

Findhorn Ecovillage Land & Housing Trust

Housing Support Policy for the Whins Cluster

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1 Definitions

Ekopia	Ekopia Social Investments Limited
Land Trust	The Findhorn Ecovillage Land and Housing Trust, a Division of Ekopia created to hold land and buildings in trust and provide support to members of the community seeking affordable housing.
Land & Housing Trust Committee	A committee set up to allocate housing support to community members. It is responsible to the board of Ekopia and comprises representatives from major stakeholders in the Findhorn Ecovillage. Abbreviated to 'L&HT Committee'.
PET	Park Ecovillage Trust
Landlord	Park Ecovillage Trust
Allocations Policy	A method of determining the suitability or otherwise of applicants for Housing Support.
Housing Support	Support provided via the Land Trust for the provision of housing.
Cluster	A group of houses or other properties forming a recognisable collective entity and having various associated by-laws to regulate relevant procedures.
Community	The community of individuals associated with Findhorn Ecovillage.
House	This shall be interpreted to include 'flat' 'unit' or other essentially self-contained form of housing.
Whins Clusters	Comprises East Whins, a cluster of houses developed by Duneland Ltd., and West Whins, an adjacent cluster of houses developed by PET & Duneland Ltd., and Woodside, another adjacent cluster of houses developed by PET & Duneland Ltd.
Woodside Affordable Housing	Housing owned by PET located on plot 13.2 of the Woodside development

Tenancy Agreement	A document issued by the Landlord.
Exclusive Occupancy Agreement	A document issued by the Landlord.
Sharing Owner	The holder of an Exclusive Occupancy Agreement.
CCC	Caring Community Circle

The singular includes the plural for the purposes of this document.

2 Scope

This policy describes the method by which a member of the Community may receive support from the Land Trust to live in accommodation at East Whins, West Whins or Woodside (in North Whins). This policy replaces earlier separate policies for East Whins and West Whins. It does not set out to describe the general circumstances in which an individual may apply to receive support from the Land Trust – this is contained in the **Allocations Policy**.

These policies are owned by Ekopia and administered in tandem by the Land and Housing Trust Committee.

3 Background

Housing Support funds have been accumulated through:

- Grants made to PET by the Scottish Government's Rural Housing Fund.
- Section 75 developer's planning gain made available by Duneland Ltd. as required by planning consent.
- Loans provided by supporters of affordable housing projects via Ekopia, Ecology Bank and Bank of Scotland.
- Shared equity contribution provided by 'Exclusive Occupancy Agreements'.
- Grants and donations made to Duneland Ltd., Ekopia and PET.

Housing Support funding is available in respect of both 'Exclusive Occupancy Agreements' and Rentals.

Note this policy covers the allocation of units. Once a unit has been allocated, the agreement between the landlord and the successful applicant is covered by a Tenancy Agreement. For the Exclusive Occupancy properties, once a unit has been allocated, the agreement between the landlord and the successful applicant is also covered by an Exclusive Occupancy Agreement.

4 Review of Policy

The principles underlying the original East Whins policy was reviewed at an open community meeting on 2 May 2011. Unanimous support for the policy itself was received at the meeting although there were unresolved questions about the most appropriate form of calculating an amount due to a sharing owner on sale or transfer of the property.

The principles underlying the original West Whins policy were reviewed at an open community meeting on 3rd October 2016. This review was informed by the results of a community-wide survey carried out earlier in the year and the views of a volunteer 'focus group' who helped craft the proposals. Unanimous support for these principles as set out in Sections 6.1 (Landlord's Criteria) and 6.2 (Community Criteria) was received at the meeting.

The East Whins and West Whins policies were merged in 2018. Woodside has now been included in this policy.

This Policy shall be reviewed as required and as a minimum prior to each new set of allocations by the Land and Housing Trust Committee, who will propose amendments (if required) to Ekopia in consultation with PET. When the amendments are accepted, Ekopia will issue the revised Policy. If no amendments are required, the policy may be reissued. This process may require consultation with the membership of Ekopia, the community at large and other interested parties.

