



Quarterly Newsletter

June 2026



Baily Thomas Provident Fund Newsletter

Edition Two

Welcome to our June 2026 Quarterly Newsletter. Inside you'll find the latest updates from the fund, important reminders and inspiring stories from our community of beneficiaries.

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Welcome from the Trustees

Welcome to the second edition of our quarterly newsletter – an important way for us to keep you informed about the work we are doing on your behalf.

Having joined the fund as a Lay Trustee earlier this year, I have been struck by the impact of the grants we have been able to award in that time and the meaningful difference the fund continues to make to those beneficiaries much in need.

It was a pleasure to see so many of you at the Open Meeting on 22nd April and to reconnect with familiar faces. We were delighted to announce the launch of our Will Writing Grant and Care Advice Service, and I encourage you to read more about these in this edition and apply for them if they are of benefit to you.

I also had the opportunity to attend a recent Mansfield Brewery Members' Association (MBMA) meeting, which was a wonderful opportunity to see old colleagues reconnecting socially. I look forward to attending more events like this and sharing updates on the fund's work in the future.



Derek Mapp

On behalf of the trustees, thank you for your continued engagement and support. We always welcome your ideas and feedback as we strive to improve what we offer and how we best support you.

Derek Mapp
Trustee, Baily Thomas Provident Fund

Update from the Fund

New grants and benefits available to you

In response to feedback from beneficiaries and a growing awareness of need, we have introduced a number of new grants and support services, designed to offer practical help when you need it most.

We are pleased to now offer a Will Writing Grant, as well as access to a Care Advice Service. This service is designed to help you better understand care options and to support you in making informed decisions about care, whether for yourself or for someone you care for.

We have also launched a range of additional support grants, including a Care Search Grant to help you find suitable care providers including care homes, and a Respite Care Grant for those beneficiaries who are the main carer for another beneficiary and who need short-term support to take a break.

Further details about these grants and services are set out below.

Will Writing Grant

Having an up-to-date will is an important way of making sure your wishes are known and your affairs are properly arranged. The fund offers a Will Writing Grant to help with the cost of preparing a will.

The trustees will consider funding up to £400 per individual beneficiary, or up to £600 per household (where both the former employee and their spouse/partner are preparing wills at the same time).

The grant is available to former employees and their spouse/partner. To qualify, the will must be prepared by a qualified solicitor from a firm regulated by the Solicitors Regulation Authority (SRA). DIY wills, online templates and unregulated will writing services are not eligible for funding.

The grant can normally be accessed once every five years, or sooner where there has been a

significant life event that requires an update to your will. Examples include marriage or civil partnership, divorce or separation, bereavement, or the birth of a child.

Applying is straightforward. You will need to complete an application form in full and provide a written quotation from your chosen solicitor (on headed paper). If you are applying following a significant life event, you will also need to provide supporting evidence.

The easiest way to apply is via our online portal: <https://btpf.benefactorcloud.co.uk>

If you prefer to apply by post, you can request a hard copy application form from the BTPF office team at enquiries@bailythomasprovidentfund.org.uk or by calling 01623 473 290.

Lasting Power of Attorney Grant

In addition to the Will Writing Grant, the fund also offers a Lasting Power of Attorney (LPA) Grant. LPAs often go hand in hand with will planning. An LPA allows you to appoint someone you trust to make decisions on your behalf should you become unable to do so.

The fund offers separate grants to support both types of LPA: one for property and financial affairs and one for health and welfare. The trustees will consider funding up to £500 per LPA, plus an additional £92 to cover the Office of the Public Guardian registration fee.

Guidance and Support with Care

Care Guidance and Advice Service

Care needs can often feel overwhelming, whether they relate to you or someone you care for. To help you navigate these situations, we have introduced an independent Care Advice Service provided by Grace Consulting, to support you in understanding your options and making informed decisions.

This service gives you access to a personalised consultation with a specialist adviser, delivered by telephone or online, along with ongoing guidance if needed. Grace Consulting has many years' experience in this area, with advisers from a range of care-related backgrounds who are there to listen, understand your situation and talk you through the options available to you.

The service can support with a range of topics including:

- Understanding the different care options available
- Support following discharge from hospital, and help navigating the care system, the NHS, and social services
- Identifying the most suitable care providers
- Paying for care, including fair costs of care and state funding
- Maintaining independence at home and helping to guard against potential future crises
- Home adaptations and assistive devices
- Guidance and support for carers
- Dementia care and support
- Legal aspects of care, including your rights and the responsibilities of the state

The aim of the service is to provide clarity, reassurance and practical guidance, particularly during times of uncertainty or change. It is available to all beneficiaries, whether you are seeking support for yourself or caring for someone else.

