



# **HARTFIELDS**

## **ALLOCATION POLICY SHARED OWNERSHIP**

### **1.0 PURPOSE**

- 1.1 The purpose of this policy is to ensure that those individuals who require support from the Local Authority to reside in Hartfields on a shared ownership basis are supported fairly and equitably. The shared ownership policy is an integral part of an overarching allocation system that is intended to be inclusive and make available to the widest group of older people in the Hartlepool Borough the opportunity to consider living in Hartfields.
- 1.2 The Hartfields Extra Care Partnership has agreed the following framework within which individual allocation decisions for shared ownership will be taken.

### **2.0 KEY PRINCIPLES**

- 2.1 The fundamental principle in relation to the Hartfields Extra Care Village is to achieve a balanced and sustainable community which makes available a range of excellent housing, care and support options and services.
- 2.2 In order to achieve this the allocation policies take into account significant issues such as: achieving a balanced community in terms of housing, health and social care support needs across Hartfields, linking allocations to the broader strategic housing needs of Hartlepool, ensuring the overall service delivery model promotes the financial sustainability of the Extra Care Village.
- 2.3 In terms of shared ownership, the Hartlepool Borough Council Housing Register will be utilised as a means of identifying applicants and co-ordinating arrangements within the Borough so the long term needs of the wider community are considered.

2.4 The overall approach to shared ownership allocations will be to work with partners to agree nominations in order to achieve flexible and sensitive arrangements, leading to a balanced community. In the event of difficulties arising, Hartlepool Borough Council has 100% nomination rights to shared ownership properties during the initial allocation phase. Subsequently the Council has 80% nomination rights.

### 3.0 OVERALL TENURE MIX

3.1 There are three types of tenure available at Hartfields:

- (a) Sale
- (b) Shared Ownership
- (c) Rent

The table below provides details of how the 242 units of accommodation will be split across the three tenure types:

	<b>Purchase</b>	<b>Shared Ownership</b>	<b>Rent</b>	<b>Total</b>
Cottages 2-bed	11	6	11	28
Apartments 2-bed plus	55	28	55	138
Apartments 2-bed	23	11	23	57
Apartments 1-bed	8	3	8	19
<b>Total Allocation</b>	<b>97</b>	<b>48</b>	<b>97</b>	<b>242</b>

The two-bedroom apartments have a choice between a single or double second bedroom. The latter type is referred to as '2 bed plus'.

Properties will be released in three phases and it estimated will be ready for occupation as follows:

<b>Phase</b>	<b>Total to be released</b>	<b>Estimated move-in</b>
1A (+2A)	87	June 2008
1B	64	September 2008
2B	48	December 2008
3	43	March 2009

## **4.0 SHARED OWNERSHIP TENURES**

- 4.1 Shared Ownership levels can range from 10% ownership to 90% ownership (usually increasing by 10, eg 10%, 20%, 30% etc) depending on financial circumstances. However it is essential to maintain the financial viability of the Village that the overall average ownership is 50%.
- 4.2 On behalf of the Hartfields Extra Care Partnership, the General Manager will be responsible for monitoring the shared ownership profile and ensuring that the Allocations Panel is aware of developments prior to allocation meetings.

## **5.0 HOUSING, CARE AND SUPPORT**

- 5.1 In order to ensure that the housing, care and support requirements, for the total resident population at Hartfields, are balanced, both the tenure and 'support' mix will be pepper-potted across the site.
- 5.2 On behalf of the Hartfields Extra Care Partnership, the General Manager will be responsible for monitoring the housing, care and support profile and ensuring that the Allocations Panel is aware of developments prior to allocation meetings.

## **6.0 ELIGIBILITY AND PRIORITISING ALLOCATIONS – SHARED OWNERSHIP**

### **6.1 Eligibility Criteria**

6.1.1 The basic eligibility criteria for joining Hartfields in a shared ownership arrangement are as follows:

- **Hartlepool Residents**

Applicants will be currently resident within the boundaries of Hartlepool Borough Council, or have a strong link to Hartlepool.

- **Older People**

The minimum age for joining Hartfields is 60. However, applications will be considered from individuals aged 55 plus who have a particular care or support need that can be met at Hartfields and who meet the other criteria for eligibility.

- **Housing, Care and Support Needs**

Applicants for shared ownership must agree to assessments being undertaken in accordance with guidance relating to the responsibilities of Hartlepool Borough Council and Joseph Rowntree Housing Trust. Priority will be given to applicants who have some level of housing, care and or support need and should be motivated towards maximising their independence.

- **Financial Commitment**

People who join Hartfields under shared ownership arrangements are expected to invest financial capital in the scheme. In order to calculate the level of financial investment required, the first £40,000 net capital and assets will be excluded. It is anticipated that finance above this figure will be invested, up to the value of the property price.

