

CCH

Confederation of Co-operative Housing
Cydfffererasiwn Tai Cydweithredol



Active membership in housing co-ops

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Active membership in housing co-ops – version one

Housing co-operatives are membership organisations. People can become their members. Their memberships are what makes them what they are.

But what does this mean? Is it just that people buy a share in a housing co-op and that's it? How does being a member of a housing co-op make any difference?

Housing co-ops are governed by their members. They are reliant on at least some of their members actively participating and taking responsibility for the co-op – making decisions about how the co-op is run. And some rely on co-op members doing more than just taking decisions. Without the active participation of at least some co-op members, a co-op could not exist. So - getting enough active members to participate is vital for the future of the co-op.

So - what does this mean? What is “enough active members”? How do co-ops maximise involvement? What does “active membership” mean? What can co-ops do if they are not getting “enough active members” coming forward?

This guidance sets out to answer these questions. There are no black and white answers because what works in one co-op will not work in another. Housing co-ops are set up to enable local people to shape their organisations in ways that work for them. Each co-op needs to develop their membership and involvement strategies and policies to suit local circumstances. This guidance sets out some of the issues that co-ops could consider in relation to membership and involvement and approaches that have worked for some co-ops. The CCH welcomes any comments on this guidance – what members agree with or disagree with – and any areas that are not included in the guidance that would be helpful. The CCH may re-publish the guidance if there are areas that need changing or adding.



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Introduction

The guidance is primarily aimed at the CCH's ownership or management co-op members. The CCH has also already produced guidance on membership for mutual housing associations – available [here](#).

There is variety in housing co-ops that has an impact on how active membership works:

- most housing co-ops are **fully mutual** - where all tenants are required to be members, and all members are tenants or prospective tenants
- but some housing co-ops are **non-fully mutual** – where membership is voluntary and where non-residents can be members
- the number of the homes that a co-op owns or manages makes a difference. Active membership needs to work differently in the CCH's smallest member (four members in a shared house) and in the CCH's largest housing co-op member (a co-op owning more than 350 homes). It also needs to work differently in the CCH's largest tenant management organisation member (managing some 700 homes) and largest mutual association member (owning some 12,000 homes).
- most co-ops elect a management committee to govern the co-op, but some, particularly smaller co-ops, are governed by their general meetings
- the nature of the homes also makes a difference. Are the homes all together in one place? Are they scattered? Are they houses? Are they flats? Are they shared housing? Are they social, affordable or market rented? Are they shared ownership?
- is the co-op an “intentional” community – where all members deliberately chose to live in a co-op? Or did some members



come from a waiting list where the primary motivation of those allocated homes was to get somewhere to live?

- did the co-op receive public grant to build its homes and is it registered with the Regulator of Social Housing?

All of these and other factors can have a big impact on how a co-op manages its active membership strategies. Each co-op should use this guidance to provide them with assistance and pointers for what they may need to think about and fashion their approaches according to their local circumstances.

What is membership?

What is membership about? On one level, membership is about the role that members play legally in the co-op. The legal membership role is discussed below but the legal basis of membership – important though it is – is just one part of what co-operative housing membership means.

A housing co-op's membership is the reason for its existence and a co-op's members need to work together to develop and own the co-op's values and vision. A housing co-op develops its legitimacy and credibility by involving as many of its members as possible in its decision-making. A co-op's democracy is based on how much its members feel a part of its identity, its ownership, its guardianship and its stewardship.

An active membership

Co-ops rely on the active involvement of some of its members. A co-op's ongoing existence and succession is dependent on there being enough active members. Encouraging and inspiring an active membership can be one of the most challenging aspects of a co-op's work. Clearly this depends on the size and nature of the co-op, but the following may sometimes be heard said by some in the co-op housing sector:

- we've tried everything to get members involved, but they just won't come to meetings



- members just want to complain about everything we do but they won't come forward to get involved
- the same members have been running the co-op for years – no one new gets involved – particularly not young members
- members just can't see the point of getting involved – it doesn't change anything
- only a small number of members understand how things are done – they're the ones who run the co-op
- members only get involved in the co-op when they want something.

All these things then lead to a spiral of apathy. Sometimes it is hard to maintain enthusiasm when a co-op is just ticking over year in year out for many years.

But these things ebb and flow. Sometimes it's hard for a co-op to get a quorate meeting. Sometimes the room is full of people buzzing with excitement! Without wishing to be complacent about the challenge of inspiring an active membership, most CCH housing co-op members have existed since the 1970s and 1980s and have gone through several generations of members. There is research that shows that the performance of co-ops – both on a business and a community level – far exceeds the performance of any other housing comparator! Housing co-ops operate with far more humanity, with far more attention to local detail, and based on far more local knowledge – than other housing organisations!

So ... it's important not to give up!!!

A strategic approach to active membership

Given the importance of active membership to co-ops, it is perhaps surprising that often co-ops do not take a strategic approach to developing it in the same way that they might take a strategic approach to their finances or to providing a repairs service. Active member involvement in the co-op may develop organically without the co-op having to do anything, but this is often not the case for a variety of reasons.



A first step to consider how to build active membership may be for the governing body to carry out a SWOT analysis – where it considers strengths, weaknesses, opportunities and threats in relation to its active membership.

This might reveal some of the significant barriers that can prevent active membership or limit how much members can get involved. It may be useful for a co-op to consider barriers to involvement in its local circumstances.

The table on the next pages sets out some common issues and steps that could be taken to address them. These possible steps are discussed in more detail later in the guide. There may be other reasons why members do not get actively involved and a co-op may wish to develop a strategy to tackle those issues.

Possible barriers to an active membership

Barrier	Likelihood that it will happen and reasons	Damage it would cause in the co-op	Possible remedies
Some members facing challenges of day to day life – such as raising a family, going to work, claiming benefits and fulfilling the requirements of claiming benefits	Very possible – there are many challenges in day to day life for everyone	If the problem applies to all or most members, it may make it challenging to find anyone able to govern the co-op	Considering approaches that could make it easier for such members to be involved – arranging childcare for meetings and other activities; reducing the number of governing body meetings; adjusting meeting times to suit those in employment; understanding volunteering rules for those on benefits; possibly considering payments for governing body members; accepting that some members have challenges in life that mean that they can't get involved at that time
Members not understanding the reasons to get involved	Co-ops may have good services and members think they will happen without them	If all members think this way, the good services will not continue	Co-ops need to continually communicate to their members what they get by virtue of being a housing co-op, and what would happen if the co-op ceased to exist

Barrier	Likelihood that it will happen and reasons	Damage it would cause in the co-op	Possible remedies
Members not understanding what opportunities exist for them to get involved	This can happen even if membership is carefully explained	If many members don't understand the co-op, this would be damaging for the co-op's democracy	A co-op needs to have a robust induction procedure for new members; good quality information on membership; and less formal methods of engaging new and existing members
The ways that members can get involved may not appeal to some members	Not everyone will engage through the co-op's formal meeting systems	If there are not ways to engage that appeal to members, members are less likely to be active	Ensuring that there are multiple ways in which members can get involved; ensuring that members can engage on the issues that matter to them; ensuring that meetings are interesting and exciting
Some members having reading and learning difficulties	Potentially possible, especially if the co-op houses people in housing need	If not addressed, it could result in such members being marginalised	Taking a personal approach to involving members; profiling the membership to ensure that the co-op is aware of members with such difficulties; developing a mentoring and buddying system to support such members; considering what external support may be available

Barrier	Likelihood that it will happen and reasons	Damage it would cause in the co-op	Possible remedies
Some members having low self-esteem and low expectations meaning that they may not have the confidence to come forward	Quite possible – many people have skills and abilities they don't even know they have but are not encouraged to use them	If there are many members with such low esteem, it could mean the co-op is only run by the confident and articulate	Face to face contact and dialogue with members; developing a mentoring and buddying system; ensuring that when people do make contributions that they are recognised, valued, discussed and acted upon; ensure that the co-op has a training budget that provides a high-quality training and development programme for members; encourage members to attend the CCH's conference and forums to enabling networking between members of different co-ops
Members having health/accessibility issues (ie. language, mobility, hearing, sight issues) making involvement harder	Potentially possible, especially if the co-op houses elderly people or people with accessibility issues	If not addressed, it could result in such members being marginalised	Taking a personal approach to involving members; considering different ways to involve members; considering accessibility, venue, and communications issues to make meeting attendance easier; developing a mentoring and buddying system to support members

Barrier	Likelihood that it will happen and reasons	Damage it would cause in the co-op	Possible remedies
Perceptions that a member might be discriminated against if they get actively involved	Hopefully unusual, but it can happen – and potentially happen without the co-op knowing it	If it's happening, it's a serious problem that needs addressing	Having a robust equalities, diversity and fairness policy; periodically considering if the way that the co-op does things is discriminating against a particular group of people; using methods of member engagement that enable them to feed in their views of the co-op
Some members fearing to leave their home after dark because of fear of crime	Again, hopefully unusual, but it can happen	If it's happening, it can be a serious problem	Thinking about where and when the co-op is holding its meetings and other activities; ensuring that members who have fears about coming out after dark are escorted by other members
Some members lacking belief that ordinary people and communities can have the power to change things or that getting involved in the co-op will change things	Many people in society do not believe they can change things	If it's happening, it can lead to members feeling like there is no point in coming forward	Ensuring that all members who attend meetings and co-op activities are encouraged to have a voice and share their views; not allowing individuals to dominate; face to face discussions with members to build their confidence; repeatedly showing how co-op decisions have changed things

Barrier	Likelihood that it will happen and reasons	Damage it would cause in the co-op	Possible remedies
The UK dependency culture where people expect that someone else will do the things that need doing and people don't take responsibility	Many have a "something should be done" mentality. It is arguable that some who hold power encourage it!	It is likely that there will be at least some victims of the UK dependency culture in the co-op	Work hard to tackle it – by doing all the things above. Help members to soar above the shackles that are placed on them; help them to realise the skills, abilities and confidence that are inherent within them; do everything possible to encourage the least confident to play leading roles!



