

The Ogilvie Charities

Housing Policies

Admissions and Selection Policy for Residents

Preamble

The Ogilvie Charities recognises the changing nature of the potential beneficiaries for housing in the residential units controlled by them in Suffolk and Essex.

The Ogilvie Charities are bound by:

- the Trust Deeds relevant to the various properties under their control
- the requirements of Statutory Organisations controlling sheltered accommodation
- the requirements of state/county funding agencies which contribute, directly or indirectly, to the running costs of the charity
- 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 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.

Trust Deeds

The selection of residents is in the first instance guided by the Trust Deed relevant to each of the properties. The reorganisation of the group of charities collectively known as The Ogilvie Charities in 2022 has released some historic constraint on the Trustees. However, they will continue to apply the original charitable intentions of the benefactors as closely as they can in the changed environment in which The Ogilvie Charities now operate. 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.

Properties

1. Ogilvie Homes, Goldings Lane, Leiston Road, Aldringham, Suffolk. The Ogilvie Homes comprise 24 residential units details of which are three studio apartments, seven two bedroom bungalows and 14 one bedroom bungalows. All accommodation is in single storey buildings and twelve properties have been modernised to mobility or wheelchair standard. 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.
2. 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.
3. 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.
4. 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.

Eligibility Criteria

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.

In all properties accommodation is normally made available to single people or couples no longer in full time employment and as interpreted 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 must supplement income from part time employment.

OC defines “part time employment” as work for 15 hours per week or less, equivalent to around a maximum of £120 per week (2018), recognising East Anglian seasonal employment that equates to around £6,250 per year.

The Ogilvie Charities recognise that this change in admissions criteria will produce anomalies of living standards in our properties but also recognises that the gradual social security 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 that 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).

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.

Whilst recognising the need to comply with the various deeds and in the light of the current relaxation of criteria referred to above and in 7 below, The Ogilvie Charities will seek to find potential beneficiaries who are:

1. homeless
2. living in substandard accommodation
3. in poor health
4. in abusive relationships
5. in “straitened circumstances”
6. those who are “fragile” in the community due to loneliness, a recent death or divorce
7. parents wishing to be close to their children
8. and those estranged from their families.

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.

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.

Other than as referred to above 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.

Admissions Process

1. An application form will be completed by the applicant and sent to the General Manager.
2. 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.
3. 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.
4. 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.
5. 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.
6. 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.
7. The General Manager will advise the Trustees of decisions.

Other information

Compliance with Ogilvie Policies and Rules

All potential residents are made aware of The 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.

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 Trustees' 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 other funds, if they have genuine difficulty in paying rent and/or have, in the opinion of Trustees, genuinely insufficient income to live at a reasonable standard.

November 2018

Reviewed January 2022

The Ogilvie Charities

Statement about Independent Living

It is a requirement that those accommodated in our 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 the Almshouse Association recommend and we strongly endorse 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 CHARITIES

email: info@ogilviecharities.org.uk

www.ogilviecharities.org.uk

Registered Charity No. 1196197

Tel: 01394 388746

THE GATE HOUSE

9 BURKITT ROAD

WOODBIDGE

SUFFOLK

IP12 4JJ

Beneficiary Application Form - Colchester

I am applying to become a beneficiary of The Ogilvie Charities

PLEASE ANSWER EVERY QUESTION ON THE FORM, IF IT DOES NOT APPLY TO YOU, PLEASE WRITE 'N/A'

IF THERE IS INSUFFICIENT SPACE TO COMPLETE YOUR ANSWER, PLEASE CONTINUE ON A SEPARATE SHEET OF PAPER

Section 1 – About You

Full name(s) Mr/Mrs/Miss/Ms.....

Telephone No.....Mobile Number.....

Email address:.....

Date of Birth.....Age.....Marital status.....

Address.....

.....

.....Post Code.....

Length of time at this address.....

If you have lived at this address for less than 10 years, please give your previous address(es):.....