How to access the service

To access the service, you will need to opt in by completing a short application form. Once approved by the trustees, you will be given details of how to contact the service directly, without the need to reapply each time you wish to use it.

The easiest way to opt in is to complete an application form via our online portal:

<https://btpf.benefactorcloud.co.uk>

If you prefer to apply by post, you can request a hard copy application form from the BTPF office team at enquiries@bailythomasprovidentfund.org.uk or by calling 01623 473 290.

Additional Support Where Needed

Following your initial consultation with Grace Consulting, you may be eligible for further practical support.

Care Search Grant

If you need help finding the right care, Grace Consulting can provide tailored support to identify suitable care options based on your individual needs and preferences. This may include researching and presenting appropriate care providers such as care homes or home care services, to help you make an informed choice.

Respite Care Grant

This grant is designed to provide temporary relief for beneficiaries who are the main carer for another beneficiary.

The trustees will consider funding up to £5,000 per beneficiary per year. This may contribute towards:

- Short-term respite care, for example, one to two weeks in a care home
- Day centre placements
- Emergency or crisis support, such as carer illness or exhaustion
- Specialist dementia support

Important

To be eligible for either of these grants, you must first complete a Care Advice Service consultation with Grace Consulting before completing an application form. For the Respite Care Grant, you will also need to provide a quotation from your chosen registered care provider.

Further information on the new grants and benefits available to you, including full eligibility criteria and application guidance, is available via our website (www.bailythomasprovidentfund.org.uk) and the online portal (<https://btpf.benefactorcloud.co.uk>).

Open Meeting Summary

We were delighted to welcome so many of you to our Open Meeting on 22nd April held at Mansfield Town Football Club. It was a pleasure to see both familiar and new faces come together for what was a highly engaging and positive event.



Open Meeting

The day began with an introduction from our new Lay Trustee, Derek Mapp, followed by an overview of the fund's activity for the financial year 2025/26. We were pleased to announce that, during this period, we awarded 4,596 grants.

We then gave an overview of the range of grants and benefits currently available to beneficiaries and were pleased to introduce our new Will Writing Grant and Care Advice Service, both designed to further support beneficiaries in planning for the future and accessing tailored guidance when needed.



Open Meeting

The meeting continued with a look ahead to our priorities for the coming year. A key focus will be on strengthening communication with our beneficiaries, increasing awareness of the grants and services available, and ensuring we continue to listen to feedback to help shape future initiatives.

We also provided an update on planned system improvements that will be introduced over the coming year. These developments are designed to create a more efficient and streamlined grant application process, as well as improving our ability to keep beneficiaries better informed about our grants and support. While these enhancements will bring positive changes to how we operate behind the scenes, there will be minimal change for beneficiaries. The focus is on improving our internal systems to help us deliver an even better experience for our beneficiaries.

The day finished with presentations from three voluntary groups that operate independently of the fund, including the Beneficiary Liaison Group, the Walking Group and the MBMA, all of which provide opportunities for connection.

If you were unable to attend the Open Meeting, a full video recording is available on the news section of our website:

www.bailythomasprovidentfund.org.uk/news.

Should you have any questions about anything discussed, wish to raise a general enquiry, or would like more information about getting involved in any of the voluntary groups, please contact the office at enquiries@bailythomasprovidentfund.org.uk or by calling 01623 473 290.

Attendance at the MBMA Quiz

Derek Mapp, our Lay Trustee, and the BTPF office team (Steph, Kirsty and Shelley) were delighted to attend the Mansfield Brewery Members' Association (MBMA) monthly gathering last month and take part in the quiz. We all joined different teams and thoroughly enjoyed getting involved in the wide range of questions, which tested our knowledge on topics such as rivers, identifying the fruit used to make Grand Marnier, and even how many songs we could name with a lady's name in the title.

It was lovely to see so many beneficiaries attending and enjoying this monthly event, which is open to former employees and their spouses/partners. The MBMA has its roots in the Brewery's Sports and Social Club and continues to play an important role in bringing ex-colleagues together.

The group is run entirely by a dedicated committee of volunteers, whose commitment ensures these activities can continue. In addition to the monthly meetings held on the first Wednesday of the month (10am to 1pm) at Debdale Sports Centre, the committee also organises a range of social activities throughout the year, including outings and Christmas parties. The fund is proud to be the main source of financial support for the MBMA, helping to support valuable opportunities for connection within our beneficiary community.