Why do members become active?

A co-op may also want to consider the reasons why its members do become active. Experience suggests the following might be reasons for involvement:

- a desire to be part of a community
- wanting to change things in the co-op
- appreciating that they have control over their homes
- wanting to be part of something real and exciting
- a genuine desire to do something positive for other members
- wanting to get better services or a better community
- curiosity to see what getting active means
- wanting to get training and development opportunities
- wanting positive volunteering experience to add to a CV
- building self-esteem and confidence
- wanting to participate in the co-operative housing sector regionally or nationally.

These are all good reasons. Those who do get active need to tell other co-op members again and again why they got active – to encourage and inspire their neighbours.

What is realistic to expect?

Will all members of a co-op get active? Possibly in a very small co-op or in one that has recently been set up. But probably not in larger co-ops and co-ops that have gone through several generations since their founder members. And the nature of involvement will differ from member to member. Perhaps it would be helpful for co-ops to set a challenging but potentially achievable target to aim for.

Active involvement is likely to fluctuate dependent on various factors, such as changing member lifestyles. And different members are likely to get involved with different aspects of how the co-op works.



What is active membership in a co-op?

Given the need for co-ops to have a functioning governing body and a reasonable and quorate turnout at General Meetings, it is understandable that co-ops focus on meeting attendance when thinking about active membership. But attending meetings is rarely why people become members of co-ops. Meetings are a necessary and important part of the mechanics of co-ops, but it is the interaction between members and the co-op – formally and informally – that make up the dynamics of a co-op. That interaction needs to happen in many ways.

Active involvement might be considered to include:

Method	Notes	Potential outcomes
Informal “over the garden fence” activity	Informal engagement between members is the lifeblood of most co-ops – things happening where members engage with each other – help each other out – have meals together – look after each other’s kids – go to the shops when people are ill. Of course – none of this is out of a textbook – but it’s the glue that holds many co-ops together.	A stronger community - a network of co-op members providing each other with a mutual support network – in some cases informally providing “services” that otherwise would either not be provided or which would have to be provided through another body. Informal mechanisms to enable discussion about key co-op issues.



Method	Notes	Potential outcomes
Induction	How a co-op brings new members/tenants into the co-op is critically important to how they see the active membership culture of the co-op and whether they will engage in the future	Ensuring that new members/tenants feel that they are joining a welcoming community and that they play a positive and active part in it. Ensuring that they know what is expected of them and what they can expect from the co-op.
Community activity	Arranging community events for members and their families and friends	A stronger thriving community – where all members, families and friends are welcomed. Helping to state the identity of the co-op.
Understanding the wishes and needs of members	Engaging with members personally – developing understanding of how they would like to be active members	Seeking to get the best possible interaction and housing services for all the co-op's members individually in ways that are right for them
Communication and dialogue	Any methods the co-op uses to communicate and have dialogue with its members can be considered involvement activity. How a co-op provides information to its members and how it responds to complaints and issues raised by members are parts of its active membership culture.	Ensuring that all members are informed about what is happening in the co-op and have the means to input their views. Ensuring that the rights of members to participate are protected individually and that the co-op makes best use of the collective knowledge and skills of each member.



Method	Notes	Potential outcomes
Consulting with members	Providing opportunities for members to feed in views about key co-op issues regarding activities and services, and enabling them to respond to consultation in different ways	A knowledgeable and constructive membership shaping the co-op's policies, procedures and strategies to get the best possible input from as many co-op members as possible
Personal member and younger resident development	Encouraging members to use their membership to receive personal support, training and development for them and their families; to get involved in activities and meetings to the level of their choosing; and to communicate their development to other members	Helping individual co-op members along their life journeys; unlocking personal skills and building knowledge that will strengthen the capacity of the co-op as a whole; creating participation ambassadors; building succession potential by encouraging youth participation
Encouragement and support to participate in the co-op's governing body	Encouraging members to put themselves forward for and/or attend governing body meetings	Ensuring the co-op has a functioning and vibrant governing body able to lead the co-op forward delivering its business plan
Encouragement to attend co-op general meetings	Encouraging active membership at general meetings – enabling democracy in the co-op	A co-op where as many members as possible treasure the co-op's identity and feel part of it



Regulatory compliance

Registered Provider co-ops also need to be aware that they are required to comply with the Tenant Involvement and Empowerment Standard. The full standard is available [here](#), but key parts of the standard include:

- providing various choices and methods of information and communication about repairs and other services
- having a clear, simple and accessible complaints procedure
- having a wide range of methods by which co-op members can influence housing policies and standards
- having different ways that co-op members can scrutinise performance and make recommendations for change
- having a robust equalities, diversity and fairness approach.

The trade body for the housing association sector, the National Housing Federation, has launched a programme called [Together with Tenants](#). This aims to address the relationship between housing associations and their tenants, which is different from how a co-op's membership works, but co-ops may find it useful to consider the Together with Tenants programme.

Assessing member activity

A co-op may wish to assess the co-op's involvement. A tool to assist in carrying out an assessment is available [here](#). To carry out an assessment, it is suggested that a co-op:

- a) gathers evidence as suggested in the table below to the extent that the co-op would find it useful
- b) holds a meeting of the governing body, possibly with other general members and any staff or other relevant stakeholders present, to agree the elements of the assessment.



Some sensible judgement may need to be made regarding the grading of some questions dependent on the size of the co-op. The general intention is that:

- 0 points equals nothing happening at all
- 1 point equals something happening rarely
- 2 points equals something happening sometimes
- 3 points equals something happening reasonably often
- 4 points equals something happening all the time



The table below suggests evidence that could be used to support the assessment:

Question	Possible evidence base
General	
How much are members satisfied with the way the co-op is run?	All questions whose evidence base should be based on a survey of members (see surveying section below); the response rate to a membership survey may also be indicative
How much do members feel that their co-op enables their views to be listened to and acted on?	
How much do members feel that the co-op offers them opportunities to be active in the co-op?	
How much are there informal community mutual support networks?	It would be difficult to get an evidence base for informal community networks beyond identification of anecdotal data
Collective activity outcomes	
How much does the new member induction process feel welcoming and leads to active membership?	Evidence could be based on new member surveys; and on actual data of new members becoming active
How much do the co-op's community events lead to a strong welcoming community?	Evidence could include the numbers of community events held and numbers of community members attending them
How much do co-op members feel encouraged and supported to get involved in governance?	Discussions with existing and former members; particularly new governing body members and those with accessibility issues



Question	Possible evidence base
How many new members came onto (or regularly attended) the co-op's governing body last year?	Actual numbers of new governing body members or actual numbers of members attending general meetings who previously did not. NB – in a small co-op where all members who could attend are attending, score 4 points, but only if new members are attending
What percentage of members attended the last Annual General Meeting?	Actual numbers of members attending the last AGM
People outcomes	
How well does knowledge of individual members inform the quality of interaction and services?	Formally kept profiling data of members; otherwise on an anecdotal basis
How well does two-way dialogue occur between the governing body and the membership?	Assessment of information provided to co-op members over the previous year (in written or digital format); assessment of information provided by members in surveys, complaints or through other means
How much does an active membership make a difference to services and activities?	Assessment of how members have influenced decision-making, services and activities in the co-op; assessment of consultation feedback provided to members
How much does active membership help members to develop themselves personally?	Assessment of training carried out with members; assessment of appraisals carried out for governing body members; anecdotal or other evidence regarding how members have developed as a result of their co-op involvement



The following table seeks to set a scale in relation to outputs from the assessment:

Percentage score	Result
19% or below	The co-op has serious member involvement problems which require it to bring in external advice and support to change the way the co-op operates
20% to 39%	The co-op's member involvement is not good. It needs to take some significant steps to rectify its active membership activities.
40% to 59%	The co-op's member involvement is average – not good but not so bad either. The co-op still needs to consider its active membership strategy.
60% to 79%	A score of above 50% in the assessment is good. It means the co-op still needs to champion its active membership activities, but it is doing good work to involve its members
80% or above	This is very good. The CCH wants to hear about your co-op to publicise how it encourages active membership. Consider putting in for a CCH annual award!

