

Community housing Allocations guideline

Guideline and Procedure details

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Overview of changes and development

This is your historical record of how this document was developed. Include information about what's changed and why, who was consulted and when:

- Guideline developed as a result of implementation of the Single Housing Register
- Renamed from Registering Community Housing Customers and Managing Vacancies to clarify Single Housing Register (SHR) requirements and superseding of the Community Housing Customer Register
- Clarifies shortlisting process and manual offers
- Moved to SA Housing Authority template

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This guideline sets out how community housing providers (providers) make offers of housing and allocate tenants to community housing. This includes volunteer member tenant managed providers (cooperatives).

This guideline applies to:

- providers registered under the [National Regulatory System for Community Housing including](#) volunteer member-tenant managed providers who have a community housing agreement (eg Master Agreement) with the South Australian Housing Trust or the SA Housing Authority
- non-government organisations which have housing leases with the South Australian Housing Trust (SAHT) which reference this policy, including [specialised housing programs](#)
- community housing tenants transferring to a separate social housing provider

In relation to SAHT Transfer programs for example Better Places Strong Communities (BPSC) and Renewing our Streets and Suburbs (ROSAS):

- This policy applies to all allocations to properties *managed by a community housing provider* under a concurrent lease associated with a Transfer program. This includes:
 - properties owned by SAHT where management responsibilities have been formally transferred to a provider (eg via transfer deed and concurrent lease)
 - properties developed and owned by the provider, as a result of development activities under the Transfer Program
- This policy does not apply to properties *under SAHT management*, and specifically does not apply to new build properties developed by a provider under the Transfer Program, where ownership is (or is planned to be) transferred to SAHT. SAHT is responsible for all these initial allocations, and providers cannot make housing offers for these properties, unless and until the management of that property (and any in situ tenants) is subsequently transferred to a provider. If SAHT then transfers the property and tenancy to a provider for ongoing management, this policy would then apply to all subsequent allocations by the provider.

This policy does not apply to internal tenant transfers within individual community housing provider portfolios. Internal transfers are covered by the provider's own policies.

1 Create a shortlist

Shortlists are filtered lists of customers who:

- registered their interest in community housing or volunteer member tenant managed housing (cooperatives)
- are suitable for the property, for example the property size would be big enough for their household and they have nominated the area the property is in

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- fit any additional eligibility criteria that the provider has in place (for example, customers who are referred by a partner agency with which the provider has an MOU).

When a property becomes available for offer create a shortlist in the Single Housing Register. The shortlist targets the most appropriate registrant for the property according to criteria set by providers, which may include additional eligibility criteria as set out in the provider's policies, for example:

- someone in the household must have a recognised disability, or
- exclusion of customers with high business turnover (even if they have a low taxable income), to make sure housing remains targeted to those most in need
- a requirement to meet ongoing eligibility criteria, to ensure housing is kept available for those most in need

Shortlists automatically include all suitable registrants, regardless of the registrant's Primary Contact Organisation (PCO).

Base a shortlist for a property on:

- the housing preferences customers recorded on their registration, for example property with no stairs or a small yard
- the property's elements, for example if it has stairs or if it's wheelchair accessible

Shortlists automatically include only customers who:

- are eligible for the number of bedrooms in the property in line with the [Occupancy standards](#)
- registered for the area the property's in

Both the area choices and the occupancy standards can be manually overridden if the provider doesn't want to apply these rules for a particular circumstance.

Providers exclude registrants who either:

- are ineligible for housing
- have previously been bypassed for the property
- have previously refused an offer of housing for the property

Review registrations for offer in the order they appear on your shortlist.

Once an offer is made to a registrant, the registrant will disappear from other shortlists.

One registrant can receive one offer at a time until the offer is refused or withdrawn.

The allocation process will be completed and the shortlist for a property will automatically close once an offer is accepted.

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Note: Providers cannot create shortlists for initial tenancies in SAHT-owned new builds in the SAHT Housing Transfer program - even where the provider has constructed the property. SAHT is responsible for those initial allocations. Where applicable, the property and tenancy may subsequently be transferred to a provider for management, and for allocating any future tenancies as a result of vacancies.

2 Manual offers

Don't create a shortlist if a manual offer is going to be made.

A manual offer to select a particular registrant is possible provided suitable reasons are given for not using the shortlist, for example to allocate a customer to a specific purpose housing program property, for example the Mental Health Supported Social Housing Program.