.....

.....

Employment History - Please give details of your current occupation (if any) and brief details of your employment history.....

.....

.....

.....

Second Applicant (only for use for a joint application)

Full name(s) Mr/Mrs/Miss/Ms.....

Telephone No..... MobileNumber.....

Email address:.....

Date of Birth.....Age.....Marital status.....

Address.....

.....

.....Post Code.....

Length of time at this address.....

CONFIDENTIAL

If you have lived at this address for less than 10 years, please give your previous address(es):

.....
.....

Employment History - Please give details of your current occupation (if any) and brief details of your employment history.....

.....
.....
.....

Section 2 – About your Family

1. Next of kin.....

Relationship.....

Address.....

.....
.....Post code.....

Telephone NoMobile Number

2. Relationship.....

Address.....

.....
.....Post code.....

Telephone NoMobile Number

Section 3 – About your present home

Type of accommodation (e.g. 3-bedroom house, bungalow, 2 room flat etc):

.....

Do you, or your spouse, own it? Yes/No

If 'yes', what is its present estimated value? £.....

Is there a mortgage outstanding on the property and, if so, how much is outstanding? If there is no mortgage, please write NONE

.....

Have you taken up Equity Release on your home?.....

If you do **not** own the property where you currently live, who does own this property?

.....

Is this person related to you in any way? If **YES** what is the relationship?

.....

CONFIDENTIAL

If you, or your spouse, have ever owned the property where you currently live, in what circumstances did you cease to be the owner?

.....

If you live in rented accommodation, please give the name and address of your landlord:

.....

.....

Current rent £.....per week/month

Do you receive Housing Benefit or other Benefits to help with housing costs? Yes/No

Do you receive Council Tax discount or reduction? Yes/No

Why do you wish to leave your present accommodation?

.....

.....

.....

.....

What are your intentions regarding your current accommodation if you are appointed to an almshouse?

.....

.....

If you or your partner own any interest in property (including jointly owned property) other than the one in which you live now, please give details below. This should include property owned abroad as well as in the UK:

Address.....

.....

.....

.....Post Code

Section 4 – Your Income

To enable the trustees to assess your application, please provide the following information. This should include details of all sources of income and state how frequently you receive them, e.g. weekly, monthly or annually:

	Applicant 1	Applicant 2
	Amount / Frequency	Amount / Frequency
Pensions 1. State retirement pension 2. Pension paid by a past employer 3. Private pension 4. Widow's or Widower's pension 5. Any other pension		
Social Security Benefit 1. Pension Credit 2. Attendance Allowance 3. Universal Credit 4. Any other benefits		
Employment or self-employment Please explain type of employment and hours of work. You will be required to bring evidence of earnings such as payslips or proof of earnings (if self-employed) to interview		
Other Income 1. Annuities 2. Bank Deposit Account 3. Building Society Account 4. Investment 5. Renting property or land that you own 6. Grants from a charity 7. Financial assistance from a relative/friend 8. From a trust fund 9. Any other income – please give details		

You may be asked to provide documentary evidence of these details

Section 5 – Your Capital

1. Current & Deposit Bank accounts: Current Balance(s)

.....

2. Building Society accounts: Current Balance

.....

3. Shares: Current Value

.....

4. National Savings (e.g. National Savings Certificates): Value

.....

5. Unit Trusts: Current Value

.....

6. Premium Bonds: Amount held

.....

Other Assets

Have you passed on any capital sum or other asset exceeding £5,000 in value to anyone in the past 5 years? YES / NO

If yes, please give details.

.....

Are you owed a sum of money (including from family members)? If yes, please give details

.....

Section 6 – Borrowing

Do you have any loans or other debts outstanding? If so, please provide details.

.....

.....

.....

Section 7 – About your Health and Social Factors

Are you able and willing to live independently and look after yourself and your accommodation? **YES/NO**

Please give details of any significant illnesses, injuries or operations during the last five years

.....

