is important to consider each individual's circumstances fully and not make generalisations. Debts and other financial commitments should be taken into account. Be consistent in the grants that you make but do not presume all applications are similar.

### **State benefits**

Many people, particularly those who are older, under-claim benefits. It is also common for benefits to have been incorrectly assessed, often being paid at too low a rate. This is particularly relevant for people with MS, where an assessment may not have taken into account the variable and often invisible symptoms that a person may be living with. It is therefore good practice to check a person's benefit entitlement and help them make any necessary applications for previously unclaimed benefits.

An applicant could be owed a large amount of money which would mean that their immediate, and perhaps longer-term, financial problems could be resolved without the Society's financial assistance.

To help you in doing this you should refer to a copy of the Disability Rights Handbook. All MS Support Officers who have received dedicated training from the Society will have been given a copy. The Disability Rights Handbook is a comprehensive guide to benefits and services for disabled people, their families, carers and advisers. If you do not have one you should purchase one from branch reserves. The handbook is published by the Disability Alliance and costs £25.00 including postage.

If you are unsure of what advice to give, you can always refer someone to their local Citizens Advice Bureau, who can assist with establishing what someone is eligible for, making benefit claims, chasing applications' progress and appealing against decisions. You can also call the Benefits Enquiry Line on 0800 882200 (Mon – Fri 8.30am – 6.30pm, Sat 9.00am – 1.00pm). The Society's freephone helpline can also advise – 0808 800 8000 (Mon – Fri 9.00am – 9.00pm).

### **Part 3: Do you have any savings, capital or investments?**

The MS Society has a policy on savings limits, whereby an applicant with more than £16,000 in savings will not be considered. Some savings policies cannot be accessed without incurring large penalties, and this should be borne in mind if a branch expects an applicant to contribute their savings toward the cost of the requested items. Applicants with over £8,000 are expected to make a contribution toward the cost of the request.

### **Part 4: Why do you need financial help?**

The applicant needs to provide details of the item they need. Two quotes for the item should be provided. This ensures that the applicant and the Society are getting best value for money.

If someone is applying for help with their contribution toward a Disabled Facilities Grant (DFG), a number of quotes will already have been required as part of the DFG process. Applicants should be advised to seek quotes from reputable builders, and work undertaken by relatives or acquaintances should not be considered. In many areas, Home Improvement Agencies (part of the Care & Repair network) may be able to help find funding for applications relating to home adaptations, as well as seeking quotes.

### **Part 5: Respite Care**

The applicant should get a provisional booking for their planned respite care stay. Most care homes should provide this before any payment is needed.

### **Part 6: Supporting assessment from Occupational Therapist, Social Worker or MS Nurse**

Depending on the request, most applications will need to be supported by a relevant assessment from an Occupational Therapist (OT), Social Worker (SW) or MS Nurse. These letters of support should confirm the need and suitability of the item requested, as well as the lack of statutory funding.

For aids and adaptations, such as wheelchairs or ramps, an OT should write a supportive report. For requests for respite care, furnishings or domestic appliances a SW should provide one.

## **Wheelchairs**

With requests for wheelchairs an assessment from your local Wheelchair Service or mobility centre such as a Disabled Living Centre (DLC) is required. At a DLC or approved mobility centre you can try out products and explore other possible solutions. These centres provide free information to people in person, by telephone, letter or email.

Sometimes an applicant will provide a supportive letter from a local supplier. It should be remembered that suppliers will often have knowledge of their own products only and may not be able to identify the most appropriate piece of equipment. It is in the supplier's interests to propose a relatively expensive model or solution to someone's needs and there have been examples of people being assessed for expensive powered wheelchairs when all they needed (and wanted) was a lightweight manual version.

## **Insurance for powered wheelchairs and motorised scooters**

Insurance is not legally required for any powered wheelchair or motorised scooter, but the peace of mind that comes with insurance can be a big benefit to the user. It is possible to add the equipment to their home insurance policy, but an applicant may find it cheaper to cover the item separately. These policies can cost around £50 a year to cover a £3,000 vehicle and will also provide public liability cover to insure the user in the event of the wheelchair or scooter injuring someone or damaging property. Your committee may consider it appropriate to include the cost of insurance in any grants given for these expensive items of equipment, but it remains up to the applicant to source suitable insurance for themselves and their equipment.

For a copy of the Society's publication Insurance and MS contact the Information Team at the MS Society or download one from our website.

## **Part 7: Grants from other sources**

In many instances an applicant's previous work history, time in the Armed Forces or membership of a trade union can help you find other sources of charitable funding which may contribute in part or wholly toward the cost of the request. The

information provided in Part 7 will help you identify these charities and make your branch reserves go further.

For more information on securing charitable funding go to pages 10 and 11

## **Part 8: Details of contributions**

The applicant should list all other contributions that they have secured so far. This can often include their own finances, those of family and friends or a grant from a statutory agency, such as a Disabled Facilities Grant or a wheelchair voucher.

## **Part 9: Data protection**

All application forms include a data protection statement outlining how the information provided by the applicant will be used. All information relating to grants given by your branch should be kept for six years. Following that, it should be destroyed in a secure way, such as shredding.

For more details on data protection, please read the relevant chapter in your Branch Handbook.

## **Part 10 & 11: Supporting information & branch contribution**

These sections of the application form are for a branch committee member to complete. If a branch has healthy reserves but is not meeting the cost from its own funds then we ask for information as to why this is not possible, and then consider the application further if necessary. Branch funds vary enormously and it is vital that we are able to assist less financially successful branches where possible.

In line with MS Society policy, the reserves of branches submitting applications must be taken into account. Branches with comparatively higher account levels may be asked to consider increasing their contributions. Requests for less than £250 will only be considered in exceptional circumstances.

Please sign and date the form when forwarding it to the Grants Team for consideration.



# Making decisions at branch level

## **The role of the MS Support Officer and Support Volunteers**

Apart from providing general support for people with MS in the local area, the role of the MS Support Officer and volunteer is crucial to grantmaking procedures. All requests for help should be dealt with by a member of the Support Team of your branch. Some branches will have just one MS Support Officer, while others will be fortunate enough to also have one or more support volunteers.

