

ALLOCATIONS AND LETTINGS POLICY

Allocations and Lettings Policy

Responsible Officer	Group Director Housing
This policy is applicable to	Karbon Group
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Policy Statement

The Karbon Homes Group (the Group) is committed to allocating and letting homes in a fair, transparent and customer-focused manner that supports those in housing need and contributes to the creation of safe, sustainable and balanced communities.

The Group will allocate homes in accordance with relevant legislative requirements, local lettings arrangements and nomination agreements, ensuring appropriate priority is given to applicants with statutory housing needs and other recognised housing circumstances.

The Group will seek to make the best use of its housing stock by matching properties to household size, accessibility requirements, support needs and other relevant circumstances. This includes the effective allocation of specialist accommodation such as adapted, retirement living and supported housing.

Decisions relating to allocations and lettings will be made consistently, proportionately and with regard to the individual circumstances of applicants. The Group reserves the right to refuse or restrict access to housing where there are legitimate housing management concerns, including serious tenancy-related issues or behaviour that may adversely affect communities.

The Group is committed to equality, diversity and inclusion and will ensure this policy is applied fairly and without discrimination. Allocations and lettings decisions will be undertaken in a manner that is accountable, transparent and compliant with all relevant legal and regulatory obligations.

Risk the policy is designed to control

2. Financial Viability – risk that the Group fails to remain financially viable

4. Customer Service & Satisfaction – failure of the Group to keep its promises to customer by meeting its customer service and TSM targets

6. Governance and Compliance – failure to comply with statutory and regulatory requirements and failure in the arrangements for managing the organisation at the highest level

Key performance measures

Average relet days

Definitions

Application date	The date we receive your completed application form.
Bands	The categories of housing need that make up the system we use to show the level of priority that applicants have on the housing register.
Bidding	The way you express an interest in an advertised property. No money is involved in this form of bidding.
Choice-based lettings	A way of letting properties that allows applicants to see the number and type of properties available.
Common Travel Area	The United Kingdom, Channel Islands, the Isle of Man, and the Republic of Ireland.
Customer	A person who accesses, receives, applies for, or is affected by services provided by the Group, including applicants, tenants, leaseholders, residents and service users.
Direct offer	In exceptional circumstances we may offer a property to an applicant without requiring a bid – this is called a direct offer or a direct let.
General needs properties	Properties that can be allocated to any eligible applicant.
Housing register	A register of those seeking rehousing.
Housing for Older People	Properties that are allocated with an age criterion or to applicants who have a physical disability.
Tenant	A customer who holds a tenancy agreement with the Group and occupies a property owned or managed by the organisation.

Abbreviations

CBL	Choice Based Lettings Scheme
DKO	Durham Key Options
TSM	Tenant Satisfaction Measures

Policy Detail

1.0 Purpose of policy

- 1.1 This policy outlines the Group's approach to offering its empty homes and signposts to specific lettings policies in place across the Group's geographical locations.

- 1.2 This policy does not go into the detail of specific lettings policies of those housing providers we work with in relation to the legal context of the reasonable preference groups or how each organisation prioritises housing need.

2.0 Objectives

- 2.1 This policy ensures that the Group's approach to letting its properties, (irrespective of geographic location or specific policy provision,) fulfils the following policy objectives:

- Contributes to the development of balanced and sustainable communities.
- Maximises access and informed choice for housing applicants.
- Promotes social inclusion and equality of opportunity.
- Provides an open, fair, and transparent allocation process.
- Makes effective use of available properties.
- Maximises the Group income by minimising void losses.
- Adheres to relevant legislation and/or regulatory requirement.

3.0 Policy detail

3.1 Reasonable preferences

- 3.1.1 The law says reasonable preference must be given to 5 groups of applicants:
- People who are homeless or threatened with homelessness within the meaning of Part VII (7) of the Housing Act 1996.
 - People who are owed a duty by any local housing authority under section 190(2), 193(2), or 195(2) of the Housing Act 1996 Act
 - People occupying unsanitary or overcrowded housing or otherwise living in unsatisfactory housing conditions.
 - People who need to move on medical or welfare grounds (including any grounds relating to a disability).
 - People who need to move to a particular locality in the authority's district, where failure to meet the need would cause hardship to themselves or others.

