



Hillview College Parent Teacher Association (PTA)

Benevolent Fund: *Policy, Procedures, Guidelines*

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Section 1: PURPOSE

The Benevolent Fund seeks to provide critical assistance to the students of Hillview College.

Section 2: POLICY STATEMENT

The Benevolent Fund is intended to provide a one-time gift to a needy recipient.

The disbursement of the Benevolent Fund shall be through an application process with an application form (see appendix I).

Section 3: BENEFITS

The provision of assistance and support to students of Hillview College who may be in financial or other difficulty due to unforeseen circumstances.

Section 4: ROLES AND RESPONSIBILITIES

Sub-Section 1: Management of Fund

- Item a:* The Benevolent Fund shall be managed by the Benevolent Fund Committee.
- Item b:* The Benevolent Fund Committee shall consist of a minimum of three and a maximum of five members comprising of a Chairperson to be selected from the Executive Committee and a minimum of two Ordinary members.
- Item c:* The Executive Committee shall nominate the members of the Benevolent Fund Committee at the first Statutory Meeting of the new PTA Executive Committee.
- Item d:* There shall be no restriction to the number of consecutive years a committee member may serve.

Section 5: GUIDELINES

Sub-Section 1: Accountability

- Item a:* The Benevolent Fund Committee shall be accountable for the Benevolent Fund as approved by the Executive Committee annually.
- Item b:* The Benevolent Fund Committee shall ensure that all funds spent are supported by approved invoices, and vouchers must be signed by the receiving party.
- Item c:* Financial reports of the Benevolent Fund Committee signed by the Chairman of the Committee must be submitted to the Executive Committee at the Statutory Monthly meetings of the Executive Committee.
- Item d:* The Benevolent Fund is subject to the overall audit by the appointed Auditor of the Association.
- Item e:* The Chairman of the Benevolent Fund Committee shall serve as liaison between the school, the Benevolent Fund Committee and the Executive Committee.
- Item f:* The Chairman of the Benevolent Fund Committee shall consult with the Principal to identify nominees and receive applications for funding.
- Item g:* All concerned parties must disclose conflicts of interest (such as where a proposed recipient involves a family member) and recuse themselves from the related discussion and decision.

Sub-Section 2: Confidentiality

- Item a:* All members of the Benevolent Fund Committee and other members of the Executive Committee shall exercise confidentiality when dealing with all applications.
- Item b:* The names of the beneficiaries of the Benevolent Fund shall remain confidential.
- Item c:* All information received from applicants shall remain confidential within the confines of the Benevolent Fund Committee and the Executive Officers of the Association.
- Item d:* An exception shall be made in the execution of an audit, during which time, all information required for the purpose of the audit shall be divulged by members of the Benevolent Fund Committee to the Auditor.

Sub-Section 3: Funding

- Item a:* The Benevolent Fund Committee shall manage an annual allocation of \$10,000.00¹.
- Item b:* The Benevolent Fund Committee shall only provide assistance when sufficient funds are available.
- Item c:* The Benevolent Fund shall receive income from two sources:
- Item d:* Funds shall be allocated to the Benevolent Fund from the Association’s Account as part of the annual budget process culminating at the Annual General Meeting of the Association. The initial allocation shall be ten thousand dollars (\$10,000) and a “top-up” allocation to replenish the fund to the sum of ten thousand dollars (\$10,000) shall be made every year thereafter in the annual budget process.
- Item e:* Financial contributions can be made to the Benevolent Fund from members of the school or wider community on a voluntary basis. Contributions can be solicited only with the written consent of the Executive Committee.
- Item f:* Contributions to the Benevolent Fund in the form of a cheque should be made payable to “Hillview College PTA”, accompanied by a note specifying that the funds are to be allocated to the Benevolent Fund.
- Item g:* All contributions to the Benevolent Fund must be unconditional and without personal benefit to the donor.
- Item h:* Contributions shall not be earmarked or otherwise designated for any particular purpose or recipient.
- Item i:* The Executive Committee and the Benevolent Fund Committee shall refuse any contribution so designated in Item (h) above.

Sub-Section 4: Duration of Charity

- Item a:* The Benevolent Fund shall provide assistance for a specific need at a specific time and shall not make any commitment to provide long-term or recurring assistance to any individual.
- Item b:* However, in circumstances where the Benevolent Fund Committee deems it necessary to help the same recipient more than once, a proposal to do such must be tabled at a meeting of the Executive Committee for approval.

¹ Quantum of allocation to be discussed

Item c: Where appropriate, referrals will be made to the School Social Worker via the Principal for assistance with accessing community and/or government programs.

