

Macfarlane Trust and Caxton Foundation

2012/13 was a year of change for the Trust. Roger Evans was appointed as Chairman in April 2012, succeeding Christopher Fitzgerald, and in August 2012 Martin Harvey retired on health grounds after 9 years as Chief Executive. In January 2013 Jan Barlow took up post as Chief Executive of both the Macfarlane Trust and the Caxton Foundation. Jan, who started her career in the NHS, brings to us considerable experience as a Chief Executive of a number of other charities.

The country has been experiencing a prolonged period of economic recession, which we are acutely aware has an impact on our beneficiaries, as well as the funding of the Macfarlane Trust. During the year we engaged in robust negotiations with the DH and Ministers regarding our financial allocation for 2013/14. The result was that we received an allocation of £2.2 million which is, effectively, the same as for 2012/13. On the face of it this may not seem a progressive outcome but, given the cuts in public spending, it was the best we could expect. By far the majority of our funding is committed to regular payments to beneficiaries; we regard the retention and increase of these as our top priority. After our commitments to management costs, to enable us to run the Trust, we are currently only able to allocate a small grants budget, which is inadequate for the level of demand from our beneficiaries. Unfortunately, following the introduction of the MFET payments, and the publication of the Archer Report, the Macfarlane Trust's overall allocation was reduced significantly and this has impacted on our ability to make financial grants.

Looking ahead, the Board is committed to submitting to the Government a strong case for a significant increase in our allocation for 2014/15 which would enable us to support our beneficiaries adequately in the future. This will not be easy in the current economic climate but we will work to convince the DH, and Ministers, of the ongoing and changing needs of our beneficiary community.

With regard to the financial pressures being experienced by beneficiaries now, we managed to identify a fuel payment to primary beneficiary households last winter. The Board has already agreed to make a similar payment for 2013/14 and primary beneficiary households will receive this at the beginning of the winter, much earlier than last year. The Board has also agreed a cost of living increase to regular payments to primary beneficiaries of 2.2% for 2013/14. We are aware that most beneficiaries are feeling the effect of changes to benefits and welfare legislation. Whilst we are not in a position to make additional payments to compensate for any reductions beneficiaries are experiencing, we are doing all we can to highlight with the appropriate authorities the particular needs of our beneficiary community.

Prior to the publication of the Archer report, the Macfarlane Trust Board adopted a policy of building up reserves, as the organisation was not guaranteed a regular allocation from Government. This has now changed and we are given regular funding. Consequently, the Board has agreed to allocate to beneficiaries those reserve funds not earmarked for known commitments to address health and mobility-related, non-recurring needs through a grants programme during the autumn of 2013.

Jan Barlow
Chief Executive
Macfarlane Trust