

# BT

# BENEVOLENT FUND

Positive action where it's most needed



NEWSLETTER • SPRING 2009

### Vision

With a potential beneficiary base in excess of one million people, the Fund is aiming 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' to 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

### Board of Trustees

Alex Wilson	Chair
Anne Fletcher	Vice Chair
Kevin Charlesworth	
Allan Gore	
John Holme	
Tom Keeney	
Steve Robertson	
Jane Shipway	

### Officers

Rachel Chapman	Hon Solicitor
Mike Pearce	Treasurer

### Secretariat

Debbie Terry	Fund Manager
Chris Bennett	Case Secretary
Steve Melhuish	Case Secretary
Phil Jennings	Case Secretary
Marjorie Graham	Administrator
Robin Snook	Volunteer

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Registered Charity No. 212565

## New Manager for Your Fund

Debbie Terry has now taken over from Barrie Seaman as Manager of the BT Benevolent Fund. Debbie has recently retired from BT after a long career, predominantly as an HR manager, where she worked in many different parts of the company. Debbie says "Following Barrie, with his many years of experience as Fund Manager, is quite daunting, but it's already clear to me that the Fund is doing great work to alleviate hardship,



Debbie Terry

both among BT pensioners and their dependents as well as for some current BT employees, and I'm determined nothing will change in that respect. The present tough economic climate is bringing its own challenges and this means requests for our help are rising. As a result of this, one of my key aims for the coming year is to raise the profile of the Fund among BT employees, with the aim of continuing to attract new members. Even a very modest monthly amount can help make a real difference."



Alex Wilson  
Fund Chairman

Alex writes: "The Trustees and I are delighted to welcome Debbie to her new role. She has a deep understanding of BT and its values and I'm confident she'll ensure the team at the Fund continue their great work for the BT family."

# Review of 2008: A Year of Change and Challenges

2008 has seen many successes for the Fund but also the need to adapt to increasing and changing demands placed on its resources as a result of the general economic situation.

One of the highlights of 2008 was the launch of an innovative 'Care in the Home' scheme designed to help elderly people retain their independence by staying in their own home for as long as possible. Typical help given under this initiative consists of grants to contribute to the cost of regular assistance from others, such as personal care, cleaning, shopping and gardening.

Thanks in part to the continued generosity of the Civil Service Insurance Society, the pro-active Pensioner Contact Scheme continued in 2008, with all BT pensioners aged 75 and over being written to approximately every 2 years to see if they

employees had been given assistance, twice the number helped in 2007, and representing 15% of all cases handled. Primarily this has been to deal with 'priority' debts, relating to rent or mortgage payments, but help has also been given

Thanks are due to two long-term supporters of the Fund who moved on during 2008. Our Honorary Solicitor, Agnes Lynch, has left BT, and has been replaced in that role by Rachel Chapman, who is Commercial Director, Central Services, in BT Global Services. Additionally, one of our longest-serving Trustees, Charlie McKay, retired from BT, and his replacement on the Board is Tom Keeney, the Director of Employee Relations for the BT Group. We're delighted to take this opportunity to welcome Rachel and Tom to the Fund.

Finally, no review of the last year would be complete without recognising the enormous contribution made to the Fund by Barrie Seaman, its Manager since 1998. Under Barrie's stewardship the Fund has gone from strength to strength, with more members



need any financial assistance. In 2008, almost 12,800 letters were sent out and some 200 cases resulted. Many pensioners contacted in this way are kind enough to respond to the Fund saying that, while they have no need for any support, how heartening it is to see such work being done.

Another area of success for the Fund has been the number of members now signing up for Gift Aid on their contributions. This means that in 2008 the Fund was able to recover £95,000 on contributions made by UK taxpayers, resulting in us being able to help even more worthwhile cases.