5 Financial Circumstances

Candidates are expected to make a full disclosure of their financial circumstances to the Land & Housing Trust Committee. The Land and Housing Trust Allocations Policy currently excludes those whose gross household income is:

- more than £29,500 for a single adult household
- more than £37,500 for a 2 or more adult household.

6 Principles and Mechanisms

The allocations process is a straightforward choice of a suitable individual(s) to receive a letting. A balance may need to be struck between housing need and ability to pay. Housing for rent at a subsidised rate shall therefore be made available via the Allocations Policy on the following basis.

6.1 Landlord's Criteria

The Landlord has agreed the following policies in respect of these properties:

6.1.1 East Whins

There are two rental flats 503 and 508.

These flats are designated as community caring units, and are most suited to

- a single person who has significant health or care needs or
- a couple where one or both of the couple have significant health or care needs or
- a single parent with one or more children where the parent or one of the children has significant health or care needs

Both flats have a level access wet room showers. 503 is equipped with a shower screen which allows carer supported showering. 503 is also equipped with grab rails. For both flats it would be up to the applicant to assess the floor plans and design to gauge whether the property would be suitable for their particular needs. PET cannot be responsible for equipping the flat for the potential needs of any tenant and this would be the responsibility of the tenant.

The landlord intends that people with care needs will be given first preference on 503 and 508. In order to prioritise allocations relating to need a health and care questionnaire will be used. This questionnaire should be filled by the applicant and appended to their application. The questionnaire will be used to score each candidate. An example of a health and care questionnaire is provided in appendix 2.1; the latest form should be obtained from the landlord. The health and care questionnaire needs to be completed in consultation with the CCC. The Landlord will provide the relevant contact details at the time of health and care questionnaire form request. Applicants should contact the CCC at least one week before the application closing date, to obtain CCC support for their application as the CCC will need to validate the return prior to the application closing date.

The landlord recognises that for a person with health and/or care needs a situation may arise over time wherein the tenant is no longer able to engage directly with the landlord in relation to the tenancy and the obligations and conditions that go along with that. For 503 and 508 East Whins an applicant with health and/or care needs will require a guarantor.

If there are no suitable applicants with health or care needs these two rental flats may be allocated to a family unit – a couple with child/children, a single parent with one or more children, a couple, or two adults intending to live together.

6.1.2 West Whins

These six flats are most suited to single people, couples or a single parent with a young child.

In addition, the four ground floor properties are also suited to those with limited mobility or who have care needs. PET cannot be responsible for equipping the flat for the potential needs of any tenant and this would be the responsibility of the tenant.

PET may require a guarantor for West Whins properties at its discretion.

6.1.3 Woodside

The four two-bedroom flats are most suited to a family unit – a couple with child/children, a single parent/carer with one or more children, a couple, or two adults intending to live together.

The four studio flats are most suited to single people but possibly couples if the applicants are willing to live together in such a small property. In addition, the two ground floor studios (No. 634 and 635) may be suited to those with health or care needs. That said these flats are not designated community caring units in the same way 503 and 508 East Whins are. Studios 634 and 635 are not specifically designed for health or care needs but could be equipped for the particular requirements of someone with such needs. It would be up to the applicant to assess the floor plans and design to gauge whether the property would be suitable for their particular needs. PET cannot be responsible for equipping the flat for the potential needs of any tenant and this would be the responsibility of the tenant.

PET may require a guarantor for Woodside properties at its discretion.

6.1.4 General Criteria

These are applicable to East Whins, West Whins and Woodside.

We also wish to attract tenants with an interest in co-housing engagement. This includes active participation in co-housing culture and group activities (social and administrative) as well as chores. (Considering the physical limitations of the intended applicants, this will not apply to EW503 and EW 508, the community caring units.)

Multi-generational living is an effective way to create social sustainability in a neighbourhood. We are wanting to support sustainability and resilience in the Whins Cluster Affordable Housing.

The full text of the policy is provided in appendix 4.