Sub-Section 5: Support

Item a: All support granted must be approved by the Benevolent Fund Committee.

Item b: Assistance to any single recipient in a single situation shall not exceed \$2,000.00 per academic year.

Item c: Assistance received from the Benevolent Fund is not to be considered as a loan.

Item d: No member of the Association may seek repayment from a recipient, either in part or in full, financially or otherwise.

Item e: The Benevolent Fund Committee has the right to verify the accuracy of the application.

Item f: Where funding is not approved by the Benevolent Fund Committee, referrals to other agencies shall be offered to the applicant for assistance.

Item g: The Benevolent Fund Committee shall maintain a record of all other agencies that can provide assistance, such as community services, government programmes, hamper distribution, etc.

Sub-Section 6: Disbursement

Item a: The Benevolent Fund is intended as a last resort to be used when an applicant requesting assistance has explored all other possibilities of assistance from other sources such as family, friends, community, and government.

Item b: The Benevolent Fund is not intended to foster financial dependency or relinquish parents/guardians from responsibilities for their child/ward.

Item c: Payments from the Benevolent Fund will only be remitted once approval has been granted by the Executive Committee² upon recommendation from the Benevolent Fund Committee.

Item d: Whenever reasonably possible, assistance from the Benevolent Fund should be paid directly to a supplier/service provider.

² According to the chain of command laid out in the Constitution.

Sub-Section 7: Disbursement Criteria

Item a: The Benevolent Fund shall be disbursed to meet basic needs such as:

1. Textbooks
2. School uniform
3. Non-optional medical treatment including eyeglasses

Item b: The Benevolent Fund shall not be disbursed to meet the following:

1. Business ventures or investments, or anything that may bring financial profit to the person or family
2. Paying off utility bills
3. Fines as a result of breaking the law
4. Legal fees
5. Penalties relating to late payments or irresponsible actions of parent(s)
6. Private tuition/lesson fees (unless recommendation for such has been made by the School's Guidance Officer based on special educational needs of the student)

Please note that these lists are not exhaustive.

Section 6: POLICY EXCEPTIONS

Item a: The Chairman of the Benevolent Fund Committee shall table before the Executive Committee, any recommendation for an exception to the policy.

Item b: Any Exception to the Benevolent Fund Policy shall be by majority affirmative vote of the members of the Executive Committee inclusive of sitting members of the Benevolent Fund Committee who are present at an Executive Committee meeting.

Section 7: POLICY AMENDMENTS

Item a: Any Amendment to the Benevolent Fund Policy shall be by majority affirmative vote of the members of the Executive Committee inclusive of sitting members of the Benevolent Fund Committee who are present at an Executive Committee meeting.

Item b: Any amendment must be circulated via email fourteen (14) days prior to the next Statutory Monthly meeting to be included in the agenda.

Section 8: PROCEDURES

Sub-Section 1: Application Process

Item a: The Benevolent Fund Application Form must be filled out by the Parent/Student/Principal/Guidance Officer/Teacher requesting assistance.

Item b: The completed Benevolent Fund Application Form should be submitted to the Chairperson of the Benevolent Fund Committee via the Office of the Principal.

Item c: All applications should be submitted at least two weeks prior to the required disbursement date.

Item d: The Benevolent Fund Committee shall select at least one member to investigate and verify each application.

Item e: When an application is submitted by the Benevolent Fund Committee during a meeting, via teleconference or email, the Benevolent Fund Committee and the Executive Committee shall review the application and make a decision.

Item f: A payment voucher should be submitted to the Treasurer by the Chairman of the Executive Committee for any remittance from the Benevolent Fund.

Item g: All applicants shall be informed of the decision by the Chairman of the Benevolent Fund Committee.

Item h: Funds shall be disbursed from the Benevolent Fund by the Treasurer/Assistant Treasurer.

Item i: The Chairman of the Benevolent Fund Committee shall arrange collection/distribution/payment of the approved funds.

Sub-Section 2: Accounting Records

Item a: The Benevolent Fund Committee shall maintain all records of applications, supporting documents, remove (disbursements and receipts.)

Item b: The Benevolent Fund accounting records shall be transferred to the incoming Benevolent Fund Committee on the date of appointment.

Item c: The Treasurer shall maintain all disbursements and receipts in accordance with Section 5 Sub-Section 2 and Section 8 Sub-Section 1 Item h.