A visit to each applicant by a MS Support Officer and a member of the support team is advisable, especially if the individual needs assistance filling in the form. As well as saving time, it can ensure all the necessary information is included. Obviously, visits are not always possible or practical (due to distance for example) but some form of contact should be made, perhaps over the telephone. Please read the Being Safe section of the Providing Support toolkit for advice on meeting and visiting applicants.

If you have enough support volunteers, to help manage the workload, you may find it useful to split the branch into a number of areas each covered by a different volunteer. Led by the MS Support Officer, they will be in a position to support each other's work and provide cover during times of holiday or illness.

## **Establishing a Grants Sub-Committee**

For reasons of confidentiality, it is not appropriate to consider applications in the full committee meeting. Committee members may know the applicants and, in turn, those needing help may be deterred from seeking it, as they are sensitive about approaching people that they know. These are often the people who are most in need of your help.

To avoid this situation, a Grants Sub-Committee must be formed to consider applications in line with procedures previously approved by the full committee. This might include guidance on upper limits, the types of requests you will help with and so on. Later in this guide you will find details on setting guidelines for applicants and on the limits that the National Grant Fund apply.

Grants Sub-Committee membership is at the full committee's discretion, but we suggest that it contains three people, ideally the MS Support Officer, the treasurer and one other. This will therefore usually include a cheque signatory.

Once the Grants Sub-Committee is in place, it should meet to consider applications regularly or when necessary. The branch Essentials require that all applications should be anonymised when reporting to the full committee. As there are only three members, it should be easier to come together at short notice or contact one another by telephone, thereby providing a faster service to those that come to you for help. The Grant Sub-Committee should then report back to the full committee with brief anonymised details of grants made.

## **Setting branch guidelines & policy**

Your committee has a responsibility to ensure that your reserves are spent wisely and equitably. We recommend that you establish clear and fair guidelines for grantmaking which can be made available to anyone who asks. These should be based on those used by the Grants Team at the National Centre (see pages 11 and 12) and the Grants Team will be happy to talk to you about what criteria could be considered. For example some branches will only offer one grant per year to an applicant, or may only offer up to £1,000 in any one grant.

These decisions need to be based on experience and branch reserves. It would appear odd for a branch with many thousands of pounds in reserves to limit all grant giving to an individual to only £500, whereas a branch with small reserves would be sensible to put a limit in place. For those branches in an area with a high number of people affected by MS, and therefore a high demand on branch resources, it may be more equitable to limit support to one grant per person per year, thereby enabling you to offer grants to more people. If you are in an area with a low number of people affected by MS, this condition may seem unreasonable.

Many committees have empowered their MS Support Officer to award small emergency grants, of up to £100 say, without the need to approach another committee member. This is only advisable for MS Support Officers who have plenty of experience of the type of requests for help that they receive. This could perhaps be applied after serving as MS Support Officer for one year and should be reviewed regularly by the full committee.

There have been situations when MS Support Officers within branches have made decisions on large grant payments without informing any other branch officers. This should not be done, as individual branch officers should not be taking on such a high level of responsibility. Branches also need to ensure that they are paying due care and attention to their 'duty of care' over the Society's resources. Regardless of how efficient and conscientious the MS Support Officer may be, unless other officers are involved in the decision-making, the branch will not be in a position to do this effectively. Branch officers have a collective responsibility to account for the proper use of branch assets.

It is important for your committee to agree a standard set of guidelines and it is wise for you to review those guidelines on a regular basis, perhaps annually. This way your branch will be able to react to changes in reserves (e.g. a large donation) or if you feel that you could have helped more people in the previous year with a more generous policy. Again, please speak to the Grants Team for further guidance on this matter.

### **The applicant's circumstances**

The applicant's circumstances, e.g. the size of his or her family, age, level of disability, and the location in which he or she lives, will all have a bearing on the decision of the branch. For instance, if someone is relatively young but has a significant level of disability, they will not have had enough opportunity to build up savings and will also have to consider future disability-related needs as they grow older. Someone who might be assessed as needing a manual wheelchair, may in fact be better suited to a powered model if his or her partner is not strong enough to push the wheelchair or help with its manoeuvre. It is not uncommon for partners and carers also to be disabled or in ill-health, particularly as people get older. Those with young children will have to juggle parenting requirements with their own needs and may, for instance, have to take the needs of their children into account when considering adaptations to their home. If in doubt, contact the Grants Team to discuss such situations.

### **Retrospective grants and debt**

It is MS Society policy that grants should not be awarded retrospectively. If an applicant is able to purchase an item from his or her own resources then reimbursement is not usually justifiable. All applicants should be advised of this at the outset to avoid the possibility of their going ahead with the purchase before approval is given.

The National Grant Fund cannot consider requests for help with debt. However, if an applicant requires help with the cost of declaring themselves bankrupt, or getting a Debt Relief Order (DRO), then a grant can be considered. The applicant should provide a letter from a debt advisor confirming that they have discussed the situation and that bankruptcy or a DRO is appropriate. It is important that the applicant gets more comprehensive support for their debt problems. To achieve this it is advisable to refer them to The National Debtline on 0808 808 4000. You may also suggest that they seek advice from a debt advice agency such as a Citizens' Advice Bureau. Debt may be another request your committee may wish to adopt a policy on.

The Grants Team have an information sheet Dealing with Debt which may be of help when advising people with financial concerns.

## Loans

The MS Society cannot provide loans to people affected by MS.

This is primarily because we do not have the resources to administer a loans system. Much time and effort would be required to allocate and follow up re-payments of loans.

It would also be hard to establish how much an applicant can afford to repay in instalments when their future employment situation may be extremely unstable. If you decide to give financial assistance to someone then the support grant procedure should be followed. If a person wishes to repay the grant, this should be treated as a donation.

## Confidentiality

When a Grants Sub-Committee is formed the issue of confidentiality is already being addressed significantly. The fewer people who see an applicant's personal information, the better. We would suggest that you let the applicant know that their request will be anonymised and considered by very few people, to put their mind at rest.