6.2 Community Criteria

As a result of the extensive consultation undertaken in 2016 and by Findhorn College in 2018 the L&HT Committee are encouraged to continue to prioritise those who fall into the category of being in financial need (as defined in the Allocations Policy) and also to prioritise those who have health or care needs.

The Allocations Policy states that length of service to the community with an organisation affiliated to the Ecovillage shall be one of the key selection criteria. The general details as to how this shall be interpreted are set out in that document. For Whins Affordable Housing units a minimum period of service of two years is ideal.

It was also agreed that the L&HT Committee be asked to take into consideration “the applicant’s fit with the community and their capacity to contribute”.

The Land & Housing Trust Committee were also encouraged to use a points system, reflecting these priorities to screen candidates, followed by an attunement process.

The L&HT Committee are given broad latitude to interpret these criteria and they may request community input into priorities and changing needs from time to time.

6.3 Allocation of Properties: General Issues

The allocation process is carried out jointly by the L&HT committee, PET and Ekopia. The roles of these different groups in the process are explained in the appendices. All applications for housing support are assessed based on the Allocations Policy and this housing support policy. This process applies to both shared ownership units and Rental units.

6.4 Properties: General

Properties shall be allocated either as rental units, governed by a tenancy agreement, or as shared ownership, governed by an Exclusive Occupancy agreement and a tenancy agreement. At this stage, the two shared ownership properties on East Whins are not covered in detail in this document (see also section 6.6). All the properties included in this section are rental properties.

6.4.1 East Whins

The rental properties available are both 2-bedroom ground floor flats, nos 503 and 508 with an internal floor area of approximately 70m². 503 and 508 East Whins are community caring units which are a precious resource for accommodating community members requiring care at home whose present accommodation is unsuitable for the delivery of care in community.

6.4.2 West Whins

The properties consist of 2 studio flats and 4 one-bedroom flats. Studio Flats 553 and 556 are on the ground floor, 38m² internal floor area, and consist of an open plan kitchen/dining/living/sleeping space with additional loft storage space; flats 557 and 558 are on the first floor, 42m² internal floor area and consist of one bedroom and an open plan kitchen/dining/living room with additional loft storage space; flats 554 and 555 are on the ground floor, 42m² internal floor area and consist of one bedroom and an open plan kitchen/dining/living room.

The common facilities in West Whins consist of a common heating plant room. A common heat network provides heating and hot water to all properties. Flats on the first floor, accessed by stairs, and are less suitable for people with limited mobility or who have significant health or care needs.

6.4.3 Woodside

The properties consist of 4 studio flats and 4 two-bedroom flats. There are two separate building masses; one building consists of the 4 two-bedroom flats (Nos 630-633) and the other building consists of the 4 studio flats (Nos 634-637).

The two-bedroom flats are two storey properties with an internal staircase with an internal floor area of approximately 72m². The bedrooms are on the first floor and an open plan kitchen/dining/living space and bathroom are on the ground floor. Given the internal staircase, the flats are less suitable for people with limited mobility or who have significant health or care needs.

The studio flats are single storey living with in a configuration of two ground floor studios (Nos 634 and 635) and two first floor studios (Nos 636 and 637). All studios have an internal floor area of approximately 38m². The layout consists of an open plan kitchen/dining/living space, a sleeping alcove and bathroom. Flats on the first floor, accessed by external stairs, and are less suitable for people with limited mobility or who have significant health or care needs.

The common facilities in Woodside consist of a plant room/laundry building which houses a common heating system and a small communal laundry. A common heat network provides heating and hot water to all properties.

6.5 Rentals: East, West and Woodside

6.5.1 Mechanism: Rentals

The rental charges quoted below may vary in future and any amounts quoted in any current advertisements take precedent of the amounts quoted below and should be treated as the actual rent applicable at any given time.

6.5.1.1 *East Whins*

Rentals are provided via a tenancy agreement, available from PET on request.

The rent charge is based on the Moray Council Local Housing Allowance Rates (2017-2023). It may vary in future, in agreement with the Moray Council.