It was a pleasure to spend time chatting with beneficiaries and seeing first-hand the enjoyment and benefit the MBMA provides. We are very grateful to the volunteers whose continued efforts make this possible.

The MBMA is always pleased to welcome new members, and we would encourage all beneficiaries to get involved. If you would like to find out more or are interested in applying, please contact the Membership Secretary, Jenny Hall, on 07746 103916 or at jhall@btinternet.com.



MBMA Committee: Left to right:
Trudie Boddice (Associate Member),
Val Moss (Chair), Jeff Walters (Treasurer),
Eileen Spencer (Associate Member),
Jenny Hall (Membership Secretary),
Sharon England (Secretary).

We also hope to attend these meetings regularly going forward, allowing us to connect socially with beneficiaries, listen to feedback and provide updates on the fund's activities.

Tax Treatment of Grants

The tax treatment of grants received from the BTPF is currently under review. As part of this process, the Trustees are consulting with their professional advisers and HMRC to ensure that the BTPF's historic and future tax position is agreed.

The review is ongoing, and we will notify you once agreement has been reached with HMRC on the tax treatment going forward.

In the meantime, please read this guidance carefully, as it contains important information about the tax treatment of grants received from the BTPF.

Temporary guidance - June 2026

The Trustees have been advised that grants paid from the Fund may be treated as employment income for tax purposes, given the historic connection to employment with the Brewery.

The Trustees are working with its professional advisers and HMRC to establish an appropriate mechanism for accounting for any tax liabilities as efficiently as possible.

The previous tax treatment should no longer be assumed to apply while this review is ongoing.

What you need to do

The BTPF will no longer issue R185 forms. This means that, if you received a grant in the 2025/2026 tax year, you will not receive an R185 for that payment.

Until the tax status of the BTPF has been agreed with HMRC, you should not submit any new tax refund claims to HMRC in relation to grants received from BTPF.

If you have already submitted a tax repayment claim for 2023/2024 and/or 2024/2025, you do not need to worry or take any further action – please continue with the process as normal.

If you have not yet applied for a tax refund, please do not submit a new claim at this time.

While we await further guidance from HMRC, please be assured that you will not be responsible for any unexpected tax liabilities arising in relation to the grants you received from the BTPF.

We will keep you informed of any changes and provide further guidance in due course. If the position has not been fully resolved by then, we will issue a further interim update in the summer.

If you have any questions regarding this guidance, please contact the BTPF Office Team by email at enquiries@bailythomasprovidentfund.org.uk.

Spotlight on a Grant

Non-urgent Medical Treatment Grant

Access to timely medical treatment can make a significant difference to your quality of life. The Non-urgent Medical Treatment Grant is designed to support you where NHS waiting times are long, or where the treatment you need is not currently available through the NHS.

This grant can help towards the cost of consultant-led treatment, enabling you to access treatment sooner and avoid prolonged discomfort or deterioration in your condition.

As with all our grants, support is discretionary and awarded at the discretion of the trustees, based on individual circumstances and the evidence provided.

To be eligible, you will need written confirmation from your GP or consultant that the treatment is required, along with evidence that it is either not currently available on the NHS or is subject to a long waiting list. In some cases, the trustees may seek a second opinion from the fund's independent medical adviser.

To apply, you will need to complete an application form in full and provide a consultant's letter outlining your diagnosis, recommended treatment and NHS waiting times, or confirmation that the treatment is unavailable. A quotation detailing the cost of the treatment is also required.

It is important that you apply for and receive approval of a grant before incurring any costs, as retrospective claims are unlikely to be considered unless there were exceptional circumstances that would have made it difficult to submit a grant application in advance.

Grants such as these can have a truly meaningful impact, helping beneficiaries access the treatment they need at the time it matters most. The following example highlights how this support can make a real difference.

Beneficiary Case Study

A beneficiary applied for support after experiencing ongoing pain caused by osteoarthritis, which led to the need for a knee replacement. At the time, NHS waiting lists were up to eight months. The trustees awarded a grant to enable the beneficiary to access treatment sooner and avoid a prolonged period of pain and reduced mobility.

More recently, the beneficiary's condition worsened, resulting in a collapsed wrist joint and the need for a further procedure. With NHS waiting times of up to 12 months, the trustees awarded a second grant to support timely treatment once again.

