Rossendale Trust
Supporting independent futures

Selection and Allocation Policy and Process

Rossendale Trust reserves the right to amend and update this Policy at any time.

Review:	This document shall be reviewed and updated when dictated by changes in legislation or other factors. Otherwise, it shall be reviewed every 2 years.
Next Review:	December 2025

Change History

Version	Date	Summary of Changes
Issue No. 2	**October 2010**	This Selection and Allocation Policy has been revised to include a process map (Figure 1) and revisions in line with the revised New Tenant Assessment
Issue No. 3	**July 2014**	Reviewed and amended.
Issue No. 4	**July 2016**	Reviewed and re-issued with minor amendments.
Issue No. 5	**July 2018**	Reviewed and re-issued with generally minor amendments, including reference to the Trust's developing role as an accommodation provider.
Issue No. 6	**October 2021**	Reviewed and amendments to format
Issue No. 7	**December 2023**	Reviewed with amendments to the Trust vision and mission statements. Additions to the review process to incorporate Digital Care Records on PASS and current tenants moving within Trust properties.

Contents

1. Scope and Purpose

This document presents the policy and the process for the selection and allocation of tenancies to people who will live in accommodation receiving care and support from the Rossendale Trust. The process described herein may be modified: for example, different accommodation providers could require a greater level of involvement in the allocation process than is described here.

This policy relates directly to the Trust's vision and mission statements: *'Supporting Independent Futures' & 'Empowering people with disabilities to live with choice and ownership'* and is central to the provision of an **effective** and **responsive** service.

2. Introduction

Rossendale Trust provides care and support to people with learning and physical disabilities. The Trust also operates as an accommodation provider to some of the tenants. This service is separate from the care service, administered as a discrete part of the Trust.

The Trust believes that a fair, robust selection, and allocation process is central to both the creation of successful and sustainable tenancies, and to the well-being of the tenants themselves. The process must be inclusive and transparent.

This policy describes how the Trust handles referrals of prospective tenants to ensure that the best interests of both existing tenants and the prospective tenant are met. The process will ensure that all parties are satisfied that the Trust is able to meet the needs of a new tenant. The selection & allocation process is organized and planned to give every new tenant the best possible support from the Trust.

The Trust also recognises the potentially life-changing nature of the decision being taken by those involved. Such decisions require a person-centred approach, and no single process can suit all individuals. Therefore, flexibility and adaptation to meet needs will always be essential.

3. Policy

It is the policy of Rossendale Trust to:

- Operate a robust process for responding to enquiries and for the selection of tenants and the allocation of accommodation, dealing with enquiries promptly.

- Maintain an effective Register of Interest (RoI), being a list of those who have expressed a strong interest in taking up a Supported Living tenancy with care and support delivered by the Rossendale Trust.
- Inform and liaise with the local authority at an early stage in responding to and processing applications, both for the RoI and for vacancies as they arise.
- Ensure that the relevant local authority social work team are aware of the individuals whose names are on the RoI.
- Liaise with the relevant accommodation provider as appropriate.
- Recognise that selection & allocation is a joint process and ensure that the prospective tenant has the information for them to make an informed choice.
- Assess each applicant's needs, using the Tenant Pre-Admission Assessment Form on PASS, working closely with families, social workers, and others, to ensure that the assessment process is effective and inclusive.
- Make an informed decision on the allocation of any vacancy, based on the needs and aspirations of the individual applicant, confident that their needs and aspirations can be met by the Trust.
- Involve existing tenants in the selection process, either directly or through advocates/representatives, particularly those with whom the prospective tenant will share accommodation.
- Ensure that the Tenancy Agreement and relevant sections of the Service Level Agreement are explained appropriately and are acceptable to the prospective tenant, either directly or with the support of an advocate/representative.
- Ensure that the prospective tenant, directly or with the support of an advocate/representative:
    - Understands the partnership between the tenant, Rossendale Trust as the care & support provider and the accommodation provider.
    - Understands the extent and limitations of care and support that the Trust is able to provide.
    - Understands the terms of the 'contract' between the tenant and the Trust as a care provider.
- Ensure that a joint agreement between the tenant, the accommodation provider and the Trust is reached and documented in a timely manner.