Current monthly rents including HoCo charges are as follows:

	Current monthly Rental
East Whins – 2BR	£544.33

6.5.1.2 *West Whins*

Rentals are provided via a tenancy agreement, available from PET on request.

The rent charge is based on the Moray Council Local Housing Allowance Rates (2017-2023). It may vary in future, in agreement with the Moray Council.

Current monthly rents including HoCo charges are as follows:

	Current monthly Rental
West Whins – 1BR/studio	£442.86

The rental charge may vary in future as specified in the Scottish Rural Housing Fund grant agreement, that is:

- the rent may increase no more than once in any calendar year
- the rent does not exceed the Average Private Sector Rate (i.e. Moray Council Local Housing Allowance Rates).
- Increase can only be in line with the percentage increase in the applicable CPI in the preceding 12-month period plus 1%.

6.5.1.3 *Woodside*

Indicative monthly rent levels excluding HoCo charges are as follows:

	Indicative monthly Rental
Studio	£386.16
Two bedroom	£503.75

Rentals are provided via a Tenancy Agreement, available from PET on request. The rental charge falls approximately 20% below the maximum rental rate allowed by Moray Council Local Housing Allowance Rates (2017-2023). PET therefore considers these rental properties to be in the ‘social’ rental category. The rental charge may vary in future as specified in the Scottish Rural Housing Fund grant agreement, that is:

- the rent may increase no more than once in any calendar year
- the rent does not exceed the Average Private Sector Rate (i.e. Moray Council Local Housing Allowance Rates).

- Increase can only be in line with the percentage increase in the applicable CPI in the preceding 12-month period plus 1%.

Additional to this PET shall not charge a rental which would result in rent plus local HoCo exceeding Local Housing Allowance rates.

6.5.2 Allocation of Property: Rentals

A rental will be paid to PET, the owner of the property. As a first step in the process, PET will assess:

- a) The ability of the candidate to pay the charge/rental. This shall be assessed according to the information provided by the candidate and by undertaking a simple check to ensure candidates are not in breach of any of the "Disqualifications and Exclusions" identified in the Allocations Policy itself.
- b) Financial Details. Checking details provided on sources of income, and that they fall within the criteria outlined in section 5. Individuals or families who are in a position to purchase suitable accommodation should not normally be considered.
- c) Tenancy History. Reviewing references, including those from the applicant's most recent landlord.
- d) Type of Tenancy. Couples who are married or in civil partnerships may become joint tenants. For other situations joint tenancies may be available on discretion of the Landlord. Where an individual is the named applicant/tenant, the obligations of the tenancy shall fall entirely on that named tenant.
- e) Candidates who have significant health or care needs will need to obtain the support of the Caring Community Circle and PET for their application. They will have to be able to prove that they will be able to access and live in the unit and sign a declaration that they will be responsible for their own health or care needs. These candidates will also have to fill out a Health and Care Needs Questionnaire (see Appendix 2.1). This will be reviewed by the CCC. Further details are available on application. To allow adequate time for the CCC assessment, applicants must contact the CCC at least one week prior to the application closing date.
- f) In the case of 503 and 508 East Whins (and/or where ever PET requires a guarantor) PET will perform background checks on the guarantor.

The applicants who pass the PET review will be passed onto the L&HT, who will assess candidates on the following criteria that are additional to those spelled out in the Allocations Policy.

- g) The suitability of the candidate for the accommodation available. For the purposes of this exercise "accommodation" means a house, flat, unit or other permanent structure. Units should be allocated on a best fit basis i.e. so that the overall size and accessibility is adequate for the household concerned.
- h) Candidates with an interest in co-housing engagement
- i) Candidate's fit within the community and capacity to contribute

6.6 Shared Ownership

Shared ownership only exists at present for two East Whins properties, namely 525 and 530 under Exclusive Occupancy Agreements. If either of these properties comes up for reallocation, the properties will be reassessed at that time, and the mechanism for future shared ownership/rental determined

6.7 Re-allocations

When a tenant or sharing owner vacates a property, PET will ask the Committee to re-allocate the property.