Developing an active membership strategy

The following section sets out what a co-op might do in relation to each aspect of active membership. There is not a right or wrong way to do most of these things, but the intention of this guidance is to suggest approaches that could be tried out.

- 1 **Informal “over the garden fence” activity** – it is next to impossible for a co-op to introduce informal activity in a co-op if it doesn't already exist, but it can be the sign of a co-op with an active membership if informal engagement takes place between its members. Informal activity can manifest itself in many ways that might include:



- members talking to each other in communal areas – gardens, communal hallways, shared facilities
- members helping each other out – looking after each other's children; doing shopping for each other; caring for each other when ill; receiving parcels and deliveries for each other
- members visiting each other or having meals together
- members attending events together
- or many other possibilities!

It may be that how a co-op inducts new members will stimulate informal activity. Some new build community led housing schemes have used design of schemes to encourage community interaction – such as having communal letterboxes, communal laundries, streets designed to encourage community contacts rather than car use. An existing co-op could explore making design changes to facilitate interaction between members.

- 2 **Induction** – the lettings process is important in relation to encouraging active membership in co-ops. Right from advertising that people can express an interest in being housed by a co-op, it is important that it is clear that living in a co-op is different from other forms of housing – that people would be moving into a community and a member owned business – it is not just about providing someone with a home.

With this in mind, the following areas need consideration:

- does the process to advertise membership or vacant homes sufficiently get across the community nature of the co-op?
- if the co-op takes nominations from the local authority, have there been discussions with the local authority about how that is done? Does the local authority advertise to potential applicants for the co-op's homes that the applicant would be joining a co-op?
- how are people selected to become members or tenants of the co-op? If there are interviews for prospective members, who carries them out? Do co-op members participate in the



allocations process (possibly alongside staff if applicable)? How well is it got across that the co-op is a community? As well as standard questions about housing need, are applicants asked about their willingness to participate in the running of the co-op or their previous experience of community activity?

- who shows a potential tenant a property that they may be moving into? Is the community nature of the co-op discussed with the tenant?
- who carries out the lettings process? Again, is there a co-op representative available to discuss the community nature of the co-op and local facilities and amenities?
- does the co-op's lettings checklist include getting across information about the co-op's democracy, co-op values and principles, community and local facilities?
- is a new member survey carried out as part of the lettings that identifies how the new member felt about the letting process? Does it include questions relating to their involvement in the co-op? Is the new member told about forthcoming co-op meetings or events?
- is a follow up visit arranged during the letting where a co-op representative visits the new member once they have settled in?
- does the co-op have a mentoring/buddying system for new members, where an existing member links with the new member to ensure that:
 - a) they can meet their neighbours if they wish to
 - b) there is a friendly face they can get information from about the co-op or the local area
 - c) someone calls round for them before the next meeting



- d) someone can explain how the co-op works, what the key issues are in the co-op, the benefits of being a governing body member and how to become one.

A Lettings & Induction Checklist is available in Appendix One [here](#).
A Moving in Survey is available in Appendix Two [here](#).
An Active Membership Survey is available in Appendix Three [here](#).
A Post Moving in Checklist (to be used at a follow up visit) is available in Appendix Four [here](#).

These documents will need to be adapted to suit the circumstances of each co-op.

- 3 **Community activity** – it is similarly impossible to define what formal community activity should be arranged within a co-op, but most co-ops should hold some events to bring its members together and should include resources in their annual budget to do so. Formal community activity that co-ops could arrange might include:

- holding community events alongside the Annual General Meeting
- arranging co-op fundays
- arranging community trips – to the seaside, the countryside, to pantomimes, to football matches etc.
- arranging events for the children/young residents
- arranging one off social events relating to particular co-op activities
- connecting members to wider co-operative movement activity.

Co-ops need to ensure that any community activity formally arranged by the co-op needs to comply with legislation and regulations, particularly regarding health and safety and safeguarding adults and children legislation and regulations.

It is particularly important to note that:

- a) **Checks on personnel** - all people in co-ops who have regular contact with vulnerable adults and/or children:



- should be subject to employment checks and Disclosure and Barring Service (DBS)/Independent Safeguarding Authority (ISA) checks, where appropriate. It is an offence for any organisation to use someone, paid or unpaid, in a regulated activity when that person is known to have been barred by the DBS/ISA.
- should be trained in the implications and processes involved with the safeguarding of vulnerable adults and children, and in how to identify signs of abuse and neglect
- should protect themselves from allegations of abuse, or situations that could be misunderstood, by maintaining strong professional boundaries
- should ensure that they understand other health and safety issues such as provision of first aid.

b) **Photos and film** – a co-op is required to seek written consent from parents, guardians or carers before publicly using photographic material that includes vulnerable adults or children. They should also get verbal consent from the child or vulnerable adult if they can communicate verbally. Photographic material should not contain personal information about them that could identify their whereabouts. Children and vulnerable adults should never be portrayed in a demeaning or tasteless way.

4 **Understanding the wishes and needs of members** – in order to encourage active membership, the co-op needs to ensure that members are encouraged and supported to get involved in ways that are right for them. To do this, the co-op may wish to “profile” their members – ie. carry out surveys that identify personal issues specific to the member that will help them to become active or help them to receive services in ways that suit them.



Any such surveys need to be carried out in accordance with General Data Protection Regulations, with appropriate assurances given to members when the survey is carried out.

Profiling usually refers specifically to asking questions about statistical, diversity and service-related issues, but in a co-op, it may be pertinent to ask questions in relation to active membership such as:

- how the member would like to be contacted
- how the member would like to contact the co-op
- do they have access to the internet?
- what consultation mediums they might respond to
- whether they would like to attend occasional/periodic meetings, and what barriers might prevent them from attending meetings
- whether there are service-related activities or issues they would like to be involved with
- whether they want to participate in social and community activities
- whether they want to participate in training & development sessions
- whether they would like to become a governing body member
- whether they will attend general meetings of the co-op
- whether they would like to attend conferences or events on behalf of the co-op, such as the annual CCH conference or CCH member forums.

Profiling may also be used to enable the co-op to discover issues about the member that may make it harder for a member to become active, such as learning or language difficulties, visual or auditory impairments or cultural differences. If such difficulties or differences exist, the co-op should take steps to address them to ensure that all its members have an equal opportunity to become active in the co-op.

- 5 **Communication and dialogue** – co-ops need to have effective, clear and easy to use methods of communication and two-way dialogue with their members as individual recipients of the co-op's services.



Members need to know that they can raise issues with the co-op and that the issues they raise will be taken seriously and either addressed or responded to with an explanation as to why something can't be done.

Written information to co-op members needs to be attractively produced, member friendly, and not containing jargon or information that members may not understand. Co-ops should use their best endeavours to assist members who are not able to read or understand written communications and be aware of members that need such assistance.

There are various information flows to members, including through:

- **information provided in the initial sign up/induction of new members** – this is discussed above
- **the member handbook** is an important method of getting information about the co-op and its services across to members. The member handbook is about providing simple, basic and easy to read information about what the member needs to know about in relation to their co-op membership and the housing services they receive. This means it could include:
 - a) information about the co-op – its vision and values and the co-op values and principles
 - b) how to contact the co-op
 - c) information about the service provider if there is one
 - d) information about the community
 - e) information about how the co-op's democratic structures work, how members can attend general meetings, be members of the governing body and can participate in other ways
 - f) information about how members can get copies of co-op policies and procedures



- g) key points from the Equality and Diversity Policy – ie. that the co-op is a community that welcomes difference and expects its members and others not to discriminate
 - h) information about how to report the need for repairs and what members should expect in relation to repairs
 - i) information on the services paid for through service charges
 - j) information about how to pay rent, support in relation to claim housing benefit or universal credit, and what happens if a member is having difficulties paying their rent
 - k) information about possible transfers and exchanges
 - l) information about making complaints – what members should do if they wish to make a complaint about services, anti-social behaviour or harassment, resident disputes or domestic abuse
 - m) fire safety information and other health and safety issues
 - n) a summary of the co-op's pets policy.
- **periodic newsletters or one-off information sheets** – including an annual report to members
 - **letters and information sent out relating to services** – co-ops need to send formal letters and information to their members – either individually or collectively about the housing services. It is important that such letters are written appropriately, using member friendly wording, explaining anything that might be complicated and giving clear reasons for anything negative.
 - **notice boards** can be used to get some general information across. Notices may particularly be required for fire safety information.
 - **digital communications** – co-ops may communicate with their members through a co-op website; a closed Facebook page that can provide real time updates; Mailchimp or through some other digital communication method. It is important that co-ops understand that digital methods of communication require appropriate management of them, but the creation of a website may be a good way to involve younger people.