3.2 General

- 3.2.1 The Group participates in the following CBL schemes:

Karbon Homes

- Darlington Home Search
- Durham Key Options (DKO)
- Gateshead Home Choice
- Hartlepool Homesearch
- Newcastle Homes
- North Tyneside Homefinder
- Northumberland Homefinder
- South Tyneside Homes
- Tees Valley Homefinder (covering Middlesbrough, Redcar & Cleveland and Stockton)

54North Homes

- Leeds Homes
- York Home Choice
- North Yorkshire Home Choice
- Barnsley Homeseeker
- East Riding
- Wakefield Homesearch

3.2.2 The Group's stock in the Sunderland area (Karbon Homes) and East Riding of Yorkshire (54North Homes) is allocated through a local authority nomination agreement.

3.2.3 Except for DKO and internal transfer applications within Northumberland, the Group does not process applications for housing and therefore will adhere to the criteria for acceptance onto the register and prioritisation of applicants adopted by the appropriate CBL scheme or nominating authority.

3.3.4 For supporting housing and student allocations outside of CBL see section 3.23

3.3 How housing need is assessed

3.3.1 The Group will accept the assessment of the applicant's housing needs and their position on any shortlist for a Group property as described below, however the Group may not offer the empty home to the applicant who is top of the shortlist as the Group reserves the right to apply our eligibility criteria when making an offer.

Durham County Council Area: -

Applications will be assessed and banded by a Karbon Homes member of staff in accordance with the DKO Lettings Policy.

Northumberland County Council Area: -

Applications from tenants currently living in a Karbon Homes property and applying for alternative accommodation will be assessed and banded by a member of Karbon Homes' staff in accordance with the Northumberland Homefinder Allocation Policy. Applicants who are not Karbon Homes' tenants will need to register directly with Northumberland Homefinder.

Gateshead, North & South Tyneside, and Newcastle

All applications are registered through each local authority's Choice Based Lettings scheme as detailed in 3.2. The assessment and banding of applications will be carried out by the relevant local authority in accordance with their own allocation policy. So, for example, applicants wishing to live in the Gateshead area will be assessed and banded by Gateshead Council.

Hartlepool, Darlington, Middlesbrough, Stockton, Redcar & Cleveland

Hartlepool, Darlington, Middlesbrough, Stockton and Redcar & Cleveland applications will be registered through each local authority Choice Based Lettings scheme as detailed in 3.2. The assessment and banding of applications will be carried out by the relevant local authority in accordance with their own allocation

policy. For example, an applicant living in Middlesbrough will have to apply to Tees Valley Homefinder.

Sunderland

Sunderland is not part of any CBL scheme therefore applicants will need to register with Sunderland City Council. Karbon Homes participates in a nomination agreement with Sunderland City Council. Applicants complete the City Council's application form and specify the type of property and the areas they want to be considered for. Karbon Homes requests nominations for available properties and Sunderland City Council provides a list of applicants requiring that type of property in that area. Applicants on the nominations list are ranked in order of housing need by Sunderland City Council.

- 3.3.2 Properties which are not let once the nominations list is exhausted will be advertised by the Group and customers can apply directly to the Group and will be assessed in terms of their eligibility, their household composition, and the date they applied in accordance with this policy.

3.4 Advertising properties

- 3.4.1 The Group will advertise its vacant homes on the appropriate CBL schemes in the first instance except for our homes in Sunderland in line with the requirements of the respective nomination agreements. Where the nominations agreement allows, 54North may alternately advertise a percentage of its available properties via its own 'Choose Your Homes' waiting list.
- 3.4.2 In addition, if the property has been classed as difficult to let as defined by the Difficult to Let Policy, we will also use a number of the other advertising methods at the same time.
- 3.4.3 Properties will be advertised on a weekly cycle on the relevant CBL scheme as follows:
- Northumberland Homefinder (all properties in Northumberland).
 - Gateshead Homechoice
 - South Tyneside Homes
 - North Tyneside Homefinder
 - Newcastle Homes
 - Tees Valley Homefinder (properties in Stockton, Middlesbrough, Redcar, and Cleveland)
 - Hartlepool Homesearch, (properties in Hartlepool
 - Darlington Homesearch (properties in Darlington)
 - DKO (all properties in County Durham).
- 3.4.4 The Group will not initially advertise properties in Sunderland (Karbon Homes) and East Riding of Yorkshire (54North Homes), we will request nominations from the council. However, if no suitable nominations are received, Karbon Homes will advertise properties using other means.