Select a registrant and record the offer reason of relocation or transfer – for example, in line with the community housing provider's own policy, or as part of an approved redevelopment project (such as SAHT Housing Transfer program like Renewing Our Streets and Suburbs) .

Eligibility criteria in the [community housing eligibility policy](#) must be met, even for manual offers.

Providers can allocate to existing properties under their management, however providers cannot make offers to tenants for SAHT-owned new builds in the SAHT Housing Transfer program - even where the provider has constructed the property. SAHT is responsible for those initial allocations. Where applicable, the property and tenancy may subsequently be transferred to a provider for management, and for allocating any future tenancies as a result of vacancies.

3 Before making an offer of housing: pre-offer check

Before you make an offer of housing, check:

- the customer is still eligible
- the customer is still eligible for the category their registration is in, if they're in Category 1 or 2
- no one has moved in or out of their household
- their household income hasn't changed
- their housing preferences and areas haven't changed
- offering the property to them won't contravene an intervention order or any other legal orders the community housing provider knows about

Create a contact to record the pre-offer check in the Single Housing Register. Update the customer's record and registration in the Single Housing Register if their circumstances have changed.

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Bypass a customer on the shortlist if they aren't suitable for the property, including if:

- they're not eligible
- they're not eligible for the category their registration is in, if they're in Category 1 or 2
- there are health and safety reasons why the property isn't suitable for the customer, for example domestic abuse
- the customer needs modifications that can't be made at the property
- the property is more suitable for someone else, for example it has disability modifications, but the customer doesn't need them
- the tenancy mix wouldn't be appropriate

3.1 Owning residential property

Check if anyone on the registration owns or partly owns residential property in line with the Community Housing Eligibility Policy. Record the outcome in the pre-offer check contact in the Single Housing Register and update the 'Property Owner' field on the person record, if required.

If someone appears to own or part own residential property, they are not usually eligible for community housing. You can make an offer of housing if both the below conditions are met:

- they meet one of the exceptions to owning residential property in line with the Community Housing Eligibility Policy (for example, domestic abuse or property owner with a disability)
- the community housing provider approves it

When you make an offer of housing, tell the customer they are required to dispose of their interest in the property, and a short-term lease can be offered, with the sale of the property listed as a key review criterion for an extension of the lease.

3.2 Property considerations

If the property is in a group site, consider if the tenancy mix in a group site reflects the wider community in the area.

If the property is on a strata or community title, consider if the customer would be prepared to live by the conditions of the strata or community corporation.

Customers may be offered specific property types or suburbs if they [verify they have special circumstances](#) for example need to be near supports or have a particular property type.

Check the customer still needs the specific property size or area, or if they're prepared to accept offers of housing outside these specific requirements.

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3.3 Modifications for people with a disability

If a property has been modified for someone with a disability, try to match it to a customer who needs those modifications.

Customers tell community housing providers if they need modifications at a property on their Registration of interest form.

Before you offer a property that isn't modified to a customer who needs major modifications, check if the property's suitable for modifications.

If the property's already modified ask the customer to inspect the property and check if it's closely suitable for their needs.

If a customer accepts the property and needs any modifications follow the community housing provider's process for arranging disability modifications.

4 Contact the customer

Call or text message to the customer.

If the customer contacts and is eligible (see above [Section 3: Pre-offer check](#)) and the property's suitable, make an offer of housing.

If the customer contacts but states they're temporarily unable to offers or they no longer want to register for housing, defer or cancel their registration in line with the Community Housing Managing the housing register guideline.

Make reasonable attempts to contact them if they don't respond, for example at least 4 contacts over a a week and call their support worker or nominated contact person.

If the customer still doesn't contact, withdraw the offer in the Single Housing Register, defer their registration in line with the [Community Housing Managing the housing register guideline](#) and consider the next customer on the shortlist for an offer of housing.

4.1 Customer's circumstances have changed

Providers are to update the customer's record and registration in the Single Housing Register if their circumstances have changed.

4.2 Category reviews

If the customer's in Category 1 or 2 and their circumstances have changed, they may no longer be eligible for the category their registration is placed in.

Assess the customer's eligibility for Category 1 or 2 in line with the Community Housing - Housing Needs Assessment guideline and manage the registration in line with the Community Housing Managing the housing register guideline.

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Bypass the customer and consider the next customer on the shortlist for an offer of housing.

