



# BT BENEVOLENT FUND

Positive action where it's most needed

NEWSLETTER • 2020

## FUND BUSIER THAN EVER IN 2019



### New Fund Manager

Rob Pearce, the new BT Benevolent Fund Manager says "2019 was another extremely busy year. The Fund helped over 700 people awarding grants of over £800,000".

Rob Pearce

### Grants in 2019

#### Helping current and former BT people

In 2019 the Fund helped over 700 BT people, many of these being current BT employees. In fact, in a continuation of the trend first experienced in 2017, the proportion of our cases coming from current BT employees increased to well over 40% of all cases and we expect this trend to continue in 2020. The Fund helps in lots of different ways. We contribute to home adaptations, such as the provision of stairlifts and wheelchair ramps, as well as helping with debt and arrears.

Some of the cases we get are truly heart breaking and we are happy that we can make a small difference when people are going through a difficult time, whether it's helping with funeral expenses or in some cases just helping to put food on the table!

At the end of the year we were also paying weekly grants to more than 200 former BT people who are on very low incomes. We were delighted that we were able to maintain our additional £225 Christmas payments to them, including a £100 winter fuel payment funded from the grant we received from the Civil Service Insurance Society Charity Fund.

### Donations

#### More regular donors needed

As is the case for many small charities, recruiting and retaining regular donors remained challenging in 2019, although we did see a slight increase in the total number of people who donate to the Fund, which now stands at 17,915. During the year we had continued success in recruiting new employee donors thanks to a number of targeted initiatives and in 2020 we hope to increase employee donations further.

### Income

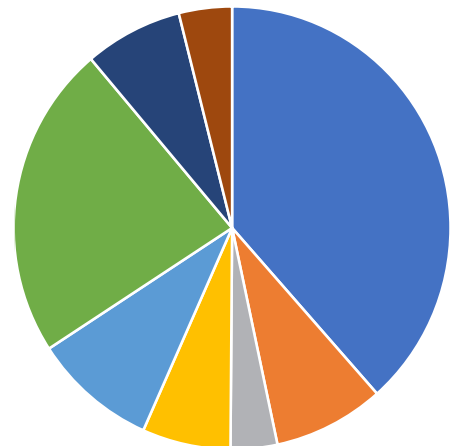
#### Where our income comes from

In 2019 our income exceeded £1 million for the 6th year in a row. Donations, together with Gift Aid, made up more than half of this. We received a grant of £20,000 from BT plc and a further £20,000 from Openreach, which were most welcome. We also received a very generous £60,000 from the Civil Service Insurance Society Charity Fund for which we are most grateful. Investment income, some small legacies and Christmas card sales, as well as one-off donations boosted our funds.

Unfortunately, we ended 2019 with a deficit for the 2nd year in a row so your generous donations are more important to us than ever. For those of you that kindly donate to the BT Benevolent Fund please accept our heartfelt thanks.

### Grants Analysis 2019

In 2019 we paid out a total of £840,511 in grants and we know that made such a real difference in so many ways. It was broken down as follows:



- Weekly grants £323K
- Furniture & appliances £29k
- Disablement aids & adaptations £77k
- Funerals £61k ■ Housing & heating repairs £69k
- Rehousing £55k ■ Debts £193k ■ Other £33k

### 2020 BTBF Christmas Cards Now on sale



Our 2020 Christmas cards are now on sale. To order please use the enclosed form or you can order online on our website at [www.btplc.com/bf/christmascards](http://www.btplc.com/bf/christmascards). Cards will be sent out from June onwards.

We made over £11,000 on the sale of cards in 2019. It's an extremely important source of income for us, so your continued support would be much appreciated.



## New Faces at the Fund

2019 was another year of change at the Fund, with Clare Dyer leaving BT in October and standing down as our Chair. We are however delighted to welcome Mark Murphy, BT's Director of HR for Technology as our new Chair.



Mark Murphy

Additionally, our long serving Fund Manager, Debbie Terry has retired from the Fund after 10 very successful years. Rob Pearce, who recently retired from BT has joined us as the new Fund Manager.



Rob Pearce

We also welcome Beth Courtier and Julia Jackson to the team. Beth joins the Board of Trustees and works in BT corporate affairs as the Regional Programme Manager. Julia joins as one of our Honorary Solicitors and currently works as a senior lawyer in BT. Both bring a wealth of experience to the team.



Julia Jackson

## BT Chairman Jan Du Plessis on the BT Benevolent Fund

"I was delighted to learn about the work of the BT Benevolent Fund and the difference it's made to the lives of so many of our colleagues, past and present. The impact they have is considerable and the vital work of this charity is only made possible by the generosity of its donors."