- 3.4.5 In exceptional circumstances the Group may need to withdraw an advert of a property either during the advertising cycle or after the advertising cycle has been completed. On occasions where a previously advertised property is no longer available, the Group is not obliged to offer an alternative property or give any priority for future vacancies.

3.5 Bidding for properties

- 3.5.1 Applicants can bid for properties in various ways including:

- On the relevant CBL scheme website.
- Contacting in person or by telephone.
- Through an advocate or Support Worker.
- Through the relevant Local Authority website.
- Via the 54North website.

- 3.5.2 Bids can only be placed during a lettings cycle. Bids received outside of the lettings cycle will not be considered under any circumstances.

3.6 Shortlisting

- 3.6.1 Where a shortlist is generated by a CBL scheme applicants will be prioritised in accordance with the CBL lettings policy.
- 3.6.2 If the Group receives nominations for an empty home the shortlist will be prioritised in accordance with the lettings criteria of the nominating authority.
- 3.6.3 Where a property has been advertised via a CBL scheme without securing an allocation we will advertise via other channels (including the 54North Homes Choose Your Home waiting list) and properties will be allocated on a first come first served basis. In this event we will still verify the applicants' details by requesting the information detailed in the following section before making any offer of accommodation.
- 3.6.4 When making offers we will also take into consideration any relevant Section 106 agreements or any rural allocation policies that the Group made as part of this policy. All areas where a rural allocation policy applies can be found in Appendix 1 and will be reviewed in line with this allocation policy. Karbon will review the need for a rural allocation policy in any area in line with the review of this policy taking into account demand and other relevant management factors.

3.7 Making an offer

- 3.7.1 When the Group is in receipt of a shortlist we offer the property to the first person on the shortlist who qualifies for the property and passes the eligibility criteria. Being top of the shortlist does not always mean the applicant will be made the offer, this may occur for example where a property has a certain adaptation and the applicant at the top of the shortlist doesn't need it or where a local lettings criterion is applicable to the property and the person top of the shortlist doesn't meet the needs of the criteria.

- 3.7.2 All offers are subject to the applicant completing a financial assessment to ensure they can afford the property and if the Group determine this not to be the case, the offer will not be made.
- 3.7.3 All offers will also be subject to the relevant right to rent checks.
- 3.7.4 If we do not make an offer of accommodation, applicants will have the right to appeal this decision. Information about the appeal process is contained in Section 3.20 of this policy.

3.8 Group eligibility criteria for making an offer

- 3.8.1 The Group will apply the following eligibility test prior to making an offer of accommodation in accordance with The Localism Act amended by the Housing Act 199 which enables registered providers to disqualify people whose behaviour makes them unacceptable for an offer of accommodation. These criteria will apply regardless of which way an applicant comes to us for housing
- 3.8.2 In accordance with s.166A(5) of the Housing Act 1996, applicants will not be considered for an offer if we are satisfied that they or a member of their household who will live with them or intends to live with them:
- Has been guilty of unacceptable behaviour that is serious enough to make the person unsuitable to be offered housing and, when we consider the application, we believe that the person remains unsuitable to be offered housing because of that behaviour.
- 3.8.3 The Group may regard an applicant, or any member of their household as having been guilty of unacceptable behaviour if any of the following statements applies to them (this is not an exhaustive list):
- They have been convicted of a drug-related offence.
 - They have been convicted of a violent criminal offence that we consider makes them a threat to the local community.
 - They have been convicted of a sex-related offence that we consider makes them a threat to the local community.
 - They have any other conviction which, in our opinion, makes them a threat to the local community.
 - They have perpetrated violence, domestic violence, racial violence, hate crime or harassment.
 - They have been abusive to, attacked or threatened staff.
 - They have a history of anti-social behaviour or are subject to an anti-social behaviour order or equivalent.
 - They have a record of unacceptable rent/mortgage arrears* to the Group, other local councils or other landlords/lenders (including associated court costs).
 - They have been evicted on any of the grounds in Schedule 2 to the Housing Act 1985 or any statutory amendment or re-enactment of it.
 - They have unsatisfactory tenancy reports which may include condition of property.

