

Policy No. 35

Allocation of Almshouse Accommodation Policy

Policy details

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PART 1: THE POLICY

1. Introduction and purpose

1.1 Shrewsbury Drapers Holy Cross Limited (SDHC) is a company limited by guarantee (07000798) and a registered charity (1132671-1). It acts as the corporate trustee of Shrewsbury Drapers Company Charity, an almshouse charity of long and historic standing whose origins reach back to 1444. Shrewsbury Drapers were granted Royal Charter by King Edward IV in 1462.

1.2 SDHC is a Registered Provider of Social Housing registered with the Regulator of Social Housing. As such, SDHC is subject to both the Regulator's economic standards and its consumer standards.

1.3 This Policy sets out how SDHC allocates its almshouse accommodation. Its purpose is to:

- (a) ensure every allocation decision is made in accordance with SDHC's charitable objects, the 2019 Charity Commission Scheme, and the 2022 Articles of Association;
- (b) ensure every allocation decision is fair, transparent, non-discriminatory, and defensible, as required by the Regulator of Social Housing's Tenancy Standard (April 2024);
- (c) reduce reliance on qualitative individual judgement by adopting a structured, scored assessment tool that applies consistently to every application and produces auditable outcomes;
- (d) ensure every applicant understands the criteria, the process, and their right to appeal an unsuccessful decision;
- (e) ensure SDHC meets the expectations set out in the Almshouse Association's Standards of Almshouse Management (SAM) 2025.

1.4 This Policy applies to the allocation of vacant almshouse accommodation at all SDHC sites, currently: Drapers Place, Fairford Place, the Hospital of St Giles, the Hospital of the Holy Cross, and the Newport almshouse.

1.5 This Policy supersedes the "Considerations for Selection of Residents" document dated May 2016 and revised 5 January 2023.

2. Regulatory and governing framework

2.1 SDHC operates within a regulatory and governance framework comprising the following instruments, listed in order of precedence. Where any tension arises between them, the higher-ranked document prevails:

Rank	Instrument	Relevance to allocations
1	Charities Act 2011 and underlying law of charitable trusts	Establishes trustees' fiduciary duties to beneficiaries and the duty to act exclusively within the charity's objects.
2	The 2014 Governing Document (trusts of the functional permanent endowment) as altered by the 2019 Charity Commission Scheme	Defines the area of benefit: Shrewsbury and the counties of Shropshire and Powys.

Rank	Instrument	Relevance to allocations
3	Memorandum and Articles of Association of SDHC (2022)	Defines the beneficiary class (clause 3(a)): needy, elderly persons of good character, ordinarily resident in Shrewsbury, Shropshire or Powys or with a strong local connection.
4	Equality Act 2010	Imposes non-discrimination duties; permits restriction to elderly as justified by charitable objects.
5	Immigration Act 2014, Right to Rent	Requires documentary verification of immigration status before granting a right to occupy.
6	UK GDPR and the Data Protection Act 2018	Governs the lawful basis for processing applicant personal data.
7	Regulator of Social Housing, Consumer Standards 2024	In particular the Tenancy Standard (fair allocation; accessible appeals) and the Transparency, Influence and Accountability Standard (published, accessible policies).
8	Housing Ombudsman, statutory Complaint Handling Code 2024	Defines the minimum standards for SDHC's complaints process, including timescales, two-stage structure, and annual self-assessment.
9	Charity Commission operational guidance on almshouses	Expectation that accommodation is offered to those most in need and not to applicants whose resources are substantial and who could afford suitable alternative local accommodation.
10	Almshouse Association, Standards of Almshouse Management (SAM) 2025	Non-binding best-practice guidance, endorsed by the Charity Commission, referenced throughout this Policy.

3. Statement of principles

3.1 Every allocation decision is made:

- (a) In accordance with the charitable objects of Shrewsbury Drapers Company Charity and the area of benefit set by the 2019 Scheme.
- (b) By the Committee, acting under delegated authority from the Board of Shrewsbury Drapers Holy Cross Limited. The Board's overall responsibility for appointments (SAM 10.4.1) is preserved through regular Committee reports to Board and the Board's approval of this Policy.
- (c) On the basis of structured scoring (Appendix B) applied consistently to every eligible applicant, not on the basis of individual qualitative impression.
- (d) With all conflicts of interest declared and managed (SAM 10.13.1(c); Articles 39 and 40).
- (e) Free from discrimination on the grounds of a protected characteristic save for the permitted restriction to elderly persons which is expressly justified by the beneficiary class defined in the governing documents.
- (f) With contemporaneous written records sufficient to demonstrate why the appointed applicant met the criteria in preference to all other applicants (SAM 10.13.4).

3.2 An applicant's ranking within the scored assessment matrix creates a strong expectation of appointment but does not bind the Committee. The Committee retains its discretion (acting under delegated authority from the Board) to depart from the ranking where there is a clear and recorded

reason (for example, evidence from the home visit that an applicant cannot in fact safely occupy the specific property, or that an applicant would disrupt the good conduct of the almshouse or the peace and quiet of other residents, as contemplated by SAM 10.13.3). Any departure from the ranking is recorded in the Committee's minute and reported to the next Board meeting.

3.3 SDHC does not operate a waiting list. In accordance with SAM 10.5.5, it maintains a register of eligible applicants, comprising only those individuals who have submitted a fully completed application form and who have been confirmed as passing all five eligibility gates set out in Section 4. Initial expressions of interest (telephone calls, emails, drop-in enquiries) are not recorded on the register. Position on the register confers no right to be appointed; eligible applicants are scored against each vacancy as it arises and ranked under Appendix B.

3.4 SDHC is a signatory to the Armed Forces Covenant and is committed, in line with the principles of the Covenant, to ensuring that those who serve or have served in the British Armed Forces, and their families, suffer no disadvantage in their access to almshouse accommodation. The practical effect on this Policy is set out at 4.2(d) and at Component 5 of Appendix B.

4. Eligibility – The Five Gates

4.1 An applicant must pass all five eligibility gates to progress to scored assessment. Failing any gate ends the application. These gates are pass/fail and do not contribute to the scored matrix.

Gate 1: Area of benefit / local connection

4.2 An applicant satisfies Gate 1 if they either (a) are ordinarily resident in Shrewsbury, Shropshire, or Powys at the date of application, or (b) have a strong local connection with that area.

There is no single fixed legal definition of a 'strong local connection' that binds an almshouse charity. The phrase is used in clause 3(a) of SDHC's Memorandum of Association without further elaboration. SDHC's working approach is therefore to draw on the four-limb definition of local connection set out in section 199 of the Housing Act 1996, which is the standard test used in English homelessness and social housing allocation law and is the test that the government recommends local authorities and registered providers use whenever a local connection question arises. SAM 2025 does not provide a definition of its own. SDHC's approach is also informed by the practice of Shropshire Council and Powys County Council in their own allocations work, the Housing Act 1996 (as amended) and its associated guidance, and the Armed Forces Covenant.

A strong local connection could be demonstrated by one or more of the following indicators (drawn from section 199 and the related guidance, and adapted for an almshouse setting):

- (a) **Normal residence of choice:** current or past residence in the area of benefit, of the applicant's own choice. Three years' continuous residence in the last five years is generally sufficient, but the Committee may give weight to longer or shorter periods on the facts.
- (b) **Employment:** current or recent employment in the area of benefit. Service in the regular Armed Forces is not, on its own, treated as employment for this purpose, but is dealt with separately at sub-bullet (e) below.
- (c) **Family associations:** close family members (typically a parent, adult child, or sibling) who have themselves been resident in the area of benefit for a substantial period.
- (d) **Armed Forces Covenant connection:** the applicant is not currently ordinarily resident in the area only because of their (or their deceased spouse's or civil partner's) service in HM Armed Forces. SDHC's commitment under the Armed Forces Covenant means this is treated as a strong local connection in its own right.
- (e) **Special circumstances:** a residual category covering connections that are real and substantial but do not fit within 4.2(a) – (d) inclusive. Examples might include long-standing

membership of a community, voluntary, or religious organisation in the area; or a documented connection to the area through Shrewsbury Drapers Company, or another civic body. The courts have held that a local connection under this limb must be one in "real terms" (a genuine connection with the area, not merely a formal one).

These five indicators are not exhaustive and are not boxes to be ticked mechanically. They are guides to help the Committee reach a sensible, evidenced conclusion on whether a real local connection exists. An applicant who believes they have a strong local connection that does not fit any of the above is invited to write to SDHC with the details so that the Committee can consider their case (see also the Applicant Questionnaire at Question 9, below).

Gate 2: Age ("elderly")

4.3 An applicant satisfies Gate 2 if they are aged 60 or over at the date of application. This minimum age is adopted in the exercise of the permitted Equality Act 2010 restriction to elderly persons justified by the charitable objects at clause 3(a) of the Memorandum of Association.