Section 9: DEFINITIONS

Association	The Hillview College Parent Teacher Association.
Allocation	The quantum of money assigned to the Benevolent Fund.
Benevolent Fund	A fund allocated to provide assistance to the students of Hillview College by the Hillview College Parent Teacher Association (PTA).
Benevolent Fund Committee	Committee that manages the Benevolent Fund.
Confidentiality	The protection of personal information of applicants to the Hillview College Parent Teacher (PTA) Benevolent Fund.
Disbursement Criteria	The basis upon which the Benevolent Fund is approved and funds provided.
Executive Committee	The Officers of the Hillview College Parent Teacher Association (PTA) including seven Executive Officers, three Ex Officio members, four Staff Representatives and twenty Executive Floor Members.

Section 10: APPENDIX I – Benevolent Fund Application Form



Hillview College
Parent Teacher Association (PTA)
Benevolent Fund Application Form

CONFIDENTIAL

Date:	Application Number:
Name of Beneficiary/Student:	
Class:	
Address:	
<p>Note:</p> <ol style="list-style-type: none"> 1) Applications require a minimum period of two (2) weeks for processing from the date of this form. 2) Please answer ALL the questions, so that we can fully consider your application. An incomplete application cannot be processed. 3) Information provided will be kept confidential and used only for the assessment of your application. 4) If possible, provide COPIES OF ALL RELEVANT DOCUMENTS to support your application, e.g. doctor's letter, special circumstances etc. APPLICATIONS WILL NOT BE FORWARDED TO THE BENEVOLENT FUND COMMITTEE UNTIL ALL THE RELEVANT DOCUMENTATION HAS BEEN SUBMITTED. 5) This application does not guarantee funding. Your application will be reviewed and processed according to <i>bona fide</i> need and availability of funds. If funding is approved, as far as possible, it is the policy of the Committee to remit funds directly to a supplier or service provider. 6) The fund seeks to provide assistance for a specific need at a specific time <i>after all other avenues for assistance has been explored</i>. The PTA's Benevolent Fund Committee cannot make any commitment to provide long-term or recurring assistance to any individual. 	

Parent or Guardian's Name (Male):	Parent or Guardian's Name (Female):
Occupation:	Occupation:
Address:	Address:
Contact No:	Contact No:
Email address:	Email address:
Name of Employer:	Name of Employer:
Net Monthly Salary:	Net Monthly Salary:

Children (If children are working please give details of financial contribution)				
Name	Age	At Home	Working	Monthly Financial Contribution
		Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	\$
		Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	\$
		Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	\$
		Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	\$
		Yes <input type="checkbox"/> No <input type="checkbox"/>	Yes <input type="checkbox"/> No <input type="checkbox"/>	\$

Dependent relatives Are there any relatives, <i>other than</i> your spouse or children dependent upon you for support? Yes <input type="checkbox"/> No <input type="checkbox"/> . If yes, please give the following information:			
Name	Age	Relationship	Living at your address
			Yes <input type="checkbox"/> No <input type="checkbox"/>
			Yes <input type="checkbox"/> No <input type="checkbox"/>
			Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you in receipt of any of the following benefits? If yes, please tick the appropriate box below to indicate the type of benefit and give details of amount received			
Disability Living Allowance	<input type="checkbox"/> In Receipt	<input type="checkbox"/> Applied/Awaiting Approval	£
Housing Benefit	<input type="checkbox"/> In Receipt	<input type="checkbox"/> Applied/Awaiting Approval	£
Pension	<input type="checkbox"/> In Receipt	<input type="checkbox"/> Applied/Awaiting Approval	£
NIS	<input type="checkbox"/> In Receipt	<input type="checkbox"/> Applied/Awaiting Approval	£
Food Card	<input type="checkbox"/> In Receipt	<input type="checkbox"/> Applied/Awaiting Approval	£
Social Welfare Child Benefit	<input type="checkbox"/> In Receipt	<input type="checkbox"/> Applied/Awaiting Approval	£
Any benefits not listed above, please give details below:			

Total Income per month (household): \$
Total Expenditure per month (household): \$

Sum/Item Requested: \$
Purpose of Sum/Item Requested: <i>(Please ensure that you attach copies of documents to support your case, e.g. Medical letters etc.)</i>

Hillview College
Parent Teacher Association (PTA)

Benevolent Fund Application Form

FOR OFFICIAL USE ONLY

Application Reviewed by: _____ Date: _____

Application Recommended :

Yes Sum Approved: \$ _____

No Reason(s): _____

Instructions for disbursement of funds: _____

Chairman (PTA Benevolent Fund Committee)

Date

Funds Issued Date: _____

Received by (Name in block letters): _____ Signature: _____

Note: If goods/services are purchased relevant receipts/bills are to be attached and the information is to be recorded below.

PTA Treasurer/ Assistant Treasurer

Date

I _____ (Name of Applicant/Beneficiary) acknowledge receipt of the following:

Signature of Applicant/Beneficiary

Date