- They have damaged a current or previous rented home and owe money for rechargeable repairs.
- They have knowingly given a false statement or given false information when applying to join our housing register.
- Customers who have (a) signed up to a new tenancy in the last 12 months, and (b) who we regard as adequately housed. All new adequately housed tenants will be disqualified until one year after their tenancy start date unless they have had a material change of circumstances since their tenancy start date.*
- Any applicant who has refused three offers of a suitable property from the Group and is making a new application within 12 months of the last refusal date.*

3.8.4 The Group may in the cases shown by * waive these exclusions if appropriate and will consider each application on a case-by-case basis.

3.8.5 Notwithstanding the foregoing provisions, the Group will also have regard to the mental and physical wellbeing of any applicant as stated in 3.13 may decide to make an offer of accommodation.

3.8.6 **Financial Restrictions to making an offer**

The Group reserves the right not to make an offer of property if, following a financial assessment we are satisfied that the applicant/s:

- Have equity in their current home of more than £120,000
- Have savings of more than £120,000
- Have a joint household income of more than £80,000

We will consider these circumstances on a case-by-case basis and may review these limits as part of policy review timeline.

3.8.7 **16/17 years old**

The Group may make offers to applicants who are under the age of 18 in exceptional circumstances. In this case the tenancy of the property must be held in trust by an acceptable (to the Group) third party, until the applicant reaches the age of 18.

3.9 **Verifying information provided before the Group will make an offer**

3.9.1 The Group will request from the applicant the information detailed below prior to making any offer of accommodation. This is not an exhaustive list:

- A full housing history for the last 6 years. We will use this housing history to determine if there is any history of rent or mortgage arrears or any unacceptable behaviour which the Group believes would make them unsuitable to become our tenant. When looking at housing history we will consider each application on a case-by-case basis.

- Proof of identification for the main applicant and any joint applicants, this should be photographic ID such as a passport or driver's licence.
- Proof of residency where possible (for example utility bill, letter from the person an applicant is staying with). If this is not possible, we will consider each case on its own merit.
- Evidence of an applicant's immigration status if they are not normally resident in the UK or have come to the country from abroad.
- Evidence the applicant has been awarded settled status.
- Proof the applicant has the right to rent – such original immigration documentation or confirmation via an online identity service provider (IDSP)
- Proof of income, so we can assess whether the applicant/s can afford the property we offer.
- Proof of joint custody, if applicants would like to be considered for a larger property than the household make-up would require.
- Proof of pregnancy to show the need for an extra bedroom where applicable.
- Proof of fostering or adopting status, if an applicant would like to be considered for a larger property than the household make-up would normally require.
- Proof that applicants and their partner cannot share a bedroom for medical reasons.
- Proof that 2 children cannot share a bedroom for medical reasons.
- Proof of an overnight carer from outside the household, if a larger property is needed to accommodate the carer.

3.9.2 In addition, prior to making an offer we will seek references to determine whether an applicant is suitable to receive an offer of a Group property. This may include but is not limited to:

- Current and former landlord references.
- Reference from mortgage provider.
- Criminal record check such as a Basic DBS check or Safer Estates Check.
- Supporting information and support plans. In the case where any support needs and or vulnerabilities are identified as requiring more intensive involvement than Karbon can provide we may decide not to make an offer of accommodation. In such instances support and clear advice regarding alternative housing options will be offered.

3.9.3 The Group reserves the right to request the applicant provides references before we will make an offer.

3.10 Property entitlement when making an offer

3.10.1 The Group aims to create balanced and sustainable communities and also to make best use of its housing stock.

3.10.2 When considering what type of accommodation, we will offer we will take into account that a separate bedroom is considered necessary in each of the following circumstances:

- A single person aged 16 or over.

