

REFERRAL PROCESS – MEMBER IDEAS

This document lists ideas from co-op members to improve CEHL’s member referral processes, gathered during the *Member Referral Training* sessions delivered in August 2019.

Many of the ideas have already generated plans for action. Further ideas can be added to the [*Improving the Referral Process*](#) page of the *Have Your Say* section of the CEHL website.

ISSUE	IDEAS	ACTIONS / COMMENTS
How to find more committed applicants	IDEAS FOR CO-OPS	
	Advertising.	CEHL has postcards that co-ops can distribute to local schools, health centres, etc to advertise co-op housing. CEHL is exploring other advertising ideas to be considered in each area as local papers often don’t work well.
	Need to let people benefit in co-ops.	Co-op members are encouraged to spread the word about what can be gained in co-op housing. This is often the best form of advertising.
	CERC’s pass on information to people who are enquiring to CEHL.	Co-ops receiving enquiries about co-op housing should advise people to apply on the Victorian Housing Register and choose the “ Co-op Housing ” option so that they can be invited to a <i>Co-op Information Session</i> .
	Be more active in recommending people to register with VHR.	
	Send in information to CEHL regarding upcoming vacancies to add to transfer list.	Ideally the member selection process should start as soon as co-ops have a definite vacancy date.
	IDEAS FOR CEHL	
	Advertising, with stability being the main benefit to promote co-ops rather than cheap housing.	CEHL is including this message in all its future communication to applicants.
	Run adverts through local papers to inform possible applicants of co-op housing.	CEHL is currently exploring options such as social media, real estate websites and options to advertise to applicants via our website portal. Further ideas would be welcome.
	Have a DVD to explain what co-op housing is and their responsibilities in having a home through the co-op.	CEHL is developing a range of video clips that can inform prospective members of the benefits and responsibilities of co-op housing.
Keep a list of current tenants looking to transfer and send this to co-ops when looking for new tenants.	Helping members to be offered transfer options is a priority CEHL is currently working on.	
CEHL adds current vacancies to website so individuals can apply to transfer.	An option called “ <i>Choice-based Letting</i> ” will be explored in the year ahead.	

ISSUE	IDEAS	ACTIONS / COMMENTS
<p>How to help applicants better understand co-ops</p>	<p>IDEAS FOR CO-OPS</p>	
	<p>To invite all members to join with new members and have full information of what it is all about.</p>	<p>CEHL is considering opening general member training sessions to applicants. Co-ops can also invite applicants to meet with members before offering housing if they wish.</p>
	<p>A couple of Directors can be invited to the Information sessions.</p>	<p>This is already happening in Applicant Information Sessions.</p>
	<p>Resource our own members using local knowledge.</p>	<p>Co-ops must use the referral list to ensure a fair and transparent process that meets the requirements of the Victorian Housing Registrar. Where co-ops know of interested people, co-ops can encourage them to register on the Victorian Housing Register (VHR) so that they can be considered for future vacancies.</p>
	<p>Co-ops to initiate invitation to co-op meetings.</p>	<p>Co-ops could invite applicants to a meeting prior to being offered housing, depending on how the schedule of co-op meetings fits with the selection timeframe.</p>
	<p>Critique a CEHL Information Session.</p>	<p>Members are invited to offer feedback on the Information Session presentation (which is in the document library of the “Have Your Say” page).</p>
	<p>Ideas for CEHL</p>	
	<p>More frequent Information Sessions, especially in metropolitan Melbourne.</p>	<p>CEHL plans to hold 12 information sessions in 2020, prioritising areas with low numbers on the referral list. This may be increased if we identify other areas with low referral list numbers.</p>
<p>Recruit members to the co-op before going to CEHL Information Sessions.</p>	<p>So that co-ops can be referred genuinely interested people, applicants are asked to attend Information Sessions describing the commitments of being a co-op member before being registered for referral to co-ops. People who haven't attended an <i>Information Session</i> are only referred if there are no applicants on our referral list for the vacancy.</p>	

ISSUE	IDEAS	ACTIONS/COMMENTS
Should applicants be invited to General Member Training?	High level of support received.	CEHL will pilot inviting people who have attended the initial information session to Core co-op training topics in 2020.
	Essential Information necessary.	
	They need to be able to understand how a co-op is run i.e. attend training prior.	Co-ops will be told which applicants have attended training on the referral list.
	I think this would work, however it may also create unrealistic expectations for unsuitable applicants.	This will be carefully explained.