.....

Are you currently receiving treatment for any illness? YES/NO

If Yes, please give details below:

.....

.....

CONFIDENTIAL

Are there any other health or social factors that you would wish the trustees to take into consideration when assessing your application? YES/NO

If Yes, please give details below:

.....
.....

Name and address of your GP.....
.....Post Code.....

The charity may wish to write to your GP asking him to complete a medical certificate to enable your application to be considered further. If you are appointed as a resident and, at a later date, trustees become concerned about your health and/or your ability to continue to live independently they may need to obtain a further medical report. Please sign and return the enclosed form in which you consent to the charity contacting your GP to authorise them to provide us with medical information about you either now or in the future.

Do you have a conviction which is not spent under the Rehabilitation of Offenders Act 1974? YES / NO. This information will be processed solely for the purposes of this application.

If 'YES', please provide details:

.....
.....
.....

Section 8 – References

Please give the names and addresses of two responsible people (not relatives) who know you well and whom the charity may approach for a reference. If you are currently renting accommodation, one of the referees should be your current landlord. Please indicate how you know the referees. We will never disclose sensitive personal data to the referees but we will supply them with basic information regarding you and your application

1.....
.....
.....

Post Code.....

2.....
.....
.....

Post Code.....

Section 9 – Additional information (optional)

Applicants should be aware that almshouses are intended to be a community where residents can live safely together. If you wish to make any other statements in support of your application and suitability for almshouse accommodation please use the space below.

Section 10 – Declaration

I/we believe that I/we meet the beneficiary criteria to live in one of the charity's almshouses. I/we declare that the information given in this application is correct and complete to the best of my/our knowledge and belief. **I/we understand that the Trustees would be entitled to terminate any appointment to an almshouse dwelling I/we may be given as a result of this application, if my/our answers in this application form are untrue, or misleading in any respect (for example, due to omitting or misstating relevant facts).**

CONFIDENTIAL

I/we accept that if I am/we are appointed as a resident I/we shall be a beneficiary of the charity and not a tenant. Any weekly sum I/we pay will be a maintenance contribution and not a rent.

I/we confirm that I/we am able to look after myself and to live independently, with the assistance of family and social services if necessary.

I/we consent to my/our GP or other medical attendant providing the charity with a medical certificate or report about my/our health and condition now or at a future date.

I/we consent to the charity holding personal and sensitive data relating to me/us and my/our personal circumstances in accordance with the General Data Protection Regulations (GDPR).

I/we understand that I/we have the right to request access to the information that is held by the Charity relating to my/our data.

The charity is obliged to check the immigration status of prospective residents and will need to see proof of identity such as passport or driving licence.

I/we agree that the charity may contact me by: (Please tick as appropriate.)

☐ email

☐ post

☐ telephone

Applicant 1

Signature.....

Name.....

(PLEASE PRINT NAME IN CAPITAL LETTERS)

Date

Applicant 2

Signature.....

Name.....

(PLEASE PRINT NAME IN CAPITAL LETTERS)

Date

Please return your completed application to: **The General Manager**
The Ogilvie Charities, The Gate House, 9 Burkitt Road, Woodbridge, Suffolk IP12 4JJ
or by email to: **info@ogilviecharities.org.uk**

Data Protection Statement: It is part of the Trustees' responsibilities to ensure that applicants for almshouses are suitably qualified under the terms of the charity's governing document. Trustees, therefore, need to investigate the personal circumstances of applicants. The Charity complies with the regulations for data security under the Data Protection Act 2018 and UK General Data Protection Regulations (UK GDPR). The data we collect has been classified as Sensitive Data under Article 9 of UK GDPR. We have strong procedures and policies in place to protect the collection and storage of this data. 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 since the charity reserves the right to investigate and verify what you write in this form, but no details will be disclosed for any inappropriate purpose. You may have access to your personal information on request.

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 _____
(If applicable)

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: info@ogilviecharities.org.uk