

Amersham United Charities

Application Form for an Almshouse

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Charity Commission Registered No: 205033

Amersham United Charities provides housing for people in need in accordance with the charity's Governing Document. The charity's entry criteria for entrance into the Almshouses are:

- The residents of the almshouses must be poor single (or divorced) women/men, widows/widowers who are resident at the time of appointment in the following areas, in the following order of priority
 - the area of benefit (the parishes of Amersham and Coleshill)
 - the ancient parish of the Lee
 - the surrounding area
- In addition to observing the above qualification, when appointing residents to the Miss Day's Almshouses, the Trustees should give priority to members of the Church of England.

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.

Section 1 – About You

Full name including Title

Current Address including Post Code

Length of time at this address

Council Tax Band

Email address

Telephone Numbers. Landline:

Mobile Number

Date of Birth

Age

Marital status

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

Section 2 – About your Family

Next of kin 1

Relationship

Address including Post Code

Telephone No

Mobile Number

Email address

Next of kin 2

Relationship

Address including Post Code

Telephone No

Mobile Number

Email address

Section 3 – About your present home

Type of accommodation (e.g. 3 bedroom house, 2 room flat)

Do you 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

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? **Yes/No** If '**Yes**' what is the relationship?

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

If rented, please give name and address of landlord.

What is your current rent £.....per week.

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 own 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 including Post Code

Do you own a car? **Yes / No**

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:

	Amount	Frequency
<p>Pensions</p> <ol style="list-style-type: none"> 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 		
<p>Social Security Benefit</p> <ol style="list-style-type: none"> 1. Pension Credit 2. Attendance Allowance 3. Universal Credit 4. Any other benefits eg Housing benefit 		
<p>Employment or self-employment Please explain type of employment and hours of work</p> <p><i>N.B. You will be required to bring evidence of earnings such as payslips or proof of earnings (if self employed) to interview</i></p>		
<p>Other Income and investments</p> <ol style="list-style-type: none"> 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 		

Section 5 – Your Capital

1. Bank accounts: Current Balance
2. Building Society accounts: Current Balance
3. Shares at their Current Value
4. National Savings (e.g. National Savings Certificates): Value
5. Unit Trusts and ISA's: Current Value
6. Premium Bonds: Amount held

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 to look after yourself and your accommodation?

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:

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 including Post Code

Please ensure that you send the attached Medical Form to your GP and that it is returned to the charity. This forms part of your application.

The charity may wish to write to your GP in the future. If you are appointed as a resident and, later, 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 note that when signing this application, you authorise your GP to provide us with medical information about you either now or in the future.

Do you smoke or vape? **Yes/No**

Do you own a pet? **Yes/No**

Section 8 – Criminal Convictions

Do you have a conviction which is not spent under the Rehabilitation of Offenders Act 1974? **Yes/No**

If **'Yes'** please provide details:

Do you have any adult cautions (simple or conditional) or spent convictions that are not protected as defined by the Rehabilitation of Offenders Act 1974 (Exceptions) Order 1975 (Amendment) (England and Wales) order 2020? **Yes/No**

If **'Yes'**, please provide details

A conviction will not automatically exclude you from being considered as an applicant, but Trustees need to be fully aware of your circumstances

Section 9 - 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 must be your current landlord. Please indicate how you know the referees.

Name	1.	2.
Address		
Telephone		
Post Code		
Relationship		

Section 10 – 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 have read the charity's Conditions of Entry and believe that I am eligible to apply to live in one of the charity's almshouses.

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

I will notify the Clerk of Amersham United Charities of any changes in details provided on my application before or during the appointment process. I will also notify the charity if my circumstances change if I become a beneficiary of the charity.

I consent to references being sent from the two listed including which includes my current landlord.

I have read this application form carefully and the charity's handbook (located on our website) and agree to abide by the rules of the charity should I be appointed to an almshouse.

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

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

I consent to my GP or other medical attendant providing the charity with a medical certificate or report about my health and condition now or at a future date in accordance section 7.

I consent to the charity holding personal data on this form in accordance with Data Protection Regulations.

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

email

post

telephone

Signature

Name

(PLEASE PRINT NAME IN CAPITAL LETTERS)

Date

Please return your completed application to:

The Clerk

Amersham United Charities

163 Stanley Hill

Amersham

Bucks, HP7 9EY

Telephone 01494 721781

clerk4auc@gmail.com

Further information

The Weekly Maintenance Charge (WMC) covers the following expenses incurred by the Charity:

- The management of the Almshouse premises
- Day to day maintenance of the building structure, and interior fixtures and fittings which are the property of the Charity (Appendix 1 attached)
- Exterior re-decoration, generally every five years, but variable dependent upon condition
- Interior re-decoration of walls, ceilings, joinery on an approximately ten-year cycle, or as otherwise appropriate depending upon condition.
- Provision of fitted floor coverings appropriate to the room in which they are installed, and replacement of such coverings at the end of their useful life (if provided by the Charity).
- Maintenance of walls and boundaries owned by AUC, also of gardens, yards, pathways and covered ways enclosed thereby, also the electric lighting to communal areas and accessways
- Insurance of the land and buildings, including fixtures and fittings (but not any contents owned by the Resident)
- Water and sewerage rates
- An Emergency Aid Call system
- The electricity and gas central heating charges for Miss Day's Almshouses Residents

The WMC is reviewed each year to be effective from 1 June until 31 May in the following year (unless otherwise agreed)

The WMC should be paid monthly by standing order to the Charity and is payable from the commencement of the week during which you take occupation.