4. Selection and Allocation Process

4.1 Referrals and enquiries

Referrals and enquiries may come from a number of sources including:

- A self-referral by the prospective tenant.
- A parent or family representative.
- The Trust's Register of Interest.

- A local authority Social Services dept.
- Advocacy service.

The first stage in a new enquiry will often be an informal conversation with some (or all) of: the prospective tenant; his or her family or relatives; a social worker; other appropriate people e.g., an advocate. The purpose of this discussion will be to establish a broad picture of the prospective tenant's needs, discuss the allocation process, and explain the Register of Interest. This conversation will be documented.

4.2 Register of Interest

If the enquiry is general i.e., not related to a specific vacancy, the outcome may be to add the person to the Register of Interest. As stated above, the RoI is a list of individuals who have expressed a strong interest (either themselves or via their families, relatives, or an advocate) in being considered for any suitable vacancies which may occur in accommodation where care and support is delivered by the Rossendale Trust. It can be that the person will not be seeking a tenancy until the future e.g., when a course at a college has been completed.

The Register of Interest is maintained and updated by the **Family Liaison Officer**, who will also chair and convene an 'allocation team' to oversee and progress each allocation. This team will usually include the Head of Supported Living and the relevant Operations Manager from the site at which the vacancy exists.

4.3 Short listing.

When a vacancy occurs in the Trust, or when the opening of a new service creates vacancies, the Family Liaison Officer will consult with an allocation team in order to short list potential candidates from the various sources outlined at 4.1 above. Typically, there will be two people chosen by that team for the short list for any one vacancy, and this choice will be based upon the assessments which will have already been carried out and filed by the Family Liaison Officer.

Those on the short list, i.e. the potential tenant and/or their relatives / representative will be asked if they wish to be considered at that time for the vacancy.

Once two candidates have expressed their wish to be considered, the process is carried forward by all relevant people: the potential tenant and support; the Family Liaison Officer, the Operations Manager and staff team of the site; social workers and any other relevant external professionals.

4.4 Information, visits, assessments, consultation and funding

Application Information

Information for applicants, including the Statement of Purpose, Tenant's Guide and other relevant information will be sent to the prospective tenant and their relative / representative.

Assessment

A prospective tenant's needs will be individually assessed, initially by sending the RT New Tenant Assessment form to the family/representative. This form is intended to give a broad picture of the person's needs, so that an initial judgement can be made about whether or not the Trust is able to meet the person's needs. It is not a comprehensive assessment of the person's needs. That information and any other information gathered at additional assessments carried out by the Family Liaison Officer and/or Operations Manager will be inputted onto the PASS system using the Tenant Pre-Tenant Assessment form.

If appropriate, an appointment will be arranged to visit the applicant in their present situation by the Operations Manager or the Family Liaison Officer.

All assessments will be conducted in a friendly and constructive manner, recognising that it is important to alleviate, and resolve where possible, any anxieties the prospective tenant and their families might have.

Rossendale Trust tenants are reviewed on an annual basis or when support needs change. If a tenants needs have changed, they will have a thorough assessment of needs involving the relevant people, such as a social worker, family/advocate, and support staff. They might like to be considered for a vacancy elsewhere within the Trust should their accommodation needs change too. It is important to discuss alternative accommodation within the Trust as a first option and ensure that any decisions made are done so in the best interests of the tenants changing needs to ensure it is the right decision for all involved, including existing tenants within the property where the vacancy is.

Social Services or other Assessment

Meeting the prospective tenant's care & support needs is at the centre of a successful and sustainable tenancy. The Trust will always seek to compile the most complete assessment of the person's needs prior to making any allocation decision.
Copies of any existing assessments of the applicant will be requested (e.g. social worker assessments). Details of the applicant's medical care and social needs, their mental state and any behaviour which could affect the well being of the individual or other tenants will typically be included in assessment.