ISSUE	IDEAS	ACTIONS/COMMENTS
How can co-ops choose the right applicant?	Ideas for Co-ops	
	Make sure no conflict of interest.	
	Selection panel wider views of life experience.	
	Be less selective.	Co-ops are expected to identify the person that <i>best fits</i> their co-op's selection criteria, rather than seeking the perfect applicant.
	Co-op selection committee should have discussions/interviews at the rental premises.	CEHL does not recommend interviews at the person's home to ensure the privacy/safety of applicant and co-op members.
	Develop questions that reflect their FDP goals.	CEHL will also review FDP goals to try to identify applicants that best meet the co-op criteria.
	List of questions for interview. Vary – male-female; linguistic diversity; cultural sensitivity.	
	Interpreters – different languages EOI.	CEHL may be able to help co-ops to access interpreters if needed.
	Develop behavioural questions.	
	Ideas for CEHL	
Make the 100 word statement longer, more specific so that we can choose who to interview.	New applicants are asked to complete a self-assessment form providing details of their skills and time commitment. This is added to the 100 word statement on the referral list (but may not have been collected from earlier applicants). The Self-Assessment Form is in the document library on the <i>Have Your Say</i> page.	

	Vet applicants more in depth – do they know where locations are?	CEHL now contacts all applicants before adding them to a referral list, so we can be sure that, if successful, they are ready to accept an offer of housing in the area of the vacancy.
	For people wanting to become a member, they must understand what it means to be involved with CEHL.	The role of CEHL and opportunities and commitments within the Program are included in the information session presentation.
	Individual CERC Training.	Co-ops may request training from their allocated Co-op Development Coordinator (CDC).

ISSUE	IDEAS	ACTIONS/COMMENTS
Pre-screening / assessment of applicants	Ideas for Co-ops	
	Let applicant give preference to where they prefer to be interviewed.	Co-ops need to be sure interviews are conducted in a safe, quiet and private space.
	Establish if paying rent – check rent statements and ask Real Estate Agent re payments/state of consistent payments/care of property, etc.	Co-ops can ask applicants to bring rent statements to interviews and the preferred candidate should be asked for contact details of their previous landlord so that references can be checked afterward.
	Ideas for CEHL	
	CEHL should pre-screen members on selection criteria to ensure they meet the requirements and fit the selection/needs of the co-op.	CEHL currently: <ul style="list-style-type: none"> - filters applicants according to <i>Future Directions Plan</i> criteria (if known) - calls applicants to ensure they are currently interested in the location and type of co-op - reminds applicants of eligibility criteria before referring them to a co-op for interview The remainder of the selection criteria is best discussed with the co-op at interview.
	List of references from rental history.	CEHL is considering offering a fee-for-service rental reference check.
	Income and asset eligibility to be done prior to the list being sent to co-ops. Provide eligibility and market rent/assessment details upfront to co-op before interview.	CEHL doesn't currently have capacity for this workload. VHR will check eligibility for each applicant when they initially apply and every 2 years in future.
	Once an applicant has said they do not want co-op housing to co-op member, remove them from the list.	CEHL calls each person who has been reported as not interested. Sometimes this is just not the right time for them or they are better suited to a different type of co-op, so not all applicants are deleted after refusing one offer after an interview.

	If the EOI application included 100 words, the board would/may be able to accept more applicants?	If a co-op needs to choose from a list that doesn't include a written statement, their CDC can help the co-op design a screening process to help to find appropriate applicants.
ISSUE	IDEAS	ACTIONS/COMMENTS
How can the process be made quicker and easier?	Ideas for CEHL	
	Appears to be a lot of reading material to go through – policy, procedures etc. can this be minimized?	This work will be done soon. Any feedback about what information is most useful would be welcome.
	The expectations of timeframes needs to be clearly articulated between co-ops and CEHL and vice versa.	CEHL will develop an information sheet about this.
	Availability of a list ASAP - 1 week is ok.	
	Process needs to be developed to aid transfers.	Work on this is currently under way.
	Co-ops to process eligibility paperwork & CEHL confirm/correct if necessary –shorten 5 day turn around.	CEHL will explore how this might work.
	Ideas for Co-op	
	Streamline process.	
	Can be done in a timely manner if we have referral lists quickly.	CEHL is exploring ways to reduce timelines.
	Check bedroom eligibility over the phone when shortlisting (saves not finding out until after interview).	This will be added to CEHL's pre-screening.
Rent calculator	This is available to co-op treasurers on the Member Portal.	