6.8 Final Decision

At the end of the assessment and allocation, the L&HT Committee will supply a ranked list of candidates who are acceptable, to the Landlord. The Landlord may only allocate units to people on the Committee's ranked list.

This ranking is valid for 6 months. If in that time period anyone offered a unit declines the offer, then the Landlord can move to the next person on the list. Similarly if another similar unit becomes available in that timeframe the Landlord could offer it to the next person down the list, without recourse back to the L&HT.

Given the substantial stake that the community has invested in such properties the role of the L&HT Committee is to recommend individuals for this form of support to the Landlord for approval. The Landlord shall always take cognisance of this advice but may carry out further investigation of the circumstances.

If the Landlord is party to additional information that may change the candidate ranking, or exclude certain candidates, the Landlord should:

- revert back to the L&HT chair with details of what additional information the Landlord would like the L&HT committee to consider
- L&HT committee is recalled and this new information is integrated into the full analysis
- L&HT committee revise recommendations if appropriate.

Appendices

These appendices are for guidance only and do not form a part of the Housing Support Policy.

These appendices explain the allocations process and the role of the L&HT committee, PET and Ekopia. The L&HT committee will not enter into discussions of individual cases. If an applicant wishes to appeal or lodge a formal complaint, this should be done through the appeals/complaints procedure in the Allocations Policy (i.e. made in writing to the Ekopia board).

1 Advertising a Vacancy

PET is responsible for advertising any vacancies, for collating applications, and forwarding them to the L&HT Committee.

1.1 Advertisement

This shall contain:

- The date any applications must be in by (see Timeline below). State that late applications will not be considered.
- Details about charges such as how the Hoco and cluster charges are levied if applicable.
- Common assets and responsibilities of occupants in relation to them.
- An up-to-date version of the application form shall be made available as a Word document on the PET website. This shall make it clear to whom completed applications should be forwarded to (normally a PET appointee). Electronic applications only will be accepted.
- Latest versions of the Allocations Policy, the Whins Housing Support Policy and the CCC Health and Care Questionnaire (if applicable) shall also be available on the PET website

A model advertisement is included in section 1.3

1.2 Distribution

- NFA members by email
- Ekopia members by email
- Duneland shareholders by email
- Trees for Life employees by email
- NFD mailing list
- Phoenix employees by email
- EF members by email
- Article placed by PET in the Rainbow Bridge
- Advertisement in the Forres Gazette (if required)

1.3 Typical Advertisement

This is a generic advertisement; it will need to be tailored for the units available at the time.

OPPORTUNITY FOR AFFORDABLE RENTED FLAT AT PET WOODSIDE AFFORDABLE HOUSING

4 studio and 4 two-bedroom flats will become available in April 2021 at the PET Woodside Affordable Housing cluster. The rent levels are as agreed with the Scottish Rural Housing Fund and are controlled by Moray Council and/or the Scottish Government and the flats are owned and administered by Park Ecovillage Trust Ltd (PET).

If you are interested and

- * are applying as (2 bed units) a couple, a couple with a child/children, a single parent with child/children, two adults intending to live together or (studios) a single person or a couple,
- * straight rental units: can pay rent of £440.00/month for two bed unit or £344.27/month for studio unit
- * can cover Hoco charges which are currently £4.70 per m2
- * can cover utilities,
- * can cover Moray Council Tax Bill; (pending assessment) the studio units are expected to be Band B and the two-bedroom units Band C
- * can ideally demonstrate to have been of service to one of the organisation affiliate to the Ecovillage for a period of two years
- * and otherwise meet the criteria set out in the Allocations and Housing Support Policies.
- * would be able to move in from [date]

8 Properties:

4 x studio (each having internal footprint of 38m2)

4 x two bedroom (each having internal footprint of 72m2)

Two of the studios are solely ground floor properties and could accommodate someone with health or care needs. However it would be up to the applicant to assess the floor plans and design to gauge whether the property would be suitable for their particular needs.

All units have access to district heating system and common laundry facility.

All the units are designed to a high eco specification and should have low running costs.