4.4 For couples (SAM 10.3.7), both individuals must satisfy the age gate in their own right.

Gate 3: Need (capital and general)

4.5 An applicant satisfies Gate 3 if both of the following are met:

- (a) The applicant's total capital (savings, investments, and realisable assets other than a principal residence that will be sold in connection with moving to the almshouse) does not exceed the DWP upper capital limit for means-tested Housing Benefit / Pension Credit at the date of application (currently £16,000 in the 2025/26 tax year; this figure updates automatically in line with the DWP rate);
- (b) The applicant would have difficulty in securing and maintaining suitable alternative accommodation in the local area, applying the Charity Commission's operational test that an almshouse should not be offered where the applicant's resources are substantial and there is alternative local accommodation they can afford that meets their needs.

4.6 Where an applicant owns a principal residence that they propose to sell in connection with moving to the almshouse, the net anticipated proceeds (after reasonable selling costs) are treated as capital for the purposes of 4.5 and assessed against the criteria in SAM 10.10.3.

4.7 The Board may, in exceptional circumstances, waive the upper capital limit where it is satisfied that the applicant is nevertheless in need and that no other qualified applicant would be prejudiced. Any such waiver must be minuted with the reason.

Gate 4: Right to reside and good character

4.8 An applicant satisfies Gate 4 if both of the following are met:

- (a) They produce documentation sufficient to satisfy a right-to-rent check under the Immigration Act 2014, confirming that they have the right to enter or remain in the United Kingdom.
- (b) They are of good character, in the sense that there is no evidence before the Board that would lead a reasonable person to conclude that appointment would disrupt the good conduct of the almshouse or the peace and quiet of other residents. The Board is not generally required to carry out Disclosure and Barring Service checks, and will not ask about unspent criminal convictions or sex offender status unless the circumstances of a particular application make it necessary (SAM 10.8.4).

Gate 5: Ability to live independently

4.9 An applicant satisfies Gate 5 if they are able, at the date of appointment and for the foreseeable future thereafter, to live independently in an almshouse, with such aids, adaptations, or third-party support packages as are reasonably available. The operational definition of "independent living" is set out in full at Section 6 of this Policy.

4.10 This gate reflects the fundamental nature of an almshouse: SDHC's accommodation is designed for those who can live independently, and SDHC does not provide and is not registered to provide personal care. An applicant who, even with reasonable adjustments, would require care of a nature that the almshouse cannot accommodate fails Gate 5, even if they are otherwise in considerable need. This is not a discrimination judgement; it is a question of fit between the applicant's circumstances and what an almshouse offers.

4.11 The application form includes specific factual questions on the applicant's current independent-living capabilities. Where the answers, the home visit, or other evidence raise a specific concern, the Committee may seek a GP report (Section 6.3) before deciding whether this gate is met.

Honesty and accuracy of information provided

4.12 All information provided by an applicant on the Application Form and the Applicant Questionnaire (Appendix B) must be truthful and accurate. Where the Committee is satisfied, on the balance of probabilities, that an applicant has knowingly provided false or materially misleading information in order to inflate their score or to qualify for an almshouse for which they would not otherwise have been eligible:

- (a) Before appointment: the application will be dismissed and the applicant removed from the Register of Eligible Applicants. The applicant retains the right to appeal that decision under Appendix D.
- (b) After appointment: the matter will be considered for setting aside the appointment in accordance with SAM Section 11 and the procedures set out in the SDHC Memorandum and Articles of Association. Setting aside post-appointment requires due process and is not automatic.

4.13 The honesty requirement is communicated to applicants in plain language at three points: in the Application Form declaration; in a prominent caveat at the start of the Applicant Questionnaire; and in the Letter of Appointment. Honest disclosure of difficult circumstances (for example, a strained family situation, mental health difficulty, or modest savings) is treated entirely confidentially and never used as a basis for refusal beyond the operation of the eligibility gates and the matrix.

5. Non-discrimination and equality of opportunity

5.1 SDHC is committed to making allocations decisions without discrimination on the grounds of a protected characteristic, save only for the permitted restriction to elderly persons (Gate 2) which is expressly justified by the charitable objects of the Charity.

5.2 SDHC will make reasonable adjustments in the application process for any applicant with a disability, including (but not limited to) providing application forms in large print or alternative formats, allowing interviews to be conducted in an applicant's home, and extending deadlines where medically justified (Housing Ombudsman Complaint Handling Code 2024, paragraph 5.10).

5.3 SDHC maintains a record of reasonable adjustments agreed with applicants and residents, in line with the Ombudsman's Code, and keeps the record under active review.

5.4 Any applicant who believes they have been subject to discrimination or that a reasonable adjustment has been unreasonably refused may appeal under Appendix D.

6. The independent-living threshold

6.1 Gate 5 of the eligibility test (Section 4.9) requires the applicant to be able to live independently. SDHC almshouse accommodation is designed for applicants who can do so. SDHC is not registered to provide personal care under the Care Quality Commission and does not provide care services to residents (SAM 10.11.3). This Section sets out the operational definition that the Committee applies (under delegated authority from the Board) when deciding whether Gate 5 is met.

6.2 An applicant is considered able to live independently if, at the date of appointment, they are able (with such aids, adaptations, or third-party support packages as are reasonably available to them) to:

- (a) Carry out the essential activities of daily living, personal hygiene, dressing, eating and drinking, moving around their own accommodation, without requiring round-the-clock care;
- (b) Manage their own medication (including with a commercial or community pharmacy delivery service);
- (c) Summon emergency assistance when needed (whether via a personal mobile phone, landline, personal alarm pendant, or other means available to the applicant);
- (d) Understand and comply with the regulations in the Letter of Appointment and the Residents' Handbook, including the rules applicable to communal areas and to relations with other residents.

6.3 Where there is specific concern about an applicant's ability to live independently, the Committee may request a report from the applicant's GP, with the applicant's written consent (SAM 10.11.7). SDHC will pay any reasonable fee charged for the report.

6.4 The threshold for when an existing resident is considered no longer able to live independently is addressed in the Residents' Handbook and is governed by SAM Section 11. This Policy does not address those circumstances.

7. Matching the applicant to the specific vacancy

7.1 SDHC's almshouses differ in their physical characteristics. Some have ground-floor access, some do not. Some have lifts, some do not. Some have low thresholds, some have steps; some have ground-floor toilets and bedrooms, some have facilities only on upper floors. The needs of an individual applicant must therefore be assessed not only against the general independent-living test (Gate 5, Section 6) but against the specific physical characteristics of the property which is vacant.

7.2 This is a property-specific suitability test, distinct from Gate 5. An applicant who passes Gate 5 in the abstract (they can live independently) may nonetheless be unsuitable for a particular property if its physical features would prevent or seriously compromise that independence. The test applies regardless of how the applicant has scored on the Matrix.

7.3 The matters that the Committee will consider include, but are not limited to:

- (a) Stairs and access. Where the only access to the property is by stairs, an applicant who cannot independently manage stairs is unlikely to be suitable. The presence of a lift does not by itself resolve this, because residents must be able to evacuate via stairs in the event of fire or lift failure.
- (b) Internal layout. Where essential rooms (bathroom, principal bedroom) are on different floors, an applicant with significant mobility limitations may be unsuitable.
- (c) Door widths and turning circles. Where an applicant uses a wheelchair, the property must accommodate it.
- (d) Distance from the front door to the parking area, the main road, or local shops or services. An applicant whose mobility is limited may be unsuitable for a property with a long unpaved approach.

- (e) Adaptations already in place, and the practicality of further adaptations within the constraints of the building (which may be listed).

7.4 This property-suitability test supersedes the Scored Assessment Matrix. Where the Committee concludes, on the evidence from the Application Form (Part 1), the home visit, and the physical features of the vacancy, that an applicant cannot safely or independently occupy the specific property, that applicant is not appointed to that property, even if they are the highest-scoring eligible applicant for the vacancy. In such a case the Committee progresses the next-highest-scoring eligible applicant for the same property, and the unsuitable applicant remains on the Register of Eligible Applicants for consideration against future vacancies for which the physical features may be suitable.

7.5 The property-suitability test is applied on a case-by-case basis. The PCM and the Committee consider the specific physical attributes of the vacant property at the time the vacancy is being filled, and assess these against the applicant's circumstances as recorded in the Application Form and verified during the home visit. SDHC does not maintain a separate written profile for each property; the assessment is informed by the working knowledge of the PCM and Committee members, supplemented by a fresh inspection of the property at the start of any void.

7.6 Decisions to disqualify an applicant from a specific vacancy under this Section must be recorded in writing with reasons (the property feature or features relied on, and the applicant's relevant circumstance). The applicant is informed in writing, advised of their continued place on the Register, and reminded of the appeals process at Appendix D.