- A couple.
- Two children of the same sex under 16.
- Two children of opposite sex under the age 10.
- Any additional child including any unborn child on proof of pregnancy.
- A non-resident carer providing 24/7 care.
- A household member with a disability where there is medical evidence that they need their own room.
- A foster child.

3.10.3 The Group will allow under occupation in the following circumstances:

- Where there is a local letting policy in place.
- Properties in an area where there is a shortage or no provision of a particular property type for example one bedroomed properties.
- Properties which have been adapted and are suitable for certain applicants.
- For specific management reasons for example where properties have been through an advertising cycle and have not been allocated, we may allow under occupation. Under occupation is only allowed where an applicant can demonstrate that they meet the affordability criteria.

3.10.4 The criteria above will apply to both housing register customers and existing Group tenants.

3.11 Offers of adapted properties

3.11.1 To ensure best use of our stock we will advertise adapted properties stating a caveat that we will offer the property to the applicant where there is medical evidence stating the adaptations in the property meet the applicants' needs.

3.11.2 Only in exceptional circumstances will we offer a non-adapted property to an applicant who requires specific adaptations, any decision will be made on a case-by-case basis and will be discussed with the Group's Aids and Adaptions team to ensure any decision complies with our Aids and Adaptions Policy and makes the best use of our stock. We reserve the right to offer an alternative property if that meets the customer's needs.

3.12 Offers of bungalow and supported housing

3.12.1 The Group reserves the right to place an age restriction on the allocation of property which has been categorised as Supported Housing accommodation.

3.12.2 In the case of bungalow accommodation, we will consider applicants over 55 years of age or younger if the younger applicant has an assessed need for ground floor accommodation on health grounds. We may only offer a bungalow if there are no ground floor flats available in the area where the applicant has support needs.

3.12.3 Before making an offer of supported housing accommodation consideration will be given to the applicant's ability to continue to live independently. The Group reserves the right to request a support plan or needs assessment or information from an

appropriate health care professional and may refuse to make an offer of accommodation if it is not satisfied the customer will be able to sustain their tenancy.

3.13 Offers of multi storey/communal accommodation (General Needs)

- 3.13.1 When making an offer of a flat in a communal block we will take into consideration the physical and/or mental health of the applicant. We will consider on a case-by-case basis whether this type of accommodation has the potential to impact the applicant or other residents living in the block either on a short term or long-term basis. For example, we may decide not to make offers to applicants who have a physical disability a flat above ground floor.
- 3.13.2 We will not offer households with children under the age of 14 a property in a multi storey building or building with communal areas, this includes households where the child/children will not occupy the property as their principal home. This will be clearly stated in the advert for the property. There are a limited number of exceptions to this which will be stated on the relevant advert.
- 3.13.3 No offers will be made to applicants with dogs (other than hearing dogs, guide dogs or therapy dogs where there is medical evidence to support this) or cats. This will be clearly stated in the property's advert.

3.14 Refusal of offers

- 3.14.1 If an applicant refuses 3 suitable offers made by the Group within a 12-month period, they will not be made any further offers of accommodation for a period of 6 months from the date of their last refusal. The suitability of offers will be decided by the Group.
- 3.14.2 Applicants do have a right of appeal against this decision. Further details of the appeal process are contained within Section 3.20 of this policy.

3.15 Withdrawal of an offer

- 3.15.1 We may also withdraw an offer of accommodation at any stage of the allocation process, when we do this, we will explain to the applicant why we have done this.
- 3.15.2 Examples of why we may withdraw an offer include:
- The applicant has provided false or misleading information.
 - The applicant has withheld information.
 - The outgoing tenant has withdrawn their notice.
 - The Group no longer intends to let the property.
 - Where the customer's circumstances change, and they are no longer eligible for the property.
 - Other circumstances that make the property unsuitable due a risk of harm to the applicant or members of their household if they were to be rehoused in that property or the area the property is in. The Group will consult with relevant support agencies (such as social services) or with the police when making this decision.
 - We may withdraw an offer of a property which is not adapted when an adapted property becomes available which meets the customer's needs.