We'd love to hear from you at [new PET allocations email address to be created/used]- closing date noon on [date] - N.B. Late applications will not be considered. If you have any questions about your application or the application process, please contact this email address.

An application form is available from the PET website. On this website you can read the Allocations Policy, which explains who may be eligible and who may be disqualified from Housing Support and how priorities will be allocation, the Whins Housing Support Policy, which explain in more detail what type of tenants we are

looking for and how applicants will be assessed, and (if applicable) the CCC Health and Care Questionnaire. You will need to fill out this questionnaire if you have health and care needs, and you will also need to contact the CCC, at least a week before the closing date, to get their support for your application.

All applications must be submitted, in electronic form (including any required supporting documents), by the closing date to [new PET allocations email address to be created/used]

2 Assessing the Applicants and Awarding the Tenancy

For candidates with limited mobility or who have significant health or care needs, PET will direct them to obtain the support of the Caring Community Circle for their application and have the applicant sign a declaration that they will be responsible for their own health or care needs, and have this supported by the Caring Community Circle. The Caring Community Circle shall not assess whether the applicant will be able to access and live in the unit. This needs to be done by a suitably qualified occupational therapist on behalf of the applicant.

For PET properties where health or care needs will be taken into consideration (i.e. 503 and 508 East Whins and 634 and 635 Woodside) a health and care questionnaire will be used to prioritise allocations based on need. This questionnaire should be filled by the applicant and appended to their application. The questionnaire will be used to score each candidate in relation to health and care needs. The health and care questionnaire is provided in appendix 2.1.

For applications where the health and care questionnaire is used PET will pass the completed questionnaire to CCC. CCC will use the health and care questionnaire to rank each applicant. The CCC will use the CCC letter of support submitted with the application to provide further context during the scoring.

PET will check the references of the applicants, their recent tenancy history, and review their financial details.

The Land and Housing Trust Committee is responsible for assessing the applicants' suitability for the tenancy. Usually this is done by screening against the criteria in the Allocations and Housing Support Policies, short listing of applicants and then an attunement. Ideally this will come up with a ranked list of applicants, so that if for any reason the 1st choice candidate turns down the tenancy, the next candidate on the list can be notified. If further clarification / information is required on a particular applicant, the Committee will contact the applicant directly for this information.

The Committee will advise PET of the ranked list of successful applicants and the list of unsuccessful candidates. In this communication, the Committee will confirm to Ekopia that all the conditions of the Allocations and Housing Support Policies have been met, so that these bodies can discharge any responsibilities they have in this matter with Moray Council and the Rural Housing Fund (if applicable). PET is responsible for communicating the outcome of the application process to the applicants, and carrying out any further checks on the successful applicant, if required. PET will send the tenancy agreement to the successful applicant for review and signature and agree the entry date for the property.

An example of the tenancy agreement is available from PET. Note that PET administers the tenancy agreement, while Ekopia administers this document.

2.1 Health and Care Needs Questionnaire

Health and Care Questionnaire to be filled in by applicant:

<<note this is a copy of the questionnaire for communication purposes. The actual form should be obtained from the landlord>>

1. Care in Community	
Do you have a chronic life limiting/progressive and/or disabling disease/condition? Yes/No	
Please describe your condition, what stage it is at and how it affects your daily life and ability to live independently.	
Do you receive support to live at home? Yes/No Support may be from The Moray Council, private carers, family, friends, neighbours or volunteers. If No - please move on to 2. If Yes -	
Have you been awarded a care package from The Moray Council? Yes/No	
If yes, how many hours of care do you receive per week?	
Do you pay privately to receive care? Yes/No	
If yes, how many hours of care do you receive per week?	
Do you have unpaid carers (friends/family/neighbours/volunteers)? Yes/No	
If yes, how many hours of care do you receive per week?	
Is your current accommodation suitable for the delivery of care at home? Yes/no	
If no, please explain why not?	
2. Your Mobility	
Do you require walking aids to live your daily life?	
If yes, please list the aids you are using (such as sticks, rollator, Zimmer frame, wheelchair)	
If no, do you have a health condition where it is likely that you will require walking aids in the future?	
If yes, is there a suggested timeframe for this prospect? Please explain.	
3. Your support network	
In your own words please describe your present support network.	
On a scale 1-10 (1 is poor, 10 is excellent) - how would you rate your current support network?	
Please explain how living in the unit you are applying for would potentially improve your support network?	