8. Roles and responsibilities

Role	Responsibility
Board of SDHC	Has overall and non-delegable responsibility for appointments to almshouses (SAM 10.4.1). To enable timely allocations, the Board delegates the operational appointment decision for individual vacancies to the Committee, retaining oversight through regular Committee reports to Board. The Board approves and reviews this Policy.
Committee	Acting under delegated authority from the Board, the Committee takes the appointment decision for each vacancy on the recommendation prepared by the Property and Compliance Manager and the home visit team. Reports each appointment to the next Board meeting. Considers any appeal at first stage.
Property and Compliance Manager (PCM)	Operational lead for the entire allocations process. Manages the void; co-ordinates advertising and applications; applies the five eligibility gates; calculates the Scored Assessment Matrix; maintains the Register of Eligible Applicants; participates in the home visit; assesses the effectiveness of this Policy on an ongoing basis.
Company Secretary	Issues formal communications on behalf of the Committee and the Board (offer letters, appeal acknowledgements), maintains the application records and retention schedule, and supports the Committee and Board in the discharge of their statutory and regulatory obligations.
Home visit team	Two or three SDHC representatives who carry out the combined home visit and interview on the highest-scoring applicant. The team comprises at least one (and preferably two) Committee members, together with the PCM where available. The team prepares the Home Visit Report (Appendix C) which forms the principal evidence base for the Committee's appointment decision.

Role	Responsibility
Reviewing Committee member (for scoring)	Any single Committee member, acting promptly and outside formal Committee meetings, ratifies the score calculated by the PCM so that the home visit can be arranged without delay. The full Committee reviews scoring outcomes at its next meeting.

9. Information, transparency and publication

9.1 SDHC publishes the following information relating to allocations on the SDHC website, in line with the Transparency, Influence and Accountability Standard 2.3.4 and paragraph 2.3.5:

- (a) This Allocations Policy in full, including all appendices except Appendix B Part 3 (the Trustee Scoring Sheet), which is for internal use only and is not published. The published version therefore includes the Application Form (Appendix B Part 1), the Applicant Questionnaire (Appendix B Part 2), the Allocations Procedure with flow diagram (Appendix A), the Home Visit Report Form (Appendix C), and the Appeals Process (Appendix D);
- (b) The eligibility criteria for applicants;
- (c) Current vacancies, if any, and the closing date for applications;
- (d) The SDHC Complaints Policy (which sets out the complaints handling arrangements and signposting required by the Housing Ombudsman's statutory Complaint Handling Code 2024).

9.2 The reason Appendix B Part 3 is withheld from publication is to prevent applicants from gaming their answers to the Applicant Questionnaire by reference to the points value of each option. This withholding is consistent with the Transparency, Influence and Accountability Standard 2.3.4: the Standard requires policies to be "fair, reasonable, accessible and transparent" but does not require disclosure of internal scoring keys, and indeed the integrity of the assessment process depends on Part 3 not being public. Applicants who are unsuccessful and want to understand the basis on which they were not appointed will be told in plain language under Step 11 of the procedure (and, on appeal, the Review Panel will see the full Part 3 scoring of the appellant).

10. Co-operation with local authorities and nominations

10.1 SDHC co-operates with the strategic housing functions of Shropshire Council, Powys County Council, and other relevant authorities within the area of benefit, in accordance with Tenancy Standard 2.1.1. The Tenancy Standard requires co-operation but does not prescribe particular mechanisms; it is for the registered provider to determine how that co-operation is best given. At the date of this Policy, SDHC has no formal nomination agreement in place and has no obligation to enter into one.

10.2 SDHC's co-operation includes:

- (a) Maintaining open lines of communication with the relevant local authority housing options / strategic housing teams, so that the authority is aware of SDHC's existence, its eligibility criteria, and how an applicant can apply;
- (b) Accepting applications from individuals referred by those teams, on the same terms and through the same process as any other applicant;
- (c) Considering, at the request of a local authority, whether to notify it of specific vacancies as they arise, although routine vacancy notification is not part of SDHC's standard practice given the volume and the small scale of the charity;

- (d) Where a nomination agreement is entered into in future, observing the nominee's right to be put forward alongside any requirement that they meet SDHC's eligibility criteria and complete the usual due diligence (SAM 10.6).

10.3 Any future nomination agreement must be approved by the Board, reflected in this Policy on review, and comply with SAM 10.6.3. Nomination does not displace the Board's non-delegable duty to appoint residents.

11. Data protection

11.1 SDHC processes applicant personal data for the purposes of assessing eligibility and suitability under this Policy. The lawful bases are:

- (a) Legitimate interests (UK GDPR Article 6(1)(f)), pursuing SDHC's charitable purpose of allocating almshouses to those most in need;
- (b) Legal obligation (UK GDPR Article 6(1)(c)), for right-to-rent checks, safeguarding, and any statutory reporting obligation;
- (c) For special category data (including health data and GP reports): substantial public interest (UK GDPR Article 9(2)(g)) where appropriate; otherwise explicit consent (Article 9(2)(a)).

11.2 Retention periods:

- (a) Applications from successful applicants: retained for the duration of residence and for six years thereafter.
- (b) Applications from unsuccessful applicants: retained for 12 months from the date of the appointment decision (this preserves the appeal window and a reasonable review period), then destroyed securely. This is consistent with SAM 10.8.2.
- (c) Expressions of interest held on the register: retained for two years from the date of registration unless renewed by the registrant.

11.3 Applicants have the rights of access, rectification, erasure (where applicable), and to object to processing, under the UK GDPR. Requests should be directed to the Company Secretary.

11.4 Further detail is set out in the SDHC Privacy Notice.

12. Appeals and complaints

12.1 An appeal challenges a specific allocation decision. A complaint challenges the standard of service, actions, or lack of action by SDHC. The two routes are separate but not mutually exclusive.

12.2 An unsuccessful applicant has the right to appeal the decision under the process set out in Appendix D. The appeals process is fair, reasonable, simple and accessible (as required by Tenancy Standard 2.1.5).

12.3 Any applicant or resident who is dissatisfied with the standard of service received from SDHC may raise a complaint under the SDHC Complaints Policy, which is published separately and which is compliant with the Housing Ombudsman's statutory Complaint Handling Code 2024. The Complaints Policy sets out the procedure, timescales, contact points, designated officers, and arrangements for escalation to the Housing Ombudsman.

13. Monitoring, review and continuous improvement

13.1 The Committee reports to the Board at each Board meeting on: (a) the number of vacancies arising and filled in the period; (b) the number of applications received and the number that passed the five

eligibility gates; (c) the number of appeals received and their outcomes; and (d) any themes emerging from the process.

13.2 The Property and Compliance Manager assesses the effectiveness of this Policy on an ongoing basis and reports any concerns or proposed adjustments to the Committee, including: whether the scored assessment matrix is producing defensible outcomes, any anonymised equality monitoring trends, lessons from appeals or complaints, and any external developments that affect the Policy. There is no requirement for a separate written annual report; substantive findings feed into the Committee's regular reports to the Board and into the Policy review at 12.3.

13.3 This Policy is reviewed by the Board every year, or sooner if triggered by a change in the regulatory framework (for example, a revision of the Regulator's standards or of SAM), a material allocations incident, or an adverse complaint outcome at the Housing Ombudsman.

PART 2: DEFINITIONS

In this Policy, the following terms have the following meanings:

AFC	The Armed Forces Covenant, the published commitment by signatory organisations to ensuring those who serve or have served in the Armed Forces, and their families, suffer no disadvantage in their access to public and other services.
Committee	The Committee, a sub-committee of the SDHC Board.
Allocation	The process by which SDHC appoints a beneficiary to occupy a vacant almshouse.
Appointment	The formal decision of the Committee (acting under delegated authority from the Board) to issue a Letter of Appointment to a named applicant.
Applicant	A person who has submitted a complete application form in response to an advertised vacancy or following an open invitation to apply for a place on the register of eligible applicants.
Area of benefit	As defined in the 2019 Charity Commission Scheme: Shrewsbury and the counties of Shropshire and Powys.
Beneficiary	A person who qualifies under the Memorandum and Articles of Association and the underlying trusts as a person to whom SDHC may grant a licence to occupy for an almshouse.
Board	The Board of Directors of Shrewsbury Drapers Holy Cross Limited.
CHC	The Housing Ombudsman's statutory Complaint Handling Code 2024.
Governing Documents	Collectively, the 2014 Governing Document of the trusts of the functional permanent endowment as altered by the 2019 Charity Commission Scheme, and the Memorandum and Articles of Association of SDHC (2022).
Letter of Appointment	The written document issued by SDHC to an appointed applicant recording the basis of their occupation as beneficiary of the Charity, as described in SAM 10.15.
PCM	The Property and Compliance Manager is a SDHC employee with operational responsibility for the allocations process and for assessing the ongoing effectiveness of this Policy.
Register of Eligible Applicants	The record maintained by the Property and Compliance Manager of applicants who have submitted a fully completed application form and who have been confirmed as passing the five eligibility gates set out at Section 4.
Regulator	The Regulator of Social Housing.
Resident	A person appointed by the Committee (under delegated Board authority) to occupy an almshouse as a beneficiary of the Charity.