Jan Du Plessis

### Vision

With a potential beneficiary base approaching two million people, the Fund aims to make itself as widely known as possible throughout this group of individuals in order to make access to the Fund's services straightforward and effective.

### Mission

To increase awareness of the Fund and its activities throughout the company workforce and pension fund membership with a view to recruitment of contributing members and identifying the Fund as a 'resource' for those in hardship.

### Values

- We will react promptly and effectively to those in financial hardship
- We will make efforts to reach out to potential beneficiaries
- We will adopt grant-making policies which are fair and consistent
- We will conduct the Fund's affairs in a manner which ensures a long-term future

## Privacy notice

The BT Benevolent Fund is a registered charity. We are sending you this newsletter because you have said it is ok to do so. You can ask us to stop sending our newsletter by contacting us by phone on 020 8726 2145, by email at [benevolent@bt.com](mailto:benevolent@bt.com) or by post at: Room 323, Reading Central Telephone Exchange, 41 Minster Street, Reading RG1 2JB. For more information about how we process your personal information, please read our privacy notice on our website [www.benevolent.bt.com](http://www.benevolent.bt.com).

## Board of Trustees

Mark Murphy	Chair
Jane Shipway	Vice Chair
Kevin Charlesworth	
John Holme	
Rob Jones	
Vivien Lantree	
Matt Rogers	
Clive Selley	
Beth Courtier	

## Officers

Steph Sharp	Hon Solicitor
Julia Jackson	Hon Solicitor
Lesley Norris	Treasurer
Mike Pearce	Accountant

## Secretariat

Rob Pearce	Fund Manager
Steve Melhuish	Grants Manager
Chris Bennett	Case Secretary
Pippa Jones	Case Secretary
Jackie Standring	Case Secretary
Jules Poole	Case Secretary
Dawn Bennett	Administrator

## Office

Room 323, Reading Central TE,  
41 Minster Street, Reading, Berks RG1 2JB  
Tel. 020 8726 2145  
Email [benevolent@bt.com](mailto:benevolent@bt.com)  
Website [www.benevolent.bt.com](http://www.benevolent.bt.com)

Registered Charity No. 212565

## 2020 AGM

Notice is hereby given that the 39th Annual General Meeting of the BT Benevolent Fund will be held at 1.00pm on Tuesday 28th July 2020 at BT Centre, 81 Newgate Street, London EC1A 7AJ.





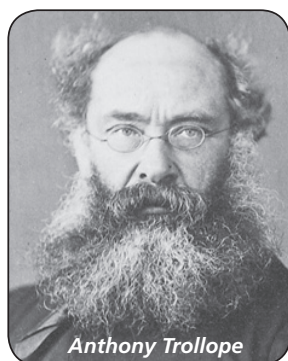
## The history of the BT Benevolent Fund

**Did you know that the BT Benevolent Fund is the oldest benevolent fund in the world!**

Founded as the Post Office Clerks' Charitable Fund, the BT Benevolent Fund has been helping current and former employees and their dependents since 1853!

At that time it cost just a penny a week to become a member and in the first year eight widows were helped at a total cost of £105.

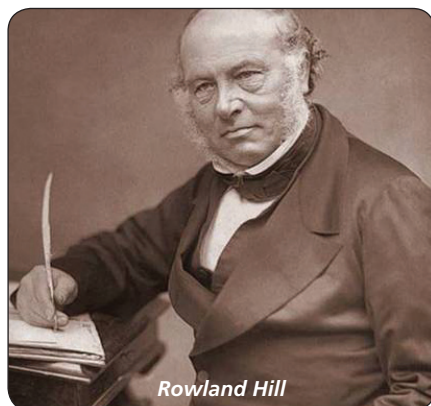
Since then we've helped many thousands of people and of course, before the existence of the Welfare State or the introduction of occupational pensions, organisations such as ours were often the only place that people could turn to for help when in financial difficulty. Even now where welfare provision is an accepted part of our society there are still people who, for many reasons fall into financial difficulty and we are always there to help.



Anthony Trollope

Two eminent Victorians associated with the Fund were Anthony Trollope, who chaired the 1860 AGM, and

Rowland Hill. The Fund that today bears the name Rowland Hill was founded in 1882 to help grades below that of Clerk.



Rowland Hill

In 1902 the BT Benevolent Fund dealt with just 20 cases, but gradually during the 20th century its work expanded, and in 1950 71 grants totalling £1,577 were made. Annual General Meetings were presided over by Postmasters General, including Reginald Bevins, Anthony Wedgwood-Benn and John Stonehouse.

