



# Notes for Interviewing Applicants

All new applicants should be visited and interviewed in their current accommodation. Where possible a privacy notice should be sent in advance to inform the applicant of how the charity will process their personal data. If this is not possible it should be handed over at the start of the interview. Please see Appendix B for an example, although the charity may wish to use its standard privacy notice.

The purpose of the interview is to:

- Establish the needs of the applicant
- Inform the applicant about the trust, the almshouses, and the weekly maintenance contributions.
- Answer any questions from the applicant

## 1 Approaching applicant's home (outside)

- Is the applicant's accommodation situated in difficult terrain?
- Is it far from transport routes or shops?
- What is the approach like to the accommodation?
- Are there steps?
- Is there a lift?
- Is the property secure?

## 2 Introduction

Please introduce yourselves to the applicant.

Interviewers should be objective and not make comments that may lead the applicant to believe the interviewer is making a judgement or pre-judging the applicant's case. For example, the interviewers should not comment on the applicant's home or neighbourhood either positively or negatively and should be friendly and courteous.

The interviewers must be non-committal as to the applicant's chances and, if questioned, should refer to there being several applicants who will all have priority at some level to be considered.

## 3 The process/selection

Advise the applicant that the decision to appoint is based on various criteria (housing, financial, social) and the applicant with the greatest need will be selected. The final decision is made by the trustees and the applicant will be informed of the outcome over the next few weeks.

## 4 Status

The applicant(s) must be informed that, if they are selected for the accommodation, they will be appointed as beneficiaries of the charity. They will not be tenants and will have no legal interest in the property. Although, in most circumstances, the accommodation is for life, residents may have to move out if they require residential or nursing care or if they are in breach of the terms of their appointment.

The following are to be treated in confidence:



## **5 Reasons for wanting to move:**

What is the prospective resident's reason for wanting to move?

## **6 What is the applicant's understanding of living in an almshouse? (If necessary, explain more about the charity)**

The interviewer should explain at this point what the charity has to offer:

Examples might be;

- interior decoration is the responsibility of the charity
- council tax is the responsibility of the resident
- the practical support and advice the warden can provide
- the availability of the emergency call system
- the social aspect of almshouse living
- access to communal gardens
- arrangements for utility costs to be explained
- repairs dealt with
- floor coverings provided.

Equally, the interviewer should explain what is not included and any policies/regulations which apply.

Examples might be:

- no provision for continuing care, shopping, meals, etc.
- furniture not provided
- partners/relatives/friends cannot share the accommodation.

The charity's policies on such matters as pets, smoking, inspecting the almshouse, etc. should be made known.





## **7 Care arrangements**

Does the applicant have any current home care arrangements e.g. meals on wheels, carers with tasks such as dressing, shopping, and cleaning? Are these by private arrangement or via social services?

## **8 Health**

Inform the applicant that the charity will be applying for a doctor's medical report in due course. Enquire whether there are any medical conditions that the applicant would like to make known at this stage.

## **9 Family or next-of-kin**

Does the applicant have a family or next-of-kin and do they live nearby?

Does the applicant receive support from family and/or friends?

## **10 Overnight stays**

The charity's overnight stay policy should be explained.

## **11 Weekly Maintenance Contributions and Council Tax bands**

Inform the applicant of the weekly maintenance contributions (WMC) and council tax which would apply. Make clear what the WMC covers and does not cover. If applicants express concern at the level of WMC they should be advised that if eligible, Housing Benefit/LHA may be claimed to cover the cost. The applicant should be reminded of the benefits of living within the almshouses (see Item 6 above).

## **12 Tour of the applicant's home**

Request a tour of the house. This is a good time to observe how the applicant copes with mobility problems and whether any mobility adjustments have been made to the property. Note also the condition of the property and garden (if applicable).

- Is there a downstairs toilet?
- Is there a bath or shower?
- What are the stairs like to the first floor?
- Any internal steps?
- How is the property heated?
- Type of windows? Are they draughty?
- Adaptations.