SAM	The Standards of Almshouse Management 2025 published by the Almshouse Association.
Scored Assessment Matrix	The scoring tool set out in Appendix B.
SDHC	Shrewsbury Drapers Holy Cross Limited.
Tenancy Standard	The Tenancy Standard issued by the Regulator of Social Housing, as in force on 1 April 2024.
WMC	Weekly Maintenance Contribution payable by residents, as described in SAM Section 9.

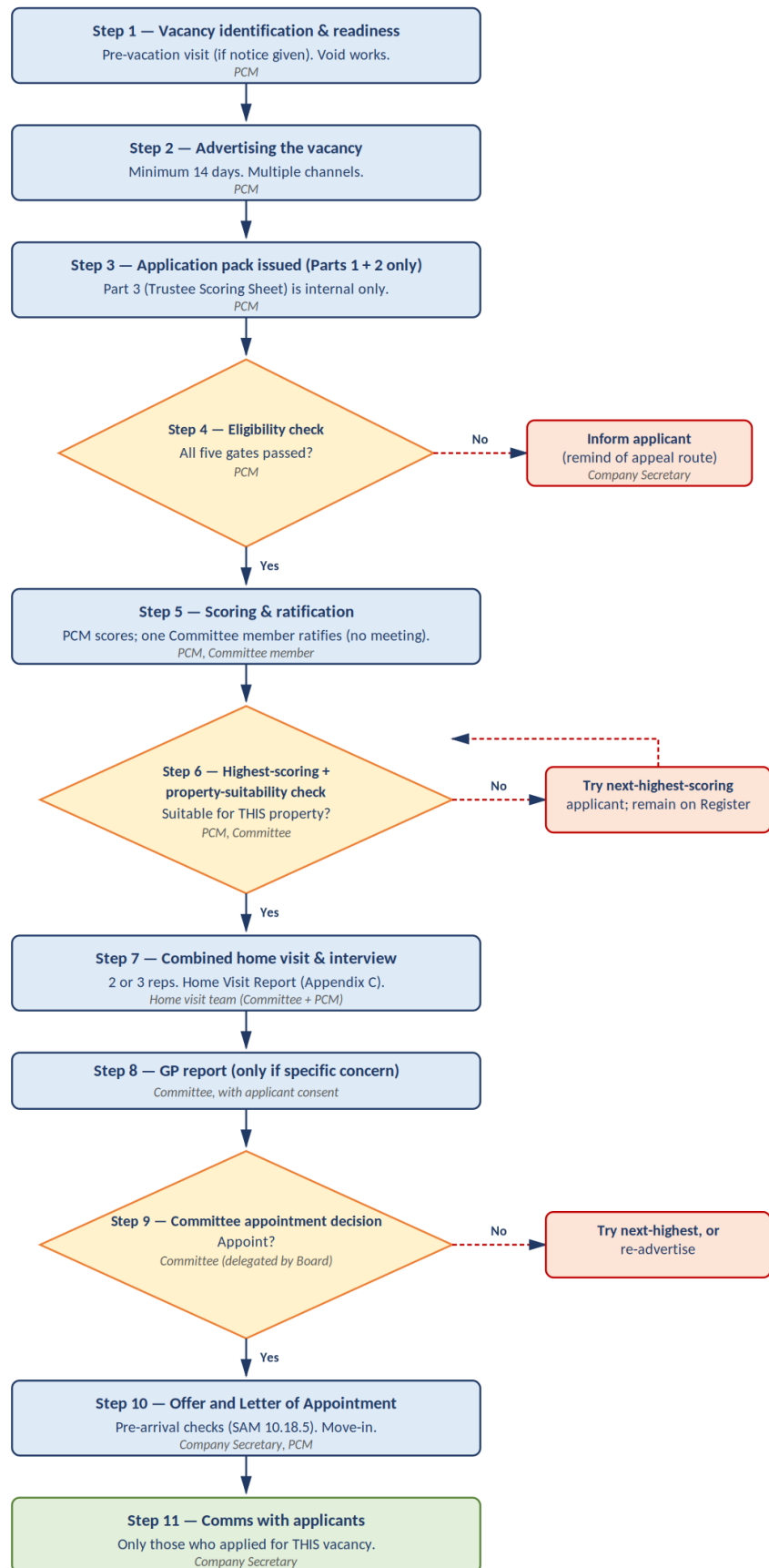
PART 3: APPENDICES

Appendix A: Allocations Procedure

This Appendix sets out the step-by-step procedure for allocating a vacant SDHC almshouse. The flow diagram on the following page summarises the procedure visually; the numbered steps below describe each stage in detail. The ordering is sequential but overlapping steps may be undertaken in parallel where that does not prejudice the fairness of the process.

SDHC Allocations Procedure

Roles in italics under each step. Yellow diamonds are decision points.



Step 1, Vacancy identification and readiness

1. A vacancy arises in one of two ways: with notice (a current resident has given notice or the licence is otherwise being brought to a planned end) or suddenly (typically the death of a resident, or unplanned end of licence). The Property and Compliance Manager (PCM) records the void start date.
2. Where the vacancy is arising with notice, the PCM conducts a pre-vacation visit during the notice period and may prepare a schedule of works for the void. No void works can begin until the current licence has ended; the pre-vacation visit and works planning are preparatory only.
3. Once the vacancy has occurred, the PCM oversees any necessary redecoration, refurbishment, and safety checks. The PCM also makes a fresh inspection of the property's physical attributes (in particular access, layout and any features bearing on the property-suitability check at Section 7 of the Policy), confirms the current Weekly Maintenance Contribution (WMC) and any service charge applicable to the property, and ensures a current Energy Performance Certificate is in place.
4. Where practicable, advertising at Step 2 may begin while void works are still in progress, provided the property is expected to be ready for occupation within a reasonable period of any anticipated offer.

Step 2, Advertising the vacancy

The vacancy is advertised for a minimum of 14 clear days before the application closing date. There is no statutory minimum advertising period for almshouse vacancies, and 14 days is considered sufficient for SDHC's purposes given the local nature of the area of benefit and the channels used. The PCM may extend the period where there is reason to believe a longer window would attract a fuller range of applicants. Vacancies are advertised through the following channels as a minimum:

- The SDHC website;
- The Almshouse Association's vacancies page (free to members) at almshouses.org;
- Local noticeboards at the relevant almshouse site;
- Local parish magazines or community newsletters where relevant;
- Where appropriate, GP surgeries, community centres, and social media.

SDHC does not contact existing applicants on the Register of Eligible Applicants individually when a vacancy arises. Doing so would generate substantial administrative burden and would also create disappointment for those not subsequently appointed. Existing applicants on the Register are instead expected to monitor the SDHC website and the Almshouse Association vacancies page; if they wish to be considered for a particular vacancy, they re-apply in the same way as any other applicant. (See Step 4 below for how the Register is then taken into account.)

SDHC does not currently have any nomination or vacancy notification agreements with any local authority. Where a future agreement is in place, the PCM will notify the relevant authority in accordance with that agreement (see Section 10 of the Policy).

Every advertisement includes, as a minimum:

- A description of the property offered (size, location, accessibility features, ground or upper floor, lift availability, etc.);
- A summary of the eligibility criteria (age, area of benefit, need, right to reside);
- The current WMC and any service charge;
- The closing date for applications;

- A statement that applications are assessed against a published Scored Assessment Matrix, a link to this Policy on the SDHC website, and a statement that there is a published appeals process;
- Contact details for obtaining an application pack, including a stated commitment to provide the pack in alternative formats on request.

Step 3, Application pack and form

SDHC issues an application pack to every individual who requests one, regardless of how that request was made. SDHC does not record informal expressions of interest; an applicant becomes known to SDHC only when a fully completed application form is received.

The application pack issued to applicants contains two parts only:

- Part 1, the Application Form, which collects factual information about the applicant's identity, household, current accommodation, financial circumstances, health, ability to live independently, local connection (including any service under the Armed Forces Covenant), references, and equality monitoring data;
- Part 2, the Applicant Questionnaire, a series of multiple-choice questions which the applicant completes by selecting the answer that best describes their circumstances.

Part 3 of Appendix B (the Trustee Scoring Sheet) is an internal document used by the PCM and the Committee to calculate the score from the applicant's responses on Part 2. Part 3 is NOT included in the pack issued to applicants and is not made publicly available; this is to prevent applicants from gaming their answers by reference to the points value of each option.

The Application Form (Part 1) is the primary source of evidence for the five eligibility gates. The Applicant Questionnaire (Part 2), scored using Part 3 internally, produces the Scored Assessment Matrix total. The two parts complement each other and together provide the evidence base for the Committee's appointment decision.