The most significant change experienced by the Fund in 2008, however, has been the rise in requests for help from current BT employees. Traditionally, these have made up only some 8% of cases. As 2008 progressed the numbers rose significantly, with the result that by year end 100

with other costs including re-housing, adaptations relating to disabled family members, and funeral costs for close relatives. Our case files show that sometimes people end up in financial difficulties because a partner has lost their job and been unable to quickly find new work; in other cases the breakdown of a relationship leads to spiralling debt, while in some cases a long period of illness leads to financial difficulties. Whatever the cause, the Fund has done its best to assist, and particularly where potential hardship to children has been involved. In this respect, it's been helped significantly by a special one-off additional grant agreed by BT's Committee for Responsible and Sustainable Business. The Committee, chaired by BT Chairman Sir Mike Rake, commented very supportively on the work done by the Fund and was keen to see it being able to do more in these difficult times.



**Barrie Seaman**  
Fund Manager

and increasing numbers of pensioners and current employees assisted at times of difficulty. Barrie is not, however, severing all his links with the charity world; he is to become a Trustee of the Civil Service Widows and Orphans Fund, as well as taking on the role of Chairman of the Careways Trust later this year. We wish Barrie and his wife Georgie a very happy and busy retirement – much of which, we understand, will be spent on the golf course!



## Employee Members – Could You Recruit a Friend?

Of the Fund's approximately 18,000 members, only 2,550 are current BT employees. This is despite the 2008 recruitment mailshot campaign to all current BT employees, which did result in additional recruits. The Fund's new Manager, Debbie Terry, finds this extremely disappointing. She commented: "Knowing I was moving to the Fund I took the opportunity, in my final months with BT, to talk to people about it whenever possible and to encourage them to visit its website. What this showed me was that many of our people haven't heard of the Fund; of those who had, most had no clear idea of the work it does." One of the ways in which Debbie intends to now try to increase membership numbers is by asking each existing employee member to 'Recruit a Friend' so, BT members, please see what you can do! Even the smallest extra monthly contribution makes a difference to our work, especially when enhanced by Gift Aid. **Please also consider adding the Fund's website address as a footer to your emails, and take the opportunity to sponsor our work with your colleagues.**

Debbie would also be delighted to attend any team events or meetings to give a brief talk – about the work of the Fund – email her on [benevolent@bt.com](mailto:benevolent@bt.com) if you'd like her to do so, if you have any other ideas about increasing Fund membership among current employees, and with any general fundraising ideas.

## New Administrator at the Fund

Last summer saw the retirement, after over six years with the Fund, of our administrator Rita Hicks. Rita was an absolute mainstay of the Fund with exceptional knowledge and experience; we all wish her a long and happy retirement. In her place, we're delighted to have been joined by Marjorie Graham. Marjorie spent over 27 years in BT, most recently as a Personal Assistant in the Marketing arm of BT Wholesale. She lives in Purley-on-Thames and tells us that one of her ambitions is to learn to play the ukulele!



Marjorie Graham

## 2009 AGM

Notice is hereby given that the 28th Annual General Meeting of the Fund will be held on Tuesday 9th June 2009 in BT Centre, 81 Newgate Street, London EC1A 7AJ. All are welcome. The meeting includes a review of the year 2008 and is followed by refreshments.

It would assist us greatly with building security arrangements if you could let the Fund know if you are planning to attend.

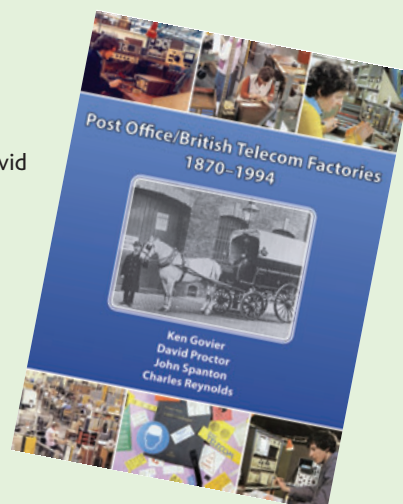
## Mobility for Irene!

