**The John William Lamb Trust**

**Charity Support Visitor**

Service Contract Description

Contribute to the well-being of older persons (the Trusts annuitants) in Nottinghamshire by visiting them in their own home to provide social contact and support around access to local community provision.

Responsible to: Nottinghamshire Community Foundation representative and the John William Lamb Trust (Appendix A).

Assess and recommend new clients as required for the approval by the John William Lamb Board. (Appendix B).

* Respect autonomy, dignity of client and safeguarding, in line with the Lamb Trust’s Confidentiality, Equal Opportunity and Vulnerable Adult Safeguarding policies.
* Assist with tasks such as reading, general correspondence, benefit applications and telephone calls.
* Maintain appropriate assessment and client case notes according to the agreed administration procedures.
* Bring to the attention of the Nottinghamshire Community Foundation representative and the John William Lamb Trustees any problems or concerns which may affect the health and safety of the client, you or any other persons.
* Write a report for the Trustee Board agenda providing a summary of each annuitant.
* You will attend each Board meeting to present your report.
* Recommend applications for additional funds for specific items and needs in accordance with the grant giving criteria of the Lamb Trust.

Personal Specification

* Good communication skills essential both verbal and written
* Ability to work unsupervised, using own initiative as required
* Understanding and experience of confidentiality and safeguarding
* Understanding and experience of working with older and vulnerable people
* Reliability, patience and sensitivity
* Experience of multi agency working and referrals
* Understanding and experience of the current benefit system.
* Access to a vehicle
* A clean driving licence
* Personal Liability Insurance

Criminal Records check will be required

Hours of work: An average of 8 hours per week including 1 hour for administration. Visits will be made to each beneficiary at least 3 times per year. The Board may approve, in exceptional cases, contact by phone, text or email.

Weekly hours not worked whilst on holiday or sick will be made up in the weeks before or after the period of absence.

An additional 5 hours at the current rate per hour will be paid to process each new applicant.

A monthly list of visits and contacts will be provided to the Charity Fund Manager.

Remuneration: Self-employed contract £15.00 per hour, travel expenses @ 45p per mile, telephone call reimbursement.

**Appendix A**

**About the Charity**

The John William Lamb Trust is a family trust, registered charity no 221978.

The object of the Charity is to provide support to persons 55 years of age and over who can demonstrate a need and live in the Nottingham City Council area or within 10 miles of the City Council House.

This support can be quarterly financial payments plus support from the charities visitor, a one off payment plus visitor support or a mixture of both.

**Governance**

The Charity was established in January 1922; it currently has 3 Board members and meets 3 times a year.

The Board employs Nottinghamshire Community Foundation to administer the Charity.

A self-employed Charity Support Visitor maintains contact with the annuitants, reports to the Nottinghamshire Community Foundation and provides a written report for the JW Lamb Board, attending each of its Board meetings.

**Operations**

The Charity currently has 18 annuitants.

The Charity is not presently supporting new applications but is hoping to in the future, if needed the hours worked by the Visitor will be adjusted to meet the requirements of additional visits and contacts.

Support for new annuitants is restricted to 3 years but can be extended following a review of their circumstances after this period.

The operating costs and annuities of the Charity are met from the income generated through its investments.

**Appendix B**

## J W LAMB TRUST

Guidance Notes on Application for Consideration as an Annuitant

**General Information**

Support from the Trust is usually only offered for a period of up to 3 years. This support can be quarterly financial payments and visitor support, a one off payment plus visitor support or a mixture of both. Potential Annuitants need to be made aware that changes in their personal circumstances may lead to the withdrawal of the Trust’s support.

**NOTE 1 SECTION 2 : DATE OF BIRTH**

As a general principle the Trust will only provide support to people aged 55 and over.

**NOTE 2 SECTION 3 : RESIDENTIAL CRITERIA.**

1. The Trust will provide support to residents of the Nottingham City Council area and residents of the Nottinghamshire County Council area living within 10 miles of the City Council House.

Whilst most people will know their Council area, there will be a few who do not. Good ways of checking for this are to ask who they pay their council tax to. If they are in receipt of social care services, which authority is providing for such care, or if they are in local authority accommodation which council/housing association they pay their rent to.

The Trust’s criteria will cover people who pay their council tax to Nottingham City Council and some residents of Rushcliffe, Gedling, Broxtowe and Ashfield District Councils.

1. If there are any doubts as to whether people live within 10 miles of the Nottingham City Council house a good way of checking would be to ensure that you have the potential Annuitants postcode. Online checks can then be made to ascertain the distance.
2. The Trust’s support is only available to people who have met the residential criteria for more than one year. This period of one year can cover previous addresses as long as they would themselves meet the residential criteria.
3. The Trust’s support will only be given to people living on their own. From a people standpoint this covers single people, those who are divorced, widows and widowers.
4. From a property standpoint living on their own basically means they have their own front door, and would include a house, flat, accommodation in warden controlled premises and a flat in an older persons community village.

**NOTE 3 SECTION 4 : INCOME**

1. The Trust’s support will normally be given to people whose only income is the basic state pension and/or other statutory benefits.
2. Where people are not in receipt of the basic state pension but have a personal pension, then support will only be considered where the personal pension and statutory benefits are their only income and the personal pension is less than the basic state pension.
3. The Trust will also consider supporting people who are not in receipt of any form of pension but, due to poor health or incapacity, are unable to work, leaving their only income as statutory benefits.

**NOTE 4 SECTION 6 : BACKGROUND INFORMATION**

1. Please include under background information anything which will be helpful to inform and support the application, and would assist Trustees in helping them judge the application. Some examples of such useful information would include, where available, family circumstances, state of health, friends and social situation and any other relevant financial information.
2. Other relevant financial information will be helpful to the Trustees to decide the level of annuity offered. Trustees can adopt a flexible approach to the level of annuity in cases of severe hardship.

**NOTE 5 SECTION 7 : CHARITY SUPPORT VISITOR’S RECOMMENDATION**

The Charity Support Visitor is encouraged to provide any other information which they think is relevant.