Step 4, Eligibility check (the five gates)

5. On receipt of a completed application, the PCM applies the five eligibility gates set out in Section 4 of the Policy: area of benefit / local connection, age, need (including the DWP upper capital limit), right to reside / good character, and ability to live independently. The PCM uses the responses on the Application Form together with any right-to-rent documentation provided.
6. Where any gate is failed, the applicant is informed promptly in writing (normally within 10 working days), with a brief explanation of which gate was failed, a copy of (or link to) this Policy and the appeal route in Appendix D. The application is not added to the Register of Eligible Applicants.
7. Where all five gates are passed, the application is treated as a current application for the specific vacancy. If the applicant is also already on the Register of Eligible Applicants from a previous application, the new application replaces the previous record (with their consent). All eligible current applications proceed to scoring at Step 5.

Step 5, Scoring and ratification

8. The PCM calculates each eligible applicant's score against the five components of the Scored Assessment Matrix (Appendix B), using the Trustee Scoring Sheet at Appendix B Part 3 and drawing the answers directly from the Applicant Questionnaire (Part 2) returned by the applicant. The factual information on the Application Form (Part 1) is used to verify that the answers selected are consistent with the underlying facts.

9. Where an answer on the Questionnaire is inconsistent with information given on the Application Form (for example, a different income band has been selected on the Questionnaire from the income figures totalled on the Form), the PCM contacts the applicant for clarification. Where the inconsistency reflects an attempt to inflate the score by misrepresenting circumstances, the application may be dismissed under Section 4.12.
10. The PCM emails or otherwise sends the completed score sheet for each applicant for the vacancy to a single Committee member for ratification, with a brief covering note. To avoid procedural delay, the ratification step does not require an Committee meeting; any one Committee member acting promptly may ratify, normally within three working days. If the ratifying member spots an error or has a query, the score is corrected or referred back to the PCM. Once ratified, the procedure can move to Step 6 without waiting for the next Committee meeting.
11. All scoring outcomes for the vacancy are reported to the next scheduled Committee meeting for transparency and oversight, but this is reporting rather than ratification.

Step 6, Identification of the highest-scoring applicant and property-suitability check

12. The PCM identifies the highest-scoring eligible applicant for the vacancy, on the basis of the ratified scores. Where two or more applicants have the same total score, the applicant with the higher score on Component 1 (Housing Need) is preferred; where Component 1 is also tied, the applicant with the higher score on Component 2 (Financial Need) is preferred; thereafter the Committee uses its judgement, recording the reason in writing.
13. Before progressing the highest-scoring applicant to home visit, the PCM applies the property-suitability check at Section 7 of the Policy. The PCM considers the physical attributes of the vacant property (drawing on the fresh inspection carried out at Step 1 and on the working knowledge of the PCM and Committee) and compares these against the relevant information on the highest-scoring applicant's Application Form (in particular Section F on independent living). Where a clear mismatch exists (for example, the only access to the property is by stairs and the applicant has indicated they cannot independently manage stairs), the PCM consults briefly with one or two Committee members and, if the mismatch is confirmed, the applicant is not progressed for that vacancy. The applicant remains on the Register of Eligible Applicants for consideration against future vacancies.
14. Where the property-suitability check disqualifies the highest-scoring applicant, the PCM moves to the next-highest-scoring applicant and repeats the check.
15. Other eligible applicants (those not highest-scoring or those with property-suitability mismatch) remain on the Register and are not progressed to home visit at this stage. This is deliberate: it minimises disappointment to applicants who would not in any event be successful, and minimises the burden on trustees and staff.

Step 7, Combined home visit and interview

16. The home visit team, comprising two or three SDHC representatives, carries out a combined home visit and interview on the highest-scoring applicant who has passed the property-suitability check. The team includes at least one (and preferably two) Committee members, together with the PCM where available. Where the applicant is frail or vulnerable, their next of kin or another appropriate person is invited to be present.
17. There is a single visit only. The visit performs the dual function of (a) verifying the information in the Application Form, assessing independent-living capability, and identifying any reasonable adjustments needed, and (b) discussing with the applicant the practicalities

of life at the almshouse, including the legal status of residence (a licence to occupy as beneficiary, not a tenancy), the WMC and any service charge, and the conditions in the Letter of Appointment. The applicant is also encouraged to ask any questions they have about the property or about almshouse life.

18. The home visit team completes the Home Visit Report at Appendix C, normally within five working days of the visit. The Report is factual and does not include discriminatory or defamatory content (SAM 10.9.4).
19. Where the visit reveals a material divergence from the Application Form (for example, the applicant's housing circumstances are materially different from those described, or capital not previously disclosed comes to light, or the applicant cannot in fact live independently), the PCM recalculates the score or, where appropriate, re-applies the eligibility gates or the property-suitability check. If the result means the applicant is no longer suitable for the vacancy, the Committee reverts to Step 6 with the next-highest-scoring applicant.

Step 8, Medical enquiry (only if required)

20. Where the home visit or Application Form raises a specific concern about the applicant's ability to live independently, the Committee may request a GP report at SDHC's expense (SAM 10.11.7).
21. A GP report is only sought with the applicant's written consent, using the Almshouse Association's model consent form. The report is restricted to information relevant to suitability for almshouse accommodation.

Step 9, Committee appointment decision

22. Acting under delegated authority from the Board (Section 8 of the Policy), the Committee takes the appointment decision. The decision is based on the score sheet, the Home Visit Report, any GP report, and the Committee's collective view that all five eligibility gates and the property-suitability check have been satisfied.
23. The Committee's decision is recorded in the Committee minute, with a short reason. Where the Committee accepts the PCM's recommendation that the highest-scoring applicant be appointed, the minute can be brief: the score sheet and the Home Visit Report carry the substantive reasoning. Any departure from the highest-scoring applicant is recorded with the reason (SAM 10.13.4).
24. Any Committee member with a conflict of interest declares it and withdraws from the decision (Articles 39 and 40; SAM 10.13.1(c)).
25. Where the Committee considers there is no suitable applicant for the vacancy, it may direct that the vacancy be re-advertised. The consideration of any unqualified applicant under SAM 10.14 requires Charity Commission consent in SDHC's case, because the Memorandum and Articles are silent on this point; such consideration is not delegated to the Committee and remains a Board matter.
26. The Committee reports each appointment to the next scheduled Board meeting.

Step 10, Offer and Letter of Appointment

27. The Company Secretary issues the Letter of Appointment in duplicate to the appointed applicant (SAM 10.15), based on the Almshouse Association's current model template, together with the Residents' Handbook.
28. The applicant signs and returns one copy, along with the signed standing order or direct debit mandate for the WMC.

29. A moving-in date is agreed; the pre-arrival checks set out in SAM 10.18.5 are completed before the moving-in date (utilities, safety certificates, water system flushing, heating, Handbook in the property).
30. Where the appointed applicant declines the offer or withdraws after acceptance but before moving in, the Committee progresses the next-highest-scoring eligible applicant through Steps 6 to 9 in respect of the same vacancy.

Step 11, Communication with applicants who were not appointed

31. The Company Secretary writes to every applicant who applied directly for the specific vacancy and was not appointed. SDHC does not write to other applicants on the Register of Eligible Applicants who did not apply for the specific vacancy: those applicants are not in expectation of a decision and would be unnecessarily disappointed by a letter.
32. For applicants who failed the eligibility gates, the letter explains which gate was failed, in plain language, and reminds the applicant of the appeals process (Appendix D).
33. For applicants who were eligible but not appointed (because another applicant scored higher, or because of a property-suitability mismatch under Section 7), the letter: confirms the outcome; explains in non-discriminatory terms why they were not appointed; confirms that they remain on the Register of Eligible Applicants and will be considered for future vacancies if they re-apply (in line with Step 2); and reminds them of the appeals process.
34. SDHC does not disclose scoring or identifying information about other applicants (SAM 10.6.3(e)).
35. Applicants on the Register of Eligible Applicants may at any time update the circumstances they previously notified, withdraw from the Register, or exercise their data subject rights under the SDHC Privacy Notice.

Appendix B: Application Form, Questionnaire and Scoring

This Appendix is the operational heart of the allocations process. It contains three documents in three Parts, all of which are issued together to applicants and used together by SDHC officers and trustees to assess applications:

- (f) Part 1, the Application Form. The applicant completes this in full. It collects factual information that the Property and Compliance Manager uses to apply the five eligibility gates set out in Section 4 of the Policy.
- (g) Part 2, the Applicant Questionnaire. The applicant completes this in full. It contains 10 multiple-choice questions which the applicant answers by selecting the option that best describes their circumstances.
- (h) Part 3, the Trustee Scoring Sheet. This is the same 10 questions as Part 2, but with the points associated with each answer. Part 3 is used by the Property and Compliance Manager and the Committee to score the application; it is not shared with the applicant.

The total score in the Trustee Scoring Sheet is out of 100, distributed across five components: Housing Need (max 30), Financial Need (max 25), Suitability for Independent Almshouse Living (max 25), Social Circumstances (max 10), and Local Connection including Armed Forces Covenant (max 10). The applicant with the highest total score is the primary recommendation to the Board, subject to ratification under Section 3.2 of the Policy.