- **methods members have of raising service issues specific to them** – members are likely to raise service and other issues relating to their co-op membership and housing services in a variety of ways. Members may raise issues with governing body members, with staff supporting the co-op, with contractors or in other ways. When such issues are raised, members may think they have raised those issues formally, but the co-op may not formally have registered them. Co-ops need to design systems that capture as many comments made by co-op members as possible to prevent this from happening.
- **complaints about services** are a means by which members communicate and have dialogue with the co-op. Members are telling the co-op something they do or don't like, and members should be encouraged to raise issues when they need to. It is important that co-ops respond with respect, positively and appropriately. Issues raised should be logged and the complainant should decide whether they wish their complaint to be managed informally or formally.

Informal resolution of a complaint means that the matter they are complaining about is resolved as soon as possible in a way that is agreed between the co-op and the complainant.

Formal resolution of a complaint means that the matter complained about is also resolved as soon as possible, but that also a formal complaints procedure is implemented. Under the formal procedure someone independent of the complaint assesses the complaint and makes a determination which the complainant may appeal against if they wish to.

In either case, the co-op should learn from complaints, considering carefully issues raised by complainants and seeing the complaints as positive feedback. As well as this, the active two-way conversation created by a complaint can be a good way to engage someone and lead to them being more involved.



- **satisfaction returns** – co-ops would normally have some means by which members can express satisfaction or otherwise in relation to repairs that have been done and in relation to the handling of complaints. Such satisfaction returns are rarely returned, but they give the opportunity for members to raise issues. Co-ops need to have systems to identify and consider any issues raised.
- 6 **Consulting with members** – co-ops also need to have the means of engaging with members collectively about housing and other services. This might be in relation to:
- a) **ongoing consultation regarding member views about the service** – ie. carrying out surveys or finding out views on the service. A short survey is available in Appendix Five [here](#) and a longer survey in Appendix Six [here](#). Both would need to be adapted to meet the specific co-op's needs.

Carrying out a survey may yield statistical information which could be useful to the co-op. It is common that co-ops will receive 90% plus satisfaction ratings when carrying out such surveys because those members who return surveys are likely to identify with the co-op.

If the co-op simply wants to get as many responses as possible, it may be useful to enable members to respond to the survey digitally, possibly using tools such as survey monkey. For a fee, the CCH can provide such facilities for co-ops to use.

However, given that the size of most co-ops is unlikely to yield a significant statistical return, a more useful purpose for a survey may be to enable engagement with all a co-op's members. A survey is a useful opportunity to enable discussion with members about how they feel about a range of issues in the co-op and whether they have any issues of concern. This purpose is better achieved through a face to face discussion where the survey is completed – either by volunteers or by staff paid to carry out the survey. A



co-op needs to make a sensible judgement about how many surveys would be returned if the co-op is reliant on members' physically returning them.

- b) **consultation regarding specific major issues in the co-op** – a co-op may wish to carry out consultation with its members about any proposed major changes. Each co-op needs to decide what constitutes major changes, but they could include:
- changing the co-op's values or vision (a method of surveying co-op members in relation to the co-op's mission statement, values or vision is suggested in Appendix Seven [here](#))
 - changing the co-op's rules (the CCH, working with Co-operatives UK, has produced model rules for housing co-ops. These model rules are an alternative to rules that many co-ops have that were produced many years ago and are somewhat outdated).
 - the co-op deciding to build new homes (the CCH encourages co-ops to explore building new homes)
 - major changes to co-op buildings that affect members (where the co-op should consult with those members affected).

It should be the case that such matters would be considered by the co-op in General Meeting where votes would be taken on such matters, but not all members attend General Meetings. A survey result would not be binding on a co-op's decision, but it would be expected that a General Meeting or a governing body meeting would take into account any results from a survey carried out before a decision is taken.

- c) **consultation in relation to policy development** – housing co-ops should regularly review their policies. Ideally, co-ops should identify a few policy areas to explore each year. Part of these policy reviews should be to use imaginative ways to engage with



members – through surveys, meetings, drop in sessions – whatever methods will get the most members to engage on the subject matter.

Feedback – it is important that when consulting that there is feedback to members about the results of the consultation and what the co-op intends to do as a result of the consultation. Lengthy reports are not necessary, but a page or two of key results will show that the co-op has a culture where membership views are listened to and appropriate action is taken.

- 7 **Personal member development** – it is a co-operative principle to provide member education and development. Co-ops should support their active governing body members in ways that are akin to supporting staff in an organisation, using a training budget to assist them with their personal development – helping to build their skills, confidence and potential. The opportunity for an individual to increase their skills may be an incentive for them to get involved.

Carrying out appraisals of voluntary governing bodies does not carry the same levels of performance expectations that might exist in relation to a paid role (unless the governing body role is paid). But the purpose of appraising governing body members may be to:

- help each governing body member discuss with the appraiser how well they feel they are performing in their role
- identify what would help them perform better in the role
- discuss how their governing body membership is helping them or could help them with their personal development.

A governing body member appraisal form is available in Appendix Eight [here](#). A co-op would need to carefully consider who carries out appraisals. Traditionally governing body member appraisals would be carried out by the Chair, but they may need training on carrying out appraisals before doing them. Someone else would need to carry out an appraisal for the Chair. Ideally a report would be drawn up identifying any issues being raised in appraisals, but the report



would ensure that individual identities are not known. Personal appraisals should be carried out alongside a method of assessment of the governing body's performance.

Dependent on the outcomes of appraisals, the co-op may wish to ensure that governing body members receive training and development to help them to develop personally. This could involve sending members to conferences or training sessions where to do so would benefit the member and the co-op. The CCH annual conference and member forums are particularly good events to enable co-op members to network with other co-op members and to receive co-op specific training and support.

Co-ops may also wish to consider how to support their younger residents (ie. either young members or the children of members) to develop, both personally and as potential members of the co-op. Young people may particularly remember activities they are sent on by the co-op. They could be encouraged and supported to carry out co-op related projects in schools or in higher education. Building such activities may lead to them becoming active co-op members as they get older.

8 Encouragement to participate in the co-op's governing body

Governing bodies in smaller co-ops may be the co-op's general meetings which all members are entitled to attend and vote at, but the memberships of larger co-ops usually elect a management committee or Board to act as their governing body. Co-ops need to have a functioning governing body and so need to encourage and support members to come forward to participate at governance level.

The co-op's rules set out how its governance works and how the members of the committee, if there is one, are elected. In practice, in most co-ops, it is unlikely that there are contested elections for committee places, and, where there is or isn't a committee, the challenge is about encouraging co-op members to come forward to



get involved in governance. It is suggested that the following pointers are likely to be instrumental in whether enough co-op members put themselves forward for governance roles:

- are meetings welcoming and enjoyable?
- are members encouraged to put forward their opinions and ideas?
- are meetings dominated by one or two individuals who do not allow others to have their say?
- does it feel like all the governing body members have been there for many years and that new members might not be welcome?
- similarly, does it feel like new members will not be encouraged to challenge the existing ways of doing things?
- does it feel like several governing body members are just there to get things for themselves? Are issues relating to people's personal issues repeatedly coming up?
- does it feel like governing body members are actually making decisions in real things in the co-op?
- does it feel like there is a lot of conflict in the governing body meetings? Are disagreements handled well?
- if members do come forward to be governing body members, is there consideration about how best to make them feel comfortable and have a positive role in the co-op?
- are the meetings well chaired? Are they sufficiently brief and to the point? Do the same issues keep coming up again and again?
- is enough information presented to enable informed decision-making? Is it well presented – jargon free – easy to understand?
- are meetings held in easily accessible and pleasant locations?
- are meetings held at times that are convenient for most members?
- do timings work for members in work or with childcare responsibilities?
- are the needs of members catered for (childcare, travel, accessibility, language issues)?
- are refreshments available at meetings?



The way that the above questions are responded to by the governing body may determine whether a member who comes forward to participate will remain and get involved.

Co-ops may wish to set targets for recruitment of new governing body members (or new attendance at governing body meetings where a co-op is governed by General Meeting). Where a co-op elects a committee, based on accepted practice, the CCH's [Code of Governance](#) suggests that governing bodies should have between five and twelve members (although older model co-op rules permit up to fifteen governing body members). This suggests that a co-op governing body could function effectively with as few as five members if those members are effective.

The Code of Governance also refers to the importance of succession in the governing body – ie. that there are some new members coming into the governing body and that maximum terms of office could be considered for governing body members. The housing association sector considers that its Board members should not serve longer than nine years because serving for longer periods could lead to stagnation, lack of new ideas and domination of the organisation by individuals. The nature of the housing co-op sector is different in that governing body members live in the homes provided and it is for each co-op to make decisions about terms of office. But for any co-op it is important that periodically new governing body members are welcomed in.

The legal basis of membership

Housing co-ops are legally **societies**, but the term “housing co-op” can be used to refer also to **companies** that operate according to the co-operative values and principles. Other forms of community led housing organisations may be societies or companies – and the legal form they adopt determines the legal purpose of its members.

