

SHARED OWNERSHIP/TENANCY CHECKLIST

Name of the person

Date of Form completion

Completed by;

Address of proposed property

Price of Property £

Client contribution/deposit £

CRITERIA FOR CONSIDERATION

	Yes	No/Query
The person must be on middle/high rate DLA		
The person on the electoral role or have ID		
The person must be over 18		
The person must have housing need that is unable to be met by local housing department		
The person (or family or other funds) has approx. £15-25,000 for contribution to purchase and fees		
The person must have a clear credit rating, not have any judgements/court orders in relation to debts, been bankrupt and not have had borrowing or rental debts in the past		
The person must not have been to prison		
The person must have a learning disability, mental health needs or physical disability		
The person must have capacity to manage their property and affairs or someone acting as a Court Appointed Deputy etc. to act on their behalf		
The person must need 1-3 bedrooms only		
The person must not have the ability to gain employment replacing their benefits in the future		

STEPS

1. CAPACITY & CONSENT

IT IS VITAL THAT ANY CAPACITY ISSUES ARE RESOLVED AS SOON AS POSSIBLE. IF A PERSON LACKS CAPACITY AND REQUIRES COURT OF PROTECTION THIS CAN TAKE UP TO 20 WEEKS.

Requirement	Reason	COMPLETED
Establish if person has capacity to understand and agree to a tenancy & a mortgage. If not someone must be appointed to legally act on their behalf (i.e. Deputyship for Property & Affairs)? Families should be the first to ask to take on this role and if not able then the local authority.	Person themselves or person with legal responsibility needs to be able to understand and agree rental and mortgage documents. This should be started asap as process for Deputyship can take up to 20 weeks.	
Ensure person has access to independent financial advice and/or advocacy/family to help?	To ensure that decisions made are in the person's best interests where necessary	

2. SERVICE DESIGN

Requirement	Reason	COMPLETED
Ensure a service design has been completed with and agreed by the person/their family that details housing specification, support team & recruitment specification at a minimum	To ensure that the whole service is one that is based on what the person wants and needs and includes the housing and support requirements to ensure the person gets a good life.	
Ensure housing specification informs housing choices	To ensure house meets the agreed needs of the person	
Ensure team support person specification is used to recruit support staff	To ensure the team are matched to the person and recruitment is person specific	

3. APPLICATIONS

SHARED OWNERSHIP PROPERTIES CAN BE 2 BEDDED OR 3 BEDDED IF THE NEEDS OF THE PERSON DICATE A NEED (I.E. SUPPORT STAFF SLEEPING IN AT NIGHT, NEED FOR AN EXTRA ROOM FOR SPECIFIC THERAUPERUTIC NEED) HOWEVER IF OVER 3 BEDDED HOUSING BENEFIT MAY NOT COVER THE FULL AMOUNT AND THIS NEEDS TO BE CONSIDERED IN THE PERSON'S LONG TERM BUDGET.

Requirement	Reason	COMPLETED
Complete application for local Social Housing register.	The person is required to be registered for social housing to enable them to bid for social housing and to log their housing needs for any future developments.	
Complete application to [HOUSING PROVIDER]	To ensure criteria is met and an allocation can be secured.	
Complete application to My Safe Home www.mysafehome.info	To ensure criteria is met and a mortgage application can be agreed by lender.	
If the person needs bespoke housing that cannot be provided through social housing a letter from the Housing Department the person is going to live in is needed for any shared ownership application.	For Shared Ownership the mortgage lenders will only lend to people that cannot be housed through social housing.	
Get professional statements from care coordinator/social worker etc. to complete application	A requirement of the application process.	

4. SUPPORT PACKAGE

A SUPPORT PACKAGE (IF THE PERSON REQUIRES SUPPORT) MUST BE IN PLACE (IN PRINCIPLE) FOR A SHARED OWNERSHIP APPLICATION TO BE CONSIDERED.

Requirement	Reason	COMPLETED
Ensure (if required) a support provider is commissioned using the service design information to inform the tender	This has to be in place (or agreed) for a shared ownership application to be processed. It also gives time for shared planning.	

Consider using a Personal health budget/personal budget for funding the package	This will give the person the best possible control and flexibility over their support	
Use team specification for advertising for staff	To ensure a team that matches the person's needs.	
Involve person/family in advertising, interviewing and recruiting team	To make the process person-centred.	
Consider use of provider staff contracts are third party with person/family included. (Not all providers are able to do this)	To ensure person/family have control over recruitment process.	
Once a support provider is commissioned ensure a detailed working policy is completed with them and people that know them well to detail how any support will be provided.	To ensure the team are supported in ways that are agreed with those that know them well and supported in ways that work positively with the person.	

5. LEGAL

Requirement	Reason	COMPLETED
Ensure person has a solicitor to act on their behalf during process	So the person's best interests are served in process	
Ensure solicitor draws up a Will as part of process	So that the person's wishes are respected in regard to disposal of property after their death	
Ensure Court of Protection Deputy (if required) is kept informed of progress throughout process	To ensure the process is in the person's best interests	

6. HOUSING & ADAPTATIONS

Requirement	Reason	COMPLETED
Confirm budget with [HOUSING PROVIDER]	So that the house is within the person's budget.	
Use housing specification to find a house (keeping within	So that the house meets the needs of the person.	

budget) when [HOUSING PROVIDER] & My Safe Home have agreed the application. Include person and family in house search.		
Ensure any adaptations required come within the budget allocated.(3 quotes to be supplied)	So that the adaptations come within the budget of the person	
Liaise with [HOUSING PROVIDER] when house identified and decide who will make an offer. Once offer made inform [HOUSING PROVIDER] who will then progress with offer.	So that the purchase process goes smoothly	
Liaise regularly with [HOUSING PROVIDER] to ensure there are no hitches that are holding things up i.e. survey's taking a long time.	So that the purchase process goes smoothly	

7. COMMUNITY SERVICES

Requirement	Reason	COMPLETED
If appropriate inform police of the arrival of person and together (if necessary put together a police passport). Ensure the Police Community Support Officer for the local area is aware of the person, their needs etc. Ensure their contact details are in the support plan.	So that the person is well supported by all Agencies.	
Ensure there is an Acute Hospital Passport in place for the person on hospital system. This should be done with the person, community team and LD liaison nurse.	So that the person is well supported by all Agencies.	
Ensure a Health Action Plan is in place for the person. This assumes registration with a local GP and that an annual	So that the person is well supported by all Agencies.	

health check has taken place.		
Ensure the person (if not already) is known to the local learning disability health or social care team and any necessary referrals are made BEFORE the person moves.	So the person is well supported by all Agencies.	

8. ONCE THE HOUSE IS NEARING PURCHASE

Requirement	Who will do it?	COMPLETED
Agree with provider timescales for staff to start to work with person and develop a transition plan.		
Ensure team spend time mapping the local community and getting to know local key people and groups		
Buy bus passes if necessary (these may be free in some areas) or make arrangements for a Motability car etc.		
Decide how to inform neighbours about person moving in (this should be in a positive way and not leave neighbours with any reasons to be worried or complain)		
Complete application for Benefits Agency loans if required (they have no capital) and apply		
Write to all electric, gas and utilities companies to set up services.		
Decide what furniture is required with the person and ensure they are included in buying it.		
Discuss with person how they want to decorate house and		

what needs to be done before arrival.		
Collect the Keys to the house from the vendor and ensure there is an agreed key holding procedure if required.		
Ensure all gas and electric appliances are tested and checks are put in place for the person to do when they arrive.		
Ensure house Insurance is arranged.		