PART 1: APPLICATION FORM

Please complete every section of this Application Form. Where a question does not apply to you, please write "N/A" rather than leaving the answer blank, so that we know you have considered it. Where you do not know the answer, please write "don't know." If you need help completing the form (in any format, including in person, large print, or with a friend or family member), please contact the Property and Compliance Manager at SDHC.

Section A: Vacancy and applicant

A1. Which almshouse(s) are you applying for? (Tick all you would consider.)

- ☐ Drapers Place, Horsefair, Shrewsbury
- ☐ Fairford Place, Shrewsbury
- ☐ Hospital of St Giles, Shrewsbury
- ☐ Hospital of the Holy Cross, Shrewsbury
- ☐ Any of SDHC's almshouses

A2. Are you applying as a single person or as a couple?

- ☐ Single person
- ☐ Couple (a separate Application Form must be completed by each member of the couple; couples are accommodated only at Drapers Place)

Section B: Personal details

B1. Title and full name(s):

B2. Address (including postcode):

B3. Telephone number:

B4. Mobile number:

B5. Email address (if any):

B6. Date of birth:

B7. Marital status:

B8. National Insurance number:

B9. Past or present occupation:

B10. Length of time at your current address:

Section C: Next of kin and referees**C1. Next of kin, name and relationship:**

C2. Next of kin, full address (including postcode):

C3. Next of kin or power of attorney, telephone / mobile:

C4. Is your next of kin able to assist in cases of illness or emergency?☐ Yes☐ No

C5. Please provide the names and addresses of two people from whom character references can be obtained. Neither should be a member of your immediate family. References will be sought before any home visit or interview.

Referee 1, name, full address and contact details:

Referee 2, name, full address and contact details:

Section D: Current accommodation**D1. Type of accommodation (e.g. 2-bed bungalow, 3rd-floor flat, semi-detached house):**

D2. Do you (or your partner) own your current home?☐ Yes, owned outright☐ Yes, with a mortgage☐ No, I rent☐ No, I live with family / friend / other arrangement**D3. If you own your home, what is its current estimated value? £**

D4. If there is a mortgage, what is the outstanding balance? £

D5. If you rent, name and address of your landlord:

D6. Current weekly rent or housing cost: £

D7. Do you receive Housing Benefit / Universal Credit housing element?

☐ Yes

☐ No

D8. Do you receive Council Tax Support?

☐ Yes

☐ No

D9. If you own property other than your current home (in the UK or abroad), please give details:

D10. In a few sentences, please tell us why you are applying to move to an almshouse. (This is a free-text answer; the scoring of your application is done through the Questionnaire at Part 2, not from this answer.)

Section E: Financial circumstances

Please complete the tables below. Enter "Nil" or "don't know" where appropriate. We use this information to apply the financial-need eligibility gate (Gate 3 of the Policy) and to verify the answer you give to Question 4 of the Questionnaire (Part 2).

E1. Net weekly income from all sources:

Source of income	Amount per week (£)
State Pension	
Pension Credit	
Pension from former employer (occupational pension)	
Personal / private pension or annuity	

Source of income	Amount per week (£)
Widow's / Bereavement pension	
War Disablement / War Widow's Pension	
Attendance Allowance	
Disability Living Allowance / Personal Independence Payment	
Carer's Allowance	
Employment and Support Allowance / Universal Credit	
Housing Benefit / UC housing element	
Income from savings/investments (if not already counted)	
Rental income from property	
Any other income (please specify)	
TOTAL weekly income	

E2. Capital and savings:

Type of capital	Approximate amount (£)
Bank current/savings accounts	
Building society / Post Office accounts	
ISAs, National Savings, Premium Bonds	
Stocks, shares, unit trusts (please attach a separate sheet listing holdings if more than one)	
Cash held at home	
Redundancy payment (if received in the last 12 months)	
Any other capital (please specify)	
TOTAL capital	

Note: SDHC will normally request supporting documentation (bank statements, benefit award letters) before any offer is made. The Charity Commission's operational expectation is that almshouses are

not generally offered to applicants whose resources are substantial and who could afford suitable alternative local accommodation.

E3. If you own your current home and intend to sell it in connection with moving, what are the anticipated net proceeds (after selling costs and any mortgage redemption)?

£ _____

Section F: Health and ability to live independently

Almshouses are for people who can live independently. SDHC does not provide care services. The questions below help us apply Gate 5 of the eligibility test. Honest answers will not in themselves disadvantage your application; they simply help us decide whether the almshouse environment is right for you.

F1. Are you, with such aids and adaptations as you currently use, able to do each of the following?

Activity	Yes	With difficulty	No
Manage your own personal hygiene (washing, dressing, toileting)	☐	☐	☐
Prepare your own meals or use meal-delivery services	☐	☐	☐
Move around your own home	☐	☐	☐
Manage your own medication (with or without a pharmacy delivery service)	☐	☐	☐
Summon help in an emergency (mobile, landline, alarm pendant or other)	☐	☐	☐
Understand and follow written rules (e.g. Letter of Appointment, Residents' Handbook)	☐	☐	☐

F2. Do you currently receive any of the following? (Tick all that apply.)

- ☐ Carer visits at home (paid or unpaid)
- ☐ Local Authority care package
- ☐ District Nurse visits
- ☐ Meals on Wheels or similar
- ☐ Live-in carer
- ☐ None of the above

F3. Please give details of any significant illnesses, injuries, or operations in the last five years, and any continuing treatment:

F4. Are you willing for SDHC to ask your GP for a reference if specific concerns arise about your ability to live independently?

- ☐ Yes (we will only ask if a specific concern arises, with a separate signed consent form, and at SDHC's expense)
- ☐ No

F5. Name and address of your GP / medical practice:

Section G: Local connection and Armed Forces Covenant**G1. Are you currently ordinarily resident in Shrewsbury, Shropshire, or Powys?**

- ☐ Yes
- ☐ No

G2. How long have you lived in the area, and (if applicable) when did you last live there?

G3. If you do not currently live in the area, which of the following describes your local connection? (Tick all that apply.)

- ☐ I previously lived in the area, by my own choice, for a substantial period (typically at least three years in the last five)
- ☐ I am, or was recently, employed in the area
- ☐ I have close family (parent, adult child, or sibling) who have themselves been ordinarily resident in the area for a substantial period
- ☐ I have a long-standing connection with a community, voluntary, or religious organisation in the area
- ☐ I am not currently resident in the area only because of my (or my deceased spouse / civil partner's) service in HM Armed Forces
- ☐ None of the above
- ☐ I have another connection to the area that I would like SDHC to consider. *Please describe in the box below*

If you ticked "another connection," or you feel none of the above quite captures the strength of your local connection, please describe your connection here so we can consider it:

G4. Have you, or has a deceased spouse or civil partner, served in the British Armed Forces (regular or reserve)?

- ☐ Yes, I served
- ☐ Yes, my deceased spouse or civil partner served
- ☐ No

SDHC is a signatory to the Armed Forces Covenant. This question helps us honour that commitment

Section H: Right to reside

Under the Immigration Act 2014, SDHC must verify the immigration status of everyone moving into one of our almshouses. Please confirm:

H1. I have the right to enter or remain in the United Kingdom and can produce documentation to evidence this (e.g. UK passport, share-code, biometric residence permit).

- ☐ Yes
- ☐ No

Section I: Good character

Residents are required to be of good character. The Board does not generally carry out Disclosure and Barring Service checks. SDHC asks the question below in order to be aware of the applicant's circumstances; a conviction does not automatically exclude an applicant.

I1. Do you have any criminal conviction which is not spent under the Rehabilitation of Offenders Act 1974?

- ☐ No
- ☐ Yes, please give brief details below

Details (if Yes):

Section J: Equality monitoring (optional)

SDHC collects this information solely to monitor whether our allocations process is reaching the full diversity of those in housing need within our area of benefit. The information in this Section is not used in your individual eligibility check or scoring; it is held separately and reviewed only in anonymised aggregate form. If you prefer not to answer any of these questions, please tick "prefer not to say."

J1. Ethnicity:

- ☐ White British
- ☐ White Irish / Other White
- ☐ Asian / Asian British
- ☐ Black / Black British / Caribbean / African
- ☐ Mixed / multiple ethnic groups
- ☐ Other
- ☐ Prefer not to say

J2. Religion or belief:

- ☐ Christian
- ☐ Muslim
- ☐ Hindu
- ☐ Jewish
- ☐ Sikh
- ☐ Buddhist
- ☐ Other
- ☐ No religion
- ☐ Prefer not to say

J3. Sexual orientation:

- ☐ Heterosexual / straight
- ☐ Gay / lesbian
- ☐ Bisexual
- ☐ Other
- ☐ Prefer not to say

J4. Do you consider yourself to have a disability under the Equality Act 2010?