Shareholding – the powers of a shareholding membership in a company are limited to what is written into a company's memorandum and



articles and what powers the company directors choose to allocate to the membership.

However, powers of a shareholding membership in a co-operative housing society are legally wider. Members buy a share in the co-op (in many, especially Registered Provider housing co-ops, a nominal share of £1) but shareholdings can be higher or lower. A member's share gives them rights and responsibilities in the co-op.

What can members do?

Shareholding members in a co-op can:

- attend and vote at General Meetings of the co-op
- propose motions to General Meetings
- call Special General Meetings
- elect a governing body (the Management Committee or Board) if the size of the co-op warrants one.

How members can participate in general meetings is defined in the co-op's rules, and the co-op may have further secondary rules that determine how General Meetings are held. Either in the rules or in secondary rules, the following items need to be covered:

- how often General Meetings are called or how often the membership decide that General Meetings will be called?
- what they are called for?
- who can attend and vote?
- quorums for General Meetings?
- how members can call Special General Meetings
- how members can raise items at General Meetings?
- how members can get onto the governing body?
- how proxy voting works?

Every co-op is required to have an Annual General Meeting whose function usually includes such items as:



- receiving the co-op's accounts together with the auditor's report, setting out their view of the co-op's financial management for the preceding financial year
- appointing the auditor for the coming year
- receiving a report from the governing body
- electing the governing body for the coming year
- deciding on how often general meetings should be held during the coming year
- considering any other resolutions tabled by the governing body or by members.

Each co-op also needs to consider other items that need to be agreed in general meetings (thereby giving all members an opportunity to discuss and vote on those matters). Some co-ops require the following to be agreed by general meetings, but there are no set rules about this:

- setting rents and service charges for the coming year
- agreeing changes to co-op policies
- the asset management/planned maintenance programme
- agreeing other major items such as developing new homes.

Where do members come from?

Members in a fully mutual housing co-op are required to be only either existing housing co-op tenants or prospective tenants. Whilst fully mutual co-ops are legally able to admit people on their waiting lists into membership, many long-established Registered Provider co-ops do not do so because of the lack of turnover in their properties. All tenants are required to be co-op members in a fully mutual housing co-op.

In a non-fully mutual housing co-op, members can include people who are not tenants (perhaps people who live in a defined geographical area or who have connections with it). Whilst tenants in a non-fully mutual housing co-op are not required to be members, it is expected that they are offered the opportunity to become members.



Removing membership

A co-operative's rules need to include clauses that set out reasons why and how membership is removed from a member. These are likely to include:

- if a member of a fully mutual housing co-op ceases to be either a tenant or a prospective tenant
- if a member dies
- if a member resigns as a member
- if a member is a tenant of a fully mutual housing co-op and the co-op considers that the tenant has breached their tenancy and a Notice to Quit has expired and the breach is not remedied to the co-op's satisfaction
- if a member is expelled.

The rules should set out clauses about how a member can be expelled for “conduct detrimental to the interests of the co-op”. Removing membership – especially in a fully mutual housing co-op where removing membership also means loss of tenancy – is a major event which could potentially involve all members of the co-op.

Removing membership for non-participation? Housing co-ops sometimes ask whether it is possible to remove a co-op membership if the member does not actively participate in the running of the co-op. Housing co-ops rely on the active participation of some members and co-ops will sometimes state in policies or in tenancy agreements that some participation is expected of members.

The answer to the question is a theoretical yes but a probable “in-practice” no.

Fully mutual housing co-ops in England issue contractual tenancies that give the co-op the ability to remove a member's tenancy having issued four week's written notice. So theoretically a co-op could remove membership from a member for non-participation.



In practice, subsequently taking the case to court to remove the member's tenancy could prove challenging. Judges – who are unlikely to be inclined to support an action that may appear to them to be unreasonable – will heavily scrutinise whether the co-op has acted in accordance with its policies and procedures to remove the membership. Seeking to progress such a case is also likely to earn the co-op a negative reputation in the court which may incline the court to heavily scrutinise subsequent potentially more legitimate cases.

Seeking to develop a policy and procedure regarding removal of membership for non-participation would be extremely problematic. What could legitimately be expected? How would this be checked? What happens if the member has legitimate reasons for non-participation, such as illness, their work schedule or other reasons preventing them from participating, the member feeling unconfident amongst other co-op members or even discriminated against? And what happens if the member wants to participate in a way that the co-op doesn't allow?

And is it desirable that active participation is compelled rather than freely and voluntarily given?

Membership policy

A housing co-op needs to have a membership policy and potentially procedures relating to aspects of the policy. **Community Led Homes** contracted the CCH to produce guidance on membership and other policies – available [here](#). Key issues to consider include:

- What is the purpose of membership?
- The nature of membership in the housing co-op
- Who can be a member?
- What powers, rights and responsibilities do members have?
- How can they exercise them?
- Training and information for members
- Equality and diversity in relation to membership
- Termination of and expulsion from membership



Further procedural matters relating to membership – a fully mutual housing co-op may also have to develop procedures regarding the following membership related issues:

- **extending membership/tenancies to other residents** – what are the co-op's policies regarding allowing a partner of an existing member or another adult in their home to become a joint tenant and a member?
- **relationship breakdown** – what are the co-op's policies regarding the breakdown of a relationship between joint tenants/members where one or both wish to retain the existing tenancy and one or both wish to be rehoused? Does the co-op have any obligations to either as co-op members?
- **transfer requests** – what are the co-op's policies regarding requests from members for transfers to another property? Do they take precedence over allocations from whatever waiting list arrangements the co-op has?
- **mutual exchanges** – how will the co-op manage mutual exchange requests and ensure that any person exchanging into a co-op property becomes a member and is encouraged to take on the rights and responsibilities of membership?

Options if there aren't enough governing body members

The co-op may wish to consider one of the following options if it is considered that:

- there are not enough governing body members
- there are not enough new governing body members coming in
- there are not enough governing body members with sufficient skills, commitment or time available



- there are going to be problems in maintaining a functioning governing body in the future due to the ageing, health or time commitments of existing governing body members.
- a) **change the way the governing body works** – perhaps a co-op could continue to function effectively by making some changes to how the governing body works. It could:
- reduce the number of governing body meetings and more focus could be placed on other methods of involvement
 - reduce the number of required governing body members – as noted previously, a co-op could function effectively with as few as five governing body members if those members are effective
 - introduce digital or virtual meeting methods and proxy voting
 - hold meetings at different times or dates
 - allow any member to attend management committee meetings in order to encourage additional governing body membership (whilst ensuring that it has systems to deal with confidential matters)
 - scrap the management committee (if it has one) and govern the co-op through a general meeting to which all members are entitled to attend.

Clearly some of these approaches would require the co-op to make rule changes.

- b) **co-options** – it may be possible for a governing body to recruit co-opted members although this can only be a partial solution to increase the numbers of governing body members by the number of co-options allowed in the rules. There would still need to be sufficient numbers of co-op members to stand as governing body members, but one or two co-options may help – even for a temporary period.
- c) **changes to what the co-op is or does** – perhaps the co-op is not now meeting the needs of its members or potential members in the way that it was set up to do possibly many years ago. Does the co-op need to consider what it is there for and make changes if necessary? For example – could the co-op sell some homes in order to build



different ones? Could the co-op think about housing different people and possibly providing different tenure options? Could there be other significant changes? None of these things would be easy or straightforward but might this reinvigorate the co-op's governance.

- d) **bringing in external advice and support** – perhaps a focussed piece of work over six months by external advisors with skills in encouraging active membership may be worth trying. Such a programme of work would involve an organisation with skills and experience relating to housing co-ops or similar carrying out focussed work to engage with members to understand member perspectives on the co-op and the governing body. The CCH may be able to assist in arranging such a programme. New model rules produced by the CCH and Co-operatives UK allow for the bringing in of external advice and support as a temporary alternative to closing co-operatives that are struggling with their governance.
- e) **considering payments for governing body members** – this may be considered as controversial in the housing co-op sector, but payment of governing body members may be an option that could be considered. It is accepted practice in the housing association sector that their Board members are paid but introducing such an approach in the housing co-op sector could open doors to criticisms that paid governing body members are only there to be paid. It is suggested that a co-op should seek advice if considering this option. Other things that would need to be considered include:
- **housing co-op rules** – the rules of housing co-ops usually state that governing body members cannot be paid and if this is the case, members would have to vote to change the rules. This could be a controversial debate – although opening it up could lead to enough numbers of governing body members coming forward.
 - **benefit recipients and tax status** - payments for governing body members would be considered income for benefit recipients and would create difficulties regarding their claims. The co-op would



also need to ensure that other governing body members were properly dealing with the payments with regards to paying tax.