Although it is not always easy, those considering the request should separate the needs of the applicant from any personal characteristics or lifestyle choice. At times we have had to intervene when the MS Support Officer and applicant have had a strained relationship. Ultimately the MS Support Officer and all committee members have to put aside their differences and view the applicant as someone with MS who is in need.

It is obviously important that the Grants Sub-Committee report back to the full committee regularly, but the reports should be anonymised, with brief details of the request and the amount awarded. For example the Sub-Committee could report that three grants have been made in the last two months as follows:

- Mrs A was awarded £500 toward a wheelchair, with family and friends contributing the remaining £1500.
- Mrs B was awarded £370 for a riser recliner chair. The National Grant Fund awarded £300 and Mrs B was able to find the remaining £400 herself.

- Mr C was awarded £800 toward home adaptations. Mr C was also in receipt of a Disabled Facilities Grant of £1650.

By doing this only a small number of committee members have access to an applicant's personal information, including income and expenditure, savings and their level of need.

## Local charitable sources of support

It is worth developing relationships with local grantmakers. Rotary Clubs, Lions Clubs and Round Tables for instance are active in supporting local people and could prove a vital source of potential funding. Masonic and Buffalo Lodges, and Foresters Associations exist for the mutual benefit of their members. Enquire whether the applicant is a member of such an organisation. Your local Citizens Advice Bureau should have an up-to-date list of these organisations; alternatively look them up in your telephone directory.

For people who have served time in the Armed Forces (including National Service and the Merchant Navy) you should make contact with a national organisation called SSAFA Forces Help, who have local branches across the country. They coordinate many of the Forces' benevolent funds and are always happy to give information and advice. Look them up in your local telephone directory under Soldiers, Sailors and Airman's Families Association Forces Help.

The Grants Team can assist you in looking for possible local funding for individual requests for help. You will find more detail on accessing this support on page 10.

# After decisions have been made

## **Informing the applicant**

Understandably, individuals want to know the outcome of applications as soon as possible and branch MS Support Officers may feel pressured into conveying decisions, often over the telephone for instance. Whilst this is not wrong, your branch may wish to introduce a policy of only informing applicants in writing (unless in emergency situations), as it can be very stressful for branch MS Support Officers to have to convey unwelcome news. Whichever method is adopted, all decisions should ultimately be made known to the applicant in writing. If a request is declined, it is good practice to let the applicant know how the decision was reached. Every possible action should be taken to minimise the stress that applicants might experience, and if they can understand the reasoning behind a decision not to fund a request, they are more often able to accept it.

## **Payment of grants**

The branch Treasurer should keep adequate records of payment for audit purposes and will need to know at some point the identity of the beneficiary.

It is not advisable to make cheques payable, or give cash, to individuals. There can be exceptions for good reason, but they should be exceptions and not common practice. Cash payments can be problematic for a number of reasons. For some, dealing with such large amounts of money can be worrying and for others, although they may have good intentions, having money available can be too much temptation to cope with. Even if the applicant is able to deal with a personal payment, family members may try to take advantage of the situation. Although rare, these situations do occur.

Branches should ideally make payments to the providers of the equipment or service supported through the grant. Branches may consider forging links with suppliers of certain goods in order to supply direct to the applicant. This ensures that a grant is spent on the specific items requested and could possibly lead to cheaper equipment if you become a regular purchaser.

Records of grants made and any personal information regarding the applicant should be kept for six years. Following this time all identifiable information should be destroyed in a secure way. For more information on storing information about people and data protection please refer to the relevant chapter in your Branch Handbook.

# The National Grant Fund

## The role of the grants team

The Grants Team at MS National Centre are there to help with any issues relating to Support grants for branches and individuals. Their role is to:

- consider applications submitted to the National Grant Fund, Young Carers Fund, Carers Opportunities Fund, Lifeline and other funds
- offer guidance on providing financial assistance at branch level
- advise on accessing funding from other sources (statutory and charitable)
- provide training at Providing Support and Providing Support Updates (contact your Local Support Development Officer for details).

## The National Grant Fund

The National Grant Fund, administered by the Grants Team exists to supplement branch support for individuals in need. The intention is that, wherever possible, branches should fund in full requests for financial assistance at the local level. **Please remember that the National Grant Fund exists to top up branch contributions. On most occasions we will be unable to contribute more than the branch has offered. Requests for less than £250 will only be considered in exceptional circumstances.**

The National Grant Fund is also directly available to individuals who have no local branch in their area. A branch may also make an approach when it does not have sufficient resources to meet a particular need or is unable to secure funding from other sources.

The Grants Team regularly receive enquiries about financial assistance from people with MS and

those acting on their behalf. Enquirers will be sent an application form, with details of their local branch and MS Support Officer. Callers are always instructed to contact their branch, if they have not already done so, and to submit the completed form to the MS Support Officer. Branches should have a supply of application forms for those enquirers who approach them directly. These can be requested from the Grants Team at the National Centre or downloaded from the BranchZone.

