



PORTFOLIO HOLDER DECISION NOTICE

INDIVIDUAL DECISION BY THE PORTFOLIO HOLDER FOR HOUSING SERVICES

TOPIC – ALLOCATION POLICY FOR SHARED OWNERSHIP GENERAL NEEDS

PROCEDURAL INFORMATION

The Access to Information Procedure Rules – Part 4, Section 22 of the Council's Constitution provides for a decision to be made by an individual member of Cabinet.

In accordance with the Procedure Rules, the Head of Legal and Democratic Services, the Chief Executive and the Head of Finance are consulted together with Chairman and Vice Chairman of The Overview and Scrutiny Committee and any other relevant overview and scrutiny committee. In addition, all Members are notified.

If five or more Members from those informed so request, the Leader may require the matter to be referred to Cabinet for determination.

Contact Officers:

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Democratic Services Officer: Nancy Graham 01962 848 235 ngraham@winchester.gov.uk

SUMMARY

- Winchester City Council is currently developing general needs shared ownership units. These are the first shared ownership properties to be built by the Council.
- Shared Ownership is aimed at people who are in housing need but are otherwise unable to buy on the open market, i.e. a middle income group.
- Shared Ownership allows the purchaser a share in a new home, the home buyer paying rent on the remaining, unsold share. This unsold share is owned by the provider of Shared Ownership, who receives the rent, with the relationship between provider and buyer determined by a lease.
- As the Council have not previously developed shared ownership units previously, an allocation policy is required to allocate properties in a fair way commensurate with the guidance produced by the HCA.

- The aim of the proposed policy (Appendix 1) is to ensure that WCC complies with the regulatory requirements set out in the Homes and Communities Agency's (HCA) Capital Funding Guide for shared ownership.
- For those schemes which do not receive HCA funding, the aim will be to ensure consistency with the HCA guidance as far as possible but allow changes to priority groups to reflect housing need and the characteristics of the scheme. The policy proposes that any changes to priority groups will be determined by the Portfolio Holder for Housing Services and the Assistant Director (Chief Housing Officer).
- The proposed policy aims to allocate shared ownership homes in a fair and transparent way to those with housing need and for whom shared ownership is appropriate.
- The policy reflects the balance to market the shared ownership units as quickly as possible whilst allocating the properties to those who meet the allocation criteria.
- The policy links to Strategic Outcome number 3 of the Council Strategy, : "Provide good access to affordable housing options across a range of Tenures, including affordable and sub market rent (within Local Housing Allowance rates) market rent, shared ownership, student housing etc."

DECISION

That the Shared Ownership General Needs Allocation policy (as set out in Appendix 1) be approved.

REASON FOR THE DECISION AND OTHER ALTERNATIVE OPTIONS CONSIDERED AND REJECTED

- The proposed policy is required to enable officers to allocate shared ownership homes in a fair and transparent way to those with housing need and for whom shared ownership is appropriate.

RESOURCE IMPLICATIONS:

The Council's Home Ownership Officer will be responsible for the allocation of the shared ownership units as part of the wider role of this post. This is a resource which has been met to cover the responsibilities of marketing all present and pipeline shared ownership units. The new post of Home Ownership Officer was appointed in April 2017

CONSULTATION UNDERTAKEN ON THE DECISION

- Both internal and external colleagues have been consulted on this policy. The Council's Assistant Director (Chief Housing Officer), Cllr Horrill, Head of Allocations, Extra Care manager, and the Home Ownership Officer have all been consulted and approve the policy.
- As part of the consultation with Human Resources, an Equality Impact Assessment has been carried out on the proposed policy on 7 April 2017. A validation meeting to discuss the policy following the impact assessment took place on 1 June 2017.

FURTHER ALTERNATIVE OPTIONS CONSIDERED AND REJECTED FOLLOWING PUBLICATION OF THE DRAFT PORTFOLIO HOLDER DECISION NOTICE

n/a

DECLARATION OF INTERESTS BY THE DECISION MAKER OR A MEMBER OR OFFICER CONSULTED

N/A

DISPENSATION GRANTED BY THE STANDARDS COMMITTEE

N/A

Approved by: (signature)

Date of Decision: 15.08.17

Councillor Horrill – Portfolio Holder for Housing Services

APPENDICES:

Appendix 1 Older Persons Shared Ownership Allocation Policy

Winchester City Council

Allocations Policy for Shared Ownership General Needs

1. Policy Statement

This policy outlines Winchester City Council's (WCC) approach to the allocation of shared ownership homes in accordance with the Homes and Communities Agency's (HCA) Capital Funding Guide.