- **accountability** – if a co-op were to pay its governing body members, there would need to be a system to ensure that those governing body members were properly accountable for the money they received. The co-op would certainly need an effective appraisals system to ensure that governing body members were attending and were delivering a good service to the co-op for the money they are paid.
- **independent review of payments** – the CCH's Code of Governance states that if a co-op "is paying governing body members, it must ensure that it has a mechanism for establishing payment levels that are independent of the governing body, possibly through a remuneration committee, an independent advisor or by using published guidance and industry norms. Payments must be disclosed to all members and be proportionate to the co-operative's size, complexity and resources and be linked to the carrying out of specified duties against which performance will be reviewed".
- **relationships with operational matters** – in some co-ops, there is an overlap between governing body members being involved in the governance/decision-making in the co-op and with those governing body members also carrying out some aspect of co-op operational services. If such a co-op chooses to pay its governing body members for their governance role, an expectation may form that governing body members who are involved in the delivery of services should be paid for those roles.

Payments to members for delivery of services (ie. work that would normally be delivered by staff) are fraught with difficulties, particularly if those members are part of the governing body. The CCH has come across a small number of co-ops which have adopted such an approach. Usually it results in substantial problems including:



- **accountability** - how are members paid to carry out services accountable to the co-op? Is there a contract and was advice taken to draw it up? Who line manages them in their service delivery role? Who appraises their performance and sets their service delivery targets? How is this line management separated from their role in governance? Are those in the co-op to whom the person is accountable sufficiently robust and confident to line manage the governing body member delivering services?
- **recruitment** – if a governing body member is being paid to deliver services, this suggests that there is a paid function in the co-op that should go out to an open recruitment process. To not do so may result in the co-op breaching equalities and other legislation if someone else considers that they could be paid for the role and has not been considered.
- **employment and tax legislation** – payments to members to deliver services may inadvertently establish formal employment relationships with those members with tax and employment liabilities. Co-ops would need to take appropriate advice to ensure that they don't, particularly ensuring that tax liabilities rest with the governing body member employed to deliver services.
- **remuneration levels** – there could be significant difficulties setting appropriate remuneration levels for a governing body member paid to deliver services. In such circumstances, given that the other governing body members will know the member concerned, how will the co-op ensure that remuneration levels are set independently, equitably and in accordance with normal rates for the services provided?

The CCH's advice is that co-op governing body members should not be employed to deliver services to the co-op. If co-ops feel they should do this – then they should seek independent and robust HR advice and comply with it.



- f) **Considering change** – if all else fails to deliver a sustainable governing body for a co-op, the co-op needs to consider change and needs to consider it within a sufficient timescale to enable an informed debate about what changes to make. The following may be options. In each of these options, a co-op would need to take legal advice to fully understand their pros and cons:
- **becoming non-fully mutual** – a co-op could consider becoming non-fully mutual. This would mean that non-resident members could become governing body members. It would also mean that tenants would not be required to be co-op members and that they would become assured tenants – which would bring a different set of legal issues.
 - **merging with another co-op** – if another co-op is willing to accept transfer of the co-op's homes, this may be a solution, but it may be passing the problems in the co-op onto another co-op
 - **transferring freehold** – a co-op could consider transferring the freehold of its properties to another co-op sympathetic organisation and entering into a leasehold or management arrangement with that organisation. If arranged properly, this arrangement could result in the organisation to whom the freehold is transferred taking on most of the onerous responsibilities that might have been the reason why few governing body members had stepped forward. If attracted to this approach, the co-op would need to be satisfied that the organisation taking freehold will remain co-op sympathetic in the future. Organisations can change quite radically – in many cases becoming taken over themselves – and the subsequent organisation may wish to terminate any agreement made with the co-op.
 - **transferring ownership** – a last resort if there is no other way and co-op members have just had enough is that full ownership can be transferred to another – hopefully co-op sympathetic – housing association. However – co-op members need to understand that this approach is not reversible and in most cases, co-op members



enjoy much better services under co-op management and statistically are far more satisfied than housing association tenants.

Final summarising pointers

- sometimes it may seem impossible – but it rarely is – things ebb and flow
- take a strategic approach to building and maintaining an active membership. Things happening organically is great – but it doesn't always work that way.
- an active membership is an end to end journey that needs to permeate throughout everything the co-op does. It can never be just about members turning up and voting at the AGM!
- value what you have. When they work well, housing co-ops are fantastic. When they work slightly less well, they are probably still better than other housing organisations. Don't lose them – once lost – they can't be got back.
- if in doubt – seek co-op friendly advice and support.
- don't give up!



APPENDIX 1 HOUSING CO-OP MODEL LETTINGS & INDUCTION CHECKLIST

Member name Joint member

Address

Phone e-mail address

Co-op officer

Handover date Tenancy start date

Item	Subject	Tick when done	Any comments
1.1	Introduction to the co-op		
1.2	Member profiling survey completed		
1.3	Check new member identification and Right to Rent Check		
1.4	Give new member Welcome Pack and give overview		
1.5	Explain tenancy agreement		
1.6	Receive £1 for co-op share (or more for joint members)		
1.7	Sign tenancy agreement (by all parties)		
1.8	If a transfer – sign and complete termination form		
1.9	Arrange 4 week post new member visit		Date arranged:
1.10	Explain how to terminate tenancy		
1.11	Explain Moving In survey		
2	Rent		
2.1	Explain weekly rent and service charge		



2.2	Explain payment methods – give rent standing order/direct debit/paying in card/book information (if applicable)		
2.3	Advice regarding Housing Benefit or Universal Credit		
2.4	Give tenant a rent control card		
2.5	Ensure regulatory CORE Form completed		
3	Repairs		
3.1	Repairs reporting methods explained including out of hours		
3.2	Issue repairs standards leaflet		
3.3	Explain amenities connection		
3.4	Outline planned maintenance works for the home		
3.5	Explain heating/hot water system		
3.6	Show location of & take readings: Electric meter & trip switch Gas meter and stop tap Water mains stop tap and meter if appropriate		Readings
3.7	Issue gas and electrical safety certificates		
3.8	Explain annual gas service access		
3.9	Issue energy performance certificate		
3.10	Issue copy of Lettable Standard		
4	Keys issued		
4.1	Front door Back door Window locks Other	_____ _____ _____ _____	



5	Additional Information		
5.1	Explain responsibilities for gardens/communal areas		
5.2	Explain that there is no Right to Buy in a fully mutual co-op		
5.3	Discuss the need for the member to get home contents insurance		
5.4	Identify/discuss any particular communication/support needs		
5.5	Give date and venue of next co-op meeting		Date
5.6	Give information on any forthcoming co-op events		Events
5.7	Identify co-op mentor to support new member		
5.8	Provide information about local rubbish collection		
5.9	Provide information about local buses		
5.10	Provide information about local shops		

Lead tenant signature

Joint tenant signature

Co-op officer

Date



APPENDIX 2 - MODEL MOVING IN SURVEY

Name

Address

Moving into a new home is a major experience. We want to know how well we did when you moved in. This is so that we can improve things for the next new members. Many thanks for your time in completing this survey.

Please tick one box per question	Very Poor	Poor	Good	Very Good
How did you find...				
The way we let your new home to you				
The way we dealt with your application				
The handover meeting				
The attitude of co-op volunteers & staff				
The knowledge of the people involved				
Your home's condition when you moved in				
How much your new home meets your needs				
How much you felt welcome in the co-op				

Please feel free to give us any other comments about how well your moving into your new home went

Thank you for completing this survey - please return to the co-op officer when they visit you for your post moving in visit



APPENDIX 3 – ACTIVE MEMBERSHIP SURVEY

Being a housing co-op means that all our tenants are members of the co-op and have an equal right to participate in making decisions in the co-op. We rely on our members to volunteer to be active in the co-op in some way. We have regular committee meetings (usually) on *day of the month*, and you can stand to become a committee member if you wish to at our Annual General Meeting which is held in *month*. We also hold other one-off meetings for all members.

This is a survey asking how you would like to be active in the co-op and how you would like us to contact you.

NAME OF THE PERSON COMPLETING THE SURVEY

.....

ADDRESS

E-MAIL

PHONE NUMBER

.....

.....

.....

BECOMING ACTIVE IN THE CO-OP

Please indicate below the ways you would like to be involved:

- ☐ would you be prepared to get involved with helping with a particular service (ie. repairs, letting homes, rent arrears, estate inspections, social events, communications etc)?
- ☐ will you complete surveys?
- ☐ are you prepared to be part of a group of members where we ask your views about particular issues?
- ☐ would you attend a one-off meeting to discuss particular issues?
- ☐ would you like to be on the co-op's management committee?
- ☐ will you attend general meetings of the co-op?
- ☐ would you attend conferences on behalf of the co-op (such as the annual Confederation of Co-operative Housing conference – the national representative body for co-operative housing)?



WHAT HOUSING ISSUES ARE YOU INTERESTED IN?

