

The Ogilvie Charities – Operating Policies **Admissions Policy including Selection Criteria for Residents**

The Ogilvie Charities are bound by; A. the Trust Deeds relevant to the various properties under their control; B. the requirements of Statutory Organisations controlling sheltered accommodation; C. the requirements of state/county funding agencies which contribute, directly or indirectly, to the running costs of the charity and D. the requirements of the law regarding Charities. Changes in demand for housing and the needs of disadvantaged groups have evolved over time and with the increase of a healthier, older population who may receive state benefits at a later stage in their lives, plus a likely reduction in those benefits, the rules applying to some paid employment up to and beyond state retirement age have been revised, see 3 (b) below. The opportunity to make other revisions has been taken and they are noted on the relevant sections below. Revisions have been made with the approval of Trustees at the Trustees meeting November 22nd 2018. A copy of the unamended Policy A3 will be retained at the Gate House for future reference. The Trustees apply any policies on the criteria for admission sensitively to satisfy both individual need and to maximise charitable benefit from the Ogilvie bequests.

(1) Trust Deeds

The selection of residents is in the first instance guided by the Trust Deed relevant to each of the properties. There is a general stipulation in Trust Deed No 1 of 1888 that prohibits preference for particular religious beliefs and professions, the charities continue the theme of wide acceptance to this day. Some of the Trust Deeds set particular specifications for preferences concerning residents

(2) Properties

(a) **Ogilvie Homes, Goldings Lane, Leiston Road, Aldringham, Suffolk.** The Ogilvie Homes comprise 24 residential units details of which are three bedsits, seven two bedroom bungalows and fourteen one bedroom bungalows. All accommodation is in single storey buildings. The site also has facilities for the less mobile such as a bathroom with a lift/hoist and wheelchair access. Currently this site provides 24/7 cover in the form of a Scheme Manager, a Deputy Scheme Manager and an Assistant Scheme Manager. This site is the most suitable for those who are less physically able.

(b) **Ogilvie Almshouses, Church Lane, Aldringham, Suffolk.** The Almshouses at Aldringham comprise 19 two storey houses – kitchen, bathroom and lounge downstairs and two bedrooms and a toilet on the first floor. The Almshouses are some distance from a main road in a rural location. The site also has a large area set aside as allotments and a recently planted 1½ acre copse.

(c) **Charles May House, Church Walk, Colchester, Essex.** Charles May House (situated in the centre of Colchester) comprises two storey buildings with a total of ten flats. Thus some units can only be accessed by stairs. There is some provision of stair lifts within the building.

(d) **Estella House, Church Street, Colchester, Essex.** Estella House is a single detached two storey building situated in the centre of Colchester. Accommodation comprises four similar studio apartments. There are no special facilities in the building other than a stair lift.

(3) Admissions Criteria

- (a) While the original Deed No 1 specified that the Hospital for Incurables, which became the Ogilvie Homes, should accept “adults” (originally defined as anyone over sixteen years of age, of either sex), the changing requirement for sheltered accommodation and provision of wider healthcare in the UK has caused the Trustees to adjust the policy to reflect current needs over the last century. Which in general has meant that “adult” is interpreted as “elderly” i.e. anyone past, at, or approaching state retirement age. This interpretation is also applied to The Almshouses, where the specification of “adult” also applied.
- (b) In all properties accommodation is normally made available to single people or couples no longer in full time employment and as interpreted in 3 (a) above. This rule will continue to apply other than where a potential beneficiary is unable to pay rent or live on benefits to a reasonable standard and thus has to supplement income from *part time employment*.
OC defines “part time employment” as work for 15 hours per week or less, equivalent to (2018) around a maximum of £120 per week, recognising East Anglian seasonal employment that equates to around £6,250 per year.
OC recognise that this change in admissions criteria will produce anomalies of living standards in our properties but also recognises that the gradual social/benefits change referred to in the introductory paragraph will eliminate such anomalies over time.
As stated, those who are in full time employment will not normally be considered as potential beneficiaries. Thus, to be clear, in the case of a couple, if one of the couple is in full time employment, that will disqualify the couple. If during residency one of a couple, both, or a single resident becomes full time employed, that will disqualify them as beneficiaries and they will be required to leave. (NB. This was envisaged in the original rules for The Almshouses).
- (c) However the Trustees will also consider younger people who are prevented from employment by disability and may have no prospect of returning to employment. People who are currently owner-occupiers of property may also qualify for admission.
- (d) Whilst recognising the need to comply with the various deeds and also in the light of the current relaxation of criteria referred to above and in 3 (e) below, OC will seek to find potential beneficiaries who are:
Homeless; Living in substandard accommodation; in poor health; in abusive relationships; in “straitened circumstances”; those who are “fragile” in the community due to loneliness, a recent death or divorce; parents wishing to be close to their children; and those estranged from their families.
- (e) The original intention of Mrs Ogilvie and the founding Trustees was to provide relief for local residents of East Anglia. Trustees have responded to change and applicants from UK residents outside the region may now be accepted in the case of need or suitability e.g. an elderly person moving to be close to family.
- (f) The Estella Canizani Trust requires that priority will be given to members of the Society of Friends, the Artists Benevolent Institution or the Royal Society for the Protection of Birds.
- (g) Other than as allowed by Clauses 193 and 194 under no circumstances will any discrimination be made on the grounds of protected characteristics as specified in the Equality Act 2010.

