Membership Application Form Guide

Some housing co-ops focus on providing services to particular groups (e.g. those who are over 55 years old), but most co-ops accept members from a variety of backgrounds and nurture mixed-income communities. Most co-ops strive to be welcoming and to contribute to the broader community: this process starts with finding potential new members, and it continues with selecting eligible candidates and providing orientations when they move into co-op buildings.

Co-ops may develop marketing strategies to minimize vacancy loss and optimize the use of their buildings. These strategies can include:

- Maintaining a co-op **website**, which offers information about the co-op to the general public, and making use of CHF BC's "Find A Co-op" service.
- Broadening the potential pool of members by **advertising** on-line (craigslist, kijiji, etc.), using community bulletin boards and even connecting with community groups, particularly when looking at optimizing the use of accessible homes, or when the co-op's mission includes elements of outreach.
- Offering **orientation sessions** or open houses to potential members. Some co-ops even limit distributing application forms to those who attend such sessions: they aim to focus on the most serious candidates and ensure they know something about co-ops from the start.
- Maintaining **waiting lists** when there are no immediate vacancies.
- Clearly **defining responsibilities** around the membership process through co-op policy.
- **Avoiding unnecessary barriers** for applicants.

Consider how members of the public might become co-op members and your own past experiences:

- Is the co-op giving time for people to find the co-op?
- How does the co-op manage waiting lists? (How often do applicants have to "renew" their information? Does the co-op provide any feedback on waiting times?)
- Does the co-op offer any materials in languages other than English?
- Does the co-op demand **application fees**? (Consider that many people of low and moderate incomes are looking for co-op housing. If co-ops charge fees, the costs of applying to multiple co-ops could quickly become cost prohibitive.) We recommend avoiding fees at this stage. Even if your co-op wishes to recoup the cost of credit checks, payment can be delayed and only impact those most likely to benefit from membership.
- Does the co-op accept submissions in multiple formats? (A few co-ops held on to using the model of self-addressed stamped envelopes to request application forms: as a default, this adds costs, takes more time and effort on both sides and is more complicated that digital options.)

• Does the co-op ask appropriate questions of potential new members through its application form?

A good application form can help co-ops avoid problems and capture the key information co-ops need, while complying with human rights and privacy legislation.

The Centre's **template Application Form** incorporates many best practices. It has a modular structure that can be adapted to meet the needs of a wide variety of co-ops. For those that have particular needs, additional sections can be included.

We recommend that sensitive financial information is treated separately from other information, but co-ops retain flexibility here.

The application form has several sections. It:

- provides some introductory information about the use of the form and the handling of applicant information
- gives space for an overview of your co-op's key concerns
- offers a checklist to help applicants ensure they properly complete the form
- takes a default "minimum barriers" perspective (e.g. using gender inclusive language, doesn't suggest an application fee, limits the immediate need for financial documents).

Options and Clarifications

In the template, you will see some formatting:

Green highlighting: indicates areas where you need to use your co-op's name

[Yellow highlighting]: indicates elements you will have to adapt to your co-op's needs. Options are usually noted also with square brackets.

Review of information

Review the length of time that the co-op keeps applications. A good practice is keeping all applications for a period of one (1) year.

Important information (submission of application)

Please adjust method of application submission here. Delete or add options as necessary: email attachments, online systems (like Dropbox), postal mail or in-person delivery are all used.

Be sure to check address information. (And if the mailing address is different from a drop-off address, be sure to include clear instructions.)

If the co-op has other requirements like attending an orientation meeting or an open house, those requirements should be included in this section.

Updating your file

We recommend co-ops do not burden applicants with a requirement to regularly update their interest in applying to the co-op. If your co-op still chooses to request this, we suggest no fewer than 12 months (one year) in between updates. Please adjust the method for updating the application form.

Checklist

You will need to adjust for any particular delivery requirements. Most co-ops don't look at applicant assets, but if yours does, you may want to remind applicants of any additional documentation to prepare.

Some co-ops will require financial backup at the time of application. We recommend against this and suggest it is easier to administer and comply with privacy rules if the financial documentation is requested later in the process (concurrent with interviewing).

Basic information about your co-op

You may choose to introduce an informal name for your co-op but be sure to start with its full legal name.

Adjust the total number and types of homes. Edit other information as appropriate for your co-op and feel free to add a few details to make clear some of the great things about your co-op and its neighbourhood (including amenities, transportation connections, etc.).