Please tick any that apply

- | | |
|--|---|
| ☐ cleaning communal areas | ☐ how members are active |
| ☐ collecting rents | ☐ improving our homes |
| ☐ communal gardening | ☐ letting our homes |
| ☐ community activities | ☐ local neighbourhood issues |
| ☐ community safety | ☐ monitoring our performance |
| ☐ developing new homes | ☐ repairs |
| ☐ fairness & equality | ☐ tenancy conditions |
| ☐ green/climate issues | ☐ other (please specify) |

If you have not attended a co-op general meeting in the last two years, is this because:

- | | |
|--|--|
| ☐ you don't know about them | ☐ not knowing other members |
| ☐ subject matter of meetings | ☐ lack of confidence |
| ☐ the times of the meetings | ☐ you are just not interested |
| ☐ the venue of the meetings | ☐ other (please specify) |
| ☐ accessibility of the meetings | |

HOW WOULD YOU LIKE US TO CONTACT YOU? Please tick all that apply

- | | |
|---------------------------------------|---|
| ☐ e-mail | ☐ telephone |
| ☐ face to face | ☐ text message |
| ☐ letter | ☐ other (please specify) |

HOW MUCH TIME CAN YOU SPARE TO GET INVOLVED? Please tick one

- | | |
|--|--|
| ☐ Up to two hours | ☐ Four to six hours |
| ☐ Two to four hours | ☐ Six hours or more |

HOW OFTEN WOULD THIS BE? Please tick one

- | | |
|----------------------------------|------------------------------------|
| ☐ weekly | ☐ quarterly |
| ☐ monthly | ☐ annually |



WHAT TIME OF DAY IS BEST FOR YOU TO ATTEND MEETINGS?

Please tick all that apply

- ☐ mornings (9am to 12pm)
- ☐ afternoons (12pm to 4pm)
- ☐ evenings (4pm onwards)

DO YOU HAVE ANY ACCESSIBILITY REQUIREMENTS?

Please tick all that apply

- ☐ mobility
- ☐ visual
- ☐ communication (including speech or literacy)
- ☐ hearing
- ☐ language
- ☐ other

We will contact you to discuss any accessibility requirements. Our aim will be to make it as easy as possible for all our members to participate.



APPENDIX 4 – POST MOVING IN CHECKLIST

Lead member Joint member

Address

Phone e-mail address

Visit date TSD

Item	Subject	Tick when done	Any comments
1	Is the member happy with their new home?	Yes/No	
2	Did the member find the tenancy agreement easy to understand?	Yes/No	
3	Did the member feel the Welcome Pack was helpful?	Yes/No	
4	Does the member have any issues regarding paying rent?	Yes/No	
5	Does the member know how to report a repair?	Yes/No	
6	Does the member have any concerns about the home?	Yes/No	
7	Does the member have any concerns about neighbourhood?	Yes/No	
8	Collect Moving In Satisfaction Survey (have another available)		
9	Has the member attended a co-op meeting?	Yes/No	
10	Go through the Active Membership Survey with the member		

Lead tenant signature

Joint tenant signature

Co-op officer

Date

APPENDIX 5 – SHORT HOUSING CO-OP SURVEY

Name Address

e-mail address

Is it OK for us to send you occasional information about the co-op and your housing by e-mail? Yes/No
We manage any personal data we hold about our members in accordance with general data protection regulations

Looking back at the last 12 months, how satisfied are you that the co-op:

	Very satisfied	Satisfied	Neither satisfied dissatisfied	Dissatisfied	Very dissatisfied	Don't know/ no opinion
Provides you with a good quality home						
Provides you with value for money for the rent you pay						
Provides services that are easy to access when you need them						
Delivers a good service when responding to your repairs						
Listens to your views and acts on them						
Keeps you informed about things that might affect you						
Provides you with opportunities to be active in the co-op						
Treats you as a valued member regardless of your age, gender, ethnicity, sexuality, faith and/or financial circumstances						
Overall how satisfied are you with the co-op						

Please let us know any comments you have about how the co-op is run or the services we provide – please contact

APPENDIX 6 HOUSING CO-OPERATIVE LONG MEMBER SURVEY

The purpose of this survey is to find out what the co-op's members think of the way our housing services are provided, so that we can improve services or deal with any problem areas. We hope you will have the time to answer these questions.

The survey should only be completed by the person who is the registered tenant at the address. If there are two joint tenants living in your home, you should have been sent two surveys, and both tenants can complete the survey if they wish to. It should not be completed by someone else who lives at the address.

Unless it says otherwise, please tick one box only to each question. Please answer all the questions. If you want to tell us anything that doesn't fit in one of the boxes, please feel free to add notes!

You can either respond to this survey by:

- completing it and returning it to ...
- or wait for someone to come around to go through the survey with you. If you don't complete the survey, we will assume that you want someone to call round. This latter option will give you an opportunity to have a chat with someone to discuss any issues relating to the co-op or your home. We'd love to have a chat with you!!!

If you don't want someone to call round, then please complete the survey and return it to us by *date* and let us know who you are below.

NAME OF THE PERSON COMPLETING THE SURVEY

.....

ADDRESS

.....

Apart from any answer you may give to the final question, all the information you give will be kept completely confidential and in accordance with General Data Protection Regulations. It will only be used to help us consider how well we are performing or for other purposes specified in the survey.

Information about you and your household

1 How long have you been a tenant/member of the co-op?

- ☐ under 1 year
- ☐ 1-2 years
- ☐ 3-5 years
- ☐ 6-10 years
- ☐ 11+ years
- ☐ don't know / can't remember

2 How many people normally live at your home (please put numbers of adults/children)?

..... adults
..... children (under 18 years)

3 To which of these groups do you consider you belong?

White

- English/Welsh/Scottish/Northern Irish/British ☐
- Irish ☐
- Gypsy or traveller ☐
- Any other white background (please tick and write in) ☐

Multiple ethnic group

- White and Black Caribbean ☐
- White and Black African ☐
- White and Asian ☐
- Any other dual background (please tick and write in) ☐

Asian or Asian British

- Indian ☐
- Pakistani ☐
- Bangladeshi ☐
- Chinese ☐
- Any other Asian background (please tick and write in) ☐

Black or Black British

- Caribbean ☐
- African ☐
- Any other Black background (please tick and write in) ☐
- Other (please tick and write in) ☐
- Prefer not to say ☐

4 Does anyone in your household have any longstanding illness, disability or infirmity?
"Longstanding" means any condition that has lasted over a period of time or that is likely to last over a period of time.

- ☐ Yes
- ☐ No
- ☐ Don't know
- ☐ Prefer not to say

5 How likely is it that you will be living in your current home in ...

	Very likely	Fairly likely	Fairly unlikely	Very unlikely	Don't know
3 years					
5 years					
10 years					

Your home and the neighbourhood

6 Taking everything into account, how satisfied or dissatisfied are you with the overall service provided by the co-op?

- ☐ Very satisfied
- ☐ Fairly satisfied
- ☐ Neither satisfied nor dissatisfied
- ☐ Fairly dissatisfied
- ☐ Very dissatisfied

7 Taking into account your homes and the services the co-op provides, do you think that the rent for your home represents good or poor value for money?

- ☐ Very good
- ☐ Fairly good
- ☐ Neither good nor poor
- ☐ Fairly poor
- ☐ Very poor

8 Overall how satisfied or dissatisfied are you with your home?

- ☐ Very satisfied
- ☐ Fairly satisfied
- ☐ Neither satisfied nor dissatisfied
- ☐ Fairly dissatisfied
- ☐ Very dissatisfied

9 How would you describe the general condition of your home?

- ☐ Very good
- ☐ Fairly good
- ☐ Neither good nor poor
- ☐ Fairly poor
- ☐ Very poor

10 How satisfied or dissatisfied are you with your neighbourhood as a place to live?

- ☐ Very satisfied
- ☐ Fairly satisfied
- ☐ Neither satisfied nor dissatisfied
- ☐ Fairly dissatisfied
- ☐ Very dissatisfied

11 Please rate the following in order of how severe you think problems are in your neighbourhood (insert other problems at the bottom if you wish):

	No opinion	Not a problem	Minor problem	Major problem
Rubbish/litter				
Noisy neighbours				
Abandoned cars				
Vandalism				
Graffiti				
Drug use or dealing				
Burglaries				
Other crime				
Car parking				
Poorly maintained grounds				
Communal cleaning				

Getting involved with the co-op

12 Do you feel that you understand what a housing co-op is?

- ☐ Yes
- ☐ No

13 Do you feel you are able to become involved in decision-making in the co-op if you want to?

- ☐ Yes
- ☐ No
- ☐ Don't know

14 If you are not involved currently in the running of the co-op, could you give reasons for your non-involvement (tick as many as you would like)?

- ☐ I don't have the time
- ☐ I don't understand what a co-op is
- ☐ I don't feel confident enough to get involved
- ☐ I was previously active and I feel I have done my bit
- ☐ I don't feel that the co-op being a co-op is important
- ☐ I feel excluded from the running of the co-op
- ☐ I don't know when the meetings are
- ☐ meetings are held at times when I can't attend
- ☐ the venue isn't accessible
- ☐ there are other reasons why I'm not active.