On a scale of 1-10 (1 is poor, 10 is excellent) - please rate what you would expect your support network would be if living in the unit you are applying for?	
4. Social connectedness	
In your own words please describe how your present accommodation affects your social connections.	
On a scale 1-10 (1 is poor, 10 is excellent) - how easily are you able to access other people in your present accommodation?	
Please explain how living in the unit you are applying for would potentially improve your social connections.	
On a scale 1-10 (1 is poor, 10 is excellent) - please rate what you would potentially expect your social connections would be if living in the unit you are applying for?	
5. Mental Health	
Are you living with a diagnosed mental health illness? Yes/No	
Does your present accommodation affect your mental health negatively? Yes/No	
If yes, in your own words please describe how you are affected.	
Do you live with emotional health challenges that are not recognised/diagnosed by Health Professionals? Yes/No	
Does your current accommodation affect your emotional well-being negatively? Yes/No	
If yes, in your own words please explain how you are affected.	
How do you expect living in the unit you are applying for would have a beneficial effect on your mental health? Please describe and also score on a scale from 1-10 (1 is poor, 10 is excellent).	

3 Timeline

A timeline is included here to give applicants and people involved in the process an idea what is involved in the whole allocation process, and why particular steps take a certain time. This refers to RENTAL properties only. A similar process is likely for Shared Ownership properties although the timelines are, in some cases, likely to be **significantly longer**.

The process assessed below covers where a sitting tenant has decided to leave the property, and covers all the steps to get a new tenant in place. This is started by the sitting tenant giving 28 days notice to PET. Durations given below are estimates for a typical process and may be longer or shorter.

The initial process for allocating new properties is similar to this timeline, though there is more flexibility, in that the process can be started much earlier.

Task	Action	Duration	Elapsed Time
1	At notification of termination of rental, or as soon as possible afterwards, PET advises Ekopia, L&HT and CCC (if applicable) that a vacancy has come up		
2	PET, L&HT and Ekopia review required documents (Allocations Policy, HSP, Application Form and Points Template). Decide whether they are still fit for purpose, or need to be updated. CCC review hierarchy of care needs, if applicable for the units concerned. PET review their Co-Housing Policy (HSP A4) and their Equal Opportunities Policy (HSP A5)	As required	
3	Develop overall schedule with PET, L&HT, Ekopia and CCC (if applicable), and confirm that all the required steps are covered and understood. Identify key dates: advertisements posting date, application closing date, date for PET reviews and L&HT assessment and allocation, award date, entry date.	As required	
4	L&HT chair organises committee meetings for screening and attunement. Any new committee members trained up as required	As required	
5	Ekopia send a pdf of the latest Allocations Policy to PET. PET put this on their website, and make sure a pdf of the HSP and a word copy of application form are also available on their website. PET advertise the vacancy, distributing the advert to the list in Appendix 1.2.	1 week	7 days
6	Application time.	3 weeks	28 days
7	If applicable, applicants who have mobility, health or care needs contact CCC and PET to obtain their support for their application	Within above period	

