

**BRITISH ASSOCIATION  
OF FORMER  
UNITED NATIONS  
CIVIL SERVANTS  
(BAFUNCS)**

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**Information Note No 10.**

**A GUIDE TO THE BAFUNCS BENEVOLENT FUND (BBF)**

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The Trustees of the Fund are pleased to provide this Revised Version (2017) of the BBF Guide for the information of BAFUNCS members.

**1. The Origin of the Fund**

In October 1984, the British Association of Former United Nations Civil Servants (BAFUNCS) received a bequest of £5,000 from the estate of Esther Simmons, a former member, in recognition of the comfort she had derived from her contact with BAFUNCS. The bequest was gratefully accepted as it fell within the “Objects of the Association” under clause 2(iii) – “To extend welfare to its members and former employees of the United Nations Civil Service and their spouses in need through grants or interest free loans”. The Executive Committee of BAFUNCS (ExCo) established the Esther Simmons Fund from which it made a few awards during 1986.

Subsequently, for administrative and financial reasons, ExCo recommended that the Fund should be instituted as a recognised charitable organisation independent of BAFUNCS itself. The draft constitution was approved by the General Assembly at its 10<sup>th</sup> AGM at Eastbourne in 1987 and the BBF was registered by the Charity Commission on 23 September 1987 – Registered Charity No. 297524.

In 2008/09 the Benevolent Fund received a large bequest (£ 435,897) from the estate of the late Denise Erica Thomas. The Trustees sought the best investment instruments, while at the same time seeking new opportunities to use the funds for the benefit of members, and of other former UN civil servants who are normally resident in the UK.

## **2. Its Constitution**

The BAFUNCS Benevolent Fund, or BBF, was registered under the Charities Act 1960 and is subject to the provisions of the more recent Charities Act of 1992. Its constitutional, administrative and financial procedures meet all the current requirements of the Charity Commissioners.

The object of the BBF is to relieve in cases of need, hardship or distress members of the Association, their spouses, widows, widowers and other dependants through grants or interest free loans.

Support is not limited to members but is also available to any former employee of the United Nations or of its Specialised Agencies provided they are resident in the United Kingdom.

## **3. The Trustees**

The functioning of the BBF rests solely in the hands of the Trustees. Amendments to the Constitution require both their unanimity and the written consent of ExCo. The Clerk to the BBF, also a Trustee, prepares and deals with all the financial information required by the Charity Commission and the HM Revenue & Customs for tax refunds. All requests for information and assistance should be directed to the Clerk. The Chairman makes a courtesy report on the activities and financial status of the Fund each year to the Association, at the time of the Association's AGM.

The maximum number of Trustees is nine and the minimum is five (Constitution, sect. 11) they must be members of BAFUNCS, unless the Association ceases to exist. The statutory power of their appointment rests exclusively with the ExCo. They are appointed for life or until they retire.

The present Trustees and their dates of appointment are: -

Cyril Groom	May 2002	Chairman 2003 --
Susan Idreos	May 2007	
Penelope Ratcliffe	May 2010	
John Doherty	May 2014	
Geoffrey Ward	May 2015	Clerk/Treasurer 2015 --
Terri Jezeph	May 2016	
Philip Daniel	July 2017	

#### **4. Administration of the Fund**

Requests for grants or loans may be made directly to the BBF ([benevolent.fund@bafuncs.org](mailto:benevolent.fund@bafuncs.org)), to the national Welfare Coordinator ([welfare@bafuncs.org](mailto:welfare@bafuncs.org)) or via the Regional Welfare Officers of BAFUNCS (see regional information on the website or in the national newsletter).

To discharge their duties and ensure their accountability to the donors, the Trustees may require an additional assessment of the need. Thus they may act alone or, with the prior agreement of the applicant, seek advice from the appropriate Welfare Officer. At all times strict confidentiality is maintained.

The objects of the BBF give the Trustees a very wide range of circumstances where grants or loans can be paid to relieve need, hardship or distress. In fact, there is little the Fund cannot support except for payments to BAFUNCS itself in any form, including subscriptions.