Pets

Each co-op will make its own decisions on pets. For various reasons, some may end up settling on a no pets policy. In these cases, the text should be clear and emphasize that pets are prohibited ("NO PETS ALLOWED").

Where possible, CHF BC recommends a flexible approach on pets. Many people struggle to find living situations that allow pets and co-ops that are open to pets can really help people, many of whom consider pets to be part of their families. (Co-ops should be clear that assistance animals are not pets and that even a no-pet policy wouldn't preclude, for example, a CNIB guide dog. Co-ops have a duty to accommodate.)

Your co-op could make your full Pet Policy available. Some co-ops post their policies publicly on their websites and this could be linked to the application form. Policy details can be important, especially when they contain size or breed limitations.

Adjust pet numbers to match co-op policies.

Smoke-free housing

This section reflects a growing consensus about the hazards of smoking, but we understand that some co-ops have smokers as long-term members and that there are a variety of approaches. You can remove or edit this section if have limited or no restrictions regarding smoking. Smoking rules can either be in the form of policy or embedded in occupancy agreements.

If there is a smoking policy and smoking is allowed in designated areas, adjust the title to "Smoking Policy" and provide key information here. If the co-op has a grandfathering provision, it may be important to highlight this information in case there's a misunderstanding at move-in.

Share purchase and Unit Options

Complete the table, adding or removing home types as appropriate. You may or may not choose to include typical home sizes. If providing areas, be clear which units are being used (square feet or m^2).

Adjust the minimum and maximum income requirements according to your co-op's practices. If your co-op does not have income ceilings, you can remove the "Maximum Income" column.

You can add or segment accessible units. In the notes to this section, adjust the reference to utilities as needed.

Options for the Primary Application

The first page collects contact information for the primary applicant (and co-applicant if present). Rather than asking for information about sex, we suggest offering applicants a chance to identify their preferred pronouns.

The second page collects information about the entire household including birthdate information. We recommend a consistent approach on date collection: year/month/day with four-digit years is usually the most clear and unambiguous. It's not so closely tied to a particular geographical region and it also allows for easy sorting.

This section doesn't make requests to identify the sex or gender of the household members. If there are occupancy standard considerations, these could be brought up later.

The second page of the form also includes information about pets. If the co-op has a no-pet policy then this section can be removed. If only one pet is allowed, you could remove excess table rows.

Home Requirements

There is often some flexibility about which home sizes are suitable for particular households in a particular co-op. We keep this broad ("interested in "rather than "need"). You can also include options for accessibility: e.g. have an entry for a "One-bedroom (apartment)" and another for "One-bedroom (accessible unit)".

This also connects to the questions about Accessibility. If the co-op doesn't have any then this section might be adjusted.

Automobiles and Parking

Not everyone requires automobile parking but many do. Here you can determine applicant wishes. It can also be useful to understand whether the applicant has an electric vehicle. If the co-op offers electrical vehicle (EV) charging, it would be worth highlighting.

If your co-op offers one parking stall, you adjust the table to offer one row only. If your co-op has no parking delete what is under this point and state: "There is no parking available on the co-op premises."

You can include information about off-site parking.

Workplace location

Some co-ops require this information, typically because they have a municipal lease that asks the co-op to prioritize or report about those who work in the city. If it is not a requirement by your co-op, remove this option. If it is, enter the relevant municipality in the brackets.

Residence history

Best practices limit history requests to the last three addresses, but this can be adjusted.

Community and Co-operative Interests (including participation)

This section collects information that may be useful to evaluate what kind of connections and experiences the applicant might draw on if accepted into membership. If your co-op requires "volunteer" hours to the co-op or defines participation in a particular way, you can adjust this section.

Income [and Assets] Declaration

As mentioned earlier, we recommend this be treated separately from the rest of the application.

Adjust age limits as required. If your co-op does not look at assets, references to assets should be removed. If your co-op does look at assets, then the third page of this section "Assets" will need to be adjusted to identify your requirements and capture the necessary information. Otherwise, this last part of the section can be removed.

Financial information is usually seen as especially confidential. For that reason, the Income Declaration part of the application should go directly to the management company at your co-op or to the treasurer, whoever is responsible for income validation and credit checking for prospective members.

Personal information protection statement

Adjust age requirements as necessary. Some co-ops have used ages as low as 16.

Signatures for Application

This combines requirements for the general application, income declaration and personal information statement.

Again, there may be a need to adjust age cut-offs.

Additional notes

The template application form uses the font **Lato**.

This is available for free online at fonts.google.com. If you do not have Lato installed, the form may not render as expected.