The findings from meetings, visits and assessments will form the basis of the decision made by the Allocation team regarding the applicant's suitability, and Rossendale Trust's ability to meet the identified needs.

If the initial assessment shows that Rossendale Trust can meet the applicant's needs, the applicant or relatives/representative will be invited to view the accommodation and decide whether they wish to pursue the option of this particular tenancy. If for any reason the prospective tenant is unable to attend, the applicant's representative or advocate will be invited to undertake the visit.

It is recognised that the management of expectation may be a significant factor at this stage of the process. As an example, it may be agreed that until a decision has been taken, the prospective tenant is not informed of the possibility of a tenancy. If this is the agreed approach, it will be fully documented.

Introductory visits

The Trust will endeavour to give the prospective tenant as full and honest an impression of the accommodation and the support as possible, in order for them and their representatives to make their own informed choices.

Part of this will include an invitation to an introductory visit during which time they will have the opportunity to meet and talk with appropriate staff, and to speak with other tenants. This will involve viewing the accommodation, including the room which would be allocated to them. This gives an opportunity to discuss how the Trust can meet their requirements and discuss other activities and services the Trust can provide.

Not least it will also give an opportunity for existing tenants (and support staff) to meet the prospective tenant and subsequently give feedback on their thoughts on the selection process.

Consultation with existing tenants

It is important that existing tenants, particularly those with whom accommodation is to be shared, are consulted as far as possible and their views are taken into account.

Similarly, consultation with the relevant Local Authority (if they were not the source of the initial referral), and the accommodation provider will commence at an early stage.

Funding

The level of care fees (personal budget) is dependent on each applicant's needs. The personal budget must be formally agreed prior to the offer of a tenancy in an apartment or house receiving care and support from the Rossendale Trust. Once the funding and tenancy have been agreed, usually, a 6-week review will occur attended by the Operations Manager and /or Group Leader, the tenant, family member(s) / advocate, social worker, Family Liaison Officer and key worker (if assigned) to agree if the funding is to remain the same.

Decision to offer tenancy

Following the assessment, introductory visit, and consultations with existing tenants and the prospective new tenant, a decision will be made whether to offer a tenancy. The Trust reserves the right to make such any offer conditional.

4.5 Tenancy offer and support planning

Tenancy offer

If a suitable vacancy exists, the applicant may be offered accommodation at once. If not, they will be accepted onto the Register of Interest and informed whenever a suitable vacancy arises within the Trust.

Should a tenancy be offered, the Trust will forward the following to the new tenant, relatives / representatives.

- Tenancy offer
- Suggested tenancy commencement date
- Service level Agreement (SLA)
- Supported Tenancy Agreement (STA) – this will need to be signed
- Support Provider Contract (where applicable).

Support planning

The Trust will ensure that adequate arrangements are planned in order to make the arrival of a new tenant as pleasant and trouble-free as possible. The Trust will also ensure that a support plan is produced and will take all reasonable steps to facilitate a comfortable settling-in period.

The following will be in place prior to arrival:

- Support Plan
- Risk Assessments (based upon assessment of needs)
- Basic Actions on PASS to ensure the new tenants routine is maintained

Arrival

The Trust provides all tenants with a Guide and other information (prior to arrival where possible) which contains information about the Trust and the accommodation, together with the date/time expected, and the person to contact upon arrival.

To ensure that the information has arrived safely, and is understood, the Operations Manager will confirm these arrival arrangements, preferably by phone, no later than 48 hours before arrival, by contacting the new tenant or their representative directly.

All staff on duty on the day and at the time of arrival will be informed of the expected arrival of a new tenant, together with essential information, such as age, sex, preferred means of address and any medication required will be handed over and added to their records on the PASS system.

All new tenants will be encouraged to bring important possessions with them.

Induction

The Operations Manager and the Group Leaders will take responsibility for the induction of the new tenant, including introducing staff, other tenants and establishing a sound basis for the new tenant's home.