4.3 Income is over the income eligibility limits

If the customer's income has increased and they don't meet the [income eligibility limits](#) for community housing anymore, establish the date their income changed.

You can still make an offer of community housing if they can provide [proof of income](#) showing their income either:

- only increased in the last 6 months
- will decrease in the next 6 months

Otherwise, defer the registration in line with the Community Housing Managing the housing register guideline.

4.4 Customer doesn't have an independent income

If the customer doesn't have an [independent income](#) but they appear to be eligible for a Centrelink payment, tell the customer or their supports to contact Centrelink to apply for an income.

Defer the customer's registration in line with the Community Housing Managing the housing register guideline.

5 Accepting, refusing or withdrawing an offer of housing

5.1 Withdraw an offer

You can withdraw an offer of housing at any time, including if:

- The property location is unsuitable
- The property is no longer available
- the offer was inappropriate, for example the property has stairs, but the customer can't use stairs because of a medical condition or disability
- there was a change in circumstances
- the customer didn't respond to the offer letter
- it was an incorrect offer
- the registrant has accepted another offer
- the property condition is unsuitable
- the property does not match property preferences

Record why the offer's withdrawn in the Single Housing Register.

If the customer's temporarily unable to accept offers, defer their registration in line with the Community Housing Managing the housing register guideline.

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5.2 Refusing an offer

A customer has refused an offer of housing in any of the below situations:

- they don't respond or contact the community housing provider when an offer's been made
- they don't provide proof of income for themselves or someone in their household when asked to do so
- they say they don't want the property

If the customer refuses the offer:

- try to determine why and record it in the Single Housing Register, for example the property's too far from essential supports
- make sure they know it may be taken into consideration at their next category review
- make sure they know the community housing provider may not be able to make another offer soon

Once the offer is refused on the system, the customer will appear on shortlists for other properties.

5.3 Accepting an offer

If the customer accepts the offer, record the acceptance, the [tenancy type](#), the [tenure](#), and the expected tenancy start date in the Single Housing Register.

Assign a tenancy type as described in the Community housing Eligibility policy.

6 Assigning a tenancy type

When an offer is made, the provider assigns them a tenure type, a tenancy type of General, Supported or Affordable and an agreement type derived from the property against the offer, as outlined below under 'specific tenancy types on the Single Housing Register'.

The portfolio profile under the Master Agreement and the SAHT Transfer programs outline the number of each tenancy type that a community housing provider must maintain – eg a portfolio of 105 properties under the Master Agreement might stipulate 80 general, 20 supported and 5 affordable tenancy types.

Customers may be eligible for more than one tenancy type given their circumstances. The community housing provider must be mindful of their portfolio profile obligations when assigning a tenancy type at allocation, if the vacant property is under the Master Agreement or the SAHT Housing Transfer Management deeds.

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Where tenant circumstances change and a change is required to manage a tenancy or manage the portfolio profile, Tenancy types can be changed later on (for example from Supported to General), rather than requiring a tenant to move to a different property.

General tenancy type

Customers who meet the [eligibility criteria](#) and the [prescribed income tests](#), AND/OR the needs test as defined in the [Community Housing Eligibility Policy](#), along with any additional criteria set by the community housing provider. Refer to the [Community Housing Rent Procedure for General Tenancies](#).

Specific tenancy types available on the Single Housing Register:

- General Community Housing
- Cooperative Housing

Supported tenancy type

Customers who meet the eligibility criteria and the [prescribed income tests](#) as defined in the [Community Housing Eligibility Policy](#), AND have a package of support as described below. They may be charged rent by using [this assessable types of income page as a guide](#). Refer to the [Community Housing Rent Procedure for Supported Tenancies](#).

Not all customers who have support will be eligible for a supported tenancy type rent calculation. Where a package of support is not one listed below, or where the community housing provider is not contracted under the Master Agreement or ROSAS Housing Transfer Management Deed to provide housing for that type of support package, the tenancy should be considered a General tenancy type (provided the customer meets general tenancy type eligibility).

The support package must correspond to one of the Tenancy Type Sub-Categories listed in the provider's Portfolio Profile either under the Master Agreement or ROSAS Housing Management Deed – Schedule 7.