Diane, who received the grant, said:

"I came across the BTPF through an ex-work colleague, and I believe I have won the jackpot. I applied for a grant to have a total knee replacement, which BTPF agreed to pay for after years of suffering pain and long NHS waiting lists. I cannot begin to tell you how much this meant to me. It is almost a year now since my knee was replaced, and to have that pain relief puts a smile back on your face. But I have won the jackpot twice now. BTPF have recently agreed to pay for me to have a total wrist replacement. It kind of leaves you speechless. The generosity of this fund is amazing, and I will never be able to thank them enough for giving me back so much quality of life, not forgetting the two lovely ladies, Stephanie and Kirsty, who will help you with anything you need to do when applying for a grant. To anyone reading this, please apply. Thank you, Diane."

If you are facing a similar situation, please get in touch or explore the guidance available on our website or via the online portal to see how we may be able to support you.



Making a Difference

Stories from our Beneficiaries

At the heart of the BTPF are the beneficiaries whom we are pleased to support. In this section, we're proud to share a few words from beneficiaries who have been supported through the grants we offer. Their experiences show the real and lasting difference the fund makes. If you have received a grant from us and would be willing to share your story, we would love to hear from you. By telling others about your experience, you can help raise awareness of the support available and inspire others who may also benefit from applying.

"I previously received support from the Baily Thomas Provident Fund during my time at university, through my dad (a former Mansfield Brewery employee), and I just wanted to begin by saying how incredibly grateful I am. That support genuinely made such a difference to me, and it played a part in enabling me to pursue my creative career.

Since graduating, I have gone on to set up my own business as a wedding illustrator and stationery designer, which has now become my full-time work (here's my website if you'd like a nosey - <https://www.harleysindall.co.uk>). It has been so rewarding to build something of my own, and I truly believe the support I received during university helped lay those foundations.

Thank you again for the support you've provided in the past; it has genuinely had a lasting impact."

BTPF beneficiary

"Today I went for my two-week follow-up meeting with the audiologist at Specsavers and all is good. The next one is in four weeks.

Since receiving the hearing aids, every day has become better, with clearer sound quality and lower TV/radio noise.

I could go on. Many, many thanks to you and the team for administering my claim."

Stuart, BTPF beneficiary

"I am now three weeks post-op and I am absolutely thrilled. My pain in my neck and spine has significantly reduced.

I just want to thank you both again for your help and guidance. I also want to show my appreciation to the trustees who released the funding for my operation. It has honestly changed my life."

Kerry, BTPF beneficiary

Staying Connected

We're Here to Help

If you'd like to know more about the fund, the grants available, how to apply, or simply want to talk something through, our team is always happy to help.

There's a wide range of information available on our website including detailed information about all of the grants we offer:

www.bailythomasprovidentfund.org.uk

Grant applications can be submitted quickly and easily through our online portal:

<https://btpf.benefactorcloud.co.uk> and you can also apply by post.

If you would like to speak to someone in the BTPF office, you can call us on: 01623 473 290 or email: enquiries@bailythomasprovidentfund.org.uk

We also hold informal drop-in sessions at our offices located in Mansfield Business Centre, where you're very welcome to come along with questions, talk through your circumstances, or get help completing an online application. These take place every Wednesday and Thursday between 10:30am and 12:00pm and no appointment is necessary during these times. Support during this time is offered on a first-come, first-served basis and is intended for brief guidance and practical assistance. If you feel you may need more in-depth support, or if you are unable to attend during drop-in times, please contact us and we will be happy to arrange a separate appointment.

Please don't hesitate to get in touch – whether you need guidance, reassurance, or simply want to understand what support may be available to you.

Helping Us Reach More Beneficiaries

We want to make sure that everyone who may be eligible for support from the fund is aware of what is available to them.

Many of our new beneficiaries who contact us, do so because a friend, former colleague or family member has mentioned the fund to them. Word of mouth remains one of the most effective ways to reach new beneficiaries, and we are always grateful for your help in spreading the word.

If you know someone who may be eligible but hasn't yet been in touch, please encourage them to contact us. They can check their eligibility online at www.bailythomasprovidentfund.org.uk/eligibility or speak to a member of the BTPF team by phone or email to talk things through and begin the eligibility process.

Proving eligibility is straightforward, and our team is always happy to guide people through the process.

Your Feedback and Stories

We are always looking for ways in which we can improve the BTPF and ensure the support we offer remains relevant and helpful to beneficiaries.