If you are entitled to Housing Benefit you may wish to make an application now to the Chiltern District Council in this regard.

It is a condition of occupancy that the full amount of weekly maintenance contribution is paid regardless of the services or support elements used by the resident.

You will be responsible for payment of council tax and telephone charges relating to your Almshouse, and for electricity and central heating gas charges if allocated a home in the Drake's Residents.

The following **Regulations for Residents** are to ensure the smooth running of the Almshouses and it is a condition of occupancy that any new Resident signs a copy signifying their willingness to abide by them before taking up occupancy.

1. The Trustees undertake to carry out all repairs as listed above. Residents are required to properly clean and make good any accidental damage to the Almshouse interior, except for that due to fair wear and tear. Residents are not allowed to make any structural alteration to the Almshouse, nor alter the plumbing or electrical installation. No shelves, cupboards, locks or fittings shall be fixed or removed, nor shall any alteration be made to any room or its fittings without the prior consent of the Clerk.
2. Residents shall permit reasonable access for periodic inspection of their Almshouse and for all repairs and maintenance works required to be carried out.

3. Residents shall keep their Almshouse clean and tidy and avoid storage of excess or unnecessary items. All defects which become apparent in the property should be reported to the Clerk as soon as possible.
4. The use of paraffin oil and portable gas heaters is strictly prohibited. The Clerk should be consulted if additional heating is required.
5. Residents should not be absent from the Almshouse for more than a total of twenty-eight days in any one year without the prior consent of the Clerk and should inform the Clerk if they will be away for more than a week at a time.
6. The name and address of the next of kin shall be supplied to the Clerk, together with information as to whether a Will has been made and, if so, where it is deposited.
7. Residents are required to occupy the Almshouse quietly and with thought for other Residents and/or neighbours. No radio, TV or music system should be operated in such a manner as to cause a disturbance, nor shall anything be done in, upon or about the Almshouse which shall be a nuisance, annoyance or disturbance to the occupants of other Almshouses, adjoining property, or to the general public.
8. The Trustees will organise a Concessionary TV Licence under the Accommodation for Residential Care Scheme for each resident where they meet and confirm their eligibility of i) retired aged 60 or over and not working in paid employment for more than 15 hours per week or ii) disabled (as set out by TV Licensing). The cost of this is paid by the resident. Currently £7.50 or free for the over 75s.
9. The Trustees may take steps as they think proper in the administration of the Charity and for the Residents' welfare.
10. Residents may expect to continue in occupation for as long as they need the accommodation providing, they continue to qualify as a beneficiary and are able to look after themselves. If health deteriorates, they must be willing to accept advice and guidance, either from their own doctor or a medical consultant appointed by the Clerk/Trustees. The Clerk will also consult with the next of kin, Social Services and other agencies if necessary.
11. Residents shall provide the Clerk with authority to contact their doctor and next of kin directly in the event of emergency by signing the attached form.
12. One or more of the Charity's Housing Trustees (usually two) will make a general visit to the Resident twice a year and will give notice of the visit. Residents should try to be home for the notified visit. A visit will also be made if a complaint is made to the Clerk or a Trustee.
13. Smoking or vaping of any other substance, including e-cigarettes, is not permitted within any Almshouse property or on Almshouse land.
14. Pets should not be kept at the Almshouse.
15. Visitors are not permitted to stay overnight in the Almshouse, except with the consent of the Clerk.
16. Neither the Resident nor any relation or guest of the Resident will be a tenant of the Charity or have any legal interest in the Almshouse.
17. The Trustees reserve the right to ask a Resident to vacate the Almshouse and move, either temporarily or permanently, to another Almshouse belonging to the Charity.
18. The Almshouse stands in a designated Conservation Area and is listed for its architectural and historic importance. Alteration, improvement and repairs to the Almshouse may be limited by Statutory controls and conditions as a result. Such limitations have been, or may have to be, accommodated in the design, building methods and timing of the work required to properly maintain the Almshouse.