Shared ownership is suitable for those people who do not have sufficient funds to purchase a property outright, after £40,000 has been deducted.

- **Couples**

For a couple to be eligible for the service, only one partner needs to fulfil the eligibility criteria. Should the partner who met the criteria die or move into residential / nursing care, the remaining partner may have the right to continue with the shared ownership arrangement, subject to confirmation from the Allocations Panel.

## **6.2 Prioritisation Criteria**

6.2.1 The prioritisation criteria have been developed taking into consideration those key principles described previously (2.0). However to support the decision-making process, priorities are also determined by the use of a points system, points are awarded according to the applicant's circumstances, and offers of housing are made on the basis of these points as well as other significant factors.

6.2.2 Where applicants have the same number of points, the applicant(s) with higher care or support needs is likely to be given priority. If these points are the same, the applicant(s) with the longest waiting time is likely to be offered the first option.

6.2.3 However whilst all applicants will be allocated points for their housing, care and support needs and this allocation will be taken into consideration when prioritising accommodation. This is only

one element of the process and the Allocations Panel must consider what level of support is required to balance the overall care profile of the community.

6.2.4 Additionally, we wish to ensure that the total population at Hartfields is balanced between single and dual households. Therefore, couples may be given priority over single applicants, if there are already a disproportionate number of single people.

## **7.0 ALLOCATING PROPERTIES**

7.1 To apply for a shared ownership property at Hartfields, an application pack must be completed. The application pack will be in sections:

- General information on individuals.
- Current housing situation.
- Health information for use in the housing, care and support assessment\*.
- Financial information summarising assets and income.

\* A Community Care Assessment will also be necessary for those applicants who consider that they may be entitled to support from the Adult and Community Services Department.

7.2 Initial applications for shared ownership at Hartfields, will be evaluated in the order that they are received, including ensuring eligibility criteria are met.

7.3 Applications for shared ownership at Hartfields will be considered by an Allocation Panel.

7.4 In the first instance, the Allocation Panel will identify inappropriate referrals e.g. those that do not meet the eligibility criteria or have other specialist needs that can not be provided in the accommodation. The referrer and applicant will normally receive written notification of the reasons for the decision from the chair of the panel, with advice on how to re-apply if circumstances change.

7.5 Vacancies and voids will be flagged up at the allocation panel meeting by Hartfields General Manager (JRHT), who is responsible for the co-ordination and management of information and enquiries.

- 7.6 When considering applications, the panel will view the completed application and relevant assessments i.e. any housing needs assessment, financial assessment and a community are assessment.
- 7.7 Allocation Panel discussion will involve sharing all of the aforesaid assessment material and written information that will help determine their decision. Decisions will take into consideration: -
- (a) The housing and care support needs of applicant(s), including points awarded
  - (b) The applicant(s) age and local connection to the area
  - (c) Any other factors which might influence the allocation process, eg carers needs, broader strategic housing fit
  - (d) Ensuring that a 'balanced community' is maintained
- 7.8 On the basis of the eligibility criteria and the information provided through the assessments', the Allocation Panel will decide which applicant(s) should be offered the vacancy/vacancies and which applicant(s) should remain on a reserve list should offers be refused or voids occur.
- 7.9 The decision of the Allocation Panel will be followed by an offer sent to the applicant(s). On receipt of the applicant(s) formal acceptance of the offer and payment of a £1,000 deposit\*, a formal letter of confirmation and agreement will follow.
- \*The deposit will be deducted from the final amount owing if the application is successful, or refunded if the Hartlepool Extra Care Partnership is unable to proceed with the application. If the applicant withdraws from the sale, then only half will be refunded, unless evidence is presented to the Allocations Panel which confirms that Hartfields would not be able to meet the applicant(s) housing, care and support needs.
- 7.10 To compliment the offer, where necessary the Allocation Panel, via the General Manager, should provide applicant(s) with advice, information, practical and emotional support to facilitate a timely and satisfactory re-location. This may assist applicant(s) to make the necessary arrangements / decisions to help them make the move as comfortable as possible. This might include providing a scheme brochure or welcome pack (including details on facilities, services etc) and details on tenancy/owner occupier responsibilities.

7.11 The Allocation Panel will be made up of appropriate representatives from the Joseph Rowntree Housing Trust and Hartlepool Borough Council.

7.12 The Allocations Panel will meet regularly, with the frequency determined by the volume of applications and the need to identify tenants / residents.

## **8.0 FURTHER INFORMATION**

8.1 For further information on any of the areas covered in this policy, or to request an application pack, please contact:

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Hartfields  
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