## **13 Closing comments**

Include:

- the need to live in harmony with other residents
- the need to keep the almshouse in a reasonable state of tidiness and cleanliness



- the charity has received other applications (if appropriate)
- what date does the applicant wish to take up residency if accepted?

Show the applicant a copy of the Residents' Handbook.

Prospective resident's name and address:

Visiting panel:

Date of visit:

Would you recommend this applicant for an almshouse? Why?

If not, why?

Documentation to be checked as proof of residency at the address visited:

(Please see Appendix A for a list of Home Office acceptable identification documents):

- Recent council tax bill and/or utility bill and/or NHS card. Y/N
- If renting, rent a book. Y/N  
Are there rent arrears?



## CRITERIA FOR GUIDANCE OF PANEL SELECTING NEW RESIDENTS

Applicant's Name:

	Trustee Comment
<p><b>1 Age:</b> Preferred range 55-80</p>	
<p><b>2 Health:</b> On a scale of 1 – 3 (3 being good) Preferred Range 2 – 3</p>	
<p><b>3 Need:</b></p> <p><u>3.1 social</u> On a scale of 1 – 3 (3 being high) Preferred Range 2 – 3</p> <p><u>3.2 Physical</u> On a scale of 1 – 3 (3 being capable) Preferred Range 2 – 3</p>	
<p>Total points should indicate likely suitable residents i.e. those with the highest score. For couples – assess separately and divide the total score in half.</p>	
<p><b>4 Wealth:</b></p> <p><u>4.1 Income</u> Minimum disposable income £..... Per week, couples £ .....</p>	



## Appendix A

### Home Office Acceptable Identification Documents

<b>Proof of name</b>	<b>Proof of address</b>
Current signed passport	Utility bill (gas, electric, satellite television, landline phone bill) issued within the last three months
Original birth certificate (UK birth certificate issued within 12 months of the date of birth in full form including those issued by UK authorities overseas such as Embassies High Commissions and HM Forces)	Local authority council tax bill for the current council tax year
EEA member state identity card (which can also be used as evidence of address if it carries this)	Current UK driving licence (but only if not used for the name evidence)
Current UK or EEA photocard driving licence	Bank, Building Society or Credit Union statement or passbook dated within the last three months
Full old-style driving licence	Original mortgage statement from a recognised lender issued for the last full year
Photographic registration cards for self-employed individuals in the construction industry -CIS4	Solicitors letter within the last three months confirming recent house purchase or land registry confirmation of address
Benefit book or original notification letter from Benefits Agency	Council or housing association rent card or tenancy agreement for the current year
Firearms or shotgun certificate	Benefit book or original notification letter from Benefits Agency (but not if used as proof of name)
Residence permit issued by the Home Office to EEA nationals on sight of own country passport	HMRC self-assessment letters or tax demand dated within the current financial year
National identity card bearing a photograph of the applicant	Electoral Register entry
	NHS Medical card or letter of confirmation from GP's practice of registration with the surgery



## Appendix B

### Ottery Feoffee Charity Privacy Notice

- 1) The Ottery Feoffee Charity may collect and process the following information about your application:
  - Personal identifiers, contacts, and characteristics (for example, name and contact details)
  - Medical Information
  - Financial Information
- 2) The personal information processed is provided to us directly by the applicant for Ottery Feoffee Charity to be able to offer appropriate accommodation and meet the objectives of the charity.
- 3) The lawful basis that we rely on for processing this information is that the Ottery Feoffee Charity has a legitimate interest.
- 4) Your information is securely stored by the Clerk or Trustees in a locked file or securely in an electronic cloud storage with restricted access.
- 5) We keep interview information for a reasonable period. We will dispose of your information by deleting it if stored electronically or by confidential shredding if on paper.

If you require any further information, please contact our Data Protection Manager, Tina Collins (Clerk to the Trustees) either by:

E-mail: clerk.feoffee.osm@gmail .com

Phone: 07865 098 253

Post: 2 Royal Oak, Bude, EX23 9NP.





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