3.15.3 This list is not exhaustive, and the withdrawal of an offer **does not** oblige the Group to make a further offer to the applicant or grant them a tenancy.

3.16 Direct Lets

3.16.1 In some circumstances we may offer a property directly to an applicant outside of the normal offer process. For example:

- Where there is urgent or immediate rehousing required.
- An emergency plan has been activated.
- Where the shortlist list has been exhausted.
- Where there have been no bids for the property following one advertising cycle
- Where someone is being housed as part of a witness protection programme.
- Where a property has had significant adaptations, which makes it suitable for specific housing need.
- Other exceptional housing management reasons.
- Where offered as an immediately available home.

3.16.2 When considering a Direct Let the applicant should be given appropriate housing advice to enable a move to be made quickly.

3.16.3 Unless there are extenuating circumstances there will only be one offer, which the Group has determined is suitable, made to an applicant. If this offer is refused, then this may result in the offer of a Direct Let being removed.

3.17 Sensitive lets

3.17.1 In some schemes the Group may introduce additional eligibility criteria to address issues such as previous anti-social behaviour. This will be clearly stated on the advert. Properties or areas subject to a request for a sensitive let will be monitored and reviewed by a manager involved in the allocation process in conjunction with another appropriate manager on a quarterly basis to see if they still are relevant to our objective of creating sustainable, safe communities.

3.17.2 All requests for Direct Let or sensitive let must be approved by two managers involved in the allocation process and there must be clear evidence to support the request (Karbon Homes).

3.18 Viewing the property

3.18.1 Once the applicant has viewed the empty home, they will have up to two working days in which to confirm their acceptance or refusal of the property.

3.18.2 The Group will carry out multiple viewings or online viewings where we feel it is appropriate. We will make it clear to any customer invited to attend a multi viewing that failure to attend and not letting us know that they are not attending will be considered a refusal.

3.19 Removal from the housing register

3.19.1 The Group, except for DKO and transfer applicants within Northumberland Homefinder, cannot remove applicants from the housing register. However, in the case of the aforementioned CBL schemes we will remove an applicant from the housing register for the following reasons:

- Applicants or a member of their household no longer qualify for housing.
- An applicant asks for their application to be removed.
- An applicant has provided false or misleading information.
- An applicant refuses or does not respond to 3 reasonable offers of accommodation.

3.20 Appeals process¹

3.20.1 Where we are not full partners of a CBL scheme, the Group has the right to reject an application for housing. The Group has the right to reject a nomination and the right to refuse to make an offer of accommodation in accordance with the eligibility criteria set out in Section 3.8 of this policy.

3.20.2 In Durham, all applicants have the right to appeal against the Group's decision to exclude them from the housing register and make them an offer. This appeal will be heard by the Group.

3.20.3 In Northumberland, Group tenants have the right to appeal against a Group decision to exclude them from the register and make them an offer. This appeal will be heard by the Group. Non Group tenants will have to appeal against the decision to not allow them on the register to Northumberland Homefinder, however an appeal against a Group refusal to make an offer will be heard by the Group.

3.20.4 In all other areas the Group will only consider an appeal against a decision not to make an offer of accommodation.

3.20.5 There is no appeals process in relation to the Group's decision to withdraw an advert.

3.20.6 We will not hold a property pending the appeal outcome.

3.20.7 The appeal process is as follows:

Stage 1

If you appeal a decision, we will acknowledge your appeal within 5 working days and ask you to send any further written comments or new information that could be relevant.

In exceptional circumstances and if a case is complex, we may hold an oral hearing. The applicant will be invited to attend the oral hearing. If the applicant is in a prison

¹ Karbon Homes is full partners of Durham Key Options and follows the Durham Key Options Lettings policy. Karbon has adopted the appeals procedure contained in this policy to have one consistent approach across all the allocation schemes within which we operate.

or detention centre, the hearing could be held there so that they can attend. In the case of an oral hearing, the applicant may bring representation.