As a guide to potential applicants, the Trustees, have listed below examples where support can be given:

- A. Medical and surgical care.
- B. Respite care, to release a family carer.
- C. Convalescence, including short term home help.
- D. Disability aids: mobility equipment such as special wheel chairs; stair lifts; bathing hoists; specialised vision & hearing aids.
- E. Household aids for the ill, disabled or frail: "Bleep" warning systems; controlled entrance door locks; rising chairs and bed lifts; walk-in baths or showers.
- F. Assistance towards transport costs for hospital out-patient visits; or visits by family or a BAFUNCS member to a hospitalised patient.
- G. Convalescent visits to family and convalescent holidays
- H. Loans or grants to meet short-term emergencies
- I. Grants on compassionate grounds

For the present, the Trustees consider that the Fund can only support one-time claims for a grant. It cannot commit itself to recurrent claims such as regular annual payments or long term hospitalisation and convalescence. Also, it can only consider support if this is not available from such other sources as the National Health Service or Social Services. Loans are primarily made to the newly widowed while pension rights are being established.

## 5. Financial Operations

At the end of the accounting period 2016 the Net Assets of the Fund stood at £583,831. Income results from covenants, Gift Aid Scheme donations, gifts and bequests and including tax refunds and bank interest.

Since 1987 up to date (October 2016) a total of £85,899 has been used to make grants and £71,200 has been lent and subsequently repaid.

## 6. Methods of Contribution

The **Gift Aid Scheme**, which came into effect on 6 April 2000 and now covers all forms of making donations to charities, has replaced the Annual Covenant, which was the previous standard method. However, the new scheme will not affect existing covenants made before the date of the changeover and, therefore, no action is required by the donors concerned.

The new system is much simpler than before. Charities will now be able to reclaim Income Tax on all donations, however large or small, provided a Gift Aid Declaration is completed and the donor has paid an amount of Income Tax or Capital Gains Tax at least equal to the Tax the Fund reclaims on that donation during the Tax year. The signed declaration is valid for a lifetime or until the donor revokes it. A Gift Aid Declaration form is attached for your use, preferably now or at any time up your next donation.

Other gifts and collections, such as proceeds of raffles and Charities Aid Foundation cheques are added directly to the capital of the Fund. For amounts of £20 or less they are eligible for gift Aid supplement of 25% through the Small Donations Gift Aid Scheme – no Gift Aid declaration is required. Bequests and Legacies for the BBF are deductible before tax. The promise of a legacy helps the Trustees to take a long-term view of their resources

Since 2004 tax payers who complete self-assessment returns to the Inland Revenue can nominate any Charity to receive all or part of any refund/repayment. The BBF is registered with the Inland Revenue number **FAO 7FG** if members wish to avail themselves of this means of contributing to the BBF.

All correspondence and enquiries about these and other methods of contribution should be addressed to :- Geoff. M. Ward, Margalla, Higher Gunville, Milborne Port, Sherborne, Dorset DT9 5AW - or [benevolent.fund@bafuncs.org](mailto:benevolent.fund@bafuncs.org)

We owe the existence of the Fund to the generosity of those members who have contributed to it in the past. We trust that members will continue in the future to maintain existing covenants or avail themselves of the Gift Aid Scheme in order to make tax effective contributions to the Fund to be used to benefit less fortunate former colleagues and their dependants.

**BAFUNCS BENEVOLENT FUND**

(Registered Charity No.297524)

**Gift Aid Declaration Form**

I,.....(name in full)

of .....(address)

.....(town) .....(county).....(post code)

wish to donate to BAFUNCS Benevolent Fund under the Gift Aid Scheme a Sum of  
£..... per annum with effect from .....(date of first payment).

I understand that I must pay an amount of Income or Capital Gains Tax in the  
relevant year not less than any Tax reclaimed by the charity in that period.

Signature .....Date.....

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**BANKERS ORDER**

To .....(name of bank)

of.....

..... (full address & postcode)

Please debit my account (name).....

Account No. ....Sort Code.....

and pay BARCLAYS BANK PLC (Sort Code ) of 21 High Street, Lymington,  
Hampshire, SO41 9YJ for the account of BAFUNCS Benevolent Fund (No. )

*The BBF Account NO and Sort Code will be added by BBF Clerk/Treasurer.*

the sum of £..... (.....pounds sterling)  
on..... day, month, year) and a like sum each year until further notice.

Name (in block capitals).....

Signed.....this .....day of.....(month /year)

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Please make sure the same sum is entered into both the Declaration and the Bankers  
Order and return the entire form to:

Mr. Geoffrey M. Ward,  
Clerk/Treasurer to the Trustees,  
BAFUNCS Benevolent Fund,  
Margalla, Higher Gunville, Milborne Port, Sherborne, Dorset DT9 5AW