

2009 MBF form guidance notes for visits

The visit (Completing the Petition)

Appointment

- (1) When planning a visit do ensure that you are prompt. Keep to the appointment time and ensure that the petitioner knows fully that you are there to assist their application for funding through the Mark Benevolent Fund.
- (2) It is important to allow a relative or friend of the petitioner to be present at the interview stage.
- (3) Be pleasant and courteous in your manner and always refer to the petitioner as (Mr. Mrs. Miss or Ms followed by surname)
- (4) Make sure the environment is comfortable or the petitioner is at their ease. A smile can have a tremendous impact on a person's well being. Music, televisions and other media forms may be a distraction for the business in hand. Be polite ask that it turned off for the duration of the interview.
- (5) Be aware of the time restraints. Do not take more that 30 minutes to talk to the petitioner or request the information required for the completion of the form.
- (6) Do accept the petitioner's hospitality by taking tea or coffee with them. Please refrain from drinking alcohol.
- (7) Complete the form by asking that the relevant information is given at the appropriate time.
- (8) If the petitioner appears anxious or ill at ease then please re- assure them (him or her) that you are there to help.
- (9) In item 7 above a petitioner may have difficulty in finding information requested, do not allow this to be an obstacle. Please remember that elderly petitioners may have physical or mental problems. In the case of dementia cases please ensure and allow a family member is present. In many cases a son or daughter of the petitioner can provide valuable information which the petitioner cannot provide you.
- (10) When all the information is carefully added to the form, let ~ the petitioner know that this information will be treated in the strictest confidence. Ask for a signed declaration on completion of the interview (reverse of the MBF form).
- (11) Once again re-assure the petitioner that you will do everything in your power to ensure that a level of financial assistance will be forthcoming. **Do not make promises.** Leave your name and phone number for ease of contact. Thank them (him or her) for their kind assistance, shake hands and walk out the door.