
Guidelines- Managing Applications and Home Vacancies

Member selection is key to the success of your co-op. It is one of the most important things your co-op will do.

Co-ops may be held liable for errors around member selection and occupancy. Good policies will protect the co-op and its members. It is important that member selection policies and procedures are in place, and are applied in a fair, consistent, and unbiased way.

The member selection process permits your co-op to interview and approve new members. Your co-op policy will need to reflect how your co-op chooses to do this. Some co-ops place emphasis on admitting members on the basis of need, others on ensuring new members meet community criteria that may include: household size and circumstance, economic eligibility, commitment to co-operation and community living, skills and experience, knowledge about co-ops, etc.

Your co-op application and interview questions can help determine the best candidate for membership in your co-op. Co-ops must be careful not to discriminate against applicants or members and must comply with existing legislation like the *Human Rights Code* and *Personal Information Protection Act (PIPA)*. Your co-op may wish to provide training to member selection committee members and co-op interviewers.

Whatever your member selection process, your co-op will need a system to collect, process, store, and destroy information on applicants and members. You should also consider creating a welcoming process to introduce and orient new members to your co-op.

The application, interview, approval process, move-in and orientation are experiences that will have a lasting effect on new members and will influence the way they care for their co-op home over time, their willingness to help manage the co-op, and the degree to which they participate in the community.

Co-op applicants

Co-ops manage their applicant lists differently, and there is no one correct process; it is what works best for your co-op. The sample policy reflects the practice of having the co-op maintain an applicant list and an external waiting list. After applicants have attended an orientation session and been interviewed and pre-approved for membership, they are added to the external waiting list as members, subject to payment of shares and occupation of a co-op home. Some co-ops do not pre-approve members as described above.



Prior to co-op homes becoming available, they will ask applicants to:

- attend an orientation session,
- attend an orientation session and be interviewed,
- be interviewed, or
- none of the above. Applicants are interviewed as a suitable co-op home becomes available.

The local housing market and vacancy situation often determine which strategy co-ops use. Your co-op policy should make sure it has a process for always having a sufficient number of current applicants to fill available co-op homes and prevent vacancy loss. An effective process will improve your co-op's ability to attract and approve good members.

Internal waiting lists

Co-ops often permit internal moves and keep internal waiting lists. When a co-op home becomes available, co-ops may first offer it to members who are under- or over-housed and/or to members on an internal waiting list who have requested to move within the co-op.

Internal moves require additional costs and community resources. For this reason, the sample policy provides boards with the discretion to limit the number of internal moves.

Over- and under-housing

Co-ops take their mandate to provide affordable housing seriously, especially if they have an operating agreement in place that requires the co-op to do so; otherwise, the co-op will be in breach of its operating agreement. The need for more affordable housing has increased dramatically. Co-ops have responded by evaluating how effectively they house current members and their potential to house future members. Many are developing over- and under-housing policies.

The over- and under-housing discussion notes provided in this manual identify some points that may help your co-op start this important discussion. Samples for over- and under-housing policies for different types of existing operating agreements that co-ops may have are provided.