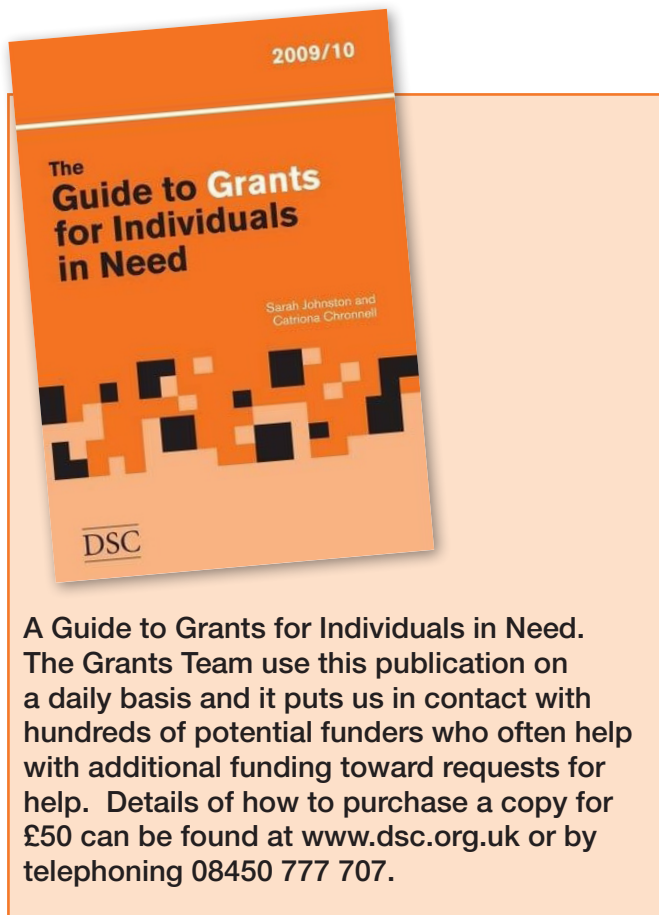
The MS Support Officer will then carry out their duties as described previously. Once a decision has been taken by a branch on an application, and you wish to submit the form to the National Grant Fund, pages 7 and 8 of the application form must be completed. As much detail as possible should be given in support of the application and/or about the decision of the branch. **We particularly need to know why a branch with sufficient resources is not able to offer funding to an applicant. We also need to have details of branch accounts, investments and reserves.**

It is important to note that if a branch does not support an application, it should not be restricted from being considered by the Grants Team for help from the National Grant Fund.

## Grants from other charities

The Grants Team aims to assist MS Support Officers, volunteers and individuals to locate alternative sources of funding wherever possible. We use various directories and electronic resources to help with this.

Detailed searches can be carried out by entering in particular details relating to an individual, such as



**A Guide to Grants for Individuals in Need. The Grants Team use this publication on a daily basis and it puts us in contact with hundreds of potential funders who often help with additional funding toward requests for help. Details of how to purchase a copy for £50 can be found at [www.dsc.org.uk](http://www.dsc.org.uk) or by telephoning 08450 777 707.**

past employment, age, religion and place of birth; these factors play an important part in locating potential sources. Together, these recourses help us raise funds which can be used alongside, or instead of, the Society's funds.

Please contact the Grants Team if you would like more information, or a search carried out on a particular application. We would strongly recommend that the branch committee authorise the purchase of

The Grants Team have also produced an Information Leaflet entitled Grants from other charities which has further advice on how to seek help from other funders. Contact the Grants Team for a copy or download a copy from the BranchZone.

### **Statutory funding**

The Grants Team can also advise on statutory provision and this should always be looked into when applications are submitted to branches.

Before an application to the National Grant

Fund can be considered, the Grants Team must be satisfied that all sources of funding have been explored. It is particularly important that eligibility for, and availability of, statutory funding is investigated by the branch before an application is submitted to the National Grant Fund. This requirement is complicated by the fact that Social Services departments are clearly interpreting the duties that they have in different ways. Further information on the duties of statutory authorities can be found in the Disability Rights Handbook or is available from the Grants Team.

Two examples of items for which there is a statutory provision are home adaptations and wheelchairs. Where someone requires home adaptations it is the duty of the local authority social services department to arrange for the provision of these. An Occupational Therapist will need to carry out an assessment and funding may be available through the Disabled Facilities Grant system operated by the local Housing Department. The MS Society booklet **Adaptations and your home** provides further information on how to proceed with a Disabled Facilities Grant application. Download a copy from our website or contact the Grants Team.

Wheelchairs, both manual and indoor/outdoor powered models, can be provided by the NHS. The local NHS Wheelchair Service should always be contacted to arrange for an assessment to be carried out. The applicant's GP, Physiotherapist, Occupational Therapist or MS Nurse will be able to make a referral.

Equipment which should be provided free includes items to make it easier to use the toilet, to wash, dress, use cooking facilities etc, these could include handrails next to the bath and toilet, raised toilet seats, the widening of doorways or a bathroom on the ground floor. The applicant's Occupational Therapist will be able to provide a full list of what is available to them.

### **National Grant Fund criteria & limits**

The present criteria are as follows:

- All grants must be for the benefit of the person with MS, for an item needed as a direct result of their MS.

- No long-term financial commitments can be entered into by the Society. It follows that top-up grants for residential care or other such requests cannot be considered.
- All applications must be supported by written evidence of an assessment of need and suitability of the item requested. This letter of support should be from an Occupational Therapist, MS Nurse or Social Worker depending on the nature of the request.
- All requests must be supported by two quotes. The cheapest quote will usually be used when calculating the cost of the request.
- Applications from individuals with savings above £16,000 cannot be considered. Applicants with savings above £8,000 will be expected to make a contribution toward the cost.
- A person with MS is limited to applying to the National Grant Fund once every two years, unless

the application relates to respite care. Respite care requests can be considered once every 12 months.

**Grants cannot be given for:**

- medical equipment i.e. pressure relief mattresses, treatment – conventional or complementary (including air-conditioning units)
- maintenance costs of wheelchairs or scooters (including batteries)
- legal costs
- removal costs
- insurance
- debt (with the exception of bankruptcy fees or Debt Relief Order costs)
- We cannot give help in instances where an item has already been purchased or where a deposit has been placed.

The following levels of financial assistance are the maximum amounts considered, once it has been agreed that the individual meets the Fund's criteria and the branch contribution has been taken into account. It also needs to be confirmed that all other statutory sources of funds have been investigated.

Category	Maximum limit (£) 2009
Home adaptations*	3,150
Driveways / hard standings	1,000
Essential home repairs	1,000
Wheelchairs	2,500
Scooters	1,500
Special equipment – beds	1,050
Special equipment – chairs	1,200
Motability deposits	750
Car adaptations	850
Furnishings, flooring & domestic appliances	600
Personal development	650
Respite care	Up to 325 per week for up to 2 weeks Up to 400 per week for up to 2 weeks for those with complex needs**
Holidays	300 each person / 800 max as family grant or 100 per child
Removal costs	500
Essential decorating (post adaptations)	600
Clinical aids (e.g. FES & TENS machines)	500
Communication aids	500
Bankruptcy fees / Debt Relief Orders	495
Driving lessons	400
Standard computers	200

Please note these limits are the maximum grants available, not necessarily what will be awarded in every case.