The appeal will be considered by a senior officer not involved in the original decision. We will notify the applicant in writing of the decision and the reasons for it within 6 weeks of the applicants request for an appeal.

Stage 2:

If the applicant is dissatisfied with the outcome of stage one, they may escalate to stage 2. If so, the applicant must make further written comments to a manager within 10 working days of receiving the Stage 1 Decision Letter.

In exceptional circumstances and if a case is complex, we may hold an oral hearing to which the applicant would be invited to attend.

If the applicant is in a prison or detention centre, the hearing could be held there so that they can attend. In the case of an oral hearing, the applicant may bring representation.

We will notify the applicant in writing of the decision and the reasons for it within 14 days from the date the appeal was requested.

The Group will consider any official complaint made via our Complaints, Compliments and Suggestions Policy in relation to any offer of accommodation or exclusion from the register (where applicable) as an appeal as defined in this policy and will consider such within the timelines outlined within this policy. If the Group receives a complaint regarding a member of staff's conduct during the allocation process this will be dealt with via the same policy.

3.21 Local lettings process

3.21.1 The Group will develop a local letting policy where it feels appropriate. Local lettings policies may be used to achieve policy objectives, to create communities that are balanced, safe, inclusive, and sustainable, while encouraging community cohesion.

3.21.2 When considering adopting a local letting policy we will work with our appropriate partners and stakeholders, including any relevant local authority.

3.21.3 Any local lettings policies introduced will be reviewed on a biannual basis to ensure they continue to be needed.

3.21.4 Local lettings policies may also be used for example when letting new developments in accordance with section 106 agreements or for rural allocations.

3.21.5 Property adverts will specify when a local lettings policy applies.

3.21.6 Local Lettings policy will need to be approved by two managers.

3.22 Rural allocation policies

- 3.22.1 In some of Karbon's geographical footprint the allocation policies operate a rural allocation policy. Karbon will adhere to the shortlisting priorities outlined within those policies when making an offer of accommodation. (Appendix 1) Karbon will reserve the right to review at any time any rural allocation policy in place and work with stakeholders where it is felt the need to remove any existing policies or develop new ones.

3.23 Lettings outside of the remit of this policy

3.23.1 Supported Housing allocations outside of CBL

The Group will not allocate its supported housing schemes via CBL or via nomination agreements. Supported Housing outside of CBL will be allocated following liaison with relevant agencies and in line with referral and allocation processes as follows: -

3.23.2 Floating support - dispersed accommodation

Applications will be made via the Local Authority Gateway and referrals made to the relevant support provider.

The support provider will liaise with the Group, and referrals made to the Group will be assessed according to need in conjunction with the support provider.

3.23.3 Floating support - cluster accommodation

In addition to the stages outlined above, consideration will be given to the existing balance within the scheme, i.e., level and type of support needs of existing tenants.

3.23.4 Independent supported living - shared accommodation for people with a learning disability

Referrals will be made to the Group via the Local Authority learning disability team who will assess suitability for the vacancy.

Once an applicant is identified, the transition process will begin and the applicant will have the opportunity to visit the property, meet other tenants and have at least one overnight stay prior to the allocation being progressed.

3.23.5 Concierge Plus

Concierge Plus allocations are made via the Local Authority learning disability panel where referrals are jointly assessed and verified.

Once the application is accepted by the panel the Group will progress the application.

3.23.6 Managing agent allocations

Some supported housing is managed by a managing agent on behalf of the Group. For this type of accommodation, the managing agents are responsible for allocations and their allocations policies and procedures are monitored by the Group.

3.23.7 Extra care

Applicants are assessed in terms of support needs and prior to any allocation consideration will be given to the existing balance within the scheme, i.e., level and type of support needs of existing tenants.

Before making an offer of extra care accommodation, consideration will be given to the applicant's ability to continue to live independently. The Group reserves the right, on receipt of a support plan or needs assessment or information from appropriate health and social care professionals, to refuse an offer if Karbon is not satisfied the customer will not be able to sustain their tenancy.

3.23.8 Supported Housing

Referrals are made to the Group via Community Mental Health teams, Social Workers, CPN's, Care Co-ordinators and Gateway teams. Applicants are assessed in terms of support needs and suitability for the vacancy.

