



Appeals policy

Appeals policy for applicants requesting financial assistance

All requests from individuals for financial assistance are considered by the Support and Grants Committee, which meets twice a year. In between meetings, requests that are regarded as urgent are considered by the Chairman of the Support and Grants Committee. These decisions are later noted by the Support and Grants Committee and are recorded in the minutes.

Verification of needs and circumstances

Trustees recognise that it can be difficult to express needs and circumstances in an application form or letter. The Trust therefore aims that where appropriate and possible, every applicant in the UK receives a visit from one of our volunteer visitors to discuss needs and circumstances and to ensure that the Trust has a clear understanding of what these are. The Trust also aims that every UK beneficiary should have the opportunity to receive two contacts a year from a visitor.

While we aim to get the decision right first time, we also recognise that mistakes or misunderstandings might possibly occur from our interpretation of applicant's circumstances. Therefore, in line with our policies on data protection and privacy, the Trust welcomes applicants to contact us to correct any details that we might have got wrong or are not up to date.

Time taken to assess a request for assistance

Trustees acknowledge that there will be an inevitable delay between the time an applicant may complete their application form and when a decision is made by the Support and Grants Committee and that the applicant's circumstance might have deteriorated further. The Trust hopes that should this be the case, applicants will contact the Trust as soon as possible, so that the most appropriate decision can be made at the right time on the applicant's current circumstances.

Process for appeal

The decision of the Support and Grants Committee and/or the Chairman of the Support and Grants Committee is final. However, noting potential mistakes, misunderstandings and time delays, the Trust will receive appeals from applicants or representatives acting on their behalf.

The Trust expects the applicant to contact the Trust where there are changed circumstances or where there is reasonable belief that a mistake or misunderstanding has occurred, with accompanying details to support the appeal.

For example this might be details of changed financial circumstances such as a reduction in the receipt of welfare benefits or an increase in expenditure not previously declared or known about. Where appropriate and possible, the Trust might arrange a visit, where the applicant could discuss their concerns and/or changed circumstances to assist with the appeal.

While we aim to respond to appeals as soon as possible and within 20 days, mindful of potential time delays, the appeal would be considered in the first instance by the Chairman of the Support and Grants Committee. While it is hoped that a decision could be swiftly made, depending on the circumstances of the appeal, the Chairman might determine that the decision is either outside his delegated authority and would need to be reviewed at the next meeting of the Support and Grants Committee, or in urgent cases additionally considered by the Deputy Chairman of the Support and Grants Committee or in serious cases by trustees. Additional liaison might also be needed with the visitor, to ensure that the right and appropriate decision is made.

Where an appeal involves the accuracy or completeness of personal data, the Trust will ensure that any relevant information is reviewed and, where necessary, corrected in line with data protection legislation. This may include updating records or seeking further clarification from the applicant.

How to make an appeal

Applicants can submit appeals to:

The Chartered Secretaries' Charitable Trust,
Saffron House, 6-10 Kirby Street,
London, EC1N 8TS

By telephone: 020 7612 7049 or by Email: CSCT@cgi.org.uk

Appeals can be submitted either by letter, email or conversation with the Trust administration or with a visitor.

In order to enable us to fully consider an appeal, applicants should provide as much detail as felt appropriate. If the appeal relates to a matter that occurred more than three months ago, it may be more difficult for the Trust to investigate fully.