Task	Action	Duration	Elapsed Time
8	PET checks references, financial details and tenancy history, and excludes applicant who do not pass these criteria	7 days	35 days
9	CCC ranks applicants where appropriate (e.g. care flats) and sends completed ranking to PET, together with any letters of recommendation from CCC (if appropriate)	Within 7 days above	
10	PET checks out the old tenant and ensures the property is ready for the new tenant (i.e. redecorate as required)	All completed before entry date	
11	PET compile the applications (including CCC scores and letters of recommendation) and send to L&HT Chairperson.	3 days	38 days
12	L&HT Chairperson distributes applications to the Committee	1 day	39 days
13	Committee review all applicants. Each community organisation represented on the committee will have one vote on the Committee, so relevant Committee members need to meet up before the meeting to agree on their ranking. Duration will depend on number of applicants and the complexity of the allocation (e.g. multiple unit types)	6 days	45 days
14	Screening meeting.	1 day	46days
15	Clarifications from applicants. It may be possible to go ahead with the process, noting that specific applicants still need to clarify some issues.	6 days	52 days
16	Attunement meeting. Outcome reported back to PET and Ekopia. In this communication, the Committee will confirm to Ekopia that all the conditions of the Allocations and Housing Support Policies have been met, so that these bodies can discharge any responsibilities they have in this matter with Moray Council and the Rural Housing Fund (if applicable).	1 day	53 days
17	PET carries out any final checks required, reports to their board and obtains their agreement. (If additional information is identified which may change the candidate ranking, PET reverts back to L&HT to include this information and revise recommendations if appropriate.) PET notifies all applicants of the outcome of the process.	3 days	56 days

Task	Action	Duration	Elapsed Time
18	PET discusses tenancy agreement with successful applicant and agrees and entry date. This may or may not take into account the notice period the applicant is required to give their current landlord.	7 days	63 days
19	Allow up to 6 weeks for applicant to give notice to current landlord (to be agreed in step 17 above)	As required	
20	PET checks in the new tenant.		

4 The Landlord's Co-housing Policy

Park Ecovillage Trust (PET) is committed to building affordable, multi-generational, sustainable community housing that improves the quality of residents' everyday lives, develops a strong sense of community, and simultaneously delivers lower overall living costs, while conserving and improving the environment.

Our policy on Multigenerational Living & Co-housing is:

- where possible, design is used to encourage social interaction, for example by keeping fewer cars (including Moray Carshare vehicles) on the periphery, providing common laundry facilities and a communal south facing green space in the centre of sites;
- to maximise where practicable, shared facilities such as playing areas, laundry/outside drying space, cycle parks etc.
- residents manage their own community's maintenance and its development, their own common assets, tending the gardens;
- the community is governed in a non-hierarchical way and adults are expected to take part in decision making and, when agreed, community chores;
- If a tenant is living in a studio/flat deemed to be fit for accessible needs they should be willing to exchange flats with an existing PET tenant that develops health needs, assessed and validated by CCC, that require living in accessible accommodation.

We will actively participate in co-creating such a culture, by assisting and supporting residents' associations social and administrative activities, in order to achieve these goals.

Please email any questions to housing@parkecovillagetrust.co.uk.

Review:

This Co-housing policy shall be reviewed as required and as a minimum prior to each new set of allocations.

5 The Landlord's Equal Opportunities Policy

<<This policy is in addition to the Ekopia policy, included in the (higher level) allocations document>>

PET acknowledges the importance of fairness with regard to all its stakeholders, for the successful achievement of its goals. It makes good business sense.

PET recognises its responsibility for making genuine efforts to ensure that its Housing Allocation policy, workplace and volunteering/employment policies and practices do not unreasonably exclude or disadvantage those prospective tenants, applicants, associates and self-employed workers who have disabilities.

Our Policy on Equal Opportunities is: PET

- will observe existing E.O legislation as a minimum standard, and so does not discriminate against people because of
 - age
 - disability
 - gender reassignment
 - marriage and civil partnership
 - pregnancy and maternity
 - race
 - religion or belief
 - sex
 - sexual orientation
- makes genuine efforts to comply with the spirit and letter of the equality laws
- promotes a multigenerational living environment in its co-housing units
- promotes a good and harmonious working environment in which employees will be treated with dignity and respect
- complies with the duty to make reasonable adjustments that is imposed on employers in relation to disabled persons
- to operate fair recruitment and selection procedures that are based on the principle of selecting the best person for the job.

This means that

- all associate recruitment interviews will include a mention of this policy, and
- clients and associates are expected to help PET in carrying out its aim of being an equal opportunity organisation, in how they interact and carry out their day-to-day duties;
- induction procedures for new associates will include information on PET's equal opportunities practices.

Review:

This equal opportunities policy shall be reviewed each time this document is updated.