

## **The CIBSE Benevolent Fund Trust**

### **Guidance on the Role of Regional Almoners**

The work of the CIBSE Benevolent Fund Trust (the Trust) depends heavily on the efforts of Almoners who currently represent each Region of the Institution. New Appointees are required from time to time to fill vacancies.

Historically, Regional Committees have appointed Honorary Almoners from amongst those members who have fulfilled their commitments as officers, and whom are able, without detriment to themselves or connections, to extend their involvement within the Region, in caring for those members, past members, and/or dependants, who are less fortunate and who are in need, within the compass of the limits set out by the Fund Trustees (Trustees).

The role of almoner demands adequate time availability, whether the aspirant is still involved in business, or who has retired, in the necessary attendances at meetings at Regional level, and at Balham, together with maintaining contact with current and new Regional Client dependants of the Trust, on a regular basis.

The Almoner must have a reasonable knowledge of social care in the Community; have a sympathetic demeanour; be able to give forthright advice; and be able to take immediate and effective action where it is necessary, through the Fund Management Committee (the Committee) Chairman, on behalf of the Trustees, and for organising and supervising appropriate relief.

He or she, shall follow up all notices of bereavement, whether originating from Balham, Region or next of kin, in the first instant, making a sensitive approach to offer assistance as thought fit, and in the second, to notify the Trust Administrator prior to Committee discussion and appropriate action being taken. This notification will incorporate duly completed Case History Sheet and detailed Assets and Liabilities Sheet, for the Applicant, who will sign such Forms in the presence of the Almoner. It is a requirement that, from the date of acceptance, the Almoner shall, every 3 years (or earlier, as seen fit), update these records with the Client, provide a copy to HQ and present to the Committee such recommendations as are necessarily appropriate.

It is extremely important, that Almoners exercise strict privacy in their dealings with prospective and ongoing Clients, never to divulge their Clients' confidence at Regional Meeting level, or anywhere else, except at the Committee Meetings.

A Regional Committee Web Site is most useful in advertising the Trust, as are the formal and social occasions, at which, donations to the Trust can be sought and realised through request, and the running of optional prize raffle initiatives. The Trust, existing as an independent organisation, although relying on the financial support of the CIBSE Membership, Patrons and Friends within the industry, cannot and does not, impose any pressure on the Regional Chairmen and Committees to unilaterally donate to the Trust. Indeed, CIBSE funds cannot be donated to the Trust, only funds raised separately at social events etc. Generally, Regions also donate generously to other charitable organisations, and normally arrange such donations, say on a 50/50% split, with the Trust.

It is expected of the Appointee, within the Almoners' Brief, as ex officio and/or as an Honorary Member of the Regional Committee (but not imperative), to ensure that all such arrangements are continued and maintained.

In general, the Committee and Trustees, meets four times in a year, currently: February, May, September and November; held at Balham; commencing at noon (Trustees at 1130 hours); meetings closing at 1430/1530 hours.

The Appointees will be expected to carry out their function on a voluntary basis, providing their own auditable IT trail, for inspection if required by the Charity Commissioners, and upon retirement, to pass all such records and material to the Trustees for handover to their successors. It is important however, that any Appointee, contemplating retirement, must if possible, arrange in due time with the supported Region, for the successor to take office, and to continue, without any interruption, this vital work.

Assistance with travelling expenses may be approved by the Trustees upon prior application and agreement. The Trust does not however provide travel or other insurance for Almoners, and it is important that the Appointee is personally covered by travel insurance whilst carrying out the duties of Regional Almoner, particularly when using their own car.