**APPLICATION & ALLOCATION POLICY & PROCEDURES**

**POLICY**

1. It is the policy of Dorchester Municipal Charities (DMC) to allocate the Charity’s almshouse accommodation according to the Scheme dated 24th April 1980 which states:

*(31) Appointments of residents under this Scheme shall be made without prejudice to the interests of the existing residents*

*(32) The residents shall be poor persons who are inhabitants of the Town of Dorchester or elsewhere in the County of Dorset at the time of appointment. Preference shall be given to persons who have been inhabitants longest of the said town or of the said county as the case may be.*

*(33) It is a condition that the resident makes a contribution from resources available to him or her, but not so as to cause hardship, and that contributions are made towards services.*

1. New residents must meet the Charity’s eligibility criteria which include:

* Evidence of housing need
* Evidence of financial need

**Plus**

* A strong local connection with Dorchester or Dorset
* Ability to live independently
* Ability to integrate into a balanced community living.

**Equality & Diversity**

DMC operates a robust Equality & Diversity Policy, a copy of which is available on request. The allocation of almshouses is restricted under the Charity’s governing document and people are selected for housing services according to their need for the service, within the limits of the above eligibility criteria. Subject to this restriction, the Trustees do not discriminate on the grounds of age; being or becoming a transsexual person; marital status; pregnancy or maternity; disability; race including colour, nationality, ethnic or national origin; religion or belief or lack thereof; sex or sexual orientation.

**PROCEDURE**

**Applicant Registration of Interest**

1. Applicants are sent the following pack of documents:

* Information Sheet
* History Booklet
* Registration Form
* Privacy Notice
* Covering letter

Applicants are advised that their personal details are held according to the Privacy Notice.

1. Completed Registration Forms are reviewed by the Welfare Group and DMC Chairman who decide on the suitability of the applicant and a letter informing them of the decision is sent via email or posted.
2. If a couple shows an interest in becoming beneficiaries of the Charity, both partners must meet the Charity’s eligibility criteria.
3. Successful applicants are added to the Applicant List. This list identifies expressions of interest from applicants, rather than acting as a waiting list, because it is important for the Charity to provide accommodation to the applicant in greatest need when allocating vacant property.

**Applicant List Management**

The General Manager will write to everyone on the Applicant List periodically and remove those who are no longer contactable or no longer wish to be on the list.

**Vacancies**

1. When a vacancy arises in one of DMC’s almshouses this is advertised to the current residents of the Charity. During the development at the Nappers site, Nappers residents are offered flats at Whetstones first and if they decline, we revert to the usual policy. If a suitable occupant is not found for the flat, the General Manager writes to people on the Applicant List informing them of the vacancy and asking for expressions of interest.
2. If there is little interest from the Applicant List, the General Manager advertises the vacancy on the Charity’s website and in the local area and press.
3. Application forms are sent to applicants who wish to apply for the current vacancy.
4. Completed application forms are reviewed by the Welfare Group and DMC Chairman and a letter sent to shortlisted applicants offering them an interview. A letter is sent to unsuccessful applicants.

**Interviews**

1. Shortlisted applicants are offered an interview in their home or at DMC if this is not practical. They are offered a site visit if not already undertaken.
2. Shortlisted applicants are interviewed by the same 2 members of the Welfare Group. If an applicant is known to the Welfare Group members, interviews will be conducted by 2 Trustees unknown to the applicants or the General Manager and a Trustee.
3. Issues for discussion at interview include:

* The role and function of the Trustees and staff
* Weekly maintenance contribution and other household bills
* Neither the proposed resident nor any relation or guest shall be a tenant of the Charity or have a legal interest in the property, as set out in the Letter of Appointment
* The contents of the Resident Handbook including rules and regulations.

**Allocations**

1. Following applicant interviews, brief notes are provided securely to all Trustees who may comment on the interviewers’ recommendation. If a Trustee knows the applicant, they may abstain from the decision making process. The vacancy is offered to the recommended applicant, if approved, and the decision recorded in the next Board meeting minutes.
2. DMC Trustees take responsibility for the appointment of residents as beneficiaries of the Charity and the allocation of almshouse accommodation. This cannot be delegated to a member of staff or external agent.
3. The General Manager offers the almshouse to the recommended applicant by phone, on behalf of the Trustees, subject to suitable references and supporting evidence. This is followed up with a Letter of Appointment, Resident Handbook and Energy Performance Certificate. The applicant is offered a site visit if they have not already had one.
4. The General Manager writes to unsuccessful applicants advising them of the Trustees decision and asking if they wish to remain on the Applicant List.

**New residents**

1. When the move-in date is known, the General Manager informs Trustees and residents via a newsletter.
2. On the move-in date, the General Manager or Warden welcomes the new resident if within working hours and provides a letter with important information.
3. Arrangements are made according to the Resident Moving-In Procedure.

**BIBLIOGRAPHY**

Almshouse Association, *Standards of Almshouse Management*, <https://www.almshouses.org/?sfid=3044&_sft_sam_chapters=residents>, accessed 4/10/2021