(4) Admissions Process

- (a) An application form will be completed by the applicant and sent to the General Manager.
- (b) The General Manager will acknowledge the application and carry out a preliminary review of suitability. When it appears that suitable accommodation may become available the General Manager will arrange an interview accompanied by the appropriate Scheme Manager, for the applicant to be assessed and to view the property.
- (c) Interviews will normally take place at the appropriate site when the applicant, who may be accompanied by a relative or friend, will be able to seek further clarification from the Scheme Manager and General Manager, and will have an opportunity to view the property. The General Manager will, if necessary, have a second interview with an applicant in their own home.
- (d) Following the interview, the General Manager will determine whether to offer accommodation to the applicant, seeking guidance/approval from Trustees if required. The applicant will be advised of the decision within seven days.
- (e) If the property is immediately available, the process of moving into the property with involvement from the General Manager and relevant Scheme Manager may proceed.
- (f) If a prospective resident is suitable for the accommodation but is not offered a home, they may remain on the waiting list, for future vacancies.
- (g) The General Manager will advise the Trustees of decisions.

(5) Other information

(a) Compliance with Ogilvie Policies and Rules

All potential residents are made aware of Ogilvie Charities Policies and Rules and made clearly aware that transgression may mean having to leave the accommodation. The agreement of applicants to this is part of the selection process.

(b) Ability to pay accommodation charges

Residents pay accommodation charges for properties. Applicants for most, but not all, properties may be in reduced circumstances; there are specific rules governing this, which may be relaxed at the Trustee's discretion. The Ogilvie Charities utilise the "Fair Rent" criteria in setting rents. Some applicants may be able to supplement their payments via Housing Benefit; this has always been acceptable to the charities and help in securing such benefit is given if required.

The Trustees will consider the need to assist some beneficiaries, from, for instance the "Straitened Circumstances Fund", who have genuine difficulty in paying rent and/or have, in the opinion of Trustees, genuinely insufficient income to live on at a reasonable standard.

Revised November 2018

The Ogilvie Charities

Statement about Independent Living

It is a requirement that those accommodated in almshouses should be able to live independently which fortunately the majority of residents are able to do into advanced age. However, circumstances sometimes arise which, as a result of illness, infirmity and frailty lead to it being inadvisable for residents to continue living in their almshouse. The Ogilvie Trustees wish you to know that Ogilvie Charities is essentially a provider of accommodation to residents in need and it is not able to provide care facilities.

There are certain arrangements that we strongly recommend residents to make. These include:

- Nominating a next of kin or close friend whom the Trustees may contact in case of need
- Arranging for a Power of Attorney to be put in place. Details of this should be provided to the charity in order that the Trustees may be aware of to whom they should refer in case of need. (Unfortunately statistics show that one in five of the over 80's is diagnosed with some form of dementia and the need for a Power of Attorney to executed is therefore of increasing importance)
- Residents should be strongly encouraged to make a Will if they have not already done so and advise the charity where this is lodged. If they have furniture and other items they wish to go to specified people or places, these should be included
- The charity should be advised of the name and address of the resident's GP and provide the Trustees with a letter of authority enabling them to make contact with him or her in case of need
- The papers relating to the resident's financial affairs should be easily accessible to the person who has Power of Attorney.