- ☐ Yes
- ☐ No
- ☐ Prefer not to say

Section K: Reasonable adjustments

K1. Do you require any reasonable adjustments at any stage of the application process (for example, a home visit instead of an interview at the almshouse, large-print papers, a longer time to respond, or someone to attend with you)? Please describe.

Section L: Declaration

Please read this declaration carefully before signing.

I confirm that the information I have provided in this Application Form, and in the Applicant Questionnaire (Part 2), is true and complete to the best of my knowledge and belief.

I understand that:

- (i) If I knowingly give false or materially misleading information, my application may be dismissed before any appointment is made, and any place I am subsequently appointed to may be set aside in accordance with SAM Section 11 and the SDHC Memorandum and Articles of Association.
- (j) I will inform SDHC promptly of any material change in my circumstances between submitting this Application Form and any appointment being made.
- (k) If appointed, I will be a beneficiary of the Charity, not a tenant. The weekly sum I pay will be a Weekly Maintenance Contribution, not rent.
- (l) My personal data will be processed in accordance with the SDHC Privacy Notice. I have read or been offered the SDHC Privacy Notice.
- (m) I understand that almshouses are for people who can live independently, and that SDHC does not provide care services.

Signature:

Print name:

Date:

PART 2: APPLICANT QUESTIONNAIRE

IMPORTANT — please read before completing

Please answer the questions below honestly and accurately. There are a few important things you should know:

- The questions are not in any order of priority. Some questions carry more weight than others, but no answer is in itself a "right" or "wrong" answer. Please simply tick the option that most accurately describes your circumstances.
- The order in which the answer options appear under each question is mixed; the most favourable answer is not always at the top.
- The answers you give will be cross-checked against the factual information you provided on the Application Form (Part 1). Where the two are inconsistent, we will contact you for clarification.
- Knowingly giving false answers in order to inflate your score is a serious matter. If we conclude (on the balance of probabilities) that you have done this, your application will be dismissed before appointment, and any place you have been appointed to may later be set aside.
- If you genuinely don't know the answer to a question, or none of the options fits your situation exactly, please tick the option that comes closest and tell us in writing why none was a perfect fit. We may contact you for clarification.
- This Questionnaire is part of a fair, structured assessment process. The answers you give do not lock the trustees into a particular decision; the trustees will always look at all the evidence in the round.

Q1. What best describes your current housing situation? (Please tick one option only.)

- ☐ I have lived in my current home for many years and feel settled there.
- ☐ I am sofa-surfing or in temporary accommodation, hostel, or staying with friends/family without a long-term arrangement.
- ☐ I own or rent my home but want to downsize, simplify, or move to a more suitable environment.
- ☐ I have been served notice to leave my home, or am at imminent risk of losing my accommodation, within the next 28 days.
- ☐ I am in private rented accommodation with no long-term security (e.g. an assured shorthold tenancy or rolling periodic tenancy).
- ☐ I am living with family but the arrangement is causing significant strain or is unsustainable.

Q2. How suitable is your current home for your age and mobility needs? (Please tick one option only.)

- ☐ It is becoming unsuitable, manageable now, but parts of the home (such as stairs, garden, or bathroom) are getting harder to cope with.
- ☐ It is fully suitable for my age and mobility.
- ☐ It is significantly unsuitable, for example, I cannot manage the stairs, the layout makes daily living difficult, or the property is in serious disrepair.
- ☐ It is currently suitable, but I expect it will become unsuitable in the foreseeable future.

Q3. Does your current home have any of the following? (Please tick all that apply, or tick "None of the above.")

- ☐ Significant damp or mould.
- ☐ No working central heating system.
- ☐ No indoor bath or shower (or, separately, no indoor toilet).
- ☐ Significant accessibility problems (e.g. cannot get a wheelchair through doorways; cannot reach essential parts of the home).
- ☐ None of the above.

Q4. What is your weekly net income from all sources, after deducting your current housing costs (rent or mortgage)? (Please tick one option only. The figure should match the total in Section E1 of the Application Form, less your weekly housing cost from D6.)

- ☐ I am in receipt of Pension Credit Guarantee Credit, or my after-housing-costs income is at or below that level.
- ☐ My after-housing-costs income is above Pension Credit Guarantee Credit but does not exceed £200 per week.
- ☐ My after-housing-costs income is between £200 and £300 per week.
- ☐ My after-housing-costs income is between £300 and £400 per week.
- ☐ My after-housing-costs income is more than £400 per week.

Q5. What are your total savings and other capital, excluding the value of your principal home if you intend to sell it on moving in? (Please tick one option only. The figure should match the total in Section E2 of the Application Form.)

- ☐ Below £6,000.
- ☐ Between £6,000 and £10,000.
- ☐ Between £10,000 and £14,000.
- ☐ Between £14,000 and £16,000.
- ☐ Over £16,000.

Q6. How well does your current home support you in living independently day-to-day? (Please tick one option only.)

- ☐ I generally manage but a few things are getting harder.
- ☐ I am significantly limited by features of my current home in maintaining day-to-day independence.
- ☐ It's manageable now but I'm finding several daily tasks increasingly difficult because of the home itself.
- ☐ I manage everything in my home with no real difficulty.
- ☐ I struggle with several daily tasks because of features of my current home (such as stairs, layout, or distance to facilities).

Q7. If you moved to a more suitable home (such as an almshouse with ground-floor or accessible accommodation, neighbours nearby, smaller rooms to maintain), how much would this help you continue to live independently? (Please tick one option only.)

- ☐ It would help noticeably.
- ☐ It would not really change my situation.
- ☐ It would help a little.
- ☐ It would make a substantial difference to my ability to live independently.

Q8. How would you describe your current social and support circumstances? (Please tick one option only.)

- ☐ I have moderate contact with family or friends, I get by, but more community would be welcome.
- ☐ I have a strong network of family and friends who I see regularly.
- ☐ I live alone and have little or no regular contact with family or friends. I feel isolated.
- ☐ I have some contact with family or friends but not regular, and I would benefit from being part of a small community.

Q9. What is your connection with Shrewsbury, Shropshire or Powys? (Please tick the option that best describes you.)

- ☐ I have lived in the area continuously for 20 or more years.
- ☐ I have lived in the area for 10 to 19 years.
- ☐ I have lived in the area for 3 to 9 years.
- ☐ I previously lived in the area for a substantial period; or I have close family who have been long-resident in the area; or I have a long-standing connection through a community, voluntary, or religious organisation.
- ☐ I have a different sort of local connection that I would like SDHC to consider.

Please describe the connection here...

Q10. Have you, or has a deceased spouse or civil partner, served in the British Armed Forces (regular or reserve)? (Please tick one option only.)

- ☐ Yes.
- ☐ No.

Thank you for completing the Questionnaire. Please return it to SDHC together with your Application Form (Part 1).

PART 3: TRUSTEE SCORING SHEET

Not included in publicly available version of the policy.

WORKED EXAMPLE

The following example illustrates how three hypothetical applicants would score under the Matrix. It is illustrative only; every real application is scored on its own evidence.

Applicant	C1	C2	C3	C4	C5	Total	Summary
Applicant A	28	25	21	10	10	94	74-year-old widow served notice by private landlord (Q1=14); current 2nd-floor flat with arthritis-difficult stairs (Q2=10, Q3=+2 for damp); full Pension Credit (Q4=15); £4k savings (Q5=10); current home significantly limits independence (Q6=14, Q7=7); isolated (Q8=10); 50 years in Shrewsbury (Q9=8); deceased husband Royal Engineers (Q10=2).
Applicant B	13	19	10	4	6	52	67-year-old, living with daughter under strain (Q1=7, Q2=6); modest income (Q4=12); £8k savings (Q5=7); current home generally OK with some difficulty (Q6=4, Q7=6); strong family network (Q8=1+3 from natural variation); 15 years in area (Q9=6); no military service.
Applicant C	4	12	9	4	2	31	63-year-old in adequate but ageing rented flat (Q1=4, wants to downsize); modest income (Q4=8) and savings (Q5=4); current home limits independence a little (Q6=4, Q7=5); some isolation (Q8=4); recently returned to Shrewsbury (Q9=2).

All three applicants pass the five eligibility gates and are added to the Register of Eligible Applicants. The Property and Compliance Manager calculates the scores from each applicant's Questionnaire (Part 2), using Part 3, and verifies consistency with their Application Forms (Part 1). The Committee reviews and confirms the calculations.

Applicant A is the highest-scoring (94/100) and is invited to a combined home visit and interview. The home visit confirms the form responses (no recalculation needed) and the property-suitability check is satisfied. The Committee minute records:

"The Committee, acting under delegated authority from the Board, resolved to appoint Applicant A. Applicant A scored 94 in the Scored Assessment Matrix, against 52 (Applicant B) and 31 (Applicant C). The score reflects acute housing need (notice from landlord; unsuitable upper-floor accommodation), full Pension Credit and minimal savings, marked limitations on independent living arising from the current home (which an almshouse would substantially address), social isolation, deep local roots, and SDHC's Armed Forces Covenant commitment in respect of the deceased husband's service. The Committee is satisfied that Applicant A is the applicant most in need of the vacancy at the time of the decision and best able to benefit from independent almshouse living, consistent with the objects of the Charity."

