The Whiteley Homes Trust

Allocations Policy

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Date of Last Update	August 2026
Review Period	3 years or sooner if change in legislation
Next Review Date	August 2029
EIA	Yes

Review Tracker

Review Date	Reviewed by	Changes Made	Approved by	Approved date	Version
12/2025	**Nick Coverdale & Pippa Claydon**	**New policy to replace Applications, Allocations, Admissions and Internal Transfer Policies**	**Board**	**16/12/25**	**1**
08/2026	**Nick Coverdale & Pippa Claydon**	**Updated scope, qualifying criteria and appeals panel**	**RECC**	**Aug 2026**	**2**

1) Introduction

The Trust's charitable mission is to provide good quality homes for older people who are in housing need and unable to obtain suitable, affordable accommodation through other means. As a Registered Provider the Trust is required to make the most efficient use of its housing stock and to let vacant homes according to the purpose of the accommodation, the needs of individual households, the sustainability of the community, and the efficient use of their housing stock.

2) Scope

This policy applies to all persons applying to the Trust for a licence to live in an almshouse in Whiteley Village, including existing residents already living in the village who wish to apply for a transfer from their current almshouse to another property.

This policy will not apply to new developments where, due to funding arrangements, the Trust enters

into nomination agreements with the Local Authority. If the Local Authority is unable to provide suitable nominations, the properties will be allocated from the Trust's waiting list in line with this policy.

This policy does not apply to market rented accommodation in the Village.

3) Purpose

This policy sets out the qualifying criteria that all applicants must meet to be eligible to go on to the Trust's housing waiting list for almshouse accommodation in the village and how the Trust prioritises applications when deciding who should receive a formal offer of accommodation if a property becomes available for letting.

4) Qualifying Criteria for Applications to join the Waiting List

The table below sets out the seven qualifying criteria applicants must meet at application stage to be eligible to join the Trust's housing waiting list.

1. Age	• Male - not less than 65 years old • Female - not less than 60 years old
2. Capital Asset Limit	• Capital assets do not exceed £30,000 for a single person or £50,000 for couples*
3. Income	• Total annual income to not exceed £25,000 net single person or £40,000 net per couple* • Total annual income does not include housing benefit or disability related benefits
4. Residency Status and time lived in the UK	• Applicants must have lived in the UK for five consecutive years immediately prior to application* • Be subject to 'Right to Rent' checks
5. Housing Need	A defined housing need including but not limited to any of the following: • Without a permanent home or at risk of involuntary homelessness, not due to their conduct • Medical or welfare need, exacerbated by their present accommodation • Inadequate or unsuitable accommodation to meet their essential needs • Need to move due to domestic abuse • Under-occupying a social housing property let on a lifetime tenancy • Would benefit from a move to sheltered / retirement or Extra Care accommodation
6. Independent living	• Ability to successfully live independently, with some support or a care package if required
7. Compliance with an Almshouse Licence	• Provision of satisfactory references • No history of either anti-social behaviour or serious tenancy / licence breaches in the last five years

	• Not on the Sex Offenders register • Not currently owing over £250 arrears for a current or former property • Sufficient income (including all state benefits) to afford all charges and costs for an almshouse licence in Whiteley Village

*In exceptional circumstances, where an applicant is suffering undue hardship but does not meet certain qualifying criteria, the Trust's Housing Panel may exercise discretion and agree for the applicant to join the waiting list.

Such discretion will only be considered if an applicant does not meet one of the following criteria Capital Asset Limit, Income or Residency Status but meets all the other criteria.

5) Awarding Points to Prioritise Waiting List Applications

The Trust awards points to each qualifying housing application according to the category or categories that reflect the applicant's personal circumstances.

The higher an applicant's total points score, the higher their application will be placed on the Trust's waiting list.