A nomination and assessment process is used to select customers and assign a Category to them - the process is outlined in the relevant program policy and procedures below:

- Supportive Homelessness Programs contract managed by DHS:
 - [Integrated Housing Exits Program policy](#)
 - [Integrated Housing Exits Program guideline](#)
 - [Integrated Housing Exits Youth Justice Program policy](#)
 - [Homelessness Supportive Housing Program policy](#)
 - [Homelessness Supportive Housing Program guidelines](#)
 - [Aged Homelessness Assistance Program policy](#)
- Supported social housing mental health

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- [Mental Health Supported Social Housing Program policy](#)

- Supported – Disability – persons who are NDIS participants with housing goals in their NDIS plan, and a need for accommodation.

Specific tenancy types available on the Single Housing Register:

- Aged Homelessness Assistance Program
- Disability Housing Program
- Homelessness Supportive Housing Adult
- Homelessness Supportive Housing Youth
- Homelessness Supportive Housing Family
- Homelessness Supportive Housing DV
- Integrated Housing Exits
- Integrated Youth Housing Exits
- Mental Health Supported Housing
- Transitional Housing Program

Affordable tenancy type

Customers who meet the eligibility criteria and the [prescribed income tests](#) as defined in the [Community Housing Eligibility Policy](#). They may be charged by using [this assessable types of income page as a guide](#). Refer to the [Community Housing Rent Procedure for Affordable Tenancies](#).

Specific tenancy type available on the Single Housing Register:

- Affordable Rental Community Housing

7 Specialised Housing Program

The programs below have their own individual eligibility criteria, tenure, and rent arrangements and the process is described in the relevant procedure.

- [Transitional housing program](#)
- [Boarding house program](#)
- [Community lease program](#)
- [Specialised lease program](#)
- [Disability Housing program](#)

8 Assigning a Tenure

This section sets out how a community housing provider:

- determines the type and length of lease agreement tenants are offered
- reviews leases and determine outcomes

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Providers are to refer to the relevant policy and guidelines when dealing with [specialised housing program](#) allocations.

When a nomination is created (a registrant accepts an offer of housing), the provider allocates a tenure to the lease.

Probationary lease

All new tenancies to which this policy applies will commence with a probationary lease of up to 12 months, unless a specific term is required as a condition of program funding.

The aim of a probationary lease agreement is to:

- emphasise the need for tenants to meet the conditions of their lease agreement
- identify tenancy issues and intervene as early as possible to help tenants successfully maintain their tenancies
- identify support needs and refer tenants to appropriate services

Community housing providers may elect to set a further probationary lease, for example where tenancy issues have arisen during the probationary period.

Tenants must be advised in writing of their probationary lease arrangements (for example in a Conditions of Tenancy or Lease Agreement).

Short term lease

Community housing providers may elect to provide a short-term lease where necessary.

Fixed term lease

A fixed term tenancy will be offered to each tenant who has successfully completed their probationary period.

Fixed term leases may be set for no longer than ten years.

Ongoing lease

Tenants of volunteer member-tenant managed providers are not required to have fixed term leases but may have ongoing leases. Members of volunteer member-tenant managed providers which merge into another community housing provider may keep their existing lease arrangements where this has been agreed in merger negotiations.

9 Related information

9.1 Controlling documents

This guideline is based on and complies with:

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- Community Housing Providers (National Law) (South Australia) Act 2013
- National Regulatory System Community Housing – Regulatory Framework
- Residential Tenancies Act 1993 (SA)
- Community Housing Allocations policy

9.2 Other documents and resources

- [Community Housing Eligibility Policy](#)
- [Community Housing Eligibility Procedure](#)
- [Community Housing Managing the Housing Register Guideline](#)
- [Community Housing Disability Access and Inclusion Policy](#)
- [Community Housing Rent Policy](#)
- [Community Housing – Housing Needs Assessment Guideline](#)
- [Specialised housing programs policy](#)
- [Registration of interest in housing form](#)
- Shortlisting, Selection and Offer - Ole
- [Occupancy standards](#) - www.housing.sa.gov.au
- [Income and asset limits](#) - www.housing.sa.gov.au
- [Proof of income, identity and rent](#) - www.housing.sa.gov.au
- [Water concession](#) - Concessions SA
- Conditions of Tenancy
- (OFFERNOTICE) - Housing Offer - Notice of Offer of Housing - Letter
- (OFFERWITHDRW) - Housing Offer - Offer Withdrawn - Letter

9.3 Date this guideline applies from

1 March 2021

9.4 Version number

1

9.5 Disclaimer

This guideline can be changed, withdrawn or replaced at any time.