**In 1985, when 154 cases were dealt with, it had been agreed that the Rowland Hill Fund would look after Post Office people and the BT Benevolent Fund would look after BT employees.**

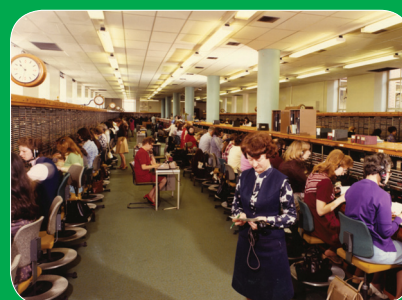
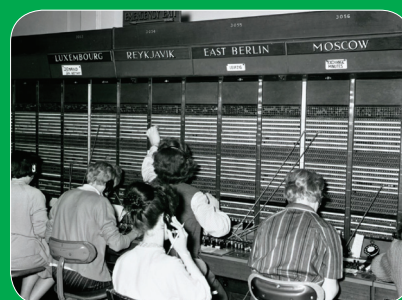
1996 the BT Benevolent Fund was registered with the Charity Commission and had a new constitution reflecting current charity law.

The revised constitution adopted in July 1996 and further revised in 2014, provides for a governing Board of Trustees and a small Secretariat, which deals with the business of the Fund and the number of cases has multiplied tenfold since the mid 1980s.

BT's HR Director of the Technology division chairs the Trustee Board, which is a mixture of current and former employees as well as one independent Trustee.

Today the BT Benevolent Fund office is at Reading Telephone Exchange and the team consists of nine part-time employees, many of them being former BT people. The Fund has come a long way since its humble beginnings in 1853 but our objective remains the same, We are here to help our BT colleagues, past and present, who have fallen on hard times. This is a noble aim, which the BT Benevolent Fund has strived to achieve and maintain from the earliest days of its existence, when it helped colleagues during Queen Victoria's reign, right through to the present day.

## Early images of BT people at work





## Case Studies

### Some typical recipients

In 2019 the Fund dealt with over 500 individual cases as well as paying regular weekly grants to more than 200 elderly people on very low incomes. We can only do this because of the generosity of our individual donors, BT, and the CSiS Charity Fund. We hope these short summaries show just how much difference your support makes. Naturally names and some other details have been changed in order to maintain confidentiality.



#### Home adaptations

The BT Benevolent Fund was approached for assistance with kitchen adaptations for an ex BT employee and serviceman.

Brett's physical and mental health were deteriorating due to his disabilities and health conditions. Diabetes resulted in a double amputation and he needs to use a wheelchair to get around indoors and out. The small kitchen in his home was proving very difficult to negotiate and he was unable to reach the worktops. His inability to contribute to making meals and other household tasks was causing severe depression and anxiety, but despite his own health issues, Brett also acts as his partner's carer.

The BT Benevolent Fund awarded a grant towards the cost of kitchen adaptations which helped Brett carry out routine chores around the home. This has had a hugely positive impact on Brett's daily life.

#### Bankruptcy fees

The Fund was contacted on behalf of Terry, who was a BT telecommunications technician for over 20 years, to ask for help in paying the fee to enable him to declare himself bankrupt, as this was the only realistic option to clear debts.

Terry is wheelchair bound following the loss of both his legs due to diabetes. He has also suffered from kidney failure, blood poisoning, pneumonia and sepsis over recent years. His wife is his carer and she also has health issues of her own.

The couple had found it very difficult to cope financially and unfortunately their debts were out of control. They had been working with "Christians Against Poverty" to learn how to budget and to live within their means going forward. They recommended that bankruptcy was their only realistic option to clear their debts so the BT Benevolent Fund awarded a grant to help pay bankruptcy fees and get them back on their feet.

#### Employee eviction

Jonathan contacted the Fund for support as he was in arrears on several bills and at risk of losing his home. Jonathan, who is a current BT employee, needed time off work due to mental health issues, for which he was receiving therapy and due to this fell into arrears with his rent and council tax.

Jonathan's issues stemmed in the main as a result of serving in the armed forces and the loss of people that were close to him. At one point he thought about taking his own life as the stress and anxiety was getting too much. The BT Benevolent Fund awarded a grant so he could clear some of his debts.

#### Amazon Smile will help us

Did you know that when you buy something on Amazon you may be able to help the BT Benevolent Fund at no additional cost to yourself? All you need to do is:

- go to <https://smile.amazon.co.uk> Note the different url.
- log in using your normal Amazon account details.
- you'll be asked to select a charity. in the search box at the bottom of the page enter "bt benevolent fund".
- press select.

Then each time you buy something from Amazon, as long as you log in via Amazon Smile, Amazon will make a small donation to the BT Benevolent Fund. Everything else is exactly the same, so no need to change anything else on your account and it would really help us!

#### Our Facebook page to share

We now have a Facebook page for the Fund which can be found at <https://www.facebook.com/btbenevolentfund/>. If you have a Facebook account please could you like, follow and share our page with as many of your BT Facebook friends as possible.