\*Where over £10,000 is being requested the applicant will need to show how the shortfall will be secured before we can consider a grant, to prevent us ring fencing funds long term that could be helping others in the present.

\*\*Those assessed as 'high' Registered Nursing Care Contribution (RNCC). If the applicant is unsure, please contact their Social Worker.

## Respite care

Local Authority Social Services Departments have a responsibility for assessing individuals requiring respite care and for arranging its provision – in the same way as for long term residential and nursing care. A grant cannot be considered unless the Social Services Department has been approached first.

Limited grant funding is available towards respite care from the National Grant Fund. However, the National Grant Fund cannot consider applications for financial assistance towards stays at the Society's respite centres (Brambles, Woodlands and Helen Ley) as these centres are already subsidised by the Society. Advice about financial assistance for stays at the Society's respite centres should be sought directly from the centre. Please contact the relevant Funding Coordinator at each centre. Branches can however offer grants toward the cost of stays at our care centres if they choose.

We can consider requests for help to stay at non-affiliated care homes. As with any application for financial assistance from the National Grant Fund, we would require a supporting letter from the applicant's Social Worker, details of the cost (preferably with a copy of the brochure attached) and clarification of the funding received, or lack of it, from statutory sources. Please state clearly within your comments on an application the outcome of any approach to Social Services. Grants towards care packages devised by Social Services cannot be considered. It is important that MS Support Officers emphasise the need to submit applications in time for them to be considered by the Grants Team prior to the respite care commencing. Retrospective applications cannot be considered. This is particularly relevant if a person's stay at a respite centre is imminent.

## Decision making

Once an application has been received the request will be considered at the next Grants Assessment Meeting. At these weekly meetings applications submitted with all supporting information are considered from the National Grant Fund.

As the amount requested from the National Grant Fund far outstrips the amount available all

applications are considered using the following priorities:

- To facilitate independence
- To enhance quality of life
- To prevent crises

Highest priority is given to those requests which meet all three of these criteria and the lowest where it partially only meets one.

## Branch contributions

If a branch has healthy reserves but is not meeting the full cost from its own funds, we ask why this is not possible, and then consider the application further if necessary. Branch funds vary enormously and it is vital that we are able to assist less financially successful branches where necessary.

For example, we could receive two applications for help toward the cost of a wheelchair from two different branches; Branch A has £15,000 in reserves, Branch B has £2,000 in reserves. In this instance we would consider the application from Branch B as a higher priority, as we feel that Branch A has sufficient funds to increase its contribution. Applications from branches with low reserves are considered for grants from the Fairer Financial Assistance Fund (FFA Fund), established to support poorer branches with funding from richer branches. The procedures and upper limits for the FFA Fund are the same as for the National Grant Fund.

## How to apply to the National Grant Fund

- Applicant submits application to branch for consideration by Grants Sub-Committee.
- Grants Sub-Committee consider request and award an amount.
- If the committee are unable to meet the full amount of the request, a committee member completes pages 7 & 8 of the application form and forwards the application to the Grants Team at the MS National Centre.
- Once the application is received with all supporting information included (specifically: letters of support, quotes, details of branch reserves and reason for inability to meet full



amount of request), the application will be considered at the next weekly Grants Assessment Meeting.

- Following assessment the branch will be informed of one of the following outcomes:
  - The request has been met and payment will be made to the branch in due course. Branch accounts will be credited within 1 – 2 weeks by the Finance Department.
  - The request has been partially met and the branch is asked to contribute further due to acceptable levels of branch reserves.
  - The request has not been met due to high levels of branch reserves.
  - The request has been partially met and we are approaching other funders for the shortfall.
  - The request has not been met as the request is for something outside National Grant Fund criteria (detailed on page 12).

### **Appeals**

There is no automatic right of appeal when an application has been declined as all our grants are discretionary. When a grant cannot be awarded the applicant will be informed of the reasons why. If an applicant is unhappy with this explanation they are entitled to write to the Director of Operations at MS National Centre, explaining their reason why they feel their request has been unfairly considered. However, requests which fall outside our funding criteria (page 12) do not have the right to challenge the decision.

Appeals against branch decisions must be dealt with by the branch concerned.

### **Confidentiality policy**

A confidentiality policy for the Society was introduced in September 1996 and is adhered to by Grants Team staff.

### **Information booklets**

You can download the following leaflets from the BranchZone or contact the Grants Team for copies.

You will find the grants information in the Downloads page, under Grants to Individuals.