Category	Points
Management Move	10
Without a permanent home or at risk of involuntary homelessness, not due to applicant's conduct	3
Needing to move due to domestic abuse	3
Medical, mobility or welfare need, exacerbated by current accommodation	2
Inadequate or unsuitable accommodation to meet essential needs	2
Under-occupying a social housing property	2
In financial hardship or experiencing other difficulties at current accommodation	1
Previous employment in commerce of agricultural pursuit	1

Examples of each of the categories are set out below:

Management Move
Where the Trust determines that the health or well-being of an existing Whiteley Village resident is severely compromised by staying at their current accommodation or where significant maintenance work is required to their home, which could not be completed without them moving out of their home for an unreasonably long period of time.

Without a permanent home or at risk of involuntary homelessness, not due to applicant's conduct
- In temporary accommodation or 'sofa surfing'
- Landlord selling property or moving back into the property and notice has been served
- Unable to afford to remain in current property due to the level of rent/charges due

Needing to move due to domestic abuse;
- Victim of domestic abuse which is the primary reason for needing new accommodation

Medical, mobility or welfare need, exacerbated by present accommodation

- Long-term or permanent medical condition or mobility difficulties, or personal welfare issue which is a) worsened by present accommodation and which b) a move to new accommodation would significantly help to alleviate

Inadequate or unsuitable accommodation to meet essential needs

- Lack of basic amenities at current property, such as no heating, shared bathroom, shared kitchen, no bedroom, etc
- Property in very poor state of repair

Under-occupying a social housing property

- Have an assured or secure tenancy with a social housing landlord and have more bedrooms than required

In financial hardship or experiencing other difficulties at current property

- Annual income significantly lower than the qualifying limit in section 4 above
- Suffering persistent or serious anti-social behaviour

Previous employment in commerce or agricultural pursuits

- Previously worked in commerce or agriculture

Applicants will need to provide supporting written evidence to the Trust to be awarded points for any of the categories above. The Trust will determine whether information provided is satisfactory and may make further enquiries, if deemed necessary.

6) Internal Transfer Applications and Management Moves

Existing residents of Whiteley Village who have lived in their current home for at least 12 months may apply for a transfer to move properties within the village if they meet the qualifying criteria to join the waiting list, as defined in section 4 above.

In certain exceptional circumstances, the Trust may award 10 Management Move points to an existing resident if the Trust determines that their health or well-being is severely compromised by staying at their current accommodation or if significant maintenance work is required at their home which couldn't be completed without moving out of their home for an unreasonably long period of time.

7) Waiting list

Applicants will only be added to the waiting list and become eligible for an offer of accommodation once all information required has been received and the application has then been approved by the Trust's internal Housing Panel.

The Housing Panel will consist of at least one Head of Department (usually the Head of Housing) and one member of the Leadership Team.

The waiting list can change regularly, depending on the decisions made by Housing Panel and the personal circumstances of each applicant on the list. Applicants can move down as well as up accordingly.

The waiting list will be reviewed regularly and applicants may be asked to provide updated information. Applicants who no longer qualify will be removed and notified of the reason for this decision in writing.

8) Offers and Refusals

Applicants on the waiting list are matched to property types, as deemed suitable for their needs, rather than to specific individual properties. For example, someone unable to manage a flight of stairs will be considered for any available ground floor property or any available first floor property served by a lift.

When a property is available, an offer will be made to a suitable applicant who has the highest number of points. Where two or more suitable applicants have the same number of points, the offer will be made to the applicant who joined the waiting list first.

An applicant who refuses two reasonable offers of accommodation will be removed from the waiting list, irrespective of their needs. Applicants will not be able to re-apply for a minimum of six months following their removal from the waiting list.

9) Exceptions

Any exceptions to the application of this policy must be approved by the Housing Panel.

10) Appeals

Applicants can appeal a decision regarding their application by lodging their appeal with the Trust within 20 working days of being notified of the decision.

Appeals will be formally considered by three senior managers including at least one member of the Leadership Team, none of whom were on the panel that made the original decision. Applicants can provide additional information to the appeals panel to support their case.

11) Monitoring

The Board will receive regular reports from the Chief Executive regarding the waiting list and allocations.