19. The Trustees will not accept responsibility for any accidents caused by the age of the buildings, and the Resident must assess for him/herself whether the Almshouse is suitable for their occupation and for any guests who visit them.
20. Residents who enjoy gardening may look after the garden beds allotted to their Almshouse. This can be arranged between the Resident and the Trustee appointed gardener and/or the Clerk.
21. The Resident's attention is drawn to the Complaints Procedure (Appendix 2 attached).
22. The Trustees retain the power to set aside a Resident's occupancy with good cause, e.g. in the case of serious misconduct, non-payment of WMC, a breach of the regulations, or if the Resident is no longer a qualified beneficiary or a risk to themselves or other Residents, in which case the resident must leave the Almshouse within one month.
23. Should a Resident wish to leave the Almshouse to live elsewhere, not less than one calendar months' notice in writing must be given to the Clerk. Weekly maintenance contributions remain payable until the notice period expires and the Almshouse is vacated and cleared of furniture and possessions. All keys are to be returned to the Clerk, who is to be provided with a written record of all relevant meter readings.
24. When the Resident vacates the Almshouse for whatever reason, all items belonging to the Resident shall be removed by him/her forthwith. Weekly maintenance contributions should be paid up to the departure date, as well as all relevant utility bills. Should a Resident ask to vacate the Almshouse without notice, the weekly maintenance contribution is to be paid to the end of the notice period.
25. On vacation of the Almshouse the Resident is to leave the property clean and tidy. The condition of the Almshouse interior will be inspected by the Trustees or their appointed representative upon vacation by the Resident. If unrepaired damage other than that due to fair wear and tear is found, the Charity will seek to recover the cost of the necessary remedial works from the departing Resident.
26. In the event that possessions and goods are left abandoned by the resident, the Trustees reserve the right to sell them after a period of one month, and out of the proceeds pay any outstanding amounts owing to the Charity, including outstanding weekly maintenance contributions and any other expenses including removal costs.
27. If a Resident is below retirement age, the appointment to the Almshouse will be reviewed regularly at an interval of not longer than five years.
28. It is the Resident's responsibility to notify the Clerk if his/her circumstances change. However, unless your income was to substantially increase to the extent that you no longer qualify as a beneficiary, the likelihood is that you would be allowed to remain in the Almshouse. The Trustees reserve the right to review the Resident's financial circumstances from time to time.
29. Neither the Almshouse nor its garden may be used as a place of business, either from where to conduct business or to store items connected with running a business.
30. Residents at the Day's Almshouses may apply to the Clerk to keep a mobility scooter at the Charity's premises. All such vehicles are kept by the Resident entirely and solely at the Resident's risk. Proof of suitable insurance shall be provided to the Clerk.
31. Should the need for mobility assistance equipment arise for use within the Almshouse, for example a stairlift, full technical details of the requirement must be provided to the Clerk for consideration. If agreed, proof of suitable insurance shall be provided to the Clerk.
32. It is a condition of occupancy that upon a Resident reaching pensionable age, an Emergency Aid Call system is installed. All telephone contact details must be advised to the Clerk.
33. Please note that any matter raised with the Clerk will be referred to the Trustees when appropriate.

MEDICAL FORM

To: Name of Doctor:

Surgery Address:

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PLEASE NOTE

THIS FORM IS COMPLETED BY YOU AND YOUR DOCTOR

Dear Doctor

I have applied to Amersham United Charities to live in an Almshouse and my application has to be supported by you. I confirm that I give my permission for you to provide the information as requested below and that I have given the Charity my authority to obtain my personal data from you. Please would you provide the details requested below, adding any comments you may have about my medical circumstances which would help the Trustees in assessing my need for almshouse accommodation. The fully completed form should be either returned to me or direct to the Charity. (Address below).

Yours faithfully

Signature: Date

My Full Name:

Current Address:

Notes for Doctors: If appointed to an Almshouse, as a qualified beneficiary of the Charity, Residents will have to be able to care for themselves and their Almshouse, albeit with any statutory or other assistance available. Please see the end of document (1) for the charity’s definition of “independent Living”. The almshouses do not have wardens and the charity is **not** qualified **nor** permitted to undertake any care, nursing or have any involvement in medication, **nor** do they provide personal care.

The applicant would benefit from living in an almshouse because:

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.....
.....

Continued over.....

Please detail any relevant physical (eg mobility problems or sensory loss) or mental health condition (eg memory loss, dementia, paranoia, schizophrenia, bi polar, depression) which may affect the applicant's ability to live independently:

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.....
.....

Please detail any history of substance or alcohol abuse

.....

Any other comments:

.....

.....

Doctor's signature: Date

Print Name Practice Name:

Once completed by you and your Doctor - return to the address below.

Independent Living.

1. Residents are responsible for looking after themselves and dealing by themselves with regard to their own day-to-day needs such as shopping, laundry, preparing meals, dressing, bathing, toileting, personal hygiene and arranging visits to or from doctors, dentists, hospital or other healthcare professionals, and/or are able to live in such a way that they do not pose a risk to themselves or others either through illness (physical or mental), infirmity or frailty.
2. As between residents and the Charity, "independent living" does not have the meaning given to it in other social and care contexts, or how that expression may be understood by other agencies, statutory or non-statutory, see (1) above.
3. It is recognised that there will be times when residents may need the services of a carer to help them live independently. However, when the attendance of a carer becomes substantial or full-time, then the Charity will consider whether the needs of the resident (and other residents) would be best met by ending the appointment as set out below. Residents should inform the Charity if they need to have the services of a carer or if the attendance of a carer has to be increased.

The Clerk
Amersham United Charities
163 Stanley Hill
Amersham
Bucks, HP7 9EY