



NOTTINGHAM ANNUITY CHARITY APPOINTMENTS POLICY AND PROCEDURE

RESPONSIBLE DIRECTOR: Director of Homes and Wellbeing
RESPONSIBLE OFFICER: Assistant Director of Homes and Wellbeing
LAST UPDATE: April 2018
NEXT UPDATE: **Under Review**

1. PURPOSE

- 1.1 To ensure that annuities are paid to qualifying persons in accordance with the object of the Nottingham Annuity Charity.
- 1.2 To ensure the process of appointment of new annuitants is fair and transparent.
- 1.3 To ensure the amount of annuities paid each year is maximised.

2. RISKS

- 2.1 Failure to maximise the number of beneficiaries of the Charity by under utilising the available funds.
- 2.2 Failure to prioritise the payment of annuities to the classes of persons to whom preference must be given under the terms of the Charity Commission Scheme.
- 2.3 Failure to identify changes in annuitants' circumstances which means they are no longer in need of financial assistance.

3. REFERENCES

- 3.1 Charity Commission Scheme dated 9 June 2008.

Nottingham Annuity Charity Appointments Policy and Procedure

4. PROCESS

- 4.1 As part of the budget setting process each year, the amount of the annuity award will be reviewed. The scope for appointing new annuitants will be established at this time each year, based on the Charity's income.
- 4.2 Vacancies for new annuitants have to be advertised before new ones are appointed, unless a vacancy occurs within 2 years after the last advert. The advertisement template is at Appendix 1 to this document.
- 4.3 All applicants for annuities must complete an application form – see Appendix 2.
- 4.4 The criteria for appointing new annuitants are as follows. Applicants must:
 - be in need
 - be of good character
 - be resident in Nottinghamshire at the time of appointment
 - Preference must be given to widows and spinsters
- 4.5 The Specialist Housing Manager will arrange a meeting of at least two of the Appointments Panel who will make a decision to appoint based on the Charity's criteria. The Panel comprises:
 - Head of Specialist Housing
 - Specialist Housing Manager
 - Specialist Housing Officers
- 4.6 The Panel will decide which applicants are to be added to the waiting list, in priority order.
- 4.7 The applicant deemed to be the highest priority will be visited at home to establish that the information given on the application form is accurate and to obtain any further information needed, for example bank account details. A written record will be kept of the home visit and held on the Annuitants File.
- 4.8 A letter will be sent to the new appointee, giving details of the payment amount, the method and frequency of payment, and stating that he/she must inform the Charity if their circumstances change significantly and they no longer need the annuity.
- 4.9 Admin will send an e mail to Finance giving the applicant's details and requesting for payment to be set up.
- 4.10 The amount of the annuity will usually be at the current rate agreed at the annual review, but this can be varied in exceptional circumstances.
- 4.11 Annuities are paid quarterly by BAC transfer into the annuitants' bank accounts.

Nottingham Annuity Charity Appointments Policy and Procedure

- 4.12 The unsuccessful applicant will be sent a letter informing them either that they will be held on a waiting list for future vacancies, or removed from the list as they do not meet the Charity's criteria.
- 4.13 All decisions of the Appointments Panel will be recorded in the Annuity Charity Appointments spreadsheet in Igloo. A record will be kept of:
- The date of each vacancy and the reason for it
 - The names of persons who have applied for appointment
 - The name of the person appointed and the date of appointment

Nottingham Annuity Charity Appointments Policy and Procedure

Appendix 1

NOTTINGHAM ANNUITY CHARITY (Registered Number 510023)

This Charity pays small annual sums (known as annuities) to needy persons who live in the City or County of Nottingham (who are known as annuitants). The annuities are paid in four equal instalments throughout the year and the Trustee of the Charity, Nottingham Community Housing Association, is required to give preference to widows and spinsters.

The Charity is now in a position to appoint some new annuitants.

Applications will be considered until [DATE]

Anyone wishing to be considered for an annuity should apply by completing an application form and sending it to:

Nottingham Annuity Charity
c/o Specialist Housing Team
Nottingham Community Housing Association Limited
12/14 Pelham Road
Sherwood Rise
Nottingham
NG5 1AP

Application forms can be obtained by contacting 0115 8443399

Applications are considered by the Trustee and the appointment of new annuitants is entirely at its discretion. It also depends on the availability of funds at the time.

This Charity is regulated by the Charity Commission.

Nottingham Annuity Charity Appointments Policy and Procedure

Appendix 2

**NOTTINGHAM ANNUITY CHARITY
Registered Charity No. 510023**

Trustee: Nottingham Community Housing Association Limited

APPLICATION FOR AN ANNUITY

Full Name of Applicant.....

Date of birth.....

Address.....

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

Telephone number..... Marital status.....

Past or present occupation (if any).....

How long have you lived in the City or County of Nottingham.....

Details of your income from ALL sources

State Retirement Pension £.....per week/ month

Other Pension(s) £.....per week/ month

State Benefits £.....per week/ month

Other income/ allowances £.....per week/ month

Details of your outgoings

Rent/ mortgage £.....per week/ month

Gas, Electricity, Fuel £.....per week/ month

Council Tax £.....per week/ month

Other expenses £.....per week/ month

Amount of any Savings or Investments (including bank/building society accounts).....

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Nottingham Annuity Charity Appointments Policy and Procedure

State below any special circumstances you wish to bring to the attention of the Trustee:

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I declare that the answers given by me above are true in every respect, and I request that I may be appointed an Annuitant of this Charity.

I accept the following rules of the Charity:

- (a) The Trustee will decide the amount of the Annuity and reserves the right to cease payment without notice.
- (b) Annuitants must reside in the County or City of Nottingham.
- (c) Annuitants are expected to apply for and receive all State Benefits to which they are entitled.
- (d) Annuitants must notify the Trustee immediately of any changes in their circumstances including the withdrawal of any State Benefits

SIGNATURE OF APPLICANT.....

DATE.....

DATA PROTECTION STATEMENT: it is part of the Trustee's responsibilities to ensure that applicants for annuities are suitably qualified under the terms of the charity's governing instrument. The Trustee therefore needs to investigate the personal circumstances of applicants. The personal data supplied on this form, and other information relating to an annuity, 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.

Nottingham Annuity Charity Appointments Policy and Procedure

CERTIFICATE

We, being well acquainted with the Applicant and his/her circumstances, certify that we believe his/her answers are true and recommend him/her to the Trustee as being in our opinion in all respects a proper person to be appointed an Annuitant of the Charity.

NOTE: This certificate should be signed by two persons who are well acquainted with the Applicant and his/her circumstances.

Name

Address

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Occupation

Signature.....

Name

Address

.....

Occupation

Signature.....

Please return your completed application form to:

Nottingham Annuity Charity
c/o Specialist Housing Team
Nottingham Community Housing Association
12/14 Pelham Road
Sherwood Rise
Nottingham
NG5 1AP