One of the Fund's most grateful recipients during 2008 was former employee Irene Hogan, whom the Fund assisted in regaining independence through help to purchase a mobility scooter. Irene writes: "Arranging to attend hospital appointments has been a real problem in the past involving ambulances, wheelchairs and a lot of waiting....this week I have been able to go direct from my home to the hospital and right into the department I needed to attend – I felt so free! It's wonderful to go into supermarkets, shops and the Post Office; I've also discovered that the cinema near my flat has disabled access so a friend and I are planning an evening out soon. There are just so many ways that having a scooter is a benefit."

## The History of BT Factories

Four former work colleagues, Ken Govier, David Proctor, John Spanton and Charles Reynolds, have recently produced a fascinating book chronicling the history of Post Office/British Telecom Factories. The book traces the 104-year history of the Factories and contains over 70 photos covering factory operations. The authors have very generously donated all proceeds from sales of the book to the Benevolent Fund.

The book can be ordered online from [www.ypd-books.co.uk](http://www.ypd-books.co.uk)



Irene on her new scooter

# From the case files

The Fund now deals with over 650 individual cases each year and pays regular weekly grants to some 225 elderly people on very low incomes. We receive many testimonials and letters of thanks from beneficiaries and family members. Because the work involves a good deal of routine and is subject to business-like practices and processes, it's sometimes easy to overlook the human stories behind each case. We hope these brief summaries adequately convey what we do and what it can mean for those we help. Names and locations have all been changed in order to respect confidentiality.

## Joyce

Joyce worked for BT for 16 years as a telephonist. Now aged 82, both she and her husband are in poor health and find daily life very difficult.

Joyce's husband had Army service and they applied to the Fund for help towards a two week respite break at a Services home. A grant was given towards accommodation and travel costs.

## Geraldine

Geraldine is a single parent employed by BT in York. She has three teenage children, one of whom has disabilities. Despite many financial

pressures, Geraldine has kept up with her mortgage and other payments but any extra expenditure is extremely difficult for her. The Fund made a grant towards provision of a laptop for her daughter, which is proving very helpful in term of her special educational needs.

## Antony

Antony worked for BT as an engineer in Manchester for 21 years before Multiple Sclerosis led to his early retirement. As time went on, his life

became very hard as he was having increasing difficulty in communicating. The Fund was able to help with provision of specialist communication equipment which meant he could be more independent and remain in his own home.

## Jason

Jason is a BT engineer in Lincolnshire who is married with a young family. As a result of various family problems they had fallen into considerable debt but

had made arrangements with their creditors to pay them back. However when Jason's car broke down and needed some costly repairs they simply did not have the funds to pay, and without the car he could not get to work. The Fund made an emergency grant to meet the cost of the repairs, with the result that Jason did not have to take any time off work.

## Elizabeth

Elizabeth is a BT employee with 34 years' service. After contracting polio in childhood she is confined to a wheelchair, but this has

not stopped her living an active life as well as working full-time. However as she got older her self-propelled wheelchair became very tiring and her ability to continue working was threatened. Her specialist recommended a powered wheelchair instead, and the Fund was happy to contribute to the costs of this.

## Bob

Bob is a retired BT manager in Glasgow who was seriously hurt in a road accident which was not his fault, resulting in partial paralysis. A

widower, his wife had died of cancer some years previously. His only daughter, who is married with a young family, was travelling from London to Scotland on a regular basis to visit her father and deal with his affairs, but was finding this a severe strain financially. The Fund was able to make a contribution to her travel costs while her father's health was stabilised and a longer-term solution could be reached.

## Lillian

Lillian, who is 87, worked for BT for over 25 years as telephonist in Birmingham. Now widowed, she recently suffered a stroke which left her unable to climb

her stairs at home. Her son managed to find a second-hand stairlift which has made her life much easier, and the Fund was happy to pay for this.

## June

June's late husband worked for BT as a Clerical Officer for over 35 years. She still lives in her own home, but has no savings so any unexpected additional

expenditure is difficult. Recently her guttering and downpipes needed to be replaced and the Fund awarded a grant to meet the cost of this essential work.

## Gerald

Gerald was an ex-BT engineer in London who was cared for by his daughter during his final years. She was unable to take any paid employment during this

time and had no savings. After his death there was insufficient money to meet the funeral expenses and the Fund contributed to these costs for her.

