METHODIST MINISTERS’ HOUSING SOCIETY

TRANSFER POLICY

September 2014

The Society recognises that tenants may want to move. This policy enables this to happen although the number of transfers each year will depend on the resources available.

*This is the latest revision of the policy which was agreed in May 2004, revised in April 2009, and August 2012.*

1. Reasons for wanting a transfer

The reasons may include:

* The current property is too big.
* The current property is not suitable because of the medical condition of the tenant or spouse.
* The location of the current property is not suitable as the family who provide support live too far away.
* The location of the current property is not suitable as access to shops, church or community facilities, involves a journey by car and the tenant can no longer rely on this mode of transport.
* The location of the current property is not suitable as he/she/they have not settled since retirement.
* The location of the current property is not suitable, because the spouse has found employment in another part of the country.
* The current property was the only one available at the time of retirement and was not in the area of choice.

1. Length of Tenancy

It must be documented and explained to tenants at their initial interview, that unless there is a significant change in their circumstances, it is expected that they will stay in their homes for at least 10 years. However, a significant change in circumstances will override this expectation.

1. Eligibility

An applicant for a transfer has to qualify for Society housing in the same way as a new applicant. An intending transferee, with resources over the current maximum allowed for new applicants will be refused.

1. Process

Tenants wishing to transfer will contact the office and be sent a copy of the transfer policy and an “application for transfer form” to complete and return to the Society. The tenants will be informed in writing, whether or not they qualify for a transfer and the reasons for that decision. If the applicant is successful then their property will be placed on the Society’s ‘Available Properties’ list which is circulated to all new applicants, medical retirees and transfer applicants on a regular basis.

* If the tenant chooses a house from the Society’s “available property list”, then the transfer process can start at once. However, if the transferee chooses instead to have a property purchased in the area of their choice, they must wait until their existing property is wanted by a new applicant or another transfer applicant.
* If the Chief Executive considers that one or both of the applicants has a pressing medical or other need for a transfer then the Chief Executive will present the case to the Housing
* Committee to make a decision and if approved allow the transfer to commence before the future of applicant’s present home has been decided.
* However, if the tenant has been on the transfer list for 2 years and their home is not wanted by a new applicant or another transfer applicant, they will be asked to complete a new application form and their application will be reviewed by the Housing Committee and a decision made whether or not to purchase a property for them.
* The same considerations for approving a property to purchase will apply for a transferring tenants and new applicants.
* A note of the number of tenants wishing to transfer and the date they applied for a transfer will be presented at Board meetings.

1. Equity Contribution

The equity contribution rules will be the same for existing tenants and new applicants.

The Societies and transferees equity contributions will relate to the year in which the transfer commences. Depending on their assets, equity may be required for tenants moving into a property either already owned by the Society or especially purchased. Where a tenant holds an equity share in the current property, an estimated value will be used for assessing their eligibility. The value may mean that they are required to have equity in their new property. An actual valuation will be obtained when a tenant has moved and depending on whether the property is sold or retained this will be either the sale price or the Society’s valuation.

1. Society’s Resources

The board approves the annual budget which details the estimated number of purchases, which includes properties for transferees.

**D Cattermole**

**Acting Chief Executive**

**September 2014**