Some properties owned or managed by the Group, or any subsidiary companies are let outside the remit of this policy, examples include:

- Privately rented properties.
- Low-cost home ownership schemes.

3.24 Leasehold and Rent to Buy properties

3.24.1 The Group has a separate Home Ownership Policy.

3.25 Garage allocations

3.25.1 The Group has a separate Garage Allocation Policy.

3.26 Mutual exchanges

3.26.1 The Group has a separate Mutual Exchange Policy.

3.27 Updating Applications

3.27.1 Where the Group has processed their application, the applicant must tell the Group of any changes in circumstances which may affect their application for housing or eligibility to remain on the waiting list. However, if the Group has not processed their application they must contact the relevant CBL scheme.

3.27.2 Any change of circumstances identified at the point of offer will result in either the Group reassessing the application or advising the appropriate CBL scheme.

Applications may be suspended, and any offers made will be withdrawn while the reassessment process is undertaken.

4.0 Customer Vulnerabilities

- 4.1 This policy is applied in line with our Customers in Vulnerable Circumstances Policy. We want people to be treated fairly, have equality of opportunities, freedom, respect, and access to our services.
- 4.2 We will support people in vulnerable circumstances to help us deliver this service. We will work alongside external agencies such as social services, the police and fire services and other appropriate agencies to help and support people in vulnerable circumstances and to ensure we meet our statutory and regulatory requirements as a social landlord.
- 4.3 Policies and key information are made available on our website.

5.0 Monitoring and Review

- 5.1 This policy will be reviewed every three years by the Group Director of Housing, or earlier if there are significant changes to legislation, regulation or best practice.

6.0 Equality and Diversity

- 6.1 This policy is applied in line with our Inclusion and Belonging Policy. This includes the legal requirements of the Equality Act 2010, Workers Protection Act 2023 and the Public Sector Equality Duty.
- 6.2 At the Karbon Group we aim to eliminate discrimination, promote equality of opportunity, foster good relations and define the nine protected characteristics of age, disability, gender reassignment, marriage or civil partnership, pregnancy or maternity, race, religion or belief, sex, or sexual orientation.
- 6.3 If you would like this or any other policies in a different language or format please contact inclusion@karbonhomes.co.uk.

7.0 Data Protection and Privacy

- 7.1 We have a clear policy on data protection and sharing data with other partners/third parties under the requirements of the UK General Data Protection Regulation, the Data Protection Act 2018 and other associated legislation. This is clearly set out in the Data Protection Policy for the Karbon Group which, along with its associated procedures, must be followed throughout the operation of this policy.

Appendix 1 – Rural allocation policies

The following villages are subject to a Rural allocation policy:

- Acomb
- Allendale
- Falstone
- Fourstones
- Gunnerton
- Newbrough
- Horsley
- Humshaugh
- Kielder
- Kirkwhelpington
- Otterburn
- Ovington
- Rochester
- Barrasford
- Corbridge
- Bellingham
- Wall
- Wark
- West Woodburn
- Wylam
- Slaley
- Bardon Mill
- Scots Gap

To be considered as having a connection with the above the applicant must:

- Living in the parish continually for at least 3 years immediately prior to the date of selection for an offer;
- Been in continuous full or part-time work (excluding seasonal work) in the parish for at least the last 3 years immediately prior to the date of selection for an offer (part-time work means a minimum of 16 hours per week);
- Lived continuously in the parish for at least 3 years immediately prior to being accepted as homeless but have been placed in temporary accommodation outside of the parish for up to 2 years;
- Having parents, adult children or siblings who have lived continually in the parish for at least 3 years immediately prior to the date of selection for an offer.

Properties subject to the rural allocation criteria will be offered to applicants in the following order;

1. To applicants with a connection to the parish or adjoining 1 rural parish in bands P, 1, 2 or 2R.
2. To any applicant in bands P, 1, 2 or 2R.
3. To applicants with a connection to the parish or adjoining* rural parish in band 3
4. To any applicants in band 3

Rural allocation criteria will only apply on the first advert of the property.