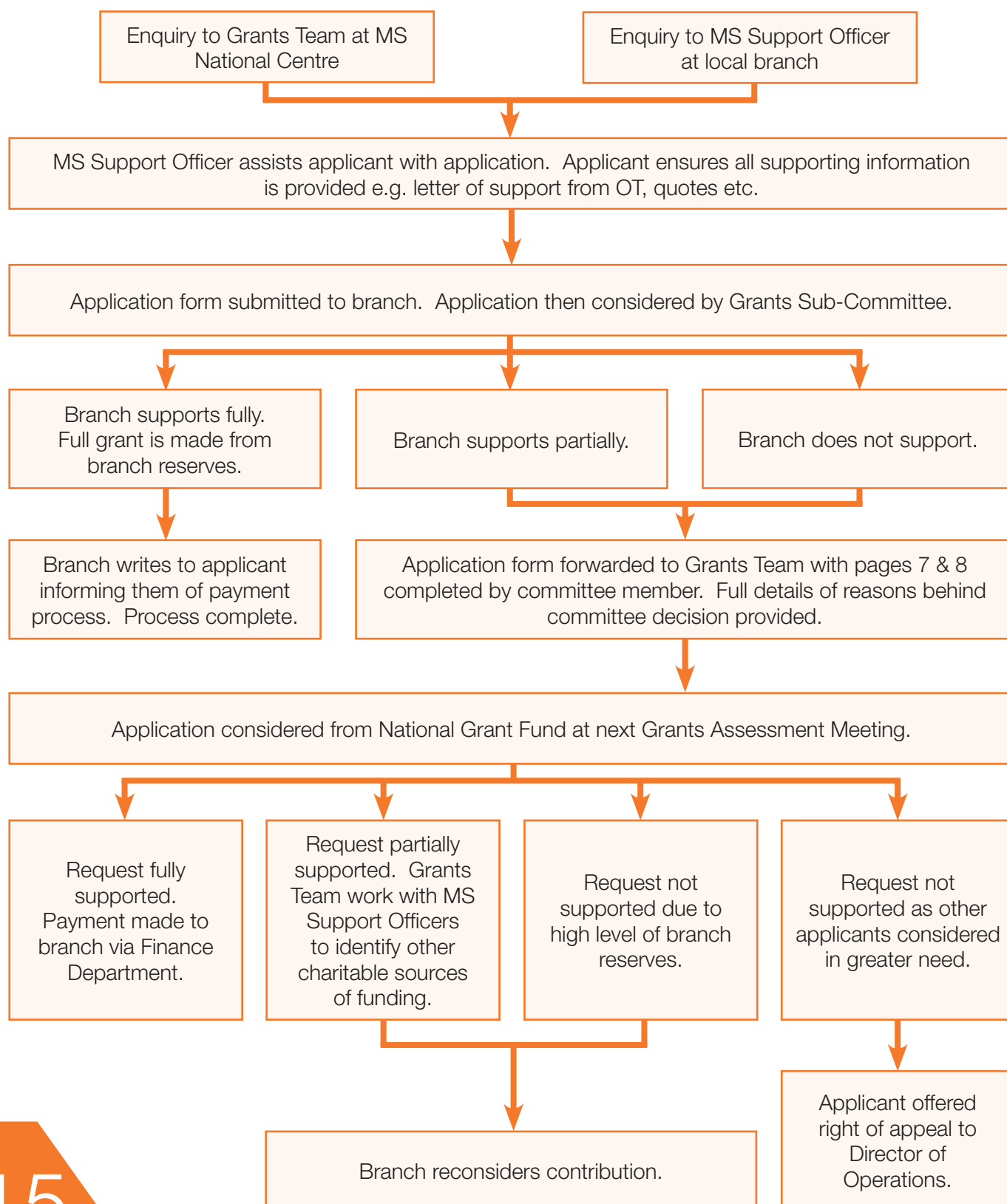
- Financial Assistance from the MS Society
- Dealing with Debt
- Guidance for branches – Grants from other charities
- Guidance for branches – Ownership of equipment
- Funding for computers – supporting letter template

*Other resources produced by the Society which may prove useful in dealing with requests for help include:*

- The Providing Support Toolkit
- Respite Care Directory

# Appendix A:

## How applications are processed



# Appendix B

## Frequently asked questions

It is not easy to predict all the questions your branch will be faced with when dealing with requests for financial assistance. If you are in any doubt as to how to handle a request please ring the Grants Team, who are there to help and advise.

Here are just a few commonly asked questions we receive from applicants and branch members.

**Someone who isn't a member of our branch has approached us, but we would like to offer him a grant as he is obviously in need. Can we do this?**

Yes. As discussed on page 5 grants from the MS Society are available to all people with MS.

**A member of our committee would like to apply for a grant, but does not want fellow committee members to read about their personal information. Can we forward the application directly on to the National Centre, to be considered from the National Grant Fund?**

In these instances requests from committee members can be assessed by the grants team on behalf of your committee. We will make a recommendation for your committee to consider and then agree a grant for. A report summarising the application and our recommendation will be sent to the branch to be considered. The personal details of the applying committee member will not be shared. The grants team will not instruct the branch to offer a grant of a specific size, this is for your committee to consider from the reserves you have available.

**How long does it take for the Grants Team to consider an application?**

Applications will be considered at the next weekly

Grants Assessment Meeting. If awarded, Grants will be paid through the Finance Department within 1 – 2 weeks.

**What is the first step if someone needs their home adapted so that it is more suitable to their needs?**

Before your branch or we can consider any grant, the applicant should approach the Housing Department of their local Social Services to enquire about possible funding, usually through a Disabled Facilities Grant. An Occupational Therapist will be assigned to assess their needs.

Download Adaptations and your home from our website or contact the Information Team for a copy.

**Someone from a residential home has enquired about a grant for a pressure relief mattress. Should we help?**

It is regarded as the responsibility of the home to provide the equipment required by the resident to enable their care needs to be met, particularly something as essential as a bed. It is therefore the Society's policy not to fund pressure relief mattresses or other medical equipment in a residential home, or in the person's own home, where the provision of medical equipment is the responsibility of the PCT.

**My washing machine has broken down. Can you help me?**

If you are in receipt of Income Support or Income-based Employment and Support Allowance, we need to have confirmation that an initial application has been made to the Social Fund. Grants and loans are available from this source although applications are not always successful. Following

that, each application will be looked at according to the individual's circumstances.

**There is a 12-month waiting list for a wheelchair assessment from my local NHS Wheelchair Service. Can I get a private assessment?**

This is a question your Grants Sub-Committee should form a policy on. In some areas there can be as much as a 12-month waiting list for a wheelchair assessment. The applicant may be able to get a free assessment from their local Disability Living Centre – this assessment would be sufficient. If you do not have an independent assessment centre nearby, some branches have adopted a policy of helping with the cost of a private assessment at a Mobility Centre or through a private OT. If you then choose to offer a grant toward a wheelchair, you may choose to subtract the cost of the assessment from any given grant.

**Why do you ask for an Occupational Therapist or Social Worker assessment with my application?**

It is important that a branch does not provide someone with a grant to purchase an item that may do the user more harm than good. With a supporting letter from an OT we can be sure that the adaptation, bed, riser-recliner chair or hoist does not put their health at risk and is suitable for their needs.