If you have any ideas about new grants or benefits we could offer, suggestions about how to make things simpler, or thoughts about your experience with us, we would really value hearing from you. Your feedback helps shape how we develop and improve.

We would also love to hear your stories about how a grant has made a difference to you or your family. Sharing real experiences can help others understand the support available and may encourage someone who is unsure to apply.

If you would be happy for us to share your story (anonymously if you prefer), please get in touch by phone or email – we would be delighted to hear from you.

You can call us on: 01623 473 290 or email: enquiries@bailythomasprovidentfund.org.uk

Staying Socially Connected

We know that staying socially connected and having opportunities to share views and experiences is important to many of our beneficiaries. Alongside the support offered by the BTPF, there are several voluntary groups that operate independently of the fund and help beneficiaries stay in touch with one another and feel part of a wider community.

While these groups are not formally part of the BTPF, we are pleased to share information about them and recognise the valuable role they play in helping beneficiaries stay connected.

Beneficiary Liaison Group (BLG)

The Beneficiary Liaison Group is a voluntary group formed by former employees, with the aim of representing the interests and views of beneficiaries and sharing these with the trustees of the BTPF. They also produce a quarterly newsletter – the



Hints, Tips and Reminders

Here are a few handy tips to make the grant application process smoother and help you get the most out of the BTPF:

University Grant Applications

If your child is planning to go to university in September, please remember to apply for the university grant in advance. The fund currently offers up to £4,500 per annum towards university fees, providing valuable support during their studies. If your child is already at university and has previously received a grant, please note that a new application is required for each academic year.

Bannatyne Renewals

If you receive a grant towards Bannatyne Health Club membership, please be aware that this renews on 1st October. We kindly ask that you submit your renewal application at least four weeks before the renewal date. The fund currently offers up to £400 towards Bannatyne or other sports club membership, and the grant is currently available every 12 months.

Drop-in support

Come see us on Wednesdays and Thursdays, between 10:30am to 12:00pm for help with grant applications or to talk through your circumstances. Can't make those times? Simply book an appointment at a different time in advance.

Online Grant Application Portal

We are pleased to remind beneficiaries that our online portal is now live, making it easier than ever to apply for grants and manage applications online. To access the portal, simply visit

<https://btpf.benefactorcloud.co.uk>, click 'Register' and create a new user account. A step-by-step user guide is also available at www.bailythomasprovidentfund.org.uk/sites/default/files/step-by-step_guide_digital.pdf to support you through the process.

Medicash Webinar

Medicash, our health cash plan provider, recently hosted a webinar, which was well attended by beneficiaries. The session provided a helpful overview of the health cash plan, including what is covered, how to make a claim and the additional benefits available, such as a virtual GP and discounted shopping. It also included useful information on Medicash's app.

If you would like a refresher on the health cash plan or are considering opting in but have not yet done so, you can watch the webinar recording here: <https://www.bailythomasprovidentfund.org.uk/news>. To opt in to the health cash plan, you can apply via the online portal or request a paper application form from the office.

Mansfield Brew - which includes updates on former colleagues, information about social groups, articles of nostalgia and shared memories, and notices of those who have sadly passed away.

If you would like to contact the group, you can email them at bailythomasliaisongroup@gmail.com

If you are not currently receiving their newsletter and would like to request a copy, please call the BTPF office on 01623 473 290 or email: enquiries@bailythomasprovidentfund.org.uk

Walking Group

A monthly walking group is organised by former employees of Mansfield Brewery, offering regular walks around the local Mansfield area. The group is open, informal and a great way to enjoy gentle exercise and social time with others.

If you are interested in joining or finding out more, please contact Susan Walters by emailing susanwalters56sw@gmail.com or calling 0780 369 7183

Mansfield Brewery Members' Association (MBMA)

The Mansfield Brewery Members' Association has its roots in the former brewery sports and social club and continues to operate thanks to the dedication and generosity of volunteers.

The group meets on the first Wednesday of each month, from 10am - 1pm at Debdale Park Sports and Recreational Club, Debdale Lane, Mansfield Woodhouse, NG19 7NS. Membership is open to all eligible beneficiaries and the association organises a range of social activities throughout the year. The BTPF provides a grant to support the group's activities.

If you would like to find out more or are interested in becoming a member, please contact the Membership Secretary, Jenny Hall, on 07746 103916 or jhall@btinternet.com



Baily Thomas

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A helping hand

01623 473 290

www.bailythomasprovidentfund.org.uk

enquiries@bailythomasprovidentfund.org.uk