Related policies:

Allocation policy for Older Persons Shared Ownership.

Hampshire Home choice Allocations Framework

2. Aims and objectives of the Policy

Aim to ensure that WCC complies with the regulatory requirements set out in the HCA's Capital Funding Guide. For schemes which do not receive HCA funding, the aim will be to ensure consistency with the HCA guidance as far as possible but allow changes to priority groups to reflect housing need and the characteristics of the scheme. Any changes to priority groups will be determined by the Assistant Director (Chief Housing Officer) in consultation with the Portfolio Holder for Housing Services.

Objective - to establish a transparent, fair and effective method of processing applications so that homes are allocated to people in housing need and to those for whom shared ownership is appropriate. To ensure WCC meets its social objectives whilst recognising the financial importance of selling properties within agreed timescales.

3. Eligibility

All applicants must be directed to the Help to Buy agent with whom the applicant must register. Following initial eligibility assessments by the Help to Buy agents, the Council will conduct their own assessment to ensure that applicants meet the eligibility criteria. As these criteria are subject to change, reference will be made to the

eligibility criteria set out in the Homes and Communities Agency Capital Funding Guidance.

<https://www.gov.uk/guidance/capital-funding-guide>

4. Allocation of shared ownership properties

Priority

When allocating shared ownership properties, the eligibility criteria applied will be as set out in the Homes and Communities Agency Capital Funding Guide. The following groups will be given priority. This is consistent with HCA guidelines.

1. Armed Forces personnel and former members of the British Army discharged in the last 2 years.
2. Persons who are eligible in accordance with the HCA guidance and meet all financial assessments for shared ownership.

Where schemes do not receive funding from the HCA, the Assistant Director (Chief Housing Officer) in consultation with the Portfolio Holder for Housing Services may agree specific allocation or priority criteria to determine the allocation of shared ownership units, depending upon the funding arrangements.

If specific criteria are added to the policy for non HCA funded projects, these will be added as an Appendix to this policy.

Allocation

An allocation of a shared ownership property will depend on the applicant providing accurate information. The Council reserves the right to withdraw the offer if information is found to be misleading or incorrect.

Applicants will be required to pay a reservation fee. This is refundable, subject to any costs incurred by the Council and will be deducted from the purchase price if the purchase proceeds. The potential purchaser will be given a timescale in which to pay a refundable reservation fee to secure the property purchase.

A maximum timescale of 5 working days will be given. On or after the date of the deadline the Home Ownership Officer will make a courtesy call to check that the purchaser is able to provide the reservation payment as arranged. If the applicant is unable to make the payment by the arranged timescale, the Home Ownership Officer will contact the next purchaser and follow the same procedure.

5. Applicants' records and data Information

Applicants and their household's information held within the Council's records is subject to the Data Protection Act 1998. Every care will be taken to keep the information secure and confidential and held only for as long as is necessary for the purpose it is intended for. The data can be disclosed to relevant third parties provided it is for the purposes of assessing eligibility of applicants and for audit purposes.

WCC reserves the right to contact third parties to request information for the purposes of assessing the eligibility of applicants.

6. Equalities and diversity

The Council is subject to the general public sector equality duty in the Equality Act 2010. The Council and its partner Registered Providers are committed to providing equality of opportunity to all individuals who apply for re-housing. Monitoring of applications and lettings may take place to ensure that everyone is being treated fairly.

7. Safeguarding

If at any time, officers dealing with the allocations process have any concerns relating to vulnerable persons, the officer should discuss their concerns with their line manager and follow the Council's safeguarding policy.

8. Monitoring

All sales allocations will be recorded in the Continuous Recording of lettings system (CORE). This will highlight the extent to which diverse needs are being met and indicate areas where a revised or different approach may be required. The Assistant Director (Chief Housing Officer) will review the profile of successful applicants to identify groups who are not accessing shared ownership homes, to ensure accountability and fairness of allocations and to inform future marketing strategy.

9. Complaints

Complaints against allocation decisions for shared ownership properties will be considered via the Council's Complaints procedure.

10. Policy review

This policy will be reviewed at least every three years by the Assistant Director (Chief Housing Officer).

Document History

Document Title	Allocations Policy for Shared Ownership General Needs
This Version	1.0
Issue Date	03/08/2017
Status:	Draft for PHD approval
Review Date:	August 2020