**Do you offer grants toward adaptations to my car?**

We can do, but you should contact Motability initially. Motability provide a vehicle lease/purchase scheme for people in receipt of higher rate DLA and can also offer grants toward car adaptations for people with disabilities such as hand controls, swivel seats and hoists. They can also help some people with the cost of driving lessons for you or your carer.

**Why does your application form ask so many questions about my work history and union membership, and that of my partner?**

With this information your local branch and the Grants Team are able to find the details of potentially hundreds of other charities, trusts and benevolent funds which exist specifically to help people with your work history or trade union membership. Your religion, place of birth and time spent in the Armed Forces can also help us in helping you get access to this money.

**My wife is not as mobile as she used to be. Can I apply for help with the costs of driving lessons to help her get around?**

The National Grant Fund can offer grants toward the cost of driving lessons for people with MS and their carers. See page 12 for the maximum grant available.

**Why do you means-test people when considering their request?**

The National Grant Fund and branch reserves are limited. The MS Society has a responsibility to help those most in need, particularly those most severely affected by MS. One of the ways we establish this is to look at the applicant's income and expenditure. If we are to use our resources to best effect, we do need to ensure that we are not giving support to individuals who can easily afford to pay for items from their own resources.

It should be remembered that applicants on Income Support or Income-based Employment and Support Allowance do not have to complete this information. This group makes up 50% of applications to the National Grant Fund. We do not look at income and expenditure in isolation, but consider any current debts and future expenses that someone living with MS may have to face.

# Appendix C:

## useful contacts

### **The Grants Team**

MS Society, MS National Centre, 372 Edgware Road, Cricklewood, London NW2 6ND  
Tel: 020 8438 0700 Fax: 020 8438 0701  
[www.mssociety.org.uk](http://www.mssociety.org.uk)  
email [grants@mssociety.org.uk](mailto:grants@mssociety.org.uk)

### **Automobile Association Disability Helpline**

Offers support and information.  
Freephone 0800 26 20 50  
[www.theaa.com](http://www.theaa.com)

### **AbilityNet**

Provides information and assessments for computer equipment.  
Can assist with installation, training and support.  
Helpline 0800 269 545  
Textphone 01926 312 847  
[www.abilitynet.org.uk](http://www.abilitynet.org.uk)

### **Benefit Enquiry Line**

Provides general advice on benefits for people with disabilities, their carers and representatives.  
Helpline 0800 88 22 00 (in English and Welsh)  
(Monday to Friday, 8.30am-6.30pm and Saturday, 9am-1pm)  
Textphone 0800 24 33 55 (in English and Welsh)  
Northern Ireland Telephone 0800 22 06 74  
Textphone 0800 24 37 87  
[www.dwp.gov.uk](http://www.dwp.gov.uk)

### **British Association of Occupational Therapists**

College of Occupational Therapists,  
106-114 Borough High Street, Southwark,  
London, SE1 1LB.  
Tel: 020 7357 6480  
[www.cot.org.uk](http://www.cot.org.uk)

### **Care and Repair England**

3rd Floor, Bridgford House, Pavilion Road, West Bridgford, Nottingham, NG2 5GJ.  
Tel: 0115 950 6500  
[www.careandrepair-england.org.uk](http://www.careandrepair-england.org.uk)  
Organises repairs and home adaptations for people with disabilities. For local office, contact address above.

### **Carers UK**

Aimed at all carers. Offers information leaflets and a national helpline run by qualified, trained staff.  
20 Great Dover Street  
London SE1 4LX  
CarersLine 0808 808 7777  
(Wednesday and Thursday, 10am-12pm and 2-4pm)  
[www.carersuk.org](http://www.carersuk.org)

### **Citizens Advice Bureau (CAB)**

Help with welfare rights, housing and disability advice. Local CABs are listed in the telephone directory and on their website. The CAB also operates an online advice guide.  
[www.citizensadvice.org.uk](http://www.citizensadvice.org.uk)  
[www.adviceguide.org.uk](http://www.adviceguide.org.uk)

### **Crossroads Care**

10 Regent Place, Rugby, Warwickshire, CV21 2PN.  
Tel: 01788 573653.  
[www.crossroads.org.uk](http://www.crossroads.org.uk)  
Professional Support to carers and people with care needs. Services in England, Wales and, Northern Ireland.

### **Counsel and Care for the Elderly**

Twyman House, 16 Bonny Street,  
London, NW1 9PG.  
Tel: 0845 300 7585 (Mon-Fri 10.00 - 1.00)  
[www.counselandcare.org.uk](http://www.counselandcare.org.uk)  
Advice service on care at home, residential care and financial help.

### **Department for Work and Pensions**

Responsible for a range of benefits and services for people who are sick or have a disability. The website includes an A-Z of benefits.  
[www.dwp.gov.uk](http://www.dwp.gov.uk)

### **DIAL – Disability Information Advice Line**

Network of local information services, providing information and advice on all aspects of living with a disability.

St Catherine's, Tickhill Road  
Doncaster DN4 8QN  
Telephone 01302 310 123  
Textphone 01302 310 123 (use voice announcer)  
[www.dialuk.info](http://www.dialuk.info)

### **Disability Law Service**

National charity providing free, confidential legal advice and support in social welfare and disability discrimination law for disabled people, their families and carers. The MS Society funds a dedicated MS Legal Officer who can provide basic legal advice, information and can arrange for an appointment with a specialist employment adviser.

39-45 Cavell Street  
London E1 2BP  
Telephone/textphone 020 7791 9800  
[www.dls.org.uk](http://www.dls.org.uk)

### **Disabled Living Foundation**

Provides information and advice to disabled people and others who use equipment or assistive technologies to enhance their independence.

380-384 Harrow Road  
London W9 2HU  
Helpline 0845 130 9177  
(Monday to Friday, 10am-4pm)  
Textphone 020 7432 8009  
[www.dlf.org.uk](http://www.dlf.org.uk)

### **Disabled Persons Transport Advisory Committee (DPTAC)**

An advisory committee for the Department of Transport, providing travel advice and transport information for people who are disabled or have difficulty in getting around.