This satisfies SAM 10.13.4 without disclosing any individually identifying information about Applicants B or C.

Appendix C: Home Visit Report Form

This Form is completed by the home visit team after the combined home visit and interview at Step 7 of Appendix A. Its purpose is to record the team's factual observations and to capture the matters relevant to the Committee's appointment decision at Step 9. It supplements the Application Form and the Applicant Questionnaire; it does not replicate them.

The Form should be completed within five working days of the visit and added to the application file. It must be factual, proportionate, and free of any discriminatory or defamatory content (SAM 10.9.4). Where any answer raises a concern, it should be drawn out clearly so that the Committee can address it.

Section 1: Visit and applicant identifiers

Applicant name	
Application reference (if any)	
Vacancy being considered for	
Date of visit	
Address visited	
Visit team (names and roles)	
Anyone else present (e.g. next of kin)	

Section 2: Verification of Application Form

Please indicate whether the home visit confirmed the information given on the Application Form. If there are any material divergences, describe them briefly and note whether they affect the score, the eligibility gates, or the property-suitability check.

Topic on Application Form	Confirmed?	Comment if not confirmed
Personal details and household composition (Section B)	Yes / No	
Current accommodation (Section D)	Yes / No	
Financial circumstances (Section E)	Yes / No	
Health and ability to live independently (Section F)	Yes / No	
Local connection (Section G)	Yes / No	

Section 3: Property-suitability assessment

The home visit team has considered the physical attributes of the vacant property. Indicate below whether the applicant appears suitable for this specific property, having regard to its features (Section 7 of the Policy).

Property feature considered	Suitable?	Notes
Access (steps, stairs, lift, level approach)	Yes / No / N/A	
Internal layout (location of bathroom, bedroom, kitchen)	Yes / No / N/A	
Door widths and turning circles (if relevant)	Yes / No / N/A	
Distance to facilities, parking, road	Yes / No / N/A	
Fire-evacuation route practicable for the applicant	Yes / No / N/A	

Overall property-suitability conclusion (please tick one):

- ☐ Suitable for this specific vacancy
- ☐ Not suitable for this specific vacancy (state reasons in Section 6 below)
- ☐ Suitable subject to a reasonable adjustment (state in Section 5 below)

Section 4: Independent-living observations

Brief factual observations on whether the applicant appears able to live independently in the type of accommodation offered. Reference the answers given to Section F1 and F2 of the Application Form. Do not record clinical opinions.

Observations:

Section 5: Reasonable adjustments and accessibility

Note any reasonable adjustments the applicant has indicated would assist them in moving into or living at the almshouse. Note also anything the applicant requested in Section K of the Application Form.

Adjustments / accessibility notes:

Section 6 — Matters discussed at the visit

The home visit doubles as the interview. Confirm below that each of the matters that would have been covered at a separate interview was covered during the visit. Note anything significant the applicant raised, or any concerns identified by the team.

Matter discussed	Covered? Add brief note if relevant
Property shown / discussed (rooms, accessibility features)	
Legal status of residence (licence as beneficiary, not tenancy)	
WMC and any service charge	
Conditions in the Letter of Appointment and Residents' Handbook	
Community life at the almshouse (neighbours, communal areas)	
Applicant's questions and concerns	
Independent-living expectation (no SDHC care services)	

Section 7: Visit team's recommendation to Committee

Tick one option only.

- ☐ Recommend appointment to this vacancy.
- ☐ Recommend non-appointment to this vacancy because of property-suitability mismatch (applicant remains on Register).
- ☐ Recommend non-appointment because the visit revealed material concerns about eligibility (state below; refer to PCM for re-application of gates).
- ☐ Recommend that a GP report be obtained before any decision is taken (Step 8).
- ☐ Other (set out below).

Reasons for recommendation:

Section 8: Sign-off

To be completed by each member of the visit team:

Name 1:

Signature and date:

Name 2:

Signature and date:

Name 3 (if applicable):

Signature and date:

Appendix D: Appeals Process

This Appendix sets out the fair, reasonable, simple and accessible appeals process required by the Tenancy Standard 2.1.5. The appeals process is distinct from (but complementary to) the SDHC Complaints Policy.

D.1 Scope

An applicant has the right to appeal any of the following:

- (n) A decision that the applicant fails one or more of the five eligibility gates (Section 4 of the Policy);
- (o) A decision that the applicant has not been progressed to home visit and final interview (i.e. the applicant was eligible but not the highest-scoring);
- (p) A decision not to appoint the applicant following home visit or final interview;
- (q) A decision to refuse a reasonable adjustment under Section 5.

D.2 Grounds

An appeal may be made on any one or more of the following grounds:

- (r) That the decision was based on a material factual error or on incomplete information;
- (s) That the decision applied the Policy or the Scored Assessment Matrix incorrectly;
- (t) That the process was procedurally unfair (for example, a conflict of interest was not declared, or a reasonable adjustment was not made);
- (u) That the decision was discriminatory.

D.3 How to appeal

- 36. An appeal must be submitted in writing (email or letter) to the Company Secretary at SDHC's registered office (or by any accessible means requested as a reasonable adjustment).
- 37. The appeal must be submitted within 20 working days of the date of the decision letter. Late appeals may be accepted at the Board's discretion where there is a good reason for delay.
- 38. The appeal must state the grounds (paragraph D.2) and any new evidence the applicant wishes the Committee to consider.

D.4 Stage 1: Internal review by a review panel

- 39. The Company Secretary acknowledges the appeal within 5 working days.
- 40. The Chair of the Board appoints a Review Panel of two directors, neither of whom was a member of the Committee that made the original recommendation in respect of the vacancy or otherwise involved in the original decision (SAM 10.13.1(c)). Where the two members reach different conclusions, the appeal is escalated to the full Board for determination.
- 41. The Review Panel reviews the original decision against the grounds of appeal, using the original evidence and any new evidence submitted with the appeal. The Review Panel may invite the applicant to meet with it (the applicant may be accompanied).
- 42. The Review Panel issues a written decision within 20 working days of acknowledgement. It either upholds the original decision (with reasons) or overturns it (with reasons and, where appropriate, a remedy, e.g. priority consideration for the next vacancy).

43. If the Review Panel cannot respond within 20 working days, it communicates an agreed revised deadline with reasons, within 10 further working days of the original deadline.

D.5 Stage 2: External redress

If the appellant remains dissatisfied following Stage 1, they may refer the matter to the Housing Ombudsman Service. SDHC provides the Ombudsman's contact details with the Stage 1 decision letter. The Ombudsman's current contact details are published on the SDHC website.

D.6 Safeguards

- (v) No appeal can require SDHC to remove an already-appointed resident from the almshouse at the end of the process. Where an appeal succeeds but the almshouse has already been appointed, the appropriate remedy is typically priority consideration for the next appropriate vacancy and/or a formal apology.
- (w) Appellants are not required to use the word "appeal" for the process to start; any written expression of dissatisfaction with an allocation decision will be treated as an appeal unless the appellant explicitly asks for it to be handled as a complaint under the Complaints Policy (or vice versa).
- (x) An appeal about an allocation decision does not prevent the appellant from also raising a complaint about the standard of service received during the process.

Appendix E: Document control

E.1 Version history

Version	Date	Approved by	Summary of change
1	[adoption date]	Full Board of SDHC	First issue; supersedes the 2016/2023 Considerations for Selection of Residents document.

E.2 Related SDHC policies and documents

- SDHC Mission Statement (Policy 37, March 2025)
- SDHC Memorandum and Articles of Association (28 March 2022, as amended by special resolution of the same date)
- 2019 Charity Commission Scheme altering the area of benefit
- SDHC Complaints Policy (compliant with the Housing Ombudsman Complaint Handling Code 2024)
- SDHC Equality and Diversity Policy
- SDHC Data Protection Policy and Privacy Notice
- SDHC Residents' Handbook
- Model Letter of Appointment
- SDHC Safeguarding Policy

E.3 External references

- Almshouse Association, Standards of Almshouse Management 2025 (www.almshouses.org)
- Regulator of Social Housing, Consumer Standards 2024 (www.gov.uk/government/collections/regulatory-standards-for-landlords)
- Regulator of Social Housing, Tenancy Standard (April 2024)
- Regulator of Social Housing, Code of Practice (April 2024)
- Housing Ombudsman Service, Complaint Handling Code 2024 (www.housing-ombudsman.org.uk)
- Charity Commission for England and Wales, operational guidance on almshouses
- Housing Benefit Regulations 2006 (for current DWP upper and lower capital limits)
- Equality Act 2010
- Immigration Act 2014, Right to Rent provisions

End of Policy.