Please tell us anything you would like to about why you aren't involved with the running of the co-op, and anything you think might make it easier for you to get involved

15 If you are currently involved in the running of the co-op, please tell us why you are involved (in your own words):

16 Which of the following co-op social events held in the last five years have you enjoyed?

- ☐ Annual General Meeting
- ☐ Street party
- ☐ Funday
- ☐ Informal events (please specify)
- ☐ I haven't attended any co-op social events in the last five years

17 Would you like the co-op to have more social events?

- ☐ Yes
- ☐ No
- ☐ Don't know / no opinion

18 Do you have any suggestions about social events the co-op could hold, or any other ideas to build our community feel?

Communication with the co-op

- 19 Have you been in touch with the co-op about a tenancy issue within the last 12 months?
- ☐ Yes
 - ☐ No
 - ☐ Can't remember
- 20 How have you contacted the co-op in the last 12 months (please tick any that apply)?
- ☐ by talking to a committee member in person or on the phone
 - ☐ by phoning or visiting the office
 - ☐ by writing to us
 - ☐ by sending us an e-mail
 - ☐ through the website contact form
 - ☐ other (please specify)
 - ☐ can't remember
- 21 What have you contacted the co-op about in the last 12 months?
- ☐ repairs
 - ☐ rent/housing benefit
 - ☐ neighbours
 - ☐ other issues (please specify)
 - ☐ can't remember
- 22 Have you been satisfied or dissatisfied with any contact you have had with the co-op over the last year?
- ☐ satisfied
 - ☐ neither satisfied nor dissatisfied
 - ☐ dissatisfied
- 23 If contact you have made with the co-op over the last year has been particularly good or bad, please tell us more about it. Please tell us whether you were contacting your co-op through a committee member or through staff.
- 24 Is the co-op good or bad at communicating with our members about issues you need to know as a tenant?
- ☐ good
 - ☐ neither good nor bad
 - ☐ bad

The repairs service

25 Generally, how satisfied or dissatisfied are you with the way the co-op deals with repairs?

- ☐ Very satisfied
- ☐ Fairly satisfied
- ☐ Neither satisfied nor dissatisfied
- ☐ Fairly dissatisfied
- ☐ Very dissatisfied
- ☐ No opinion / don't know

26 Have you requested any repairs to your home in the last 12 months?

- ☐ Yes
- ☐ No
- ☐ Can't remember

27 Have you had any repairs completed in the last 12 months?

- ☐ Yes
- ☐ No
- ☐ Can't remember

28 What are your views of the co-op's repairs service with regard to the following:

	Very good	Fairly good	Neither	Fairly poor	Very poor	No opinion
Being told when workers would call						
Contractor showing ID						
Time taken to complete the repair						
Attitude of workers						
Overall quality of repair work						
Keeping dirt and mess to a minimum						

29 Do you think the repairs service has improved or deteriorated over the last year?

- ☐ the repairs service has improved over the last year
- ☐ the repairs service is about the same
- ☐ the repairs service has got worse over the last year
- ☐ I don't have an opinion about the repairs service

Complaints

30 Have you reported a complaint to the co-op in the last 12 months?

- ☐ Yes
- ☐ No
- ☐ Can't remember

31 Who did you report the complaint to?

- ☐ a member of staff
- ☐ a committee member
- ☐ someone else (please specify)

32 Was the complaint about?

- ☐ the service you receive from the co-op
- ☐ the behaviour of another co-op tenant/member or their family/friends
- ☐ someone or something else (please specify)

33 How satisfied or dissatisfied were you with the following aspects of the handling of the complaint?

	Very satisfied	Fairly satisfied	Neither	Fairly dissatisfied	Very dissatisfied
Advice and support provided					
How the complaint was dealt with					
How well you were kept informed					
The final outcome of the complaint					
Speed with which complaint dealt with					

34 Is there anything you would like to tell us about the co-op (please continue overleaf if necessary)?

Background information

You don't have to respond to any of the questions below, but by answering these questions, you will help us consider whether we are discriminating against you or anyone else.

35 How old are you?

- ☐ 16-24
- ☐ 25-34
- ☐ 35-44
- ☐ 45-54
- ☐ 55-59
- ☐ 60-64
- ☐ 65-74
- ☐ 75+
- ☐ Prefer not to say

36 Are you:

- ☐ Female
- ☐ Male
- ☐ Transgender
- ☐ Prefer to self-describe
- ☐ Prefer not to say

37 What is your religion?

- ☐ None
- ☐ Buddhist
- ☐ Christian
- ☐ Hindu
- ☐ Jewish
- ☐ Muslim
- ☐ Sikh
- ☐ Any other religion
- ☐ Prefer not to say

38 How would you describe your sexual orientation:

- ☐ Bisexual
- ☐ Heterosexual/straight
- ☐ Gay woman/lesbian
- ☐ Gay man
- ☐ Prefer to self-describe
- ☐ Other
- ☐ Prefer not to say

39 What is your work status?

- ☐ employee in full time job (30 hours or more per week)
- ☐ employee in part time job (less than 30 hours per week)
- ☐ self-employed (full or part time)
- ☐ unemployed
- ☐ retired from work
- ☐ full time education at school, college or university
- ☐ government supported training
- ☐ carer
- ☐ looking after family
- ☐ permanently sick/disabled
- ☐ doing something else

APPENDIX 7 WHAT DO YOU THINK THE CO-OP SHOULD BE ABOUT?

We are developing a “mission statement” and set of values that will govern what the co-op does. We want to know your views about what you think the co-op should be about.

Please tick up to five of the following words or phrases that you think are particularly important and should apply to the co-op:

- | | |
|---|--|
| ☐ a mixed community | ☐ local knowledge |
| ☐ accountable to our members | ☐ neighbourliness |
| ☐ an active membership | ☐ people working together |
| ☐ business like | ☐ people powered homes |
| ☐ common ownership | ☐ responsive to what our members want |
| ☐ common wealth | ☐ run by people for people |
| ☐ democratic | ☐ safety and security |
| ☐ education and training | ☐ strong community |
| ☐ empowerment | ☐ support when you need it |
| ☐ fair and equal | ☐ welcoming different views |
| ☐ friendly | ☐ welcoming people with different backgrounds |
| ☐ gets things done | |
| ☐ good quality homes | |
| ☐ good quality housing services | |
| ☐ homes for families | |
| ☐ homes for people of all ages | |
| ☐ homes for people who are in housing need | |
| ☐ homes for single people | |
| ☐ inclusive | |

OTHER (please feel free to add):

- ☐
- ☐
- ☐
- ☐

APPENDIX 8 GOVERNING BODY MEMBER APPRAISAL

The purpose of this appraisal is to help each governing body member discuss with the appraiser how well they feel they are performing in their role; what would help them perform better; and how their governing body membership is or could help them with their own personal development. All matters raised in appraisals will be kept strictly confidential to the governing body member and their appraiser. The appraiser may make recommendations following appraisals, but recommendations will not be specific to any one governing body member and what individual governing body members said will not be reported to the governing body.

Name of governing body member	
Any roles within the governing body	
Length of time as a governing body member	
Date of appraisal	
Date since last appraisal	
Name of appraiser	

The following questions will be discussed in the appraisal. It may be helpful to consider the questions prior to the appraisal.

- 1 What do you think are the purposes of the governing body member role?
- 2 Do you consider that you are fulfilling the governing body member role in the way you would like?

- 3 What difficulties have you had in fulfilling the role including any problems outside your control?
- 4 What do you like best about being a governing body member?
- 5 What part of being a governing body member do you like least?
- 6 What support or training do you think would help you to perform your role as a governing body member?
- 7 Have you attended an annual Confederation of Co-operative Housing conference or a member forum? Would you like to?
- 8 Do you think you have other skills you could offer the co-op?

Score yourself on the following criteria in relation to your governing body membership - provide a score between 1 and 5 for each of the aspects listed below

5 = I think I am doing extremely well on this

4 = I am exceeding my expectations on this

3 = I am achieved my expectations on this

2 = I am below my expectations on this

1 = my performance on this is unacceptable to me

Aspect	My score
Drive, determination and self-motivation	
Striving for my personal development	
Taking personal responsibility for co-op activities	
Making positive suggestions	
My confidence to raise issues at meetings	
Understanding business practices, rules and procedures	
Level of attendance/punctuality at meetings	
Integrity and honesty	
Relations with other governing body members	
Relations with others (ie. staff or other external people)	
Community leadership qualities	
Positive contribution to morale of the governing body	
Able to manage conflicts well	
Levels of social responsibility	
Attitude to financial and other risks	
Understanding the way people feel	
Understanding co-op finances	
Understanding complex information	
Suggesting workable solutions to day to day problems	
Good judgement and decision-making	
Preparing for meetings	
Awareness of the housing environment	
My overall performance	

Member personal development

- 9 What ideas do you have for your personal development that could be assisted through your development in the co-op?

- 10 Are there things that the co-op could be doing to assist in your personal development?