Increased Frailty

In the case of residents experiencing increased frailty, where practical Trustees will, of course, endeavour to authorise adaptations to their almshouse to make life easier. However, Trustees should inform residents that permission must be sought on all occasions before any adaptations are made. If it is necessary for a care package to be put in place, again Trustees should be informed accordingly.

If increased frailty or ill health makes it impossible for a resident to continue to live independently, after full consultation with the resident, their relatives, if applicable, and medical practitioners, Trustees may feel it is necessary to request the resident to move to more appropriate accommodation where care is provided.

THE OGILVIE ALMSHOUSES
ALDRINGHAM, LEISTON, SUFFOLK

APPLICATION FOR ADMISSION

1. **APPLICANTS NAMES IN FULL:** -----
2. **PRESENT ADDRESS:** -----

3. **TELEPHONE NUMBER:** -----
4. **ANY PREVIOUS ADDRESS/ES IN SUFFOLK/ESSEX OR AREA, WITH APPROXIMATE DATES.** -----

5. **DATE OF BIRTH:** -----
6. **PLACE OF BIRTH:** -----
7. **WHETHER MARRIED, SINGLE OR WIDOWER:** -----
(IF YOU ARE SEEKING ACCOMMODATION FOR YOUR PARTNER AND YOURSELF, YOUR PARTNER SHOULD INSERT THE ANSWER TO QUESTIONS 1, 5, 6, 9, 10, 11, 12 & 13 ON A SEPARATE SHEET OF PAPER AND SIGN IT). -----
8. **NAMES & ADDRESSES OF CHILDREN OR OTHER CLOSE RELATIVES:** -----
(please state relationship) -----
9. **DO YOU SUFFER FROM ANY ILLNESS OR DISABILITY? IF SO, PLEASE GIVE DETAILS.** -----
10. **ARE YOU RECEIVING ANY FORM OF MEDICAL CARE OR TREATMENT FROM YOUR DOCTOR OR HOSPITAL?** -----
11. **DO YOU SMOKE?** -----
12. **DO YOU GIVE PERMISSION FOR YOUR DOCTOR TO BE APPROACHED FOR ANY NECESSARY INFORMATION?** -----
(If so, please include his/her name, address and telephone number). -----

- 13. **ARE YOU ABLE TO CARE FOR YOUR PERSONAL AND HOUSEHOLD NEEDS WITHOUT ASSISTANCE FROM OTHERS?**
(If help is given by others, please give details)
- 14. **WHAT IS YOUR PRESENT HOUSING POSITION?** *(If you own the property in which you are living at present, please say so).*
- 15. **ARE YOU ON THE LOCAL COUNCIL'S HOUSING LIST, MOBILITY SCHEME, OR TRANSFER LIST?** *(This may help your present application).*
- 16. **WHAT ARE YOUR MAIN REASONS FOR LOOKING FOR OTHER ACCOMMODATION?**
- 17. **ARE YOU RECEIVEING INCOME SUPPORT FROM THE D.H.S.S. OR HOUSING BENEFIT FROM YOUR LOCAL COUNCIL?**
- 18. **PLEASE GIVES NAMES & ADDRESSES OF TWO PEOPLE WHO CAN BE APPROACHED FOR A PERSONAL REFERENCE.**
- 19. **DO YOU UNDERSTAND AND AGREE TO PAY THE CHARGES MADE BY THE TRUSTEES FOR THE ACCOMMODATION?**
- 20. **DO YOU UNDERSTAND AND ACCEPT THAT IF YOU ARE APPOINTED AS A RESIDENT YOU WILL NOT BE A TENANT AND THAT ANY WEEKLY SUM YOU PAY WILL BE A MAINTENANCE CONTRI-BUTION AND NOT RENT?**

SIGNATURE OF APPLICANT -----**DATE**-----

This form, when completed, should be returned to: **THE OGILVIE CHARITIES
THE GATE HOUSE, 9 BURKITT ROAD
WOODBRIDGE, SUFFOLK IP12 4JJ**

It is a Charity Commission requirement to investigate the personal circumstances of applicants for almshouses. The personal data supplied on this form, and other information relating to an almshouse appointment or your care management, will be held on file. Some details may be checked with relevant organisations but none will be disclosed for any inappropriate purpose. You may have access to your personal information on request.

