

Appropriate Allocation of Masonic Support Cases

A requirement of the Masonic Charitable Foundation's Masonic Grant Application process is that the Application Form is completed by a representative of the Foundation during a visit to the applicant's home.

The majority of application related visits are completed by Visiting Volunteers. However there are circumstances in which it will be more appropriate for a member of the AST to act as the Foundation's representative.

This policy explains how to appropriately allocate cases and must be followed to ensure the safety and welfare of everyone involved in the grant application process.

Cases for allocation to the AST

Visits may only be commissioned by a registered GAMES user who must be an employee of the Masonic Charitable Foundation or an authorised Provincial Contact. When commissioning a visit the user must allocate the case to a member of the AST if any of the following circumstances apply:

- History or risk of physical or verbal aggression towards volunteers, charity employees or other third parties.
- History or indication of concerns for the welfare of a child or vulnerable adult.
- History or indication of mental health issues.
- The applicant has a dementia.
- The application is for children and both parents are absent.
- The application relates to a child with special educational needs and/or disability.
- The case is being considered for a reduction in support, known as the 'taper policy'.
- The visit is for a purpose other than the completion of a Grant Application Form. For example, completion of a care/pre-home admission assessment.

- The applicant refuses to cooperate with any Visiting Volunteer.
- There is a conflict of interest, for example, a close personal friendship or business relationship between the Visiting Volunteer and the applicant.
- The case is very complex or unusual.
- There is a reasonable concern that the applicant is not providing complete or accurate information.

The AST will handle all cases allocated to them in accordance with the current Lone working policy and visit risk assessment process.

Right to withdraw from a case

A Visiting Volunteer must refuse to visit, stop a visit whilst it is in progress or withdraw from involvement in a case at any time if they are concerned for their safety or become aware of information which means the case meets the criteria for allocation to a member of the AST.

The Visiting Volunteer must contact the Foundation as soon as possible to request allocation of the case to the AST, explaining why. If appropriate, action must be taken in accordance with the MCF's Safeguarding and Health and Safety Policies (e.g. submitting an incident report form).

Further advice

If a Provincial contact or Visiting Volunteer is unsure if the case should be allocated to the AST they should contact the Foundation for further advice and guidance on the best way to proceed. This may include the AST taking responsibility for the case or providing guidance and support on how to manage a visit. Employees of the MCF should speak with their line manager.

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