

ALLOCATION POLICY/PROCEDURES

1. All application enquiries are dealt with promptly by administration staff. Where possible eligibility criteria checked before the application form is sent out.
2. Eligibility Criteria; all applicants must be aged 60 years or more and have either been born in Colne or lived in Colne for 10 years or more.
3. Application forms, notes for applicants and privacy notice are either posted or emailed.
4. Received application forms are checked for eligibility and a letter of acknowledgement is sent out or given verbally.
5. Trustees consider all new applications and existing applicants' change of circumstances.
 - Trustees consider the information provided by the applicant;
 - age
 - property details
 - medical circumstances
 - financial circumstances
 - social need
 - A score is given to each section by administration staff (see score sheet), which gives a total out of 90.
 - The trustees have the option of varying any of the totals achieved on PROPERTY, MEDICAL, FINANCIAL or SOCIAL, if they feel the circumstances of the applicant requires it. The decision to vary points in these categories must be collective.
 - Individually trustees may give up to a maximum of 10 additional points for unrecognised need, the MEAN of which is added to the applicant's score.
6. Applicants are then placed on the waiting list in line with their overall score.
7. When a property becomes vacant the applications are screened to assess the suitability of accommodation dependant on site location and facilities available. (For example, some applicants will only consider ground floor with a shower on a particular site).

8. A short list is drawn up, (score and date ordered), and applicants contacted. Interested parties are invited to view the property.

9. If at any time during the allocation process it appears to the Trustees or their designated allocations staff or committee that the applicant would require a level of support (physical, social, or otherwise) that the Trust could not reasonably provide, the applicant will be contacted, and the concerns discussed with them. This will preferably take place in the form of a home visit to the applicant, if practical and permitted by the applicant.

A decision will then be made by the Trustees to either refuse or postpone the application or accept the applicant onto or back onto the waiting list. The applicant will be informed of the decision in writing.

10 Appeals process: If a decision has been made to refuse or postpone an application the applicant has a right to appeal the decision. The applicant will be given a written notice of that right and the process will be explained.

The appeal should normally be made in writing and be addressed to the Trustees. The appeal will be decided by the Trustees and the applicant will be given a written notice of the decision.

This policy has been approved by the board of trustees of Peter Birtwistle Trust

Updated October 2024