The information requested below will be used by the General Manager in assessing your needs and suitability for accommodation by Ogilvie Charities. Information disclosed will remain confidential to the General Manager and the Ogilvie Trustees.

To help us in our assessment of your needs, please answer the following questions:

Present Accommodation

- | | | | | | |
|----------|--------------------------|------------|--------------------------|----------------|--------------------------|
| House | <input type="checkbox"/> | Bungalow | <input type="checkbox"/> | Flat | <input type="checkbox"/> |
| Bathroom | <input type="checkbox"/> | Accessible | <input type="checkbox"/> | Not accessible | <input type="checkbox"/> |
| WC | <input type="checkbox"/> | Accessible | <input type="checkbox"/> | Not accessible | <input type="checkbox"/> |

Stairs

- | | | | |
|----|---|--------------------------|--------------------------|
| | | <u>Self</u> | <u>Spouse</u> |
| a) | I can manage stairs easily | <input type="checkbox"/> | <input type="checkbox"/> |
| b) | I can manage stairs but with difficulty | <input type="checkbox"/> | <input type="checkbox"/> |
| c) | I cannot manage stairs | <input type="checkbox"/> | <input type="checkbox"/> |

Mobility

- | | | | |
|----|--|--------------------------|--------------------------|
| a) | I can manage to move around my home unaided | <input type="checkbox"/> | <input type="checkbox"/> |
| b) | I can manage to move around my home and the local area unaided | <input type="checkbox"/> | <input type="checkbox"/> |
| c) | I can only move around using sticks or a frame | <input type="checkbox"/> | <input type="checkbox"/> |

Bathing

- | | | | |
|----|--|--------------------------|--------------------------|
| a) | I can bathe without assistance | <input type="checkbox"/> | <input type="checkbox"/> |
| b) | I require assistance to get in and out of a bath | <input type="checkbox"/> | <input type="checkbox"/> |
| c) | I require shower facilities | <input type="checkbox"/> | <input type="checkbox"/> |

Dressing

- | | | | |
|----|--|--------------------------|--------------------------|
| a) | I can dress and undress without assistance | <input type="checkbox"/> | <input type="checkbox"/> |
| b) | I need minor assistance with dressing/undressing | <input type="checkbox"/> | <input type="checkbox"/> |

Home Management

- | | | | |
|----|--|--------------------------|--------------------------|
| a) | I can perform all household duties unaided | <input type="checkbox"/> | <input type="checkbox"/> |
| b) | I have support with cleaning/laundry/shopping
<i>Please delete categories which do not apply to you</i> | <input type="checkbox"/> | <input type="checkbox"/> |
| c) | Who provides this help? | | |

Financial Information

- | | | |
|--|---|---|
| I/we am/are currently claiming Housing Benefit | Yes <input type="checkbox"/> | No. <input type="checkbox"/> |
| | <u>Self</u> | <u>Spouse</u> |
| I receive a State Pension | Yes <input type="checkbox"/> No. <input type="checkbox"/> | Yes <input type="checkbox"/> No. <input type="checkbox"/> |
| I receive a Private Pension | Yes <input type="checkbox"/> No. <input type="checkbox"/> | Yes <input type="checkbox"/> No. <input type="checkbox"/> |

My/our current weekly income is approximately £-----

Please indicate into which of the following ranges your savings/capital falls:-

- | | | | |
|--------------------|--------------------------|-------------------|--------------------------|
| Less than £5,000 | <input type="checkbox"/> | £5,001 to £15,000 | <input type="checkbox"/> |
| £15,001 to £40,000 | <input type="checkbox"/> | More than £40,000 | <input type="checkbox"/> |

Thank you for your co-operation in completing this form

OGILVIE CHARITIES

GDPR CONSENT FORM

Thank you for completing the form below to enable Ogilvie Charities to provide services to beneficiaries in accordance with the aims of the charity

Name _____ E mail _____

Telephone number _____

Postal address _____

I CONSENT to The Ogilvie Charities holding and processing my data according to the Privacy Notice as displayed on our website, and I understand that I may withdraw my consent at any time.

Signature _____ Date _____

Please return this form to the General Manager by post to:-

**The Ogilvie Charities
The Gate House
9 Burkitt Road
Woodbridge
Suffolk
IP12 4JJ**

Or by email to: ogilviecharities@btconnect.com