Telephone 020 7944 8011  
Textphone 020 7944 3277  
[www.dptac.gov.uk](http://www.dptac.gov.uk)

### **Disability Alliance**

Universal House, 88-94 Wentworth Street, London, E1 7SA  
Tel: 020 7247 8776  
[www.disabilityalliance.org](http://www.disabilityalliance.org)  
Authors of the Disability Rights Handbook.

### **Forum of Mobility Centres**

Provides practical advice on driving, vehicle adaptation and suitable vehicle types for both drivers and passengers.

Old Wokingham Road  
Crowthorne RG45 6XD  
[www.dft.gov.uk/access/mavis](http://www.dft.gov.uk/access/mavis)  
c/o Providence Chapel  
Warehorne  
Ashford  
Kent TN26 2JX  
Telephone 0800 559 3636  
[www.mobility-centres.org.uk](http://www.mobility-centres.org.uk)

### **Holiday Care**

Imperial Buildings, Victoria Road,  
Horley, Surrey, RH6 7PZ.  
Tel: 01293 771 500  
[www.holidaycare.org.uk](http://www.holidaycare.org.uk)  
email [holiday.care@virgin.net](mailto:holiday.care@virgin.net)

### **Motability**

Motability helps disabled people and their families become mobile by supplying wheelchairs, scooters and cars.

Motability Car Scheme  
City Gate House  
22 Southwark Bridge Road  
London SE1 9HB  
Telephone 0845 456 4566  
[www.motability.co.uk](http://www.motability.co.uk)

### **Motability Wheelchair & Scooter Scheme**

Route2mobility  
Newbury Road  
Enham Alamein  
Andover  
Hampshire SP11 6JS  
Telephone 0845 60 762 60  
[www.motability.co.uk](http://www.motability.co.uk)

**Mobility Centre, Banstead**

Damson Way, Orchard Hill, Queen Mary's Avenue,  
Carshalton, Surrey SM5 4NR.

Tel: 0208 770 1151

Free information service, assessments for car  
drivers, passengers and wheelchair users. Driving  
Tuition and residential accommodation.

**Princess Royal Trust for Carers**

Provides information, advice and support through its  
network of independently managed carers' centres.

Also has a range of grant schemes for carers.

Unit 14, Bourne Court

Southend Road

Woodford Green IG8 8HD

Telephone 0844 800 4361

[www.carers.org](http://www.carers.org)

**Royal Association for Disability and  
Rehabilitation (RADAR)**

Offers information and advice on rights and services  
and also operates the National Key Scheme, which  
gives users access to around 4,000 locked toilets  
suitable for people with disabilities.

12 City Forum

250 City Road

London EC1V 8AF

Telephone 020 7250 3222

Textphone 020 7250 4119

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

**Red Cross (British Society)**

9 Grosvenor Crescent, London

SW1X 7EJ.

Tel: 020 7235 5454.

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

Limited equipment loan, escort and transport  
services.

**SSAFA Forces Help**

Look in your telephone directory under Soldiers,  
Sailors & Airmen's Families Association Forces Help  
for your local office. Can provide financial assistance  
to those who have been in the Forces, their family  
and dependants. This includes National Service.

19 Queen Elizabeth Street, London, SE1 2LP. Tel:

020 7403 8783

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

email [info@ssafa.org.uk](mailto:info@ssafa.org.uk)

**Skill (National Bureau for Students with  
Disabilities)**

Promotes opportunities for young people and adults  
with any kind of disability in post-16 education,  
training and employment.

Unit 3, Floor 3

Radisson Court

219 Long Lane

London SE1 4PR

Freephone 0800 328 5050

Textphone 0800 068 2422

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

**Tourism for All**

Gives people with disabilities the opportunity  
to holiday (where possible in a mainstream  
environment) by providing information across all  
sectors of hospitality, including accommodation,  
visitor attractions, activity holidays and respite care  
establishments, both in the UK and overseas.

c/o Vitalise

Shap Road Industrial Estate

Shap Road

Kendal LA9 6NZ

Telephone 0845 124 9971

Textphone 0845 124 9976

[www.tourismforall.info](http://www.tourismforall.info)

Details of these and other addresses are available  
in the back pages of the Disability Rights Handbook  
referred to earlier in this guide. A copy can be  
found in your Providing Support Toolkit.

## The MS Society's Respite Homes & Centres

The Society manages three care centres in England that offer specialist respite care for people severely affected by MS. Teams of fully trained and experienced staff provide high quality personal and nursing care 24 hours a day. The centres also offer a relaxed atmosphere with the opportunity to enjoy a varied leisure programme. Contact the centres directly for more information or visit the Society's website and find further details of the care being offered.

Brambles Respite Care Centre  
Suffolk Close  
Massetts Road  
Horley  
Surrey  
RH6 7DU  
Tel: 01293 771 644

Helen Ley Care Centre  
Bericote Road  
Blackdown  
Leamington Spa  
Warwickshire  
CV32 6QP  
Tel: 01926 313 550

Woodlands Respite Care Centre  
120 Thief Lane  
Hull Road  
York  
YO10 3HU  
Tel: 01904 892 864

The Society has also developed the Preferred Provider scheme which offers external care providers the opportunity to demonstrate their ability to meet the respite needs of people with MS, particularly those with advanced and complex needs. To gain Preferred Provider status, centres will be required to work through criteria identified in a detailed assessment devised by the Society to evaluate the services provided. For more information on Preferred Providers, contact the Respite Care team at the Society.

## Useful Local Contacts

We have provided room for you to list some of the local charities, organisations and statutory agencies that you may contact on a regular basis, when dealing with a Support grant application. You may have already collated this information in your Providing Support toolkit; if so, it may be useful to copy some of that information here.

Useful contacts may include: your local MS Nurse, the local housing department, wheelchair service, benefits agency, citizen's advice bureau, round table or rotary club, SSAFA representative or other agencies. Use the space provided as you see fit.

Useful Contact

Address

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Telephone Number

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Useful Contact

Address

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